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PINE CASTLE CORRIDOR STUDY

Overview of County Presentation

1. South Orange Avenue from Hoffner Avenue at the north and Sand Lake Road at the south
 2. Commercial parcels east and west of the CSX rail line and Commercial parcels east along South Orange
 3. Review Group meetings held from 4Q, 2016 through 2AQ, 2017
 4. Purpose – implement Pine Castle’s vision shaped through previous efforts focused on the revitalization of South Orange Avenue corridor and the SunRail Station area
 5. Results
 - a. Transportation
 - i. Pedestrian Safety
 - ii. Reduction of truck traffic
 - iii. South Orange Avenue median – impact on businesses
 - b. Environmental
 - i. Include wetlands west of SunRail station for master retention
 - ii. Improve stormwater and lake water quality
 - iii. Increase open space, landscaping and beautification
 - c. Green Infrastructure
 - i. Stormwater parks
 - ii. Improved water quality
 - iii. Landscaping
 - iv. Low impact development
 - v. Financing structure
 - d. Brownfield Designation
 - i. Incentives for redevelopment
 - ii. Job creation
 - iii. Financial assurance
 6. Preliminary Cost Estimate
 - a. Master Retention \$4MM
 - b. Green Infrastructure \$4.1MM
 - c. South Orange Corridor \$11.27MM
 - d. Brownfield Designation County Allocation
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EXECUTIVE SUMMARY

During the 2016-2017 fiscal year, ULI Central Florida structured its Mentor/Mentee Program to focus on an actual corridor study to expose the Mentees to the important aspects of such a study: horizontal infrastructure, vertical improvement, public/private financing and the implementation of form-based code. Given Orange County’s study of other commercial corridors in other sectors, the unincorporated

area of Pine Castle was chosen for its proximity to nearby study areas and manageability of size and scope. The Pine Castle area is strategically located to take advantage of the new comprehensive plan amendments and zoning codes to allow the transition for mixed-use and transit-oriented development. With this transition, however, focus and consideration must be given to the placement of these developments in relation to existing uses, quality and design of the existing infrastructure and finance mechanism to transform vision into reality.

The goal of the 2016-2017 Mentor/Mentee Program was to provide real-world experience and exposure to the Mentees in identifying and addressing critical issues, assess viability, and ultimately produce vision recommendations to Orange County based upon the expertise and experience in the private sector.

The participants of the Mentor/Mentee Program were divided into three groups:

1. Public-Private Partnership to focus government incentives, public input, bond and tax-increment financing and the partnership between government and private stakeholders under the common economic vitality
2. Horizontal Infrastructure to focus on traffic, land design, streetscapes and non-vehicular connectivity
3. Vertical Development to focus on the local vernacular site-specific design elements and a proposed plan to execute the highest and best uses

DISCUSSION AND RECOMMENDATIONS

PUBLIC-PRIVATE PARTNERSHIP

The Public-Private Partnership Group (the “P3 Group”) was formed to focus and review creative ways under the auspices of P3 to finance the public infrastructure and improvements for the use by, and to service the needs of, the public within the Pine Castle Corridor. In 2016, the Florida legislature passed two bills to further advance the State’s existing P3 framework and to facilitate various bond financing mechanisms, private capital and other funding sources for the development and operation of qualifying projects to meet a public need.

The County studied the Pine Castle corridor in full view of the revitalization of South Orange Avenue to the north under an approved Vision Plan implemented by the City of Orlando and the study of development impacts and tax increases stimulated by transit-oriented development (“TOD”) around the SunRail stations. The public improvements necessary for a TOD mirror the public improvements discussed and approved by the property owners within the Pine Castle corridor. The need for these common public improvements will advance the opportunities and willingness for these improvements to become a reality. Both studies speak to the “regional connection” of SunRail to surrounding points of interest; i.e., the Florida Mall, the Airport and Downtown, as well as the major employers to the North and South of the Sand Lake Station. The stakeholders within the corridor and around SunRail Stations speak to the local desires for increased accessibility and mixed uses around the Stations, as well as upgraded streetscapes and pedestrian/cyclist-friendly infrastructure. Orange County, along with the stakeholders within the Pine Castle corridor, can advance public improvements under a TOD model while also emphasizing that such is a long-term investment and commitment.

In 2008, the County showed early support for the SunRail-related TOD standards by approving Ordinance No. 2008-02, establishing standards and guidelines encouraging TOD around the Sand Lake Road SunRail Station, and by establishing a TOD Overlay Zone within a half-mile radius of the Station. Although the overlay is established with guidelines in place, there is no funding mechanism to advance the development and construction of the needed infrastructure. Without a funding mechanism for the public infrastructure, the private mixed-use developments will not happen.

In addition to the existing bond financing programs and negotiated structures of private capital without public input and guidance, the P3 Group discussed ways in which the resultant public improvements throughout the study corridor can be funded through incremental tax dollars under the direction and guidance of Orange County and the property owners and end users within the corridor. The final resolution was a formation of a “district”, governed by the County and stakeholders to influence and consider the capital project items within the corridor and to administer the incremental tax dollars for the funding of same.

The P3 Group reasoned that, prior to the County’s investment into an area, an organized, active group of stakeholders needs to exist within the corridor with a common voice to communicate the implementation of its goals. The following is the structure of this organized, grass-roots group and the funding mechanism for the Pine Castle corridor.

The Main Street Program – The success of a Main Street Program can be seen through the operations of the Downtown South Main Street Program, the boundaries of which are approximately one-mile north of the Pine Castle study area. The Main Street Program is a national platform under a time-tested framework to promote community-driven, comprehensive revitalization. The Main Street framework is practicable and adaptable for initiatives that can be easily tailored to local conditions. The members of a Main Street Program can reach outside of the Pine Castle study corridor to include adjacent residential stakeholders; these residential stakeholders need a voice and a vote in the development of the public infrastructure.

Under its transformation strategy, the Main Street Program generates meaningful community engagement leading to the improvement of the market position. An effective transformation strategy, serves a stakeholder segment, responds to an underserved market demand and creates a differentiated destination and a sense of place. The four-point approach of this transformation strategy is:

1. Economic Vitality
2. Design
3. Promotion
4. Organization

The national platform of the Main Street Program will guide in the start-up of the organization; however, support from the County, both in personnel and start-up funding, is vital to the success of the Main Street Program. The program will need seed money for the:

1. Employment of an executive director
2. Payment of national dues
3. Organizational documents
4. Establishment of member dues and sponsorship levels

5. Seed capital for community programs

Support of the County can be phased-out over time as the Main Street Program gains members, holds community fundraisers and builds its operating account. Over time, leaders from the residents and business owners within the corridor will be made known and recognized, and all members of the Main Street program will be acting as a unified front to the County.

As the County acknowledges the strength in the numbers of the Main Street members, and begins to work with the Main Street leaders, the natural progression will be the consideration of a special taxing district to organize and bring forth a referendum calling for a self-imposed, incremental tax to remain within the district to provide the seed funding of the resultant and needed public infrastructure. In addition to the incremental tax, opportunities will open for federal, state and private grants, as well the bonding capabilities of future incremental taxes.

The structure of the special taxing district can be discussed by the community leaders and the County. As with the support of the County in the organization of a Main Street program, support of the County will also be vital in the creation of a neighborhood/business improvement district within the corridor. Under the current structure of a taxing district, the Board of County Commissioners will act as the Board of Directors of the taxing district with an Advisory Board to advise the County Commissioners of both the needs and wants of the stakeholders and the timing of capital funding.

The P3 Group acknowledges the effort by the County thus far in working with the stakeholders of the Pine Castle corridor, but the County's willingness to support the grass-roots, local drivers to be made a part of the creative funding process will make the visions of the corridor plan and the SunRail study reality. The creation of the Main Street program, and ultimately the neighborhood/business improvement district, will bring unity among the stakeholders and organized platforms upon which to control their destiny.

HORIZONTAL INFRASTRUCTURE

This Group's effort has examined and discussed Orange County's form-based code and all aspects of a horizontal nature. That is; we are making observations and suggestions to Orange County on community design, road design, transit, other infrastructure and Civil engineering aspects.

It seems desirable to incorporate historically sensitive designs in the attempts to improve the future of Pine Castle. When we look at pictures from the 1890's, for example, the roads are narrow and gently crowned. Drainage is handled in shallow swales with very gradual grades. In short, what they did back then was very low impact. That suggests, for the local streets with low-volume traffic, using sand colored concrete streets with two ten-foot wide lanes, flush ribbon curbs and five-foot wide swales on each side. Then we suggest a railing that might mimic a horse rail, perhaps, or a green wall arrangement to separate the vehicular section from the non-vehicular section. If those paths / trails are ten feet wide on either side of the street, the total R/W would be fifty feet in width.

Form-based code seems to favor block grid streets and high density. We have been wondering how to best pursue profitable development in such a layout. It appears that virtually no condominiums are being built here in Central Florida, with a few exceptions. Our take is: General contractor liability is

the main issue outside of pent-up market demand. The general contractors will, in fact, be sued by the condo association for defects within the ten-year litigation window. Given this situation, the alternative is three- or four-story town homes with "lock out" units on each floor. The owner of the fee interest in the town home could have a shop, a studio, an office or some other nonresidential use on the ground floor. A retailer might benefit by having a covered sidewalk adjoining the front porch. Owner might live on the second floor, or the top floor, with homestead exemption for that space. Then owner is free to rent out, or have family occupy. the other units. An investor might rent out all floors. The block layout would be sized so that each building fit optimally with an alley for garages down the middle. We suggest drawing one up with units that are generally 36 feet (or less) wide, 50 feet deep, so 1,800 SF per floor. Tapering to the top with lots of porches and balconies would make the overall appearance fit nicely.

Another interest stems from older, transformed neighborhoods. Many of the STOP signs were gone, replaced by YIELD signs and, where a local street intersected with a busier collector road, there were two STOP signs on the same pole with a very prominent STOP line painted on the roadway. Often, we witness drivers rolling through STOP signs, without incident. We suggest that Orange County do a review and begin the process of determining where there needs to be a FULL STOP, as opposed to a situation where changing to a YIELD sign would be more appropriate.

Slower traffic can move more volume through an area due to closer following distances, especially if the intersections allow them to move through without stopping. Drivers slow down when they perceive narrowness and confined space. We support striping the lanes much more prominently, at narrower widths with reflective markers that confine the vehicles, slowing them down.

We have characterized Orange Avenue traffic in various ways. It is a very high volume major arterial, one that carries considerable truck and semi-trailer traffic. The businesses in Pine Castle depend on these trucking activities. The current vehicle-per-day count is in excess of 40,000. In reality, Orange Avenue divides Pine Castle into east and west sectors, as there are few pedestrian-friendly crossings. FDOT, Orlando, Edgewood and Orange County are designing improvements from Anderson to south of Sand Lake Road.

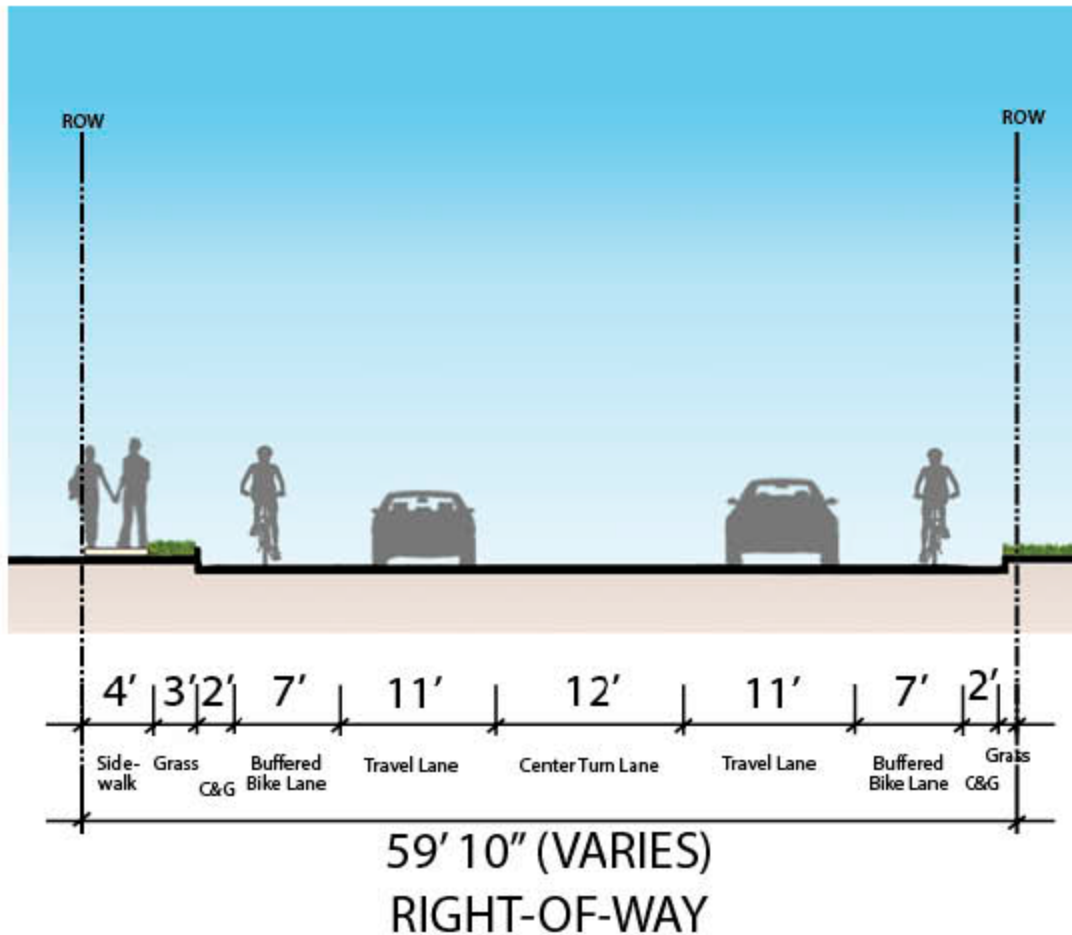
We strongly encourage consideration of a Round-About at Lancaster. Such an improvement slows the speed of the vehicles, allowing closer following distances, thereby having a positive effect on through-put capacity. Vehicle collisions tend to be much less violent, a huge safety factor. Intersections where there are three, not four, roads flow very well. At such three-way intersections there is one half the number of left turning movements compared with four-way intersections.

There is strong advocacy for properly designed round-abouts and other traffic devices that can increase the through-put capacity of a roadway, enhance safety and increase inter-connectivity.



There is the recommendation to Orange County to discuss treating the Orange Avenue lane design in a new way. There is considerable through traffic, both commercial vehicles and private autos. We have frequently observed these vehicles racing past us up to the next stop light and then sitting there for one or more light change cycles. We have used the term “vehicular sewer”, which brings a smile most times. However, it seems the two inner lanes, the “force lanes” if you will, adjacent to the median, ought to be 12 feet wide and given high priority. A round-about at Lancaster and Orange, for example, might be designed so that the force lanes move through with priority, at a slower speed but without stopping.

Proposed



The above is one of many iterations of sections that utilize narrower lanes.

The outside lanes in a five-lane configuration might be slimmer, encouraging slower speeds and more local turning movements. We suggest we look at 10 – 11-foot lane widths, with prominent paint delineating the lanes and creating the impression of narrowness and confined space. People drive slower under those conditions. Slower traffic can actually have higher throughput capacity due to closer following distances. The outside lanes also need to promote commercial viability in the real properties they serve. Think of it as addition by subtraction. All work being done by Metro Plan with regard to Complete Streets and Road Diets must be considered for each right-of-way in the study area, on a case-by-case basis. An added benefit of slower traffic and proper design is better safety with regard to non-vehicular traffic such as pedestrian and bicycle.

Non-vehicular connectivity is a significant factor with regard to the health of a community. Bike trails and adequate pedestrian access improvements enhance the well-being of an area. Home buyers these days want to be near community activity, what we characterize, in one word, as “nightlife.” Pine

Castle is currently deficient in that regard. There needs to be more to do there. One remedy might be a trail along the WEST edge of the RR right-of-way. Such a trail would safely connect businesses and residences with the Pine Castle SunRail station without having to interface with Orange Avenue. We also think it would spur interesting new development all along the west side of Orange Avenue. Throughout Pine Castle, sidewalks, bike path, trails and other non-vehicular improvements should be a part of a Complete Streets inquiry.

VERTICAL DEVELOPMENT

After significant review and collaboration, this group offers the following recommendations:

Use -- When considering the site's highest and best use, major consideration was given to the infill location relative to South of Downtown (SoDo) and Orlando International Airport (OIA) as well as major transportation corridors including Orange Avenue and SunRail. Due to the strategic location, existing market conditions, and perception of the community's needs of the subject property our focus was narrowed to Education, Healthcare and Housing.

The overall area of Pine Castle as highlighted in the horizontal development and public private partnership sections is on the cusp of undergoing significant change to its infrastructure. More efficient travel lanes, an increase in connectivity, and a focus on pedestrian safety will help to energize Pine Castle. The updated infrastructure also intensifies SunRail's already large impact in the area. This will lay the ground work for an influx of new development.

Pine Castle stands to benefit from the adjacency of SoDo's sphere of influence. Over time this will become more interconnected as the growth boundary of the successful SoDo area expands. Orange Avenue is a long-established corridor which directly links to downtown Orlando which is poised for revitalization. One can already see this taking place specifically between SoDo and Pine Castle. With a popular high growth area to the north and new infrastructure earmarked for the near future, Pine Castle begins to stand out as a future destination for education, healthcare and housing in close proximity to major transportation hubs, job centers, and retail destinations.

From an educational prospective our proposal focuses specifically on vocational learning. With trends shifting and more technical skills needed in technology and healthcare, our subject site seems ripe for an educational-oriented development. Due to the site's size, ample space is available for living and learning within the master development. This is critical for the viability of educational development as it provides efficiencies and increased retention for various stakeholders. Furthermore, this creates a unique opportunity to partner with one of Central Florida's industry leaders in which they can collaborate with the community to establish direct workforce solutions. Given Pine Castle's history as an area anchored by industrial-oriented development, it seems natural for a new high tech industrial user to locate here with a modern facility and workforce. Examples of mixed-use developments with integrated educational components are prevalent in established urban settings in the form of public grade schools or universities. Many master-planned communities seek to incorporate satellite college campuses, public schools, or private educational users to expand the complimentary uses beyond housing, retail, and office components.



Stetson University - Celebration Campus



School of Cooperative Technical Education – New York City (Proposed)

A development focused on healthcare is another great tool to energize the subject site and Pine Castle. Healthcare is a vast and high growth industry. Our focus is to create a linkage to Orlando Health's SoDo campus. Bringing Orlando Health to Pine Castle will create synergies between the Pine Castle and SoDo districts therefore establishing a cohesive identity of south Orlando. With a significant acreage in a distinct setting, the McCoy site allows for a variety of Healthcare uses. As a micro-scaled health village, a variety of activities could occur ranging from manufacturing to services and beyond. Our vision would allow for fostering of research and development for senior care services which focus not only on the administration, but training of employees. This follows a shifting demographic trend of urbanization of elder care in which seniors increasingly desire to locate in closer proximity to doctors and hospitals, retail services, and family members. An example right in our own backyard would be Lake Nona's Medical City and its array of users including the Sanford Burnham Prebys Medical Discovery Institute at Lake Nona or the University of Central Florida Medical Institute. Nationally, the Science and Technology Park at Johns Hopkins is planned to provide a dense mixture of office, retail, housing, and a K-8 school within an 88-acre campus.



University of Central Florida Medical Institute



Science and Technology Park at Johns Hopkins

Ideally the educational and healthcare components will co-exist with housing opportunities. Housing is the single biggest and most important aspect of reviving an area. With new residents comes new demand for a myriad of services. Workers locating on or nearby job centers will help to transform the Pine Castle area therefore creating a catalyst for adjacent re-development opportunities. In the example we set forth with education, a live-work environment is envisioned therefore reducing traffic and promoting an expanding community culture centered around cornerstone characteristics. This is critical to the transformation of Pine Castle. Without students or workers living onsite there would continue to be a transient nature to the area. Though it would be an improvement to the current site, we are most interested in the highest and best use. Creating a partnership with Orlando Health or a

major education user to develop affordable housing as part of the development at-large would be an optimal utilization of the site. This would again generate consistent positive traffic to Pine Castle and bring with it new demand. Google and Facebook announced earlier this year they would be creating housing for employees to subsidize rapidly increasing costs for their workers. Whereas this trend has not come to Central Florida yet, it appears increasingly likely given housing unaffordability for much of the labor force.

The engine that makes these development strategies go is finding a partner like Orlando Health or OIA that aim to create places people want to be. A large organization with significant resources and a desire to provide a world-class experience is the key to building the fabric of our community. Without the influence of an organization like this, a significant impact to the Pine Castle area will take significantly longer and be increasingly difficult to realize the vision as described. An example of this strategy is Amazon. Though overused today due to the hype around their second headquarters and the intrigue to know what city it will call home, it highlights the importance to have a large comprehensive stakeholder which drives influence and change for an area. Pine Castle needs to find their Amazon and we believe the Educational, Healthcare and Housing models have an opportunity to be just that.

CONCLUSION

The participants of the 2016-2017 ULI Mentor/Mentee Program applaud the County's foresight and proactive work in setting the guidelines for the future of the Pine Castle area. The stage can be set for Pine Castle to grow into a place sought out by people and businesses outside the area, convenient to Orlando's Central Business District while preserving its history and meeting its potential.

The common aspects from the study are:

1. The partnership between the County government and the private stakeholders within the Pine Castle area working toward common economic vitality
2. The focus on traffic, land design, streetscapes and non-vehicular connectivity
3. The creation of local vernacular and site-specific design elements to execute the highest and best uses
4. The enforcement of the County's form-based code with the flexibility and vision needed for the Pine Castle area to achieve its potential over the passage of time

It will be important for the County leaders and the local stakeholders to understand this is not a short-term project, but a long-term undertaking to span over a decade or more. For the County to move forward with a project of this magnitude, it will need the unity, support and investment of the stakeholders.