COMMITTEE FOR A SUSTAINABLE TREASURE COAST

SHARING LESSONS LEARNED

Prepared for the Florida Department of Community Affairs
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This evaluation looks at the work of the Committee for a Sustainable Treasure Coast (CSTC) – a three-county public-private leadership committee. Created by Executive Order, CSTC came together in the spring of 2004 to study the opportunities and challenges facing the Treasure Coast and to recommend tools and actions that could be used to maintain a sustainable quality of life within the region. The evaluation, prepared for the Florida Department of Community Affairs (DCA) by the Center for Urban and Environmental Solutions (CUES) at Florida Atlantic University, provides a way of sharing with other regions the experiences of CSTC and the lessons learned. The report is divided into three parts (CSTC Background, the CSTC Process, and Conclusions) and also contains an extensive appendix of useful sample CSTC materials.

CSTC BACKGROUND

CSTC Overview
The three Treasure Coast counties (Martin, St. Lucie, and Indian River) have a long history of regional planning. In March 2004, that relationship took a giant step forward with the creation of the CSTC by the Governor. The impetus for CSTC came from Senator Ken Pruitt, who recognized that the complex growth challenges facing the Treasure Coast required a coordinated regional planning effort that involved the public, private, and not-for-profit sectors from the region’s three constituent counties. Underscoring the importance of a regional approach, the Executive Order (Appendix A) that established CSTC charged it with considering, evaluating, and making recommendations about long-range planning issues important to ensuring sustainable growth and development.

CSTC held its first meeting in April 2004 and met over an 18-month period, ending its work in September 2005. It is succeeded by a new not-for-profit, Sustainable Treasure Coast (STC), to support the implementation of CSTC principles and action steps, and the Institute for a Sustainable Treasure Coast (ISTC), to provide STC with data and research and to monitor and report on progress in implementing CSTC’s recommendations. CSTC produced three reports: two required by the Executive Order (an Interim Report in January of 2005 and a Final Report in September 2005), and, after hits by three major hurricanes in the fall of 2004, an additional report, Towards a Safer Sustainable Region: Special Storm Report.
Evaluation Methodology

CUES initiated this evaluation to enable other regions of Florida to learn from the experiences of CSTC. The evaluation consisted of three steps:

- Step One - document the CSTC process and products
- Step Two - evaluate the CSTC process and products
- Step Three - distill from the first two steps a list of lessons learned

The criteria for evaluating the CSTC process and products were drawn from the recommendations outlined in the Urban Land Institute (ULI) report, Building Florida's Future: State Strategies for Regional Cooperation – A Report from the ULI Florida Committee for Regional Cooperation.1 The report, which was presented at a statewide conference in March of 2006, contains a set of recommendations for improving regional cooperation in Florida. Those recommendations were selected as the criteria for this evaluation because they were developed through a thoughtful 12-month fact-finding process that analyzed how to best strengthen regional cooperation in the state and identified specific steps to improve the current system.

Each recommendation was:

- researched and vetted by a 37-member statewide leadership committee (the ULI Florida Committee for Regional Cooperation) that represented all geographic areas of Florida and all interests;
- tested through community forums held by the committee in different regions of Florida to learn first-hand about stakeholders’ experiences with regional cooperation and to seek their ideas for improvements;
- refined by a ULI Advisory Service panel workshop that convened a panel of experts from around the country to examine obstacles to regional cooperation and to develop recommendations for improving the system in Florida.

The recommendations from the ULI report were supplemented with materials from the Alliance for Regional Stewardship, the regional planning experiences of the evaluator, and another ULI publication, Translating a Regional Vision into Action,2 that outlines ten principles for success in regional visioning implementation. The ten principles represent the collective thinking of experts who participated in a ULI policy forum on translating a regional vision into action.

THE CSTC PROCESS

Recognizing that success rested on who was involved and how the process was designed, the CSTC process began with putting together the foundation for a successful initiative: deciding who its members, including its leadership, should be; how the committee would receive the technical support and funding it needed; and the schedule and structure for its meetings. Early in the process, CSTC also agreed on a decision-making process, a committee structure, communication procedures, and its work products.
Members and Technical Support

CSTC’s membership and technical support team were carefully thought through to ensure that the committee would succeed. That attention to detail recognized that, for the committee’s work to be effective and viewed as creditable, the composition of the committee was critical, beginning with strong leadership. It was also critical to put in place a skilled technical team that could support the committee’s work and ensure that CSTC benefited from the knowledge and resources of state and regional agencies.

Members

The Executive Order establishing CSTC named its members, including its chair and co-chairs. That meant that CSTC started with two important ingredients: strong leadership and a diverse membership that could provide a broad range of views and knowledge of the region. CSTC’s chair was well-known in the region and was respected by people with a variety of views (a good boundary-crosser). Three exceptionally strong vice-chairs, also known and respected in the region, joined the chair in leading the committee: the presidents of Florida Atlantic University and Indian River Community College and the Secretary of DCA. CSTC’s 37 members represented a microcosm of the Treasure Coast’s interests and perspectives.

In addition to the elected officials from the three Treasure Coast counties and the municipalities within those counties, each county had representatives on the committee from quasi-government organizations and from education, conservation, and business interests. Other interests included health, public safety, media, water (including wastewater, water resources, and storm water), real estate, transportation, seniors, agriculture, economic development, public relations and communication, workforce, developers/homebuilders, and regional planning (the regional planning council). (The roles of the committee members, along with the roles of those supporting the committee and the roles the public and legislature, are described in Appendix B, pages eight-nine.)

Technical Support Team

The technical support team was composed of CUES, a Technical Advisory Subcommittee (TAS) (both named in the CSTC Executive Order), and the Florida Conflict Resolution Consortium (CRC).

CUES: The Executive Order designated CUES as the committee facilitator. CUES brought experience in managing stakeholder planning processes and the neutrality associated with a university. CUES also had a 30-year record of working with policymakers and the public in southeast Florida and an in-depth knowledge of the land use, water, infrastructure, environmental, social, educational, and economic planning issues facing the Treasure Coast. CUES staff provided overall management and facilitation of the work of CSTC and its subcommittees, including managing meeting logistics and the distribution of meeting materials, serving as a source of information between meetings, monitoring progress, arranging presentations, and maintaining CSTC’s website (www.sustainabletc.org). CUES’ director moderated meetings with CSTC’s chair.
TAS: The Technical Advisory Subcommittee (TAS), chaired by the Secretary of Florida’s Department of Community Affairs (DCA), was created by Executive Order to provide CSTC with information and guidance and ensure consistency and coordination with state programs and policies. Members of the TAS (Appendix C) came from, in addition to DCA, the Florida Departments of Environmental Protection and Transportation, the Fish and Wildlife Conservation Commission, and the South Florida and St. Johns River Water Management Districts.

CRC: The role of CRC was to bring to CSTC the experiences and skills of practiced facilitators. CRC staff provided individual meeting facilitation, work plan development, meeting summaries and agendas, and preparation of the final report text. CRC provides neutral services to governments, organizations, businesses, and members of the public who seek consensus solutions to public problems.

**Funding**

Funding for CSTC came from diverse sources: private foundations (the John D. and Catherine T. MacArthur Foundation), state government (DCA and the Florida Departments of Transportation [FDOT] and Environmental Protection), and the South Florida and St. Johns River Water Management Districts. CSTC also received special grants to further the work of its Rural Lands Subcommittee. Those contributions came from a blend of public and private sources: the Florida Department of Agriculture and Consumer Services, the St. Lucie County Board of County Commissioners, the Indian River Citrus League, the Florida Farm Bureau Federation, and the Indian River County Florida Farm Bureau. CSTC also received significant in-kind support from two of the region’s institutions of higher education: Florida Atlantic University and Indian River Community College. They provided CSTC with convenient, well-equipped, neutral, and easily accessible places to meet, and the leadership, coordination, and extensive staff assistance needed to plan and prepare for CSTC meetings (a backbone of any successful planning process). FDOT’s District Four also provided significant in-kind technical support and data.

**Meeting Schedule and Structure**

An important part of the CSTC process was establishing a meeting schedule (Appendix D, pages seven-nine) and structure.

**Meeting Schedule**

CSTC’s meeting schedule was designed to get CSTC to its end goal – a consensus-based final report outlining a strategic vision of success and the principles and action steps to achieve the vision – within the time provided by the Executive Order. The committee adopted the schedule early in the process and made sure that it was widely distributed. That allowed committee members and members of the public to understand where the committee was in the process at any point in time, where it was going, and when it met. CSTC met
monthly, usually for one to two days, for an 18-month period at locations rotating among the three counties.

CSTC divided its work into three phases:

*Phase I, Organizational:* Phase I consisted of three meetings from April-June, 2004. Those meetings provided the building blocks for future success, one of which was giving committee members time to become acquainted and build trust. Other important building blocks included time for committee members to agree on a consensus-based decision-making process and committee mission, and to build consensus on a 2030 picture of potential failure and a shared long-term 2030 vision (image above) of success for the Treasure Coast region. The vision of success provided the framework for the committee’s later agreement on guiding regional principles and action steps.

*Phase II, Education and Initial Development of Recommendations:* Phase II consisted of eight meetings from July-January 2005. That phase of CSTC’s work provided time for the committee to become better informed about regional issues and alternative planning tools, discuss and reach consensus on broad issue areas, and initiate the process of drafting recommendations. Phase II ended with the adoption of an Interim Report.

*Phase III, Recommendation Consensus Building and Final Report Adoption:* Phase III consisted of nine meetings from February-September 2005. Those meetings continued the process of providing opportunities for CSTC members to learn more about regional issues and planning tools and pushed the drafting process into the step of refining and ranking recommendations. The final CSTC meeting was held on September 24, 2005. The committee used that meeting to unanimously adopt the final report and to celebrate.

**Meeting Structure**
CSTC’s meetings were carefully planned to accomplish the goals for the day. Important to each meeting was the preparation of a detailed agenda, use of facilitation techniques to draw out and synthesize the ideas of committee members, and presentations designed to expand the committee’s knowledge of the region and introduce possible implementation tools and strategies.

**Agenda:** A detailed agenda was prepared for each CSTC meeting and sent in advance to CSTC and to all interested members of the public. The agenda package provided a timed outline (a road map for the day) that clearly showed what was to be accomplished at each meeting and contained the materials to be reviewed. That enabled committee members and members of the public to prepare for a meeting and to know when their comments could be heard. (See Appendices B and D for a sample agenda package.)

A typical CSTC meeting consisted of:

- a review and confirmation of the agenda and meeting objectives
- information presentations on timely topics
- reports from CSTC drafting committees
• a review and discussion of committee work products and issues
• seeking consensus on issues and committee recommendations
• agreement on next steps
• time for public comments

Facilitation: To make each meeting productive, facilitators provided a variety of ways for committee members to contribute their ideas. Examples of techniques used early in the process to help the committee establish its strategic vision and identify key issues included:

• An on-line survey that enabled CSTC members to identify key issues to address in each of the seven issue topics outlined in the Executive Order creating CSTC and to note useful information sources for each topic;
• Worksheets for committee members to identify the forces and trends affecting the region — tailwinds (forces aiding the region) and headwinds (forces hindering the region).
• A visioning exercise that enabled committee members to think about the Treasure Coast of the future — what the committee wanted for the future of their region and what they did not want. Committee members were asked to address two core questions: What is a potential but undesirable future for the Treasure Coast Region? If everything went right, what will the Treasure Coast Region look like and what will the region be doing in 2030?

Information Presentations: The committee heard presentations from local, regional, state, and national experts about a broad range of issues and planning tools. CSTC also benefited from current regional and state initiatives, such as two initiatives of the Urban Land Institute (ULI): a study for the City of Port St. Lucie, which included a recommendation for a regional initiative to address growth management issues (a catalyst for creating the CSTC), and the report from the ULI Florida Committee on Regional Cooperation. Another resource was an evaluation of the 2005 amendments to Florida’s growth management laws (SB 360) for relevance to the Committee’s work.

Decision-Making Process
One of the first tasks of the committee was to agree on a decision-making process that would help its members work through a complicated set of issues and regional needs in a way that consensus could be achieved. To do that, the committee developed and agreed on a committee mission and a set of guiding principles for working together and developing recommended actions and on guidelines for reaching consensus (Appendix D, pages three-five).

Guiding principles for working together and for developing recommended actions: The guiding principles for working together emphasized the importance of respecting and learning from different views, using consensus building to find common ground to build on, and having access to state of the art tools and information. The principles also recognized the value of a shared vision to guide decisions. The guiding principles for developing recommended actions emphasized the importance of accepting shared responsibility for the committee’s work, recognizing and building on the region’s diversity and its assets, forming public-private partnerships to achieve vision goals, using good information to make decisions, and providing opportunities for public contributions.

Guidelines for reaching consensus: CSTC’s consensus guidelines addressed what a consensus is and how a consensus was to be reached. The guidelines also addressed the role of CSTC’s members, chair, and
vice-chairs and, important to how CSTC operated, asked that members bring information on the concerns of their respective organizations and public bodies to CSTC. Other decision-making guidelines addressed the consensus process to be used in drafting recommendations and an amendatory review process for reports. One technique used to help the committee reach a consensus on its report was a consensus ranking scale (Appendix D, page 10), that enabled committee members to not only indicate their degree of support for a recommendation, but to also comment on changes or concerns, which if addressed, would enable them to support the recommendation. The consensus-testing scales allowed the group to identify where differences still existed and how to address them.

Committee Structure

To do its work, CSTC initially divided into four drafting subcommittees that focused on the region’s economic, social, built, and natural environments. After few months into the process, CSTC established a Rural Lands Subcommittee (RLSC) because of the overriding importance of the region’s rural lands to the essence of what makes the Treasure Coast such a uniquely desirable place to live. The committees were led by CSTC members but included nonmembers who brought a needed expertise or viewpoint to the committees’ deliberations. The committee process was used to help seek consensus (using CSTC’s procedures and guidelines for reaching consensus) on recommendations for consideration by CSTC. The committees met at special set-aside times during the regularly scheduled CSTC meetings. They also met from time to time between CSTC meetings. The committees brought their recommendations to the full CSTC, which then answered questions raised by the committees and reviewed, ranked, and suggested refinements to the recommendations. The sequence of activities was designed to build consensus as the process progressed.

Communications

A hallmark of the CSTC process was its transparency and its attention to getting information out about the process and to getting information from committee members and the public back into the process. The agenda for each CSTC meeting was emailed to the committee and all interested parties (an extensive list maintained by CUES) and was available on CSTC’s website. The website also contained a broad array of information about CSTC and its work, as well as a resource section that provided information about the region and the tools that could be used in creating a more sustainable Treasure Coast. To ensure full public participation, a specific time for public comment was set aside on each meeting agenda. In addition, CSTC held three public workshops in August 2005 to provide specific forums for public input into the final draft report.

Products and Next Steps

CSTC produced three reports: an Interim Report in January of 2005, a Final Report in September 2005 (both required by the Executive Order creating CSTC), and an additional report, Towards a Safer Sustainable Region: Special Storm Report, produced by the committee after the Treasure Coast was impacted by three major hurricanes in the fall of 2004. All three reports are available on CSTC’s website.
CSTC’s final report presents a compelling case for action. The report highlights trends in the Treasure Coast, describes a strategic vision for regional action, and details a comprehensive set of recommendations by each of CSTC’s five drafting subcommittees. Each set of recommendations is prefaced by an examination of the facts and current efforts in the region and outlines a set of guiding principles and action steps. A toolbox at the end of the report describes many of the tools that will be needed to implement CSTC’s recommendations. Images and captions featured in the final report convey the CSTC message at a quick glance.

The report also outlines next steps in a section called Moving Forward. Two of the next steps are to create the new not-for-profit Sustainable Treasure Coast (STC) and the Institute for a Sustainable Treasure Coast (ISTC) that are charged with ensuring that CSTC’s vision and recommendations will be implemented and not left to sit on a shelf. Creation of those organizations recognizes that achieving a long-term regional vision does not happen in one or two years; that success will depend on sustaining a strong public-private leadership that is working for the long-term well-being of the region and is committed to implementing CSTC’s recommendations.

**STC:** CSTC charged STC with the mission of supporting the implementation of the principles and action steps outlined in the CSTC final report. STC was to draw its members from the region’s leaders, including members of CSTC. Another part of STC’s charge was to work closely with and support other regional entities, including the Treasure Coast Regional Planning Council.

**ISTC:** The complimentary ISTC (to be created by Florida Atlantic University in cooperation with Indian River Community College) was charged with providing continuity for the research and data collection called for in the final CSTS report and ensuring that the CSTC report is widely disseminated to Treasure Coast decision-makers and the public. ISTC was also charged with providing educational activities and tools that will lead to a greater understanding of the regional linkages identified in the CSTC report and with working with STC and other organizations to assist in implementing and monitoring progress in achieving the CSTC principles and action steps.

**CSTC EVALUATION**

The evaluation of CSTC looks at its process through three lenses: the definition of region, the guiding principles for regional cooperation, and the recommendations for regional visioning initiatives outlined in the ULI report, *Building Florida’s Future: State Strategies for Regional Cooperation.* The evaluation of the principles and recommendations outlined in the ULI report are augmented by ULI’s report on translating a regional vision into action. The evaluation also draws on information from the Alliance for Regional Stewardship (ARS), a civic/community/national peer-to-peer network of regional leaders addressing the long-term well-being of their regions and working collaboratively on innovative approaches to common regional challenges. The primary ARS source used was its monograph, *The Practice of Regional Stewardship: Developing Leaders for Regional Action,* which examines how regions have developed the capability over time to lead themselves into the future.

**Defining the Right Region**

The first criteria for evaluating CSTC is reviewing the definition of the region it serves – the three Treasure Coast counties of Martin, St. Lucie, and Indian River. The ULI report on regional
cooperation defines a region as an area of distinctive communities, cities, and counties where residents share:

- a geographic identity and are socially, economically, and culturally interdependent
- a capacity for planning and functioning cohesively for communication, education, transportation, housing, and the protection of natural resources
- a capacity to create competitive advantage to promote opportunity and prosperity for all.

How does the CSTC region stand up to that definition?

**Regional Geographic Identity and Interdependence**
A review of CSTC's findings reveals a region that is:

- Bound by a unique geographic identity – residents see their region as a place of unmatched natural beauty made possible by its location between the Indian River Lagoon, Lake Okeechobee, and the headwaters of the St. Johns and Loxahatchee Rivers.
- Linked socially and economically – the three counties historically have shared one labor force and an economy dominated by agriculture, tourism, and construction jobs.
- Connected by a shared value – residents in the Treasure Coast value the region’s natural beauty and tranquil way of life and share the fear that those qualities, given current trends, will quickly disappear with the growth that is coming.

**Regional Capacity**
While most regions in Florida have lagged behind in developing regional responses to regional issues, the three Treasure Coast counties have been getting serious about regionalism. The region has long supported a strong regional planning council. Building on that tradition, recent regional initiatives include:

- a joint planning process led by the region’s three Metropolitan Planning Organizations to plan for the region’s growth
- a three-county marketing and job development program led by the newly established Research Coast Economic Development Cooperation
- a collaborative forum for educators sponsored by the Treasure Coast Educational Coalition
- a regional workforce initiative led by the Treasure Coast Workforce Development Board

The Treasure Coast is clearly a region that recognizes the common attributes that bind together its distinct and different communities and is committed to developing its capacity for collaborative actions that benefit the entire region. The coming together of the many organizations and community leaders to work together through CSTC to develop a unified strategic vision and action plan now exponentially adds to the region’s capacity to think and act regionally.

As proof of its achievement, CSTC successfully completed the first stage in 18 months and is well into the second stage of what ARS calls the four common stages of building and sustaining regional stewards and regional stewardship capacity: initiation, mobilization, collaborative action, and
sustaining change. Using the ARS criteria for the initiation stage, through CSTC, Treasure Coast leaders have built the foundation for regional action:

- recognizing that change is required to close the gap between current conditions and the desired future
- exploring their common interests and how they might work and learn together
- committing to work for change
- designing a road map for what should happen next

Because of CSTC, regional leaders are well into ARS’ second stage – mobilization. CSTC has completed the first two steps of that stage: framing the critical issues and opportunities, focusing attention on what needs to be done and why, and communicating the message widely to stimulate discussion. CSTC has also set up two successor organizations (STC and ISTC) to complete the second and fourth steps of that stage (motivating others join the cause and recruiting an even larger set of people to get involved in what happens next) and to launch the third and fourth phases (collaborative action and sustaining change). CSTC has created what ARC calls regional – those who recognize the “interdependencies between the four spheres of innovative economy, livable community, social inclusion, and governance” and who “work across boundaries of jurisdiction, sector, and issues to connect these four spheres and create opportunities for their region.”

**Principles for Regional Cooperation and Visioning**

The ULI Florida Committee for Regional Cooperation adopted six guiding principles for encouraging regional cooperation and developed a set of recommendations to be used in regional visioning initiatives. The principles emphasize the importance of developing and maintaining a network of regional leadership, a regional identity and vision, and regional dialogue. The principles also emphasize using public and private resources to encourage creative regional collaboration, planning for environmental sustainability, and measuring progress along the way. The following evaluates the work of CSTC vis-a-vis those principles and the recommendations for regional visioning.

**Principle One: Develop a network of regional leaders**

**ULI Principle:** These leaders must represent the region as a whole – a diverse geographic and demographic mix of people representing businesses, civic/environmental organizations, and government, willing to engage in and discuss issues that cross traditional jurisdictional boundaries.

**CSTC Practice:** CSTC’s membership represented a microcosm of the region’s leadership: representatives from each local government (city and county), from quasi-government organizations, and from education, conservation, nonprofits, and business interests. Other interests included health, public safety, media, real estate and real estate development, transportation, seniors, agriculture, economic and workforce development, and regional planning (the regional planning council). That those 37 individuals were willing to meet monthly or more often over an 18-month period to understand the needs of each county, the pressing concerns of each interest, and the regional issues that crossed county (or agency) lines demonstrates their commitment to regional cooperation. The result is that, through CSTC, the region has developed a core network of informed, dedicated regional leaders.
**Principle Two: Create and sustain a regional identity and vision**

*ULI Principle:* Regional visions should originate at the local level and address ways to respect individual community identity while building unity around issues of regional importance.

*CSTC Practice:* CSTC’s strategic regional vision (box to the right) grew out of the collective work its members, drawing on and balancing their diverse views and passions. To ensure that CSTC understood and respected local views, members were asked to represent the views of their organizations while looking at the region as a whole. As a result, the CSTC vision builds on and celebrates the common attributes that residents value and that bind the region together, while providing for individual county or municipal differences.

**Principle Three: Develop and maintain a place for ongoing regional dialogue and planning**

*ULI Principle:* Whether it is a public agency, private organization, or a collaboration of community groups, each region needs an organization that will be responsible for convening groups, creating opportunities for on-going dialogue, and building trust among diverse interest groups.

*CSTC Practice:* CSTC provided the Treasure Coast with a forum for open dialogue and collaborative goal setting and planning. Through the CSTC meetings, committee members were able to learn together, build trust, grow comfortable in speaking openly and testing new ideas, and have time to understand and synthesize a host of complicated interrelated issues. The result was that most of the participants became true regional boundary crossers – people who are willing to talk and work together “across the boundary lines that traditionally divided and diminish community.” Several features of the CSTC forum format contributed to its success. The order and structure of meetings, for example, allowed time for members to develop good working relationships and give ideas time to sift and evolve (the “slow-cook approach”). Also critical were the consensus-based decision-making process and facilitation techniques that helped participants see and build on common ground, while still working on differences, and access to good technical support and sound information. As a result, participants were able to move beyond local and single-issue thinking. Through CSTC, the region was able to see first hand the benefit of a regional organization dedicated to convening, supporting, and maintaining an ongoing regional dialogue, a tradition that CSTC’s successor organizations, STC and ISTC, will continue.

**Principle Four: Direct public and private resources to address regional issues**

*ULI Principle:* Public and private resources, including incentives, should be made available to encourage creative regional collaborations among the public, private, and civic sectors of the community. Regional plans that extend beyond traditional jurisdictional boundaries should be supported with both public and private investments.

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**Our vision for the Treasure Coast is a region with**

- a diversified and prosperous economy,
- a healthy natural environment,
- an attractive landscape made possible because of intelligent development and preservation,
- popular cultural facilities and events,
- world-class research and education,
- healthy and vital citizens and communities, and
- citizens and decision-makers who collaborate to achieve a shared regional vision.
CSTC Practice: The Treasure’s Coast’s public and private sectors stepped forward to make CSTC a success – investing their money, their time, and their leadership. Two of the region’s institutions of higher education provided the in-kind technical and logistical support CSTC needed to succeed. State and regional agencies also stepped in with technical support and funding. CSTC’s Rural Lands Subcommittee, which addressed one of the region’s most thorny issues – the future of the region’s rural lands, – is a good example of how CSTC worked. Funding for the subcommittee came from the public sector (the Florida Department of Agriculture and Consumer Affairs and St. Lucie County) and the private sector (the Indian River Citrus League, Florida Farm Bureau Federation, and the Indian River County Florida Farm Bureau. The subcommittee’s leadership also exemplified the public-private balance: one co-chair was a county commissioner and the other a third-generation citrus grower.

Principle Five: Plan for and implement environmental sustainability

ULI Principle: Regions are built on an environmental foundation. Leaders must recognize the environmental consequences of regional decisions and ensure that environmental resources are sustained for future generations.

CSTC Practice: CSTC dedicated itself to developing a set of recommendations that will result in a more sustainable region. At the heart of CSTC’s recommendations is the desire to preserve the region’s unique natural environment. That desire is underscored in CSTC’s letter transmitting the final report to the governor, stating that the region needs to balance its growth “with our desire for clean healthy communities and preserving our rural and agricultural heritage.” Two of CSTC’s five drafting subcommittees concentrated on the region’s environment. The Natural Systems Committee focused its recommendations on restoring and protecting in perpetuity connected, functional natural systems. The Rural Lands Subcommittee addressed the actions needed to continue the region’s rural lands in the form of a functioning network of agriculture, open space, and natural areas.

Principle Six: Measure and evaluate progress

ULI Principle: To ensure that regional collaboration attains its intended results, regional benchmarks should be established and a process defined that allows the region to measure progress on regional goals and plans. Evaluation determines if policies are working and whether or not they need to be changed.

CSTC Practice: The Moving Forward section of CSTC’s recommendations recognizes the importance of monitoring and measuring results. The report charges ISTC with developing indicators for each section of the CSTC report, monitoring results, and preparing periodic reports on progress in achieving the action steps. ISTC is also charged with coordinating a regional database and providing information about regional trends.

Recommendations for Regional Visioning

The ULI Florida Committee for Regional Cooperation recommends that regional visioning projects include the following elements. The elements are consistent with the ULI principles for regional cooperation but are repeated here as an additional way to review and evaluate the CSTC process.

ULI Recommendation: A leadership team composed of public, private, and civic leaders from regional agencies, local and state governments, and business, civic, and not-for-profit organizations.

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CSTC Practice: CSTC’s leadership involved representatives from the public, private, and civic sectors: a chair from the private sector, two vice-chairs from the region’s leading institutions of higher education, and a vice chair from state government (the Secretary of DCA). The community leaders who served as members of CSTC represented the region’s local governments (city and county), quasi-government organizations, and civic, nonprofit, and business organizations. In addition, CSTC demonstrated another important tenant of ULI’s report on regional cooperation: state support in enabling regional visioning. CSTC began with state leadership (that of the state senator, whose leadership led to the creation of CSTC, and the governor, who signed the Executive Order establishing CSTC). The state continued its support with the involvement of the Secretary of DCA as a CSTC co-chair and the support of state agencies through CSTC’s TAS, which ensured coordination with state agencies.

ULI Recommendation: A lead organization, or consortium of organizations, that would convene the regional visioning process. This lead organization should have demonstrated success with geographically and demographically diverse audiences and have a proven record of success. The lead organization should have demonstrated effective and innovative leadership in the region and may vary from region to region.

CSTC Practice: CSTC was a new organization that represented a coming together of many different organizations and individuals with a long-standing reputation in the region. (A common practice in visioning processes is for several organizations to come together and create an “organization of organizations” to lead a visioning project. That approach is often used when participants believe their objectives for creating a shared regional vision are better served through a new organization that does not carry the perceived biases or preconceptions of an existing organization.) Because of the creditability of the leaders, from the governor down, involved in the creation of CSTC and the proven record and geographic and interest diversity of the many organizations involved, CSTC had instant standing and creditability. Also important to CSTC’s standing were the roles of Florida Atlantic University and Indian River Community College (both long-time respected institutions in the region) and CUES, which had provided leadership in the region for more than 30 years and enjoyed a proven record of success in managing broad-based planning processes.

ULI Recommendation: A process for the region’s stakeholders and citizens to develop several alternative long-range scenarios with different outcomes to address growth-related challenges. A public outreach program, enabling citizens to understand the implications of preferred scenarios for the future growth of their region, should be a part of the process.

CSTC Practice: The CSTC process was not designed to carry out a citizen-based alternative futures exercise, although such a process is recommended as a next step in the CSTC final report. Rather, the CSTC process was designed to allow a representational committee of regional stakeholders to learn more about regional trends and alternatives to those trends, and to reach consensus-based decisions on a strategic regional vision and the actions and tools needed to implement the vision. CSTC achieved that goal: unanimous agreement on the vision, guiding principles, and actions outlined in the CSTC final report. CSTC did reach out to the public through opportunities for comments at each of its meetings and through widely publicized public workshops in each county.
ULI Recommendation: Funding from private and public stakeholders, including the state, to support a regional vision and action plan initiative.

CSTC Practice: As discussed above in Principle Four, funding from CSTC came from the public and private sectors, including the state.

ULI Recommendation: Each regional leadership team, working with legislators, local officials, and state and federal agency representatives within their regions, should develop a regional action plan that addresses the key challenges and sets goals, objectives, and strategies for implementing the regional vision.

CSTC Practice: The CSTC report lays out a concise description of the region’s challenges, a strategic vision that describes the desired future for the region, and a detailed road map to achieve that future. The road map contains a clear set of goals for the region, guiding principles for measuring progress, and detailed action steps for each guiding principle. The drafting of the principles and action steps had the benefit of local thinking, through the CSTC members, and state thinking, through the TAS.

ULI Recommendation: The regional visions and action plans should clearly articulate how regions build and sustain communities, improve the quality of life, preserve environmental quality, and define and enhance community character.

CSTC Practice: CSTC’s vision and its implementing action steps take a holistic view of the region: its natural, built, social, rural, and economic environments. CSTC organized its work around those five main topic areas. For each of the areas, CSTC examined current efforts and current and projected trends and developed and agreed on a set of guiding principles and implementing action steps. The result is a comprehensive analysis of the region – current and future – and a set of integrated action steps that, if fully implemented, will result in a more successful, sustainable region.

ULI Recommendation: Each regional vision should clearly outline to diverse stakeholder groups the benefits of regional cooperation and the cost of failing to do so.

CSTC Practice: CSTC’s final report clearly outlines for diverse stakeholders the benefits of implementing the vision. It describes and outlines cooperative action steps for a broad range of topics related to regional sustainability. It has something for someone interested in protecting the natural environment; addressing the needs of agriculture; reversing sprawl development patterns and designing and building more livable, walkable communities; correcting problems with water quality and supply and transportation; planning more hazard resilient communities; enhancing access to education, health, and cultural opportunities; and achieving economic prosperity for all citizens.

ULI Recommendation: The regional action plans should emphasize collaboration among the region’s governmental entities to strengthen the region’s abilities to achieve stated goals and objectives.

CSTC Practice: The CSTC recommended action steps focus heavily on the role of governmental entities in the region. The final report makes it clear that collaborative governmental actions are an
essential prerequisite to success. ("Governments always need reforming, but all the reforms need government."") Examples of those actions include the following:

- a coordinated regional effort to assure full-funding authorization of the Indian River Lagoon.
- greater cooperation among the three Metropolitan Planning Organizations to address local and regional transportation needs.
- collaborative Evaluation and Appraisal Report (EAR) processes;
- developing a formula to ensure that communities equitably share in the costs and benefits of economic development associated with the region’s planning decisions.

**ULI Recommendation:** The geography of the region should be defined as part of the regional visioning process.

**CSTC Practice:** As discussed earlier in this section (Defining the Region Right), the appropriateness of CSTC’s three-county region focus of was confirmed through the CSTC process, which clearly identified the common regional values and identity shared by the three CSTC counties and their economic, cultural, and social interdependency.

**ULI Recommendation:** Regional visions and action plans should be communicated using visual images.

**CSTC Practice:** The final CSTC report makes liberal use of images to illustrate each major point. Photos and other visual tools were selected that most appropriately illustrated the vision, current trends, guiding principles, and action steps. Image captions and quotes from committee members were also used to call out principal ideas.

## CONCLUSIONS

A review of the CSTC process – how it worked and how it stacks up to the evaluation criteria – underscores a list of important lessons learned:

**Favorable Conditions:** a recognized gap between current reality and the desired future – business as usual will not work. (It is far harder to achieve regional cooperation without the presence of a change. ("The only thing more challenging than a crisis may be its absence."")

**The Right Region:** what is a region cannot be forced fit. Participants in a regional vision or planning initiative need to feel that the region is correct for addressing the problems (or opportunities) at hand. The right region is characterized by a shared identity (we are in this together), interdependency, and capacity (and motivation) for acting cohesively.

**The People:** The “who” of making regional cooperation and visioning work is critical. It takes a combination of ingredients, including a credible convener to bring and keep people at the table, and public and private leadership with the ability to understand and respect all views (good boundary crossers who can see below and above the trees). It also takes participants who are inclusive of all
geographic areas and views, who are committed to working for the general well-being of the region (the big tent), and who are committed for the long-term. Regional cooperation takes time and a lot of nurturing along the way; it also takes keeping an eye on the end goal at all times.

The Resources: To be successful, regional cooperation and regional visioning need the right resources, including the financial participation (the investment) of the public and private sectors. The right resources also include a skilled, neutral facilitator who is viewed as having no stake in the outcome and who can encourage participants to listen for and find common ground. Another important resource is having technical support to provide the information and meeting logistics to ensure that participants are informed and that meetings are effective. Regional cooperation is hard enough to do. Being successful requires sufficient resources, including incentives, to bring people to and keep them at the table.

Process: The process of working regionally, like the people and the resources, is important. This review highlights a number of process practices that merit repeating and center on seven ingredients:

- Relationships – Time for building relationships among diverse participants is important. Regional cooperation is largely about relationships, and without carefully nurtured relationships, regionalism can quickly disappear.

- Education and communication early and often – Learning together to develop a common understanding of the issues and identifying common values and goals before getting to the hard issues and action steps is critical to ultimate success. Without agreement on the facts, and without recognizing some common values to build on, it is unlikely that people will agree on solutions. Also, recognize that education and communication never stop. There is always someone else to bring along or changing conditions to work through.

- Manageable, clear results – Agree on a manageable focus and clear outcome expectations at the beginning and keep checking throughout the process. Agreeing on manageable results requires setting a realistic time horizon for completing the job (not force-cooking solutions) and a work plan and decision-making process structured to achieve the agreed upon outcomes. It also requires agreeing at the beginning exactly how success will be defined. A good way to end up with frustrated participants is not to have agreement on what is to be (or not be) accomplished by the process.

- Meaningful methods to engage participants in the dialogue – Most people need visual and other ways to receive information and contribute ideas. The dense text explanation and the two-minute comment opportunity at meetings no longer work. Participants need multiple ways to convey their ideas. Examples include on-line surveys, postcards from the future, worksheets to express ideas, and small working groups to explore ideas and bring back recommendations.

After a decade of exploration, we have observed a reoccurring pattern that offers the best explanation for why regions succeed. The communities that are the most optimistic and ready for the new world practice “collaborative advantage.” They enjoy tight relationships at the intersection of their business, government, education, and community sectors, which provides regional resiliency and a unique ability to assess and achieve long-term development goals. At the center of every one of these collaborative communities, we observed a team of civic entrepreneurs. Civic entrepreneurs provide collaborative leadership to bridge the economy and the community (Alliance for Regional Stewardship).
• Consensus-based decisions – Develop and have participants agree on a discussion and decision-making process that enables them to identify and build on common ground, while at the same time identifying and working on the differences. Building on common ground while having the room and resources to keep working on differences is critical in any process that involves asking people to think and act differently, which is what regionalism is often about.

• Clear, measurable action plan – A successful vision needs to be supported by a clear action plan with concrete, measurable results that benefit multiple stakeholders (a vision without actions is an hallucination). Monitoring and documenting progress on desired outcomes are important to being successful in the end. Also important is celebrating along the way – both the little and the big successes – and not giving up during hard times. Build in resiliency and the ability to regroup, make changes, and keep moving forward. Remember that success is never complete and requires constant vigilance. “Aim for the big curve ahead. Complacency is to begin to fail again.”

• Institutionalizing regional cooperation and visions – The governments that need to be at the table when it comes time to implement should be at the table when it comes time to plan. In addition, plan and vision should lead to results that can be incorporated into local plans and decision-making.

The benefits of using these principles is best summed up by a CSTC member, who observed that: “The recommendations in the CSTC report represent a rare coming together of diverse people who agreed on what needs to happen today if our Treasure Coast is to be the livable region we want it to be tomorrow. I cannot think of a better foundation for moving forward.”