The Village of North Palm Beach
Citizens' Master Plan Report

Charrette Dates: January 30th - February 5th 2016

October 20, 2016

Treasure Coast Regional Planning Council

Indian River - St. Lucie - Martin - Palm Beach

prepared by

Treasure Coast Regional Planning Council

Michael Busha, Executive Director
Dana P. Little, Urban Design Director
Kim Delaney, Director of Strategic Development and Policy
Stephanie Heidt, Intergovernmental/Brownfields Coordinator
Marcela Camblor, Urban Designer
Juan Caurancho, Architect
Steven Fett, Architect
Ricardo Lopez, Architect
Rober Gibbs, Retail Analysis
Thomas Lavash, Economic Analysis
Lauren Moss, Urban Designer
Anthea Gianniotes, Urban Designer
Eloine Sabol, Urban Designer
Jose J. Venegas, Urban Designer

for the

Village of North Palm Beach

in partnership with the

Palm Beach Metropolitan Planning Organization

Table of Contents

Acknowledgments

Honorable David Norris, Mayor, Village of North Palm Beach
Doug Bush, Vice Mayor, Village of North Palm Beach
Darryl Aubrey, President Pro Tem, Village of North Palm Beach
Robert Gebbia, Councilmember, Village of North Palm Beach
Mark Mullinix, Councilmember, Village of North Palm Beach

Nick Uhren, Executive Director,
Palm Beach Metropolitan Planning Organization

A Special Thanks to
Host Committee Members
Pat Friedman, Kristen Garrison, Alison Harvey,
Tim Hullihan, Karen Marcus, Steve Mathison,
Steve Muller, Ron Pertnoy, Christian Searcy, Carolyn Stone

Purpose of the Village Master Plan

In August of 2015, the Village of North Palm Beach, in collaboration with the Palm Beach Metropolitan Planning Organization (MPO), contracted with the Treasure Coast Regional Planning Council (TCRPC) to study ways to improve mobility, quality of life, and economic vitality of the Village. In its FY 2016 Council Goals and Objectives, the Village articulated Goal 5 which states, "Develop a master plan for economic development in our business districts and community development in our neighborhoods." Specifics of this Goal include holding a public charrette, review of the Village Comprehensive Plan and Land Development Regulations, preparation of a market study and economic strategies, develop a master plan with specific recommendations and renderings, and complete the plan by FY 2016.

Objectives of the Village Master Plan

Village leadership decided the time was right to work with community stakeholders to create a business plan to guide the next era of growth and development in the Village of North Palm Beach. By engaging the public in a discussion encompassing both broad goals as well as specific priorities and concerns, the goal was to determine a clear vision for the future to help guide decisions and investments by the Village. Three clear objectives were identified:

1. Improve mobility, quality of life, and economic vitality of the Village;
2. Create a vision and Village Master Plan that illustrate strategies to achieve those objectives; and
3. Establish goals and policies to implement the Plan.

The Study Area

The study area included the Village of North Palm Beach, anticipated annexation properties, as well as areas outside the Village that would benefit from coordinated planning efforts.

The main elements of the effort include the following:

- The creation of a physical master plan for the Village, which considers infill and redevelopment opportunities;
- A review of the land use and development regulations in order to recommend improvements and ways to incent desired redevelopment and business creation;
- The development of a Market Overview, which reviews existing market conditions, demographics, and analyzes key market trends within the Village and relevant areas within the region;
- A detailed assessment of the current and future vehicular volumes on US 1 and potential application for the Florida Department of Transportation's Lane Elimination Process;
- A community-based vision for desirable economic and redevelopment growth for the Village of North Palm Beach; and

- Coordination with all relevant agencies, including but not limited to the Palm Beach MPO, Florida Department of Transportation (FDOT) District IV, Palm Beach County, and adjacent municipalities.

The public workshop on January 31, 2016, was well-attended by local stakeholders.

Study Area

The project area for the Village of North Palm Beach Master Plan is focused on, but not limited to, all properties within the Village of North Palm Beach municipal boundaries, the US 1 and Northlake Boulevard corridors, as well as areas outside the Village where analysis would benefit the master planning effort.

Process

In early 2016, the Treasure Coast Regional Planning Council conducted a significant public involvement process, including a week-long economic development and urban design charrette to assist the Village in accomplishing its goals. From Saturday, January 30, 2016, through Friday, February 5, 2016, the TCRPC team worked with over 150 citizens, elected officials, business owners, and staff in forging a strategy for redevelopment and economic growth in the Village of North Palm Beach. Working together, the team and the public created a master plan that represents the aspirations for the village's waterfront, commercial corridors, and neighborhoods. (Appendix A)

Two Types of Strategies: Infrastructure and Administrative Projects & Principles for Redevelopment

The Village of North Palm Beach Master Plan documents recommendations for both public and private efforts. Public efforts are projects such as street improvements, updating or installing infrastructure, changes

A recommended infrastructure project is a new design for the Prosperity Farms Bridge over the Earman River that expands the sidewalk area over unused asphalt and installs trellises for shaded seating to create an area to enjoy views of the waterway.

Characteristics of a Typical Village Center

1. Prominent civic open space
2. Buildings define the streets and open space
3. New streets link to neighborhood
4. Mixed use buildings have lively, active uses along the sidewalk
5. The existing post office is enhanced and maintained
6. Parking is located in the rear of buildings and on-street

An example of the principles for redevelopment applied to a vacant site to create a Village Center. These principles can shape infill redevelopment in various conditions and locations throughout North Palm Beach.

to public property, and adjustments to the municipal framework, such as the land development code or village programs. Since the Village is largely built-out, the plan also provides guidance for redevelopment. A detailed description of the principles of urban design – time-tested planning principles evident in the most successful, livable and economically resilient communities – are articulated to use as a framework for decision-making (Appendix D). Redevelopment is more likely to occur on properties with obsolete buildings on the main commercial corridors and in aging, waterfront multi-family areas. The plan illustrates methods for applying the principles to the different conditions that exist within the Village; however, it is important to note that the examples of redevelopment are not site specific solutions nor are they the only design that would successfully implement the principles on the example site.

Market Analysis

The Village of North Palm Beach is a desirable place to live, offering significant waterfront options and beautiful residential neighborhoods with strong property values. It is also characterized by vacant and obsolete offices along US 1, its most prominent corridor. To ascertain market-driven redevelopment potential, an economic analysis evaluating four key sectors was conducted. A summary of the results is provided in the box below. Clearly, a demand for housing, retail, and lodging exists in North Palm Beach. The key is to position the Village to attract growth in a form that will define and strengthen the Village's character (Appendix C).

Summary of Market/Development Potentials

Use	Forecast Period	Market Potentials
Retail & Restaurant	5 Years	104,360 sf
Market-Rate Housing	10 years	400 to 600 Units
Speculative Office	8 years	Limited
Lodging/Hospitality	10 Years	90-120 Rooms

Key Recommendations of the Master Plan

1. Redefine US 1
   a. Calm the corridor by pursuing a Lane Elimination to reduce the roadway from six to four lanes
   b. Beautify the corridor by repurposing asphalt into a new streetscape design
   c. Balance mobility by designing the roadway for a superior pedestrian and bicycle environment

2. Create a Form-Based Code and Design Guidelines
   a. Ensure private redevelopment complements public investments and contributes to realizing the vision
   b. Respond to market forces
   c. Establish predictability in the built environment and the approval process
   d. Maximize the waterfront
   e. Provide incentives for desired patterns and forms of development

3. Improve Prosperity Farms Road
   a. Create a signature design feature on the bridge
   b. Upgrade street furniture, especially bus stops
   c. Install pedestrian-scaled lighting
   d. Ensure infill development is consistent with the surrounding neighborhood
   e. Adopt programs to improve distressed areas

4. Prioritize Targeted Redevelopment Areas
   a. Northlake Promenade Shoppes (Twin City Mall) site
   b. Village Center(s) along US 1 corridor
   c. Camelot Inn/ Marina Area
   d. Crystal Tree Plaza
   e. Potential Southwest Annexation Area
   f. Northlake Boulevard / Earman River Area.

The Village of North Palm Beach
Citizens' Master Plan

January 30th - February 5th 2016

prepared by

The Treasure Coast Regional Planning Council

THE VILLAGE OF NORTH PALM BEACH
CITIZENS' MASTER PLAN
January 30th - February 5th 2016

prepared by

The Treasure Coast Regional Planning Council

Introduction

The focus of the Village of North Palm Beach Charrette was to engage the public to consider how to chart a course for the future that improves mobility, quality of life, and the economic vitality of the Village. The Village of North Palm Beach Master Plan addresses this goal in two ways: first, by providing design recommendations for public projects such as streets, infrastructure, and municipal programs; and, second, by illustrating methods for applying the principles of urban design (Appendix D) to different conditions that exist within the Village to achieve the stated goal. *It is important to note that the examples of potential redevelopment are not site specific solutions nor are they the only design that would successfully implement the principles on the example site.*

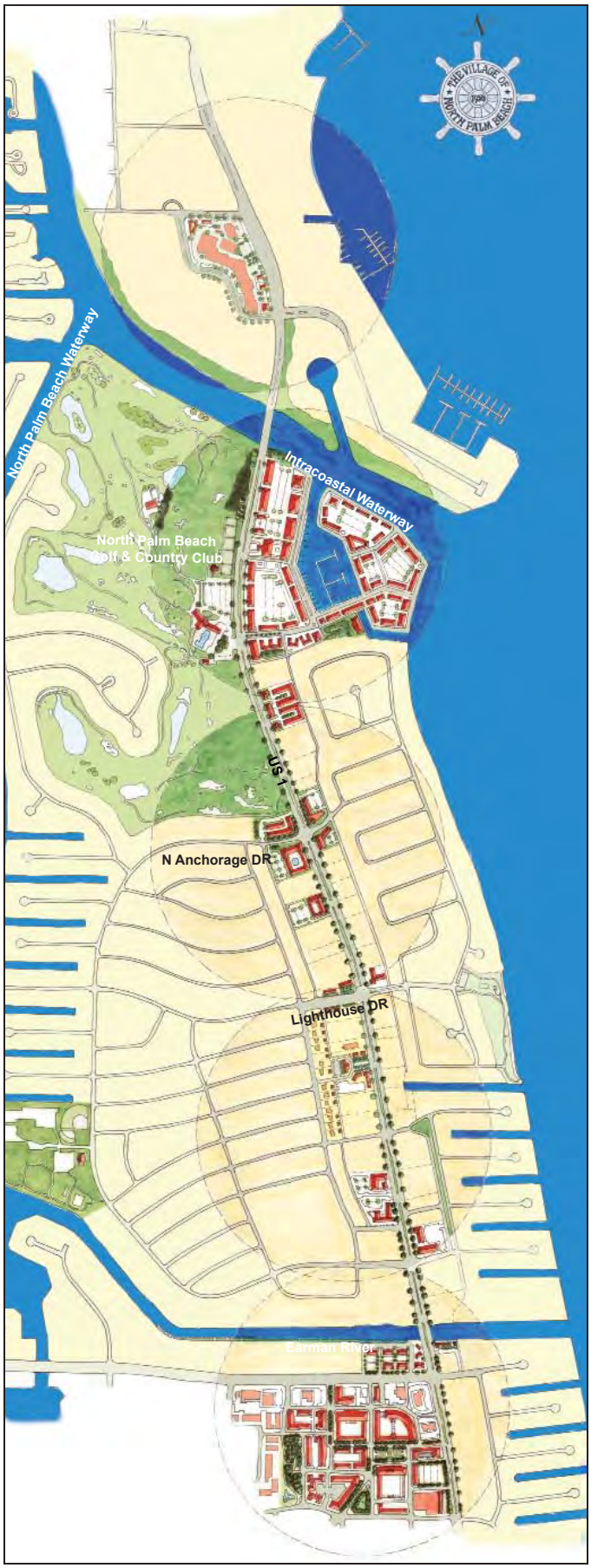
Village of North Palm Beach Master Plan

1. Improve mobility, quality of life, and economic vitality of the Village.
2. Create a vision and Village Master Plan that illustrates strategies to achieve those objectives.
3. Establish goals and policies to implement the Plan.

The strategies demonstrated within this plan are the result of considering the initial public input from a series of one-on-one stakeholder interviews, a seven-day public design charrette, and additional analysis. Each intervention is described both by text and graphics to clearly demonstrate the potential opportunities and the qualities the intervention could create..

US 1 Corridor

The master plan identifies five unique areas along the corridor as it traverses the village. Each circle has a 1/4-mile radius, which is roughly the distance a fully ambulatory person can comfortably walk in five minutes. One of the strategies presented is to encourage a redevelopment pattern that creates an amenity for the surrounding neighborhoods for each portion of the corridor, as well as for the Village as a whole. The circles provide a quick scale reference for ascertaining the residences and businesses served by potential projects. Rendered roofs denote potential new buildings, not the type of roof or architecture.

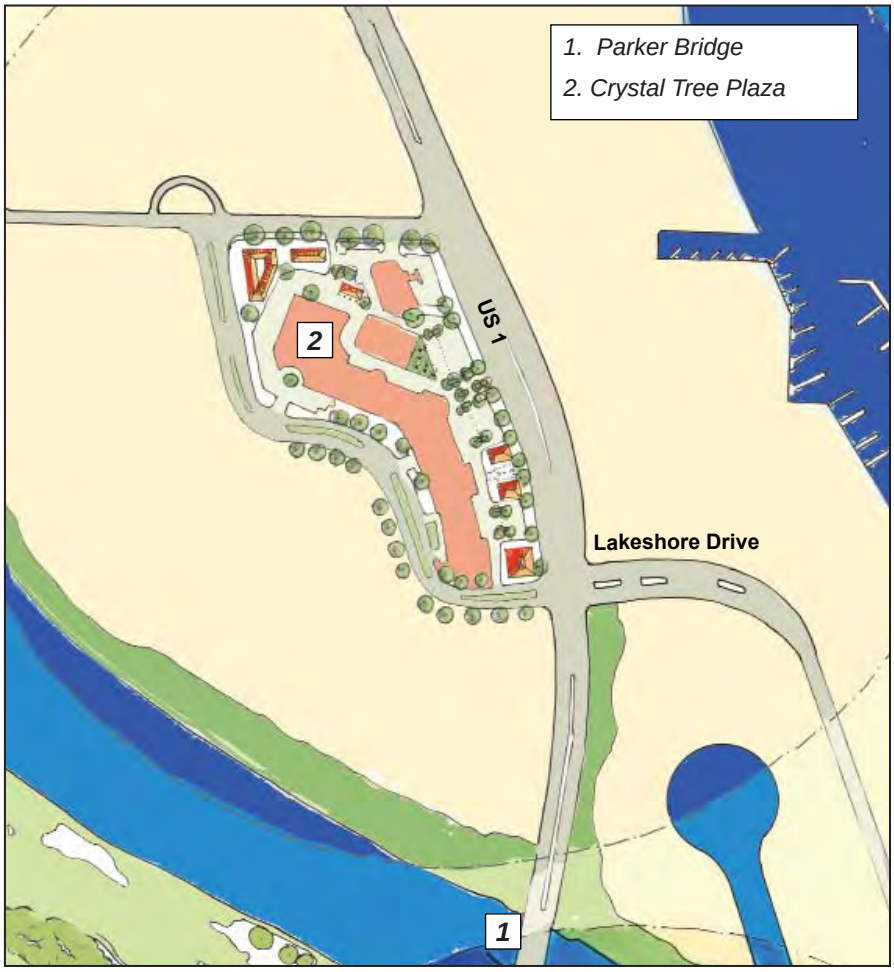


Parker Bridge North

Beginning in the area north of the Parker Bridge, specific concerns were raised regarding traffic:

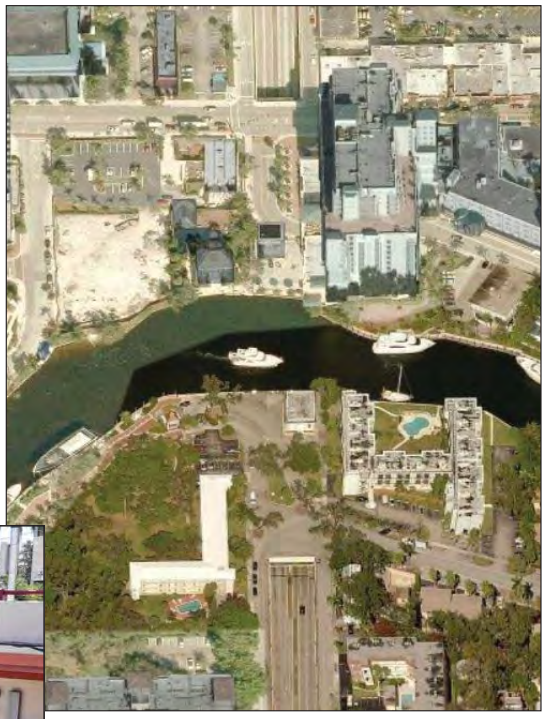
1. A longer turn-lane and better signal timing is needed on US 1 for turning into and out of Lakeshore Drive.
2. Signalization for the Lakeshore Drive and US 1 intersection needs better coordination with bridge openings.

The recommendation is to continue the discussion initiated as part of the charrette with FDOT for a traffic study to inform needed improvements.



The impact of the disruption of traffic due to bridge openings is not merely an inconvenience to local residences. The interruption of access has an economic effect and was raised as a factor affecting the desirability of having office space in the Village. The bridge height also affects the free flow of maritime vessels. Most importantly, the bridge openings interrupt the ability of emergency vehicles to respond and create congestion for navigation. The Village and Palm Beach Gardens are coordinating to ensure coverage for emergency service response.

An idea that seems radical, but with precedent in the region, is to eventually replace the draw bridge with a tunnel. Before out-right dismissing this idea as cost-prohibitive, it could create significant benefits: remove congestion, allow continuous uninterrupted emergency vehicle access, establish continuous maritime access, and better position the US 1 corridor as a business location. While a tunnel is an expensive proposition, the recommendation is to perform a benefit/burden analysis to fully understand the impact a long-term, major project would have on the Village, as well as Lake Park, Palm Beach Gardens, and norther Palm Beach County.



Top: US 1 in Fort Lauderdale tunnels under the New River.

Left: The Henry E. Kinney Tunnel.

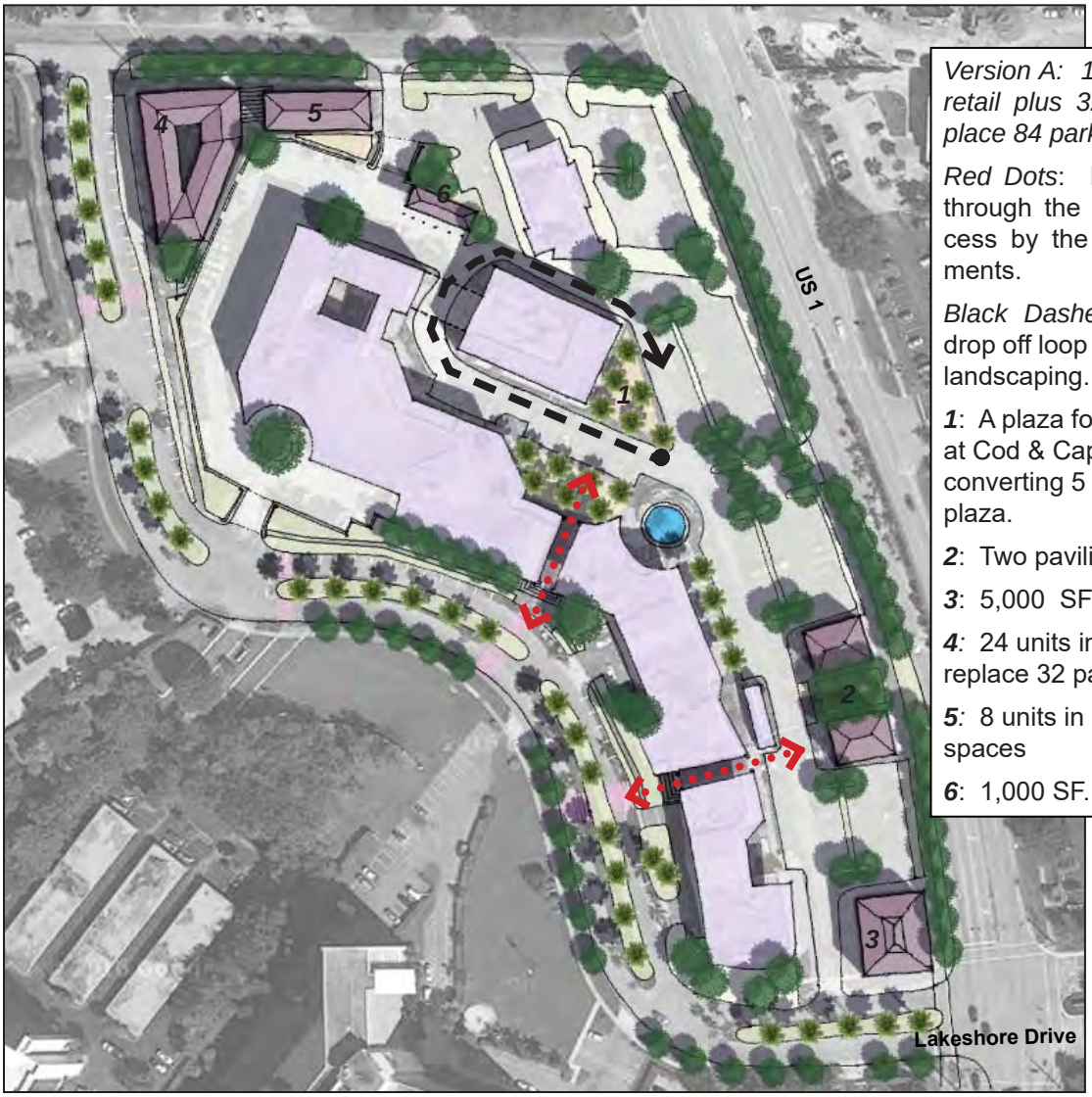
Crystal Tree Plaza

One of the main properties in the northern section of US 1 is the Crystal Tree Plaza. The plaza contains a mix of office, retail, and restaurant uses, connected with wide arcades and several designed open spaces. The plaza appears to be in need of update. Though several key local destinations are located in the plaza (e.g., Sprinkles Ice Cream, Cod and Capers), the plaza is dominated by asphalt parking areas which remain largely underutilized, even during high season. Most of the stores are closed in the evenings.

Diversifying the uses by adding a residential component was considered during the charrette to establish more activity in the evening. Initially, the idea was to convert the four-story office portion into residential units; however, the existing building does not lend itself to easy conversion, limited by its plumbing configuration and other factors. Since this property is one of the few office locations that afford users the ability to walk to lunch or dinner, another approach is presented as part of the master plan.

In order to build on the center's existing strengths to create a more active, attractive location to serve as a neighborhood center for the northern area, strategic additions are illustrated. The concept is to strategically introduce new buildings, create attractive outdoor spaces, rationalize vehicular circulation, reduce the prominence of surface parking areas, diversify uses, and better link the center to its surroundings for pedestrians and cyclists.

Like many recommendations throughout this plan, these concepts can be achieved in a number of ways. The following plates illustrate two different options, but other configurations are possible as



Version A: 10,000 SF of additional retail plus 32 residential units replace 84 parking spaces.

Red Dots: New Pedestrian Links through the center to improve access by the surrounding developments.

Black Dashed Line: A new valet drop off loop is created by adjusting landscaping.

1: A plaza for outdoor dining at Cod & Capers is created by converting 5 parking spaces into a plaza.

2: Two pavilions 2,000 SF each.

3: 5,000 SF pavilion.

4: 24 units in a Courtyard Building replace 32 parking spaces

5: 8 units in building replace 12 spaces

6: 1,000 SF.

well. Additionally, the concepts illustrated to retrofit this property can be used to reshape and energize other shopping centers located throughout the Village.

Several concepts are common to both plans. Outparcels are added to form outdoor spaces and reinforce pedestrian routes. A clear valet parking route and stronger pedestrian links are introduced through minor adjustments to the layout. In both plans, residential uses replace under-utilized parking areas in the rear of the center. The courtyard building and adjacent bar building replace 44 parking space with 32 residential units. Consider that except for the restaurants, Crystal Tree Plaza is mostly closed during evening hours when residential units need parking most. Also, by diversifying uses, the ability to for some shoppers and workers to live on-site provides parking efficiencies.

A plaza in Coral Gables, defined by building placement and landscape design.

Version B: 10,000 SF of additional retail plus 32 residential units replace 84 parking spaces.

Red Dots: New Pedestrian Links through the center to improve access by the surrounding developments.

Black Dashed Line: A new valet drop off loop is created by adjusting landscaping.

1: A plaza for outdoor dining at Cod & Capers is created by converting 5 parking spaces into a plaza.

2: 5,000 SF pavilion with outdoor dining.

3: 3,000 SF pavilion.

4: 5,000 SF pavilion

5: 24 units in a Courtyard Building replace 32 parking spaces

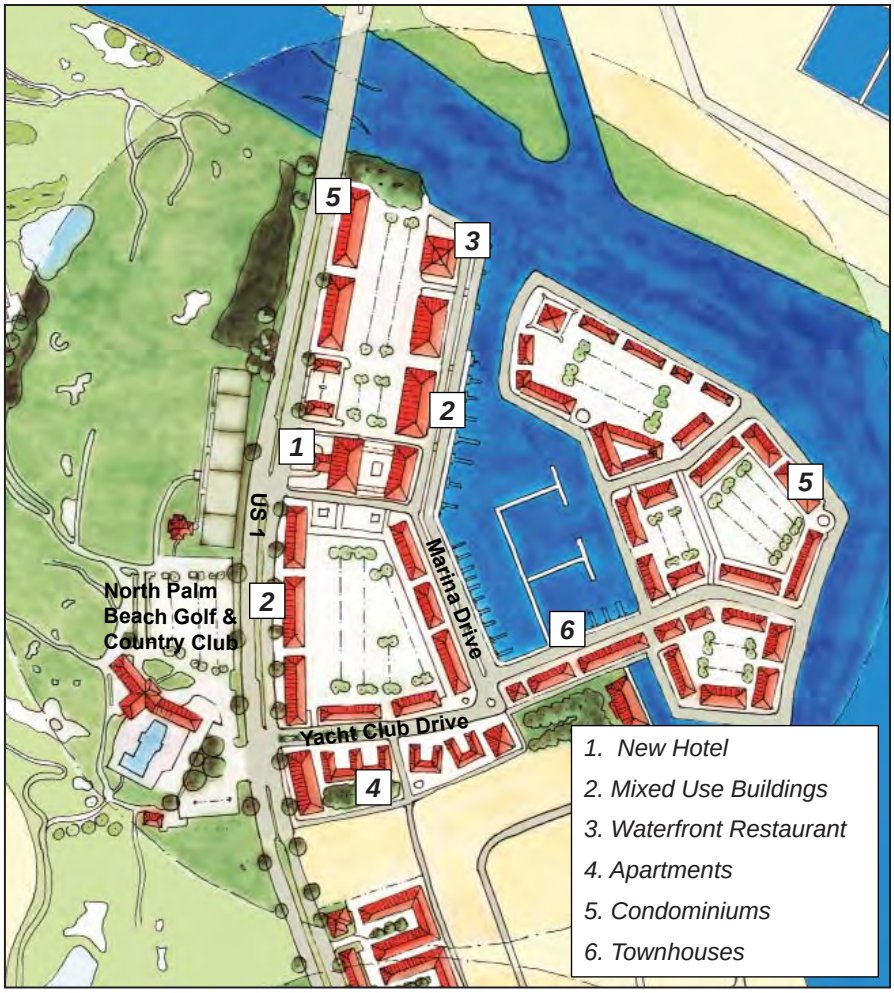
6: 8 units in building replace 12 spaces

7: 1,000 SF

The area just south of the Parker Bridge was frequently identified by charrette participants as a resort area with a waterfront village character. An almost universal idea among the presentations by the citizens at the Saturday workshop was to locate a new signature hotel on the site of the old Camelot Inn, building on the attraction of the golf course and the marina while replacing an out-of-date building.

Country Club House Amenities

Should be the "Town Center"
Should Accommodate Residents (Especially Kids)
Family-Oriented Programming
More Tennis Courts
Fitness Facility
Kiddy Splash Park
Family Pool Access
It is the Community's Facility



The Village is currently in the process of creating a new country club building and updating the amenities. A separate process is underway focused solely on that effort. However, many charrette participants voiced ideas and while not tested as part of this effort, the some of the suggestions are listed in the box above.

The area surrounding the marina is indicative of many waterfront areas in the Village. It is largely comprised of condominiums constructed in the 1960s, 1970s, or early 1980s. They range from two to six stories, frequently walk-up types with exterior circulation among units. While these buildings do not redevelop easily, given the ownership pattern, structures have finite life spans, and waterfront parcels are extremely valuable so a vision for the future is important to illustrate. A defined vision provides guidance if and when changes occur. While changes may be incremental or small, each element should move the Village toward its ultimate vision. The resort area has the following characteristics:

1. Waterfront dining locations;
2. A continuous boardwalk environment so everyone can enjoy the waterfront;
3. A new boutique hotel;
4. A variety of buildings that maintain the mid-rise scale and line the streets;
5. A vibrant mix of uses located along the boardwalk;
6. Street trees, street lights, and benches create a nice place to visit; and
7. Parking is available but not visually prominent.

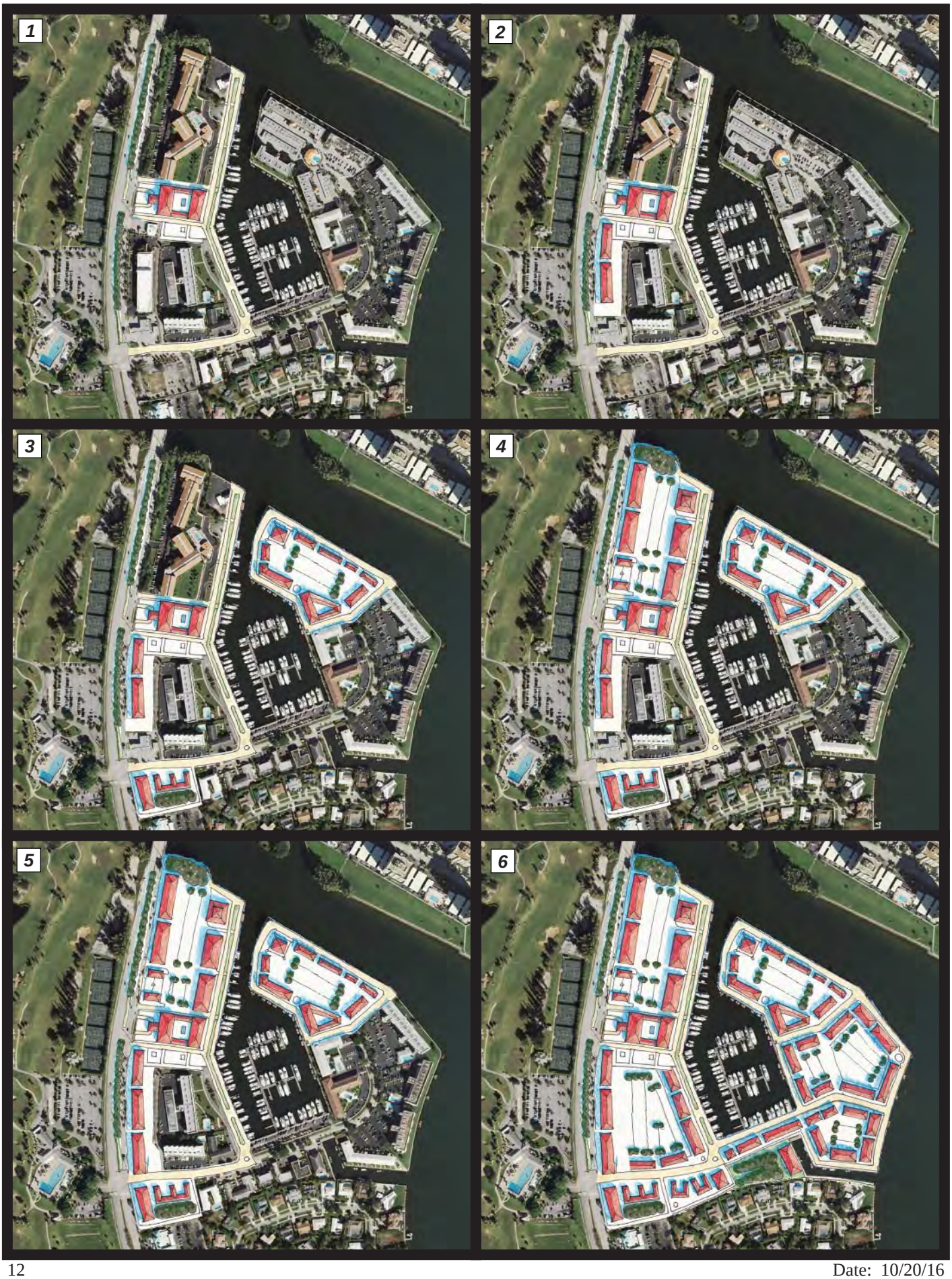
The characteristics described for the marina area also apply to other aging waterfront locations within the Village.

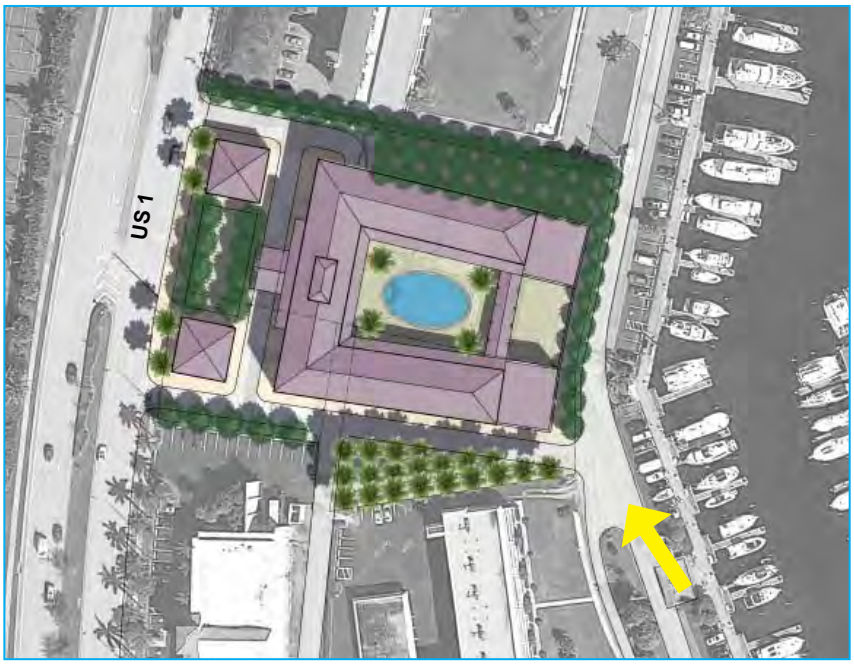
Top: Several participants referenced Portofino as a reference for the character of waterfront redevelopment. This image illustrates a view from the water of this type of redevelopment around the marina.

Middle: The position of the buildings in both the top and middle images define the street/promenade along water's edge. As the week progressed, charrette participants supported an island Bermudian architecture, consistent with John Volk's design of the Village Hall, and raised concern about introducing Mediterranean Revival in the Village. The desired scale and urban experience can be achieved using a wide range of architecture.

Bottom: The current streetscape on Marina Drive is not defined, without clear locations for sidewalks and appears barren. Locations exist along the street where head-in parking could be relocated to the west side, allowing a wider promenade and landscaping along the water's edge.

The following page illustrates the concept of realizing the vision over time. First, the redevelopment of the old inn could provide a signature hotel with a streetscape improvement project on the road leading into the district and along the marina. Then, infill redevelopment could occur on commercial properties, which are easier to redevelop than condominiums. Finally, one of the larger condominium complexes could be redeveloped. And so on, until the district is gradually redeveloped into the buildings that would be there for the next 100 years. The key is that each investment should move the Village toward the community's vision.


1
2
3
4
5
6

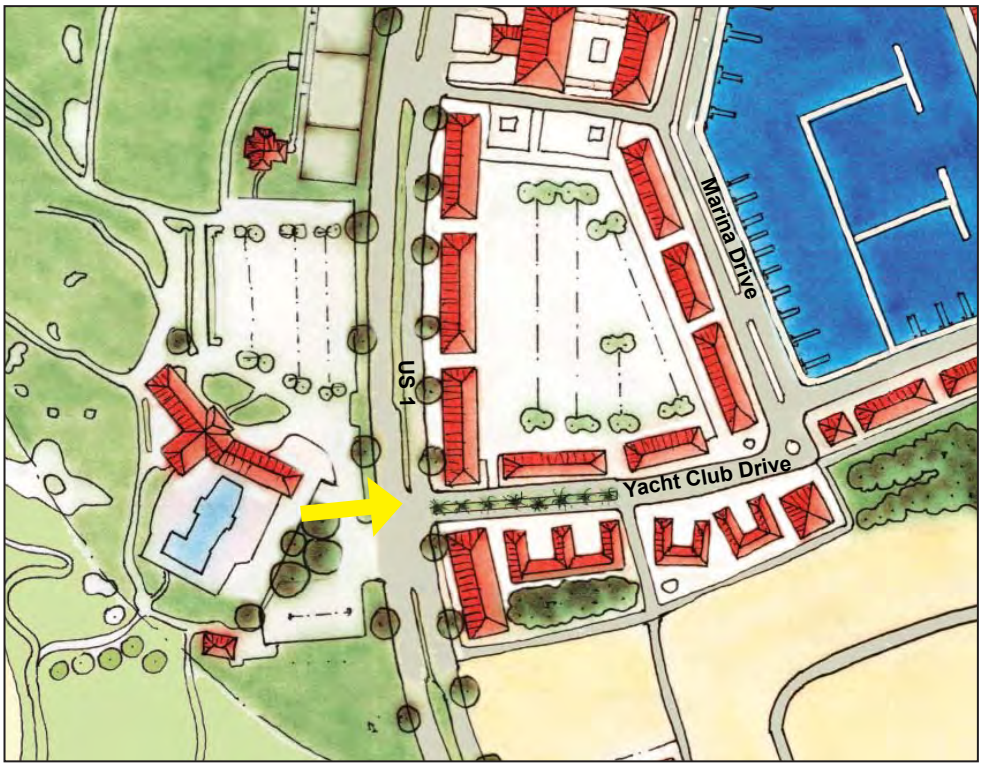


Top: A view of a potential new hotel on the site of the current Camelot Inn. Note that head-in parking has been relocated to the west side to allow for a wider promenade, landscaping, and parallel parking on the east side of Marina Drive. The arrow in the image below indicates to point of view.

Left: A potential site plan for a new hotel with two pavilions along the street, each offering 2,500 SF of retail, 7,500 SF of internal retail/restaurant space, 255 rooms, and 255 parking spaces.

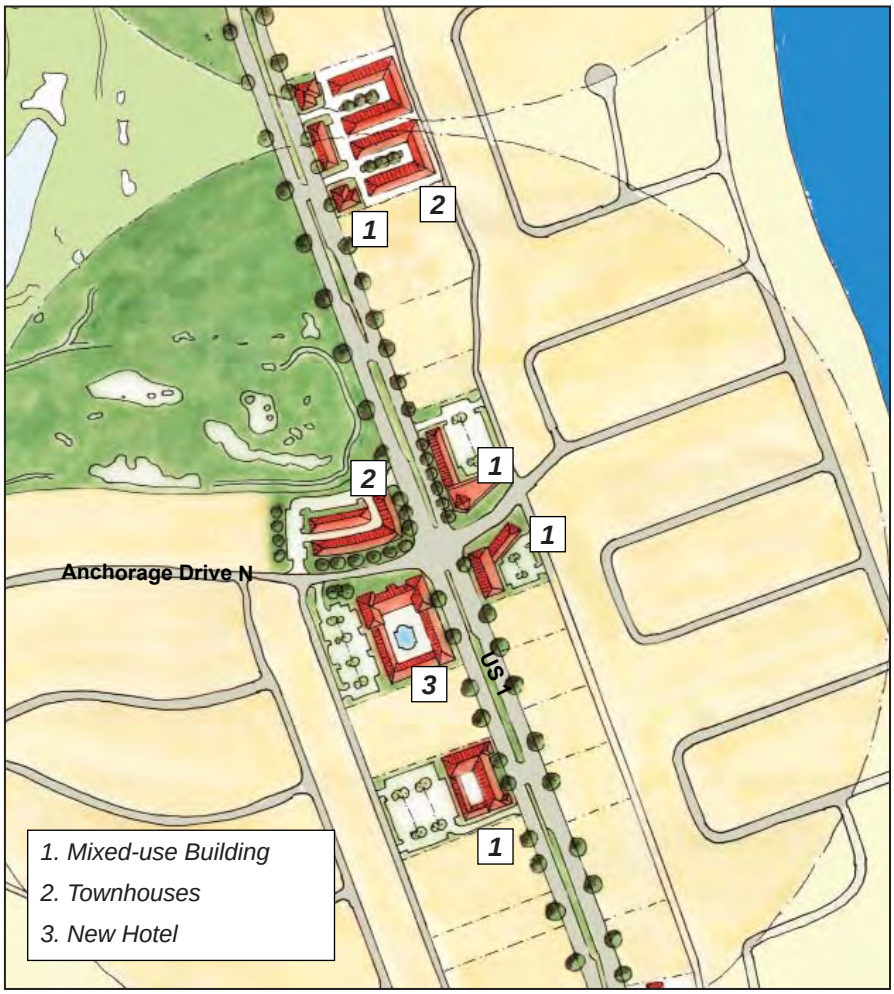
Right: The arrow indicates the view shown in the image below.

Bottom: A street elevation of potential redevelopment in the resort area across the street from the North Palm Beach Country Club. A new streetscape on Yacht Club Drive with shaded sidewalks and an entry median with palms announces arrival to the district. New mixed-use buildings are shown with varied rooflines and building facades. Buildings in the area currently range from two to six stories in height. A similar scale is depicted in the image.



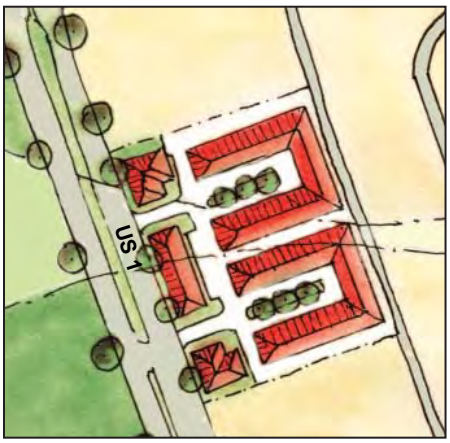
Infill Redevelopment along US 1

Sites with redevelopment potential are illustrated throughout the master plan, denoted by rendered roofs on buildings. Redevelopment is not limited to these sites nor is it suggested to occur within a certain timeframe or exactly in the configuration shown. They are illustrative of the principles embedded in the community's vision and key to placemaking. Certain sites were chosen for testing redevelopment based upon several factors, including current vacancy rate, building size, condition and age. These factors suggest certain properties are more likely to redevelop in a near-term timeframe.

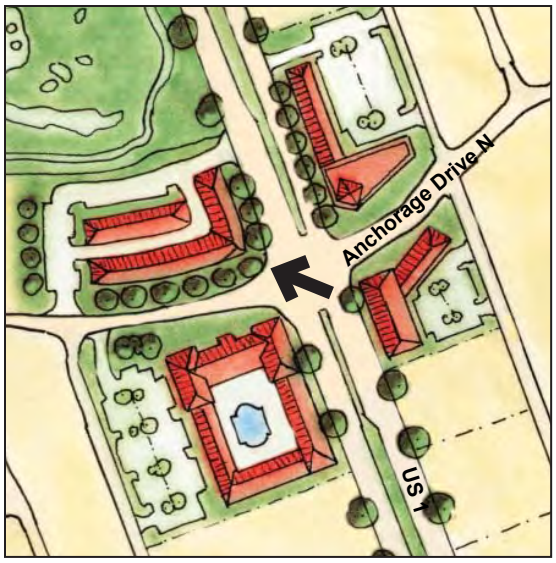


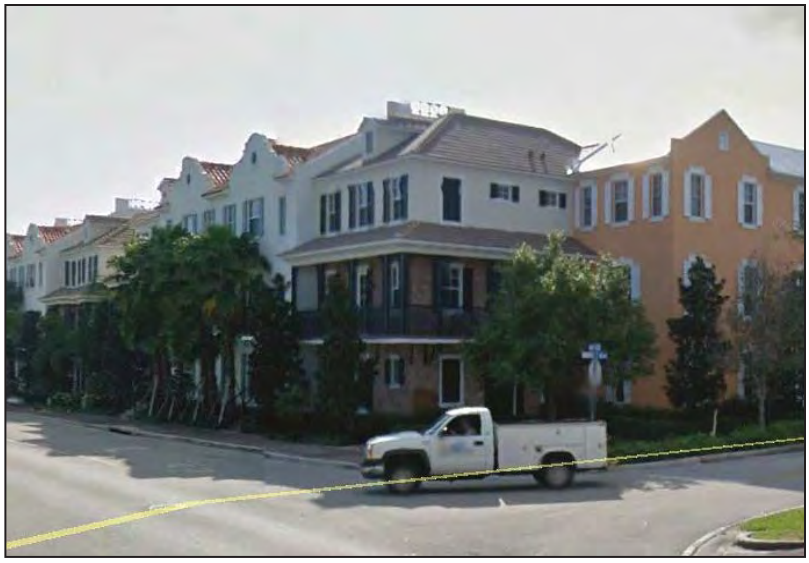
Each infill project tests redevelopment potential of the site using a building scale of two to four stories in height. Building placement shape streets and form outdoor spaces. A center should be defined for each portion of the village; however, not every site has to be mixed-use. Some sites may be good candidates for higher density residential development. The key is to position the Village to accommodate growth in a form that will define and strengthen the Village's character.

The redevelopment scenario below depicts mixed-use development on two adjoining properties, one of which is currently vacant land and the other an older office building that is currently 33% vacant. The suggested program provides 13,000 SF of commercial space along US 1 transitioning to 54 townhouse units toward the neighborhood. The density is just over 18 du/acre, which is higher than currently permitted without rezoning. In order to encourage the form depicted below, code adjustments should make it simple and fast to approve projects consistent with the vision.



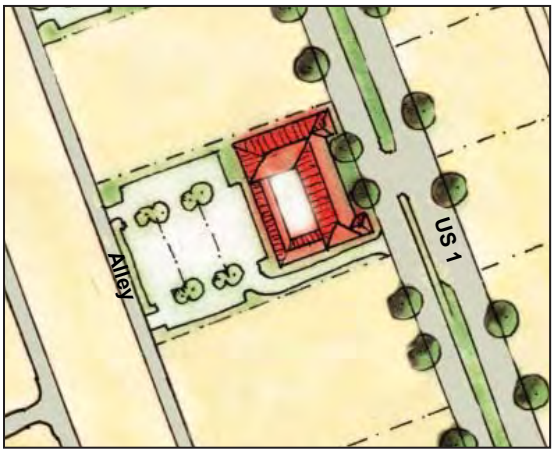
Left: A mixed-use development. ***Right***: An image of a similar type of development on US 1 in West Palm Beach.





Left: The arrow indicates the view demonstrated in the photograph in the image to the right. ***Right***: Townhouses in Delray Beach are a similar scale, density, and configuration as illustrated in the master plan.

The intersection at North Anchorage Drive and US 1 provides a unique opportunity for redevelopment on all four corners of the intersection. The northwest parcel is currently occupied by a vacant bank. This parcel adjoins the golf course and could be redeveloped with townhouses facing the course and an urban condition lining tree-shaded streets. Many communities in the region, including West Palm Beach, Lake Worth, and Delray Beach, have successfully established new townhouses along US 1 and in other "downtown" locations without the additional benefit of a golf course view. The market analysis showed a demand for 90 to 120 new hotel rooms. The plan suggests the possibility of upgrading the current Super 8 motel on the southwest corner of US 1 and Anchorage Drive North to a new 3-star hotel.



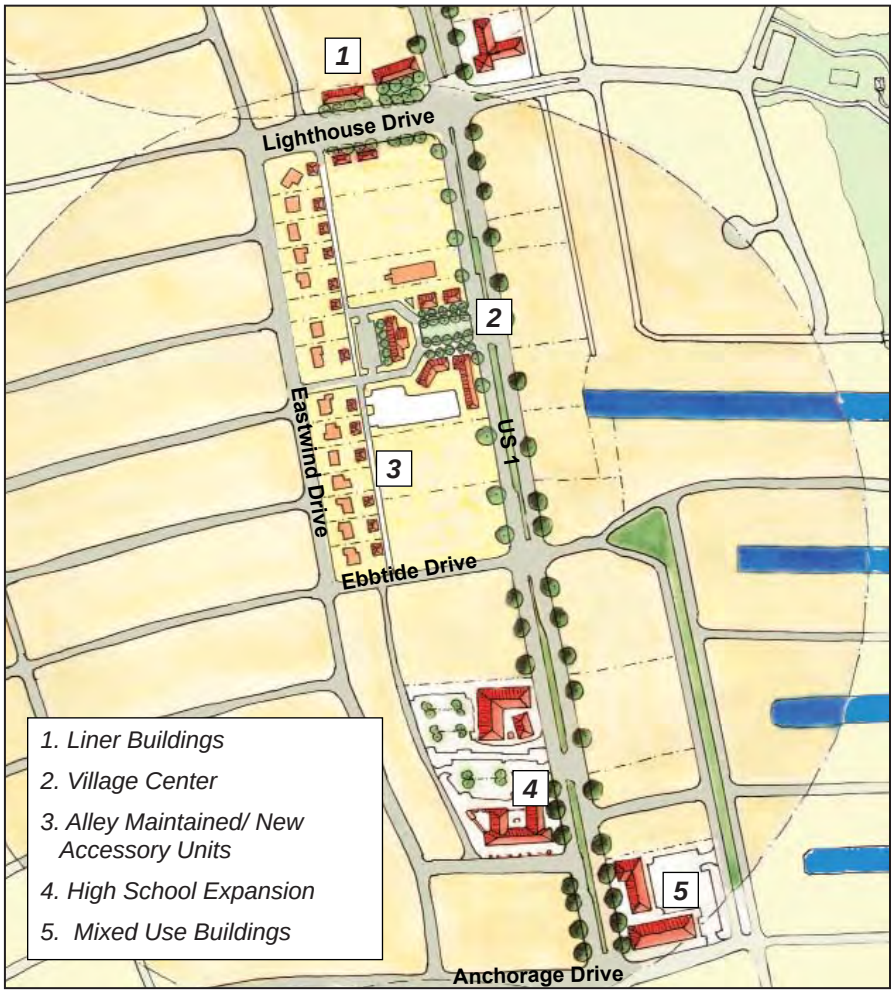
Top: Potential infill development along US 1

Right: A mixed use building in a similar scale, density, and configuration as the plan illustrates.

Village Center

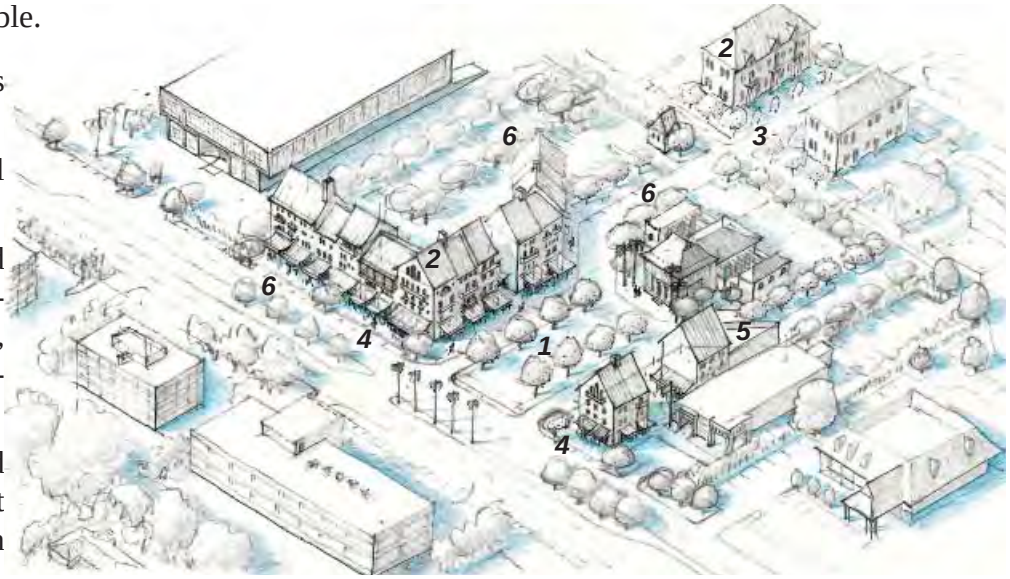
The portion of US 1 between Lighthouse Drive and South Anchorage Drive is the civic center of the community. The Village Hall, Library, and the Conservatory School at North Palm Beach are located in this area. It is important that each portion of the corridor has a center serving the surrounding residents. This section should accommodate the most prominent center - an identifiable Village Center for the community.

A Village Center can be achieved in a number of configurations or locations. The illustration below demonstrates how 27,000 SF of commercial and 44 units could be configured into a Village Center on vacant land within this section of US 1. An attractive destination for the community is formed, distinguished from the surrounding development pattern as a location for people to gather. The buildings should be tall enough to enclose the space. Pedestrian routes to the center should be shaded, clearly defined, and as direct as possible.



The illustration demonstrates the following qualities:

- Buildings define a formal green or plaza;
- Streets are public and interconnected to the surrounding neighborhood, shortening walking distance to the center;
- A vibrant mix of uses and high density development line streets and the open space.
- Parking is provided in the rear of buildings and on-street.



1: Prominent new civic green; ***2***: Buildings define the streets and open space; ***3***: New streets link to neighborhood; ***4***: Mixed-use buildings have lively, active uses along the sidewalk; ***5***: The existing post office is enhanced and maintained; ***6***: Parking is on-street and in the rear of buildings.

Top: A mixed-use building study for the Village Center

Bottom: The Village Center is comprised of mixed-use buildings in varying scales with lively uses located along the sidewalk and a civic open space.

The Alleyway & Accessory Units

One of the strongest characteristics of this section of the US 1 corridor is the continuous north-south alleyway. This alley provides an important local link with numerous benefits:

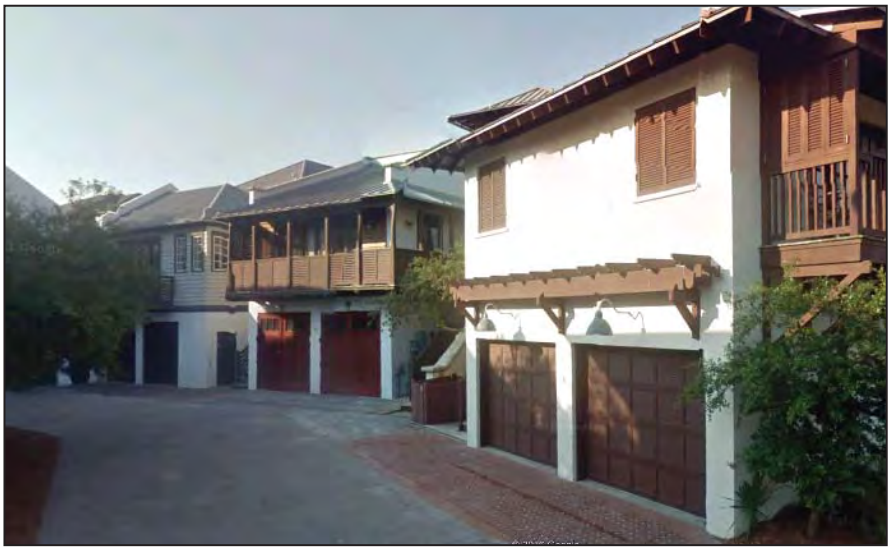
1. Locals can move between properties without having to engage US 1;
2. Deliveries can be made discreetly without impacting traffic or blocking access;
3. Parking and other back of house uses are easily accessed.

The lots that back up to the commercial properties have an opportunity to increase their value, provide a new housing option for the Village, and maintain affordability over time by incorporating accessory units. With the alley access, these buildings can be easily accommodated without increasing traffic to the neighborhoods. In addition to providing potential rental income that supports the main household, they could also provide a home office option or a housing option for extended family members (e.g., grandparent, newly graduated adult children).

These units would provide natural surveillance of the alleyway and, if properly designed, transform the alley into an interesting, unique thoroughfare.

Top: Accessory units located in outbuildings behind houses on Eastwind Drive and along the alley.

Bottom: Accessory dwelling units along an alley in Rosemary Beach, Florida.



The Alleyway & Townhouse Units

Alley access provides another possibility for further diversifying housing options in the Village. With rear vehicular access available, these lots could easily accommodate potential townhouse redevelopment, which would serve as a transition between the single-family neighborhood to the west and the commercial corridor to the east. The pattern shown also includes accessory units to capture the benefits enumerated on the previous page. Pedestrian links to the commercial corridor could be provided within new development. Increasing density could provide an opportunity to establish a new street link, if desired, to potential new development along US 1.

Top: Townhouse units line Eastwind Drive with accessory units located in outbuildings to the rear along the alley.

Left: Townhouse development in West Palm Beach, Florida.

Retrofitting Sites Not Likely to Redevelop

Throughout the corridor, large office buildings are setback from the street and surrounded by parking lots. Though many of these buildings, through their building placement and parking location and quantity, do not contribute to a Village character, steps can be taken with strategic interventions to create a more economically viable and attractive condition.

For example, on the north side of Lighthouse Drive, the office at 701 US 1 is fully leased and four stories tall. It is not likely to redevelop in the near future. On the south side of Lighthouse Drive, a small bank at 667 US 1 is also fully leased and surrounded by surface parking areas. Both properties have open parking spaces available throughout the day.

One opportunity is to add small object buildings along the street to define the street and create pockets of desirable urban spaces. These buildings would be appropriate for coffee shops or cafes to serve the office users and the adjoining neighborhood. It would require a reduction in the current amount of parking on the sites in order to achieve this, but this strategy would provide an amenity to building users and surrounding residences.

***Top**:* the current condition at the west side of Lighthouse Drive and US 1.

***Middle**:* The potential location of new liner buildings in existing parking lots to create a desirable urban experience and offer an amenity to office workers and nearby residences.

Bottom: A liner building used as a cafe with planter boxes defining an outdoor eating area. These buildings have an attractive facade on all sides and are only 12 feet wide.

The Conservatory School at North Palm Beach (NPB)

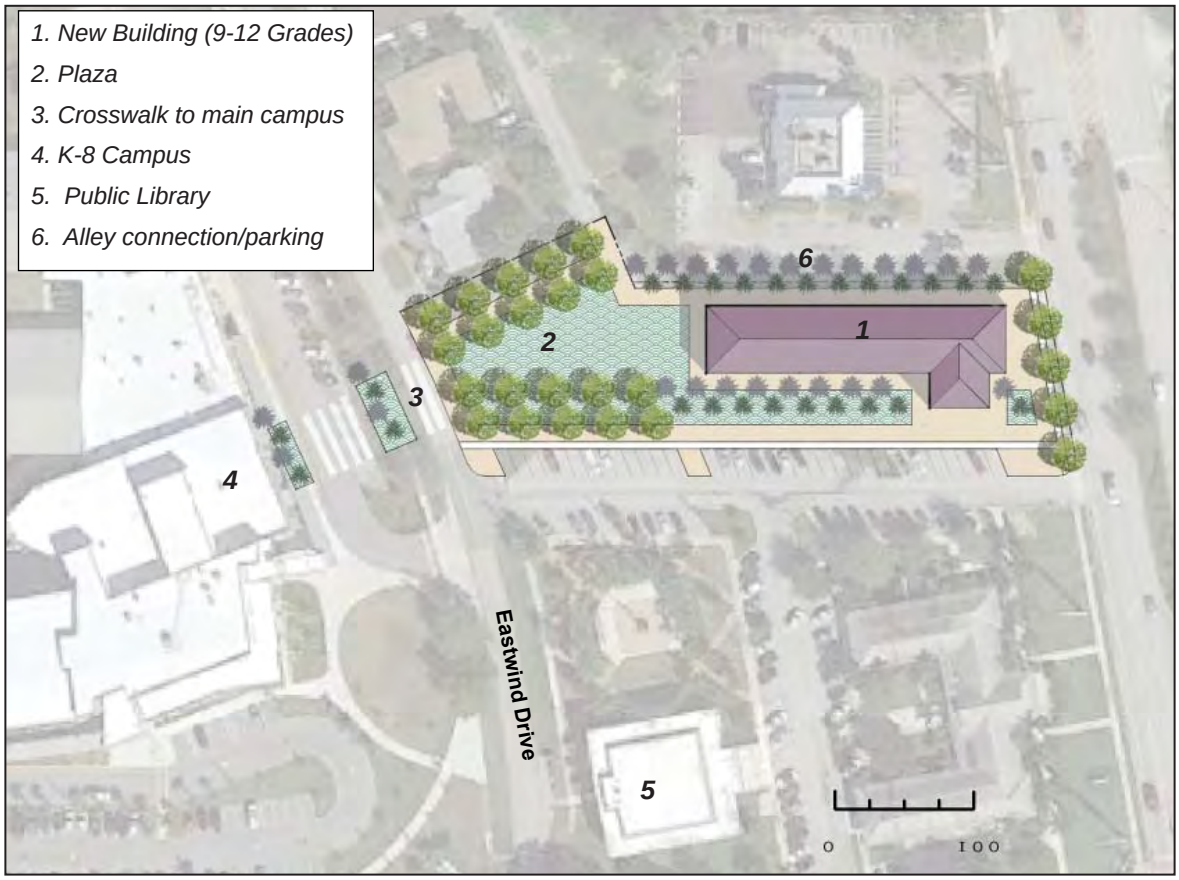
The Conservatory School at NPB provides a traditional K-5 educational program as well as a "choice" program, focused on music education for K-5 as well as a highly selective choice program for middle schoolers, grades six through eight. The Conservatory School at NPB has an enrollment of 657 K-5 students and 44 middle school students, providing a total 2015/16 enrollment of 701. Ultimately, The Conservatory School at NPB anticipates 120 middle school students among three grades at full capacity.

Charrette participants were highly complementary regarding the range of educational choices available to Village residents. They voiced a strong desire to expand the successful programming at The Conservatory School at NPB to include a choice program for high schoolers, grades nine through twelve. As of the time of this charrette report, preliminary discussions were underway among the school's administration, Village, School District of Palm Beach County, and members of the community.

The state regulatory structure controlling educational environments has continued to change over time, with greater flexibility for alternative educational environments depending on program, partnerships, educational needs, and other factors. The creativity of the District and increasing flexibility among regulations suggests there are many formats within which a high school program could be added to The Conservatory School at NPB. Based on discussion with school administrators and reviewing alternative high school programs around Florida and across the nation, it would appear as though a focused choice-type high school program at The Conservatory School could include 40-50 students per grade, totaling 200 students across the four grades.

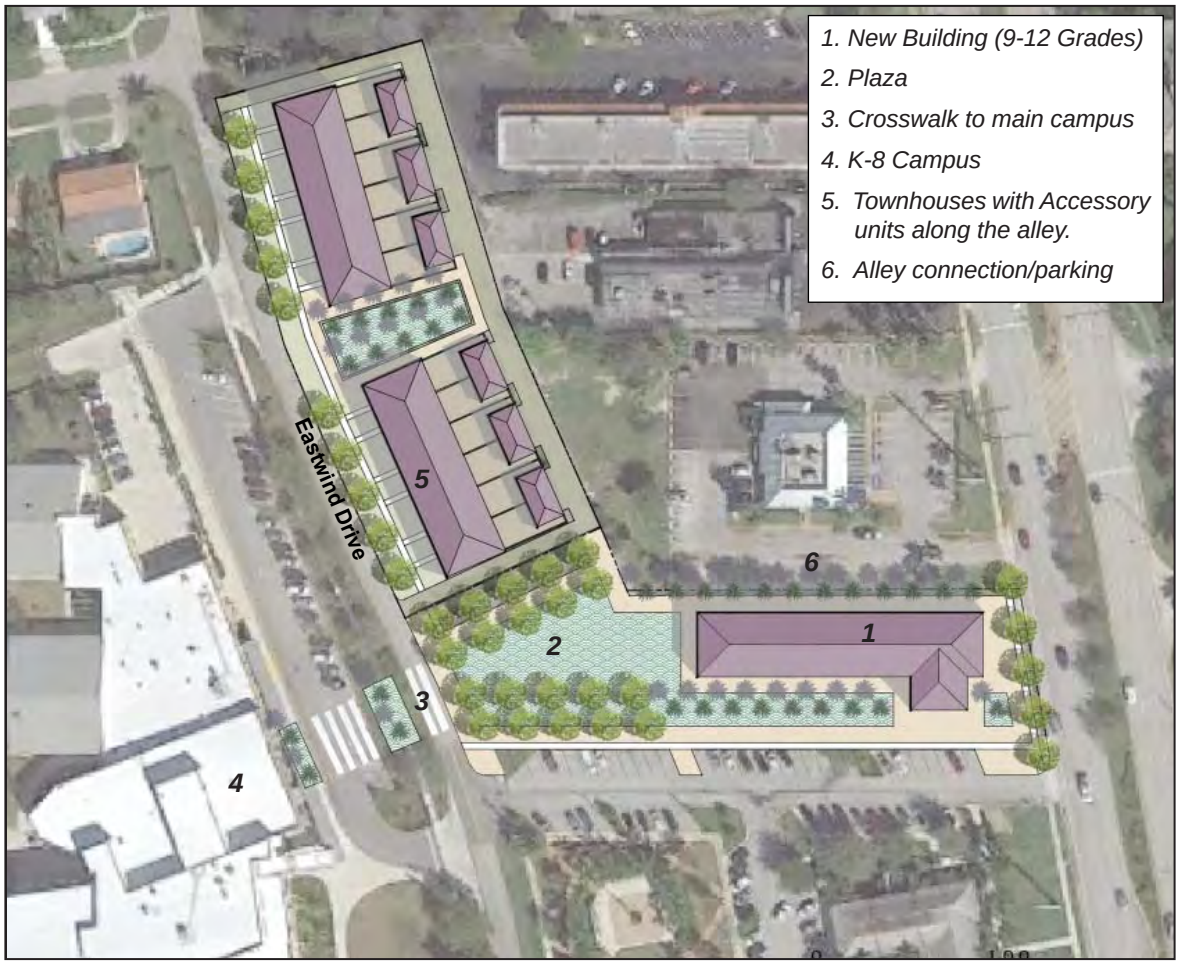
With appropriate programming and scheduling, there could be efficiencies developed with broader utilization of some of the current core facilities on the campus. Additionally, classroom and other educational spaces could be created on ancillary properties, such as those owned by the Village or others adjacent to the current campus. Proximity to the current campus could be advantageous in such a design to maximize the utility of the physical and human resources of the existing school. In addition, Palm Beach State College's north campus, located on PGA Boulevard, is approximately three miles north of the existing campus and could offer dual-enrollment and other educational programming enhancements to a high school curriculum.

A potential site is illustrated for the high school program below. This scenario suggests replacing an underutilized office building to provide approximately 22,400 SF (in two stories) of classroom and ancillary space. The site is proximate to the existing campus, located roughly 300 feet east across Eastwind Drive, which is a small neighborhood street. In order to connect the satellite building and provide a gathering space for older students, a plaza connection could be easily achieved with the purchase of one additional lot. The site is adjacent to the North Palm Beach Library. This scenario helps illustrate one of the many ways in which additional educational space could be designed to augment The Conservatory School's program to accommodate a high school component.



Top: A potential elevation of a new school building. ***Bottom***: A new high school building with a floor plate of 11,200 SF, providing 22,400 SF in two stories. If one additional lot is acquired, the campus could be unified by a plaza.

An expanded school with high school grade levels can be accommodated in the Village in a number of ways. One of the strengths of the current campus is that it is easily accessed via walking, biking, and driving by its position in an interconnected neighborhood. Building upon its position in the community (both physically and civic), a design is illustrated that emphasizes the school's civic presence in the community as a whole, connecting it to the current campus and library.

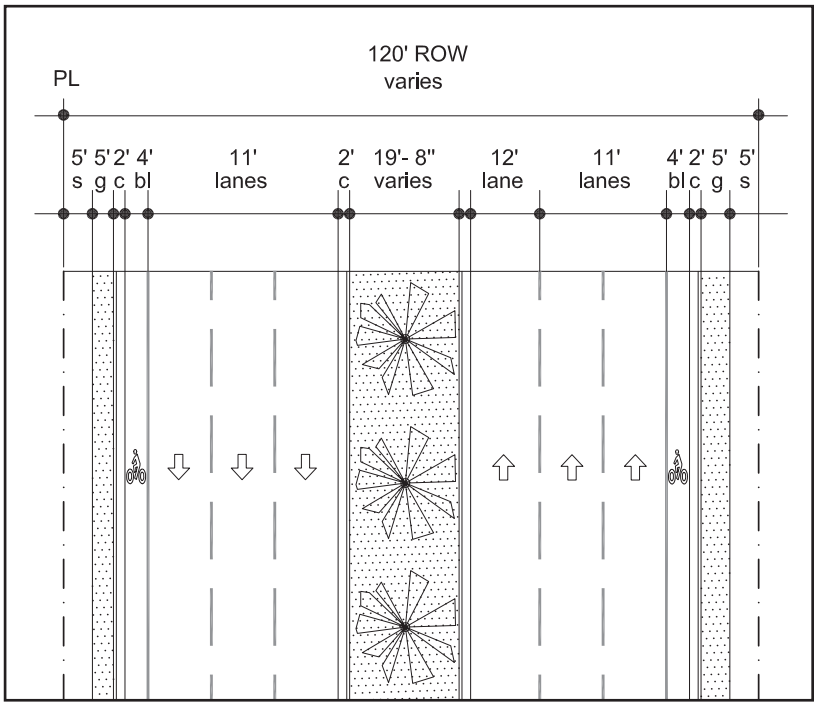


Top**:* A view of a potential new school building. ***Middle**:* The lots facing the school are currently duplexes. An opportunity to provide a more resilient building type along the campus edge transitioning to the commercial uses behind it is illustrated. ***Bottom: A potential elevation of a new school building.

US 1 Options

US 1 is the Village of North Palm Beach's main thoroughfare. As discussed in Background & Existing Conditions (Appendix B), the current and projected traffic volumes afford the Village with a choice in the roadway design of the section between Northlake Boulevard and the Parker Bridge. The current road has three travel lanes in each direction with a striped shoulder functioning as a bike lane, though unmarked and substandard in width. A landscape strip and sidewalk, both generally five feet wide, are provided on both sides. Generally, the only landscaping provided is in the median.

Three options are illustrated on the following pages showing how the right-of-way could be reconfigured. The Village could opt to maintain the current configuration or pursue a Lane Elimination and change the design using one or more of the following options.

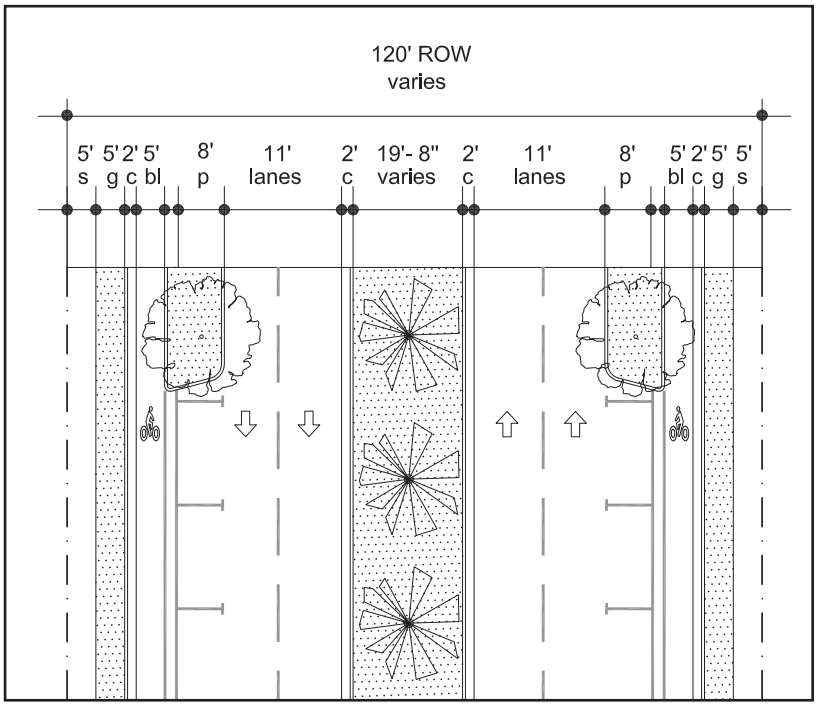


Top: The existing condition of US 1 in North Palm Beach, between Northlake Boulevard and the Parker Bridge.

Bottom: An image of the current thoroughfare.

US 1 ~ On-Street Parking Option

This configuration provides on-street parking, physically separating the cycle lane and sidewalk from moving traffic. The bike lane is expanded to a standard width of five feet. Sufficient room is available to have a buffered bike lane, which adds more than two feet of striping to guide cyclists away from potential conflicts with passenger doors. Street trees would occur in landscape islands located between parking spaces.

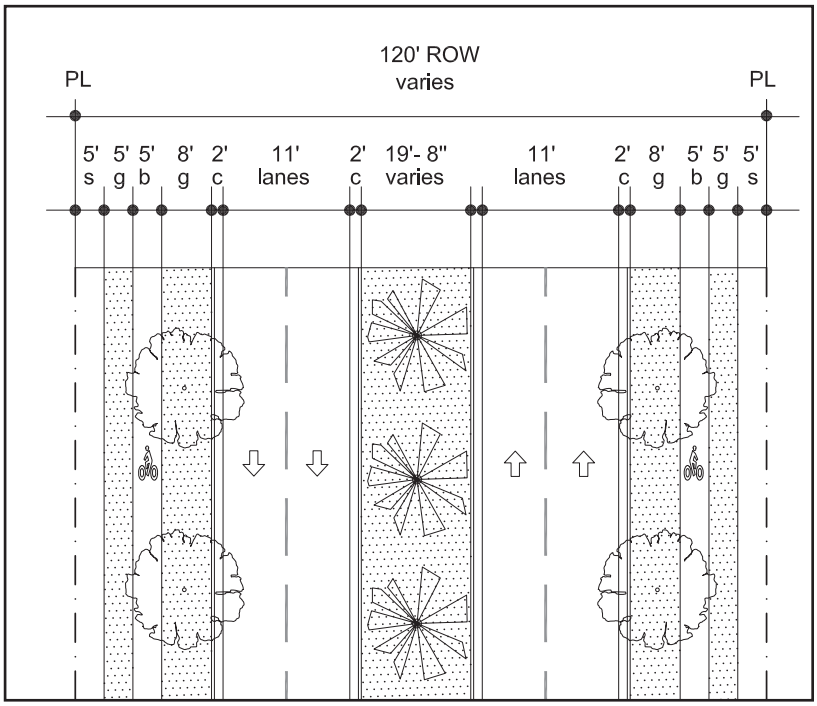


Top: One of three options developed for the section of US 1 between Northlake Boulevard and the Parker Bridge.

Bottom: An image of a design with on-street parking and a buffered bike lane.

US 1 ~ Cycle Track Option

This configuration provides a bike lane that is separated from the roadway and the sidewalk. This configuration protects both cyclists and pedestrians from vehicular traffic while eliminating potential conflicts between bikers and walkers. The image shows the bike lane curbed, but it could also take the form of a path at the same grade as the sidewalk. The majority of space gained from narrowing the roadway would provide wide landscaping swales, which could accommodate regularly spaced shade trees along the corridor.

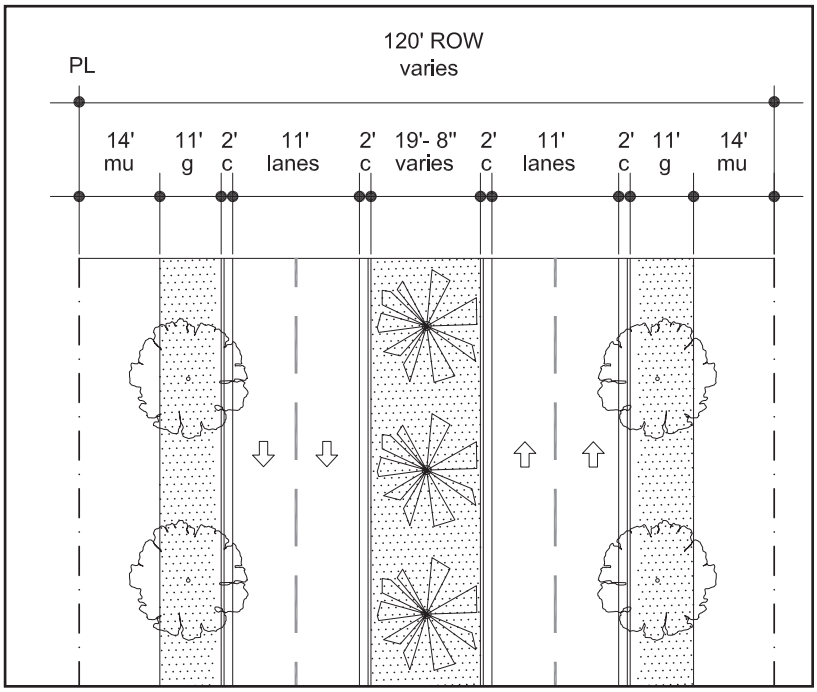


Top: One of three options developed for the section of US 1 between Northlake Boulevard and the Parker Bridge.

Bottom: An image of a design with a cycle track and wide planting area.

US 1 ~ Multi-Use Path Option

This configuration widens the sidewalk into a multi-use path, providing a route for both pedestrians and cyclists separated from vehicular traffic by a wide planting strip. Shade trees could be uniformly spaced, creating shade and a parklike condition along the corridor.



Top: One of three options developed for the section of US 1 between Northlake Boulevard and the Parker Bridge.

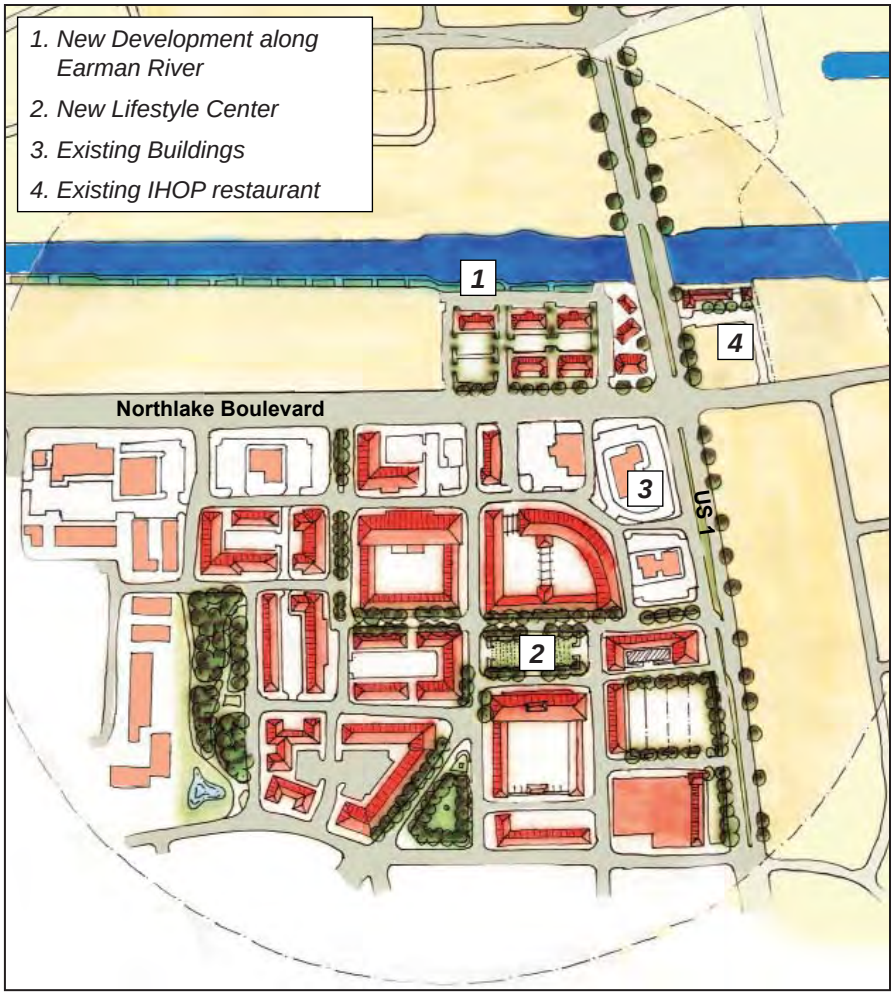
Bottom: An image of a design with a multi-use path and wide planting area.

Northlake & US 1

The focus of this area was on three main concepts: new development on the north side of Northlake Boulevard, the creation of a signature project at the southwest corner of US 1 and Northlake Boulevard, and maximizing the waterfront.

Redevelopment on the Earman River

The characteristics for redevelopment along the Earman River are to provide access to the waterfront, to enhance the fragile ecosystem, and to protect the residences on the north side of river from noise and other impacts. The plan locates retail and restaurant uses along the bridge edge and Northlake Boulevard. Residential uses predominantly line the water side. A boardwalk is proposed to allow access for people and to docks and, but it is pulled away from the natural edge to allow for additional mangrove planting to improve the ecosystem and provide a buffer from new development.



Top: An elevation shows the scale and massing of a potential infill project. The restaurant is located next to the bridge, and three multi-family buildings line the Earman River. A boardwalk is provided for access, but all active uses are located behind a screen of mangroves and new landscaping.

Bottom: A perspective view of a potential infill project. The program accommodates 21,000 SF of restaurant/retail and 26 new residential units.

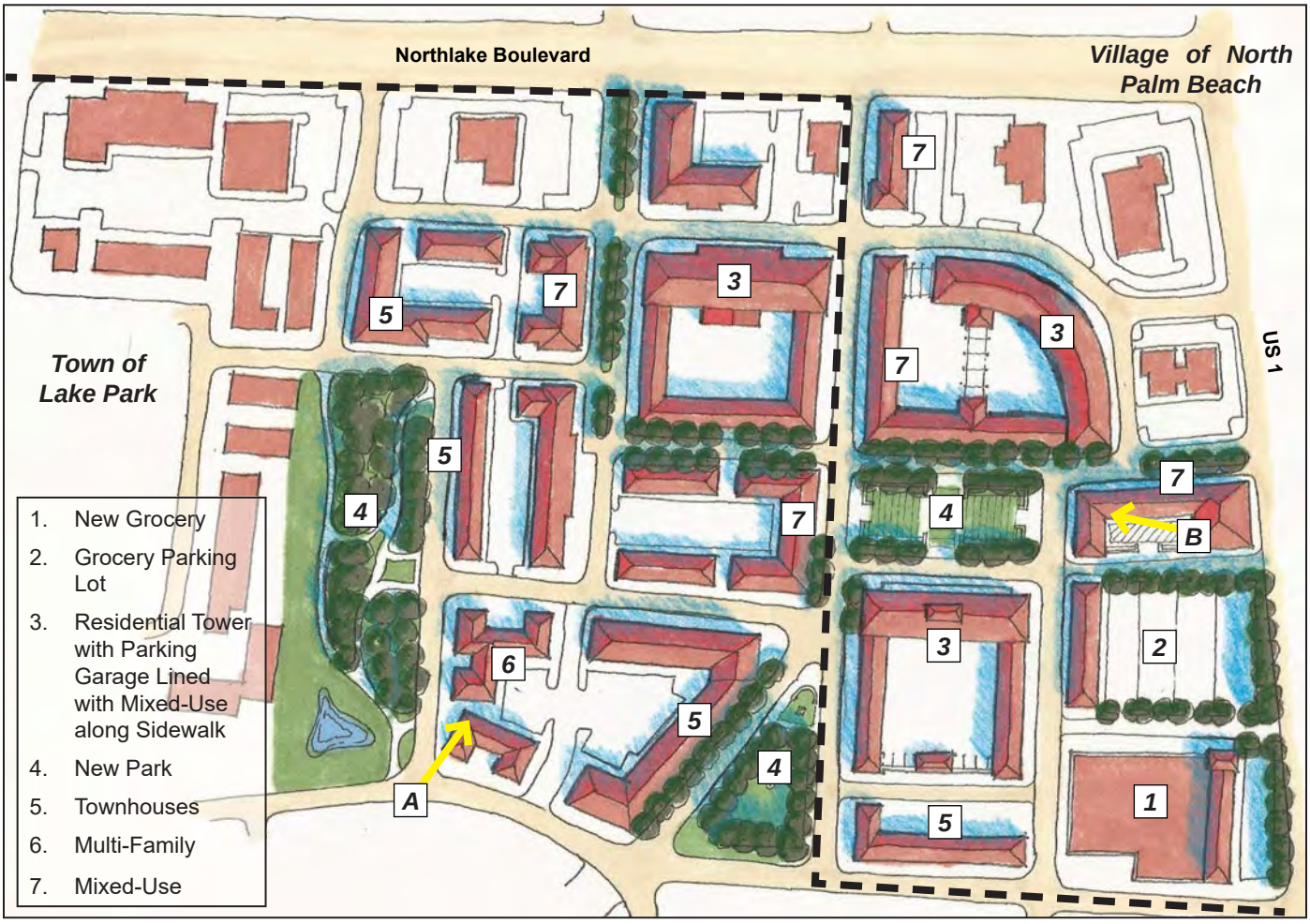
Northlake Promenade Shoppes

Many charrette participants recognized the potential for redevelopment of the old Twin City Mall site, which currently includes the Northlake Promenade Shoppes. A lifestyle center, like CityPlace or Mizner Park, was the most common description of the preferred form. These types of development provide shopping, entertainment, restaurant uses within the form of a an urban neighborhood that incorporates residential as an integral use.

The site is large enough to accommodate a significant project. Buildings tall enough to afford water views could be incorporated without impacting existing residences. Currently, the project turns its back to adjacent houses, negatively impacting physical and economic potential, particularly for the residential uses. Since half of the site is located within the boundary of Lake Park, a clear vision that both municipalities support is a crucial tool to encourage investment.

The plan below demonstrates the qualities that could create an exciting new lifestyle center for this portion of the Village:

1. An interconnected system of walkable blocks and small streets;
2. Buildings line streets and face parks and open spaces;
3. The grocery store is moved east to have visibility from US 1;
4. A mix of building types is provided including townhouses, low-rise multi-family, high-rise multi-family, retail and mixed-use;
5. Parking is provided on-street, in garages, and behind buildings;
6. Transitions to the adjacent area is designed to be harmonious - like uses face like uses; and
7. Redevelopment is equitably divided between the two municipalities.



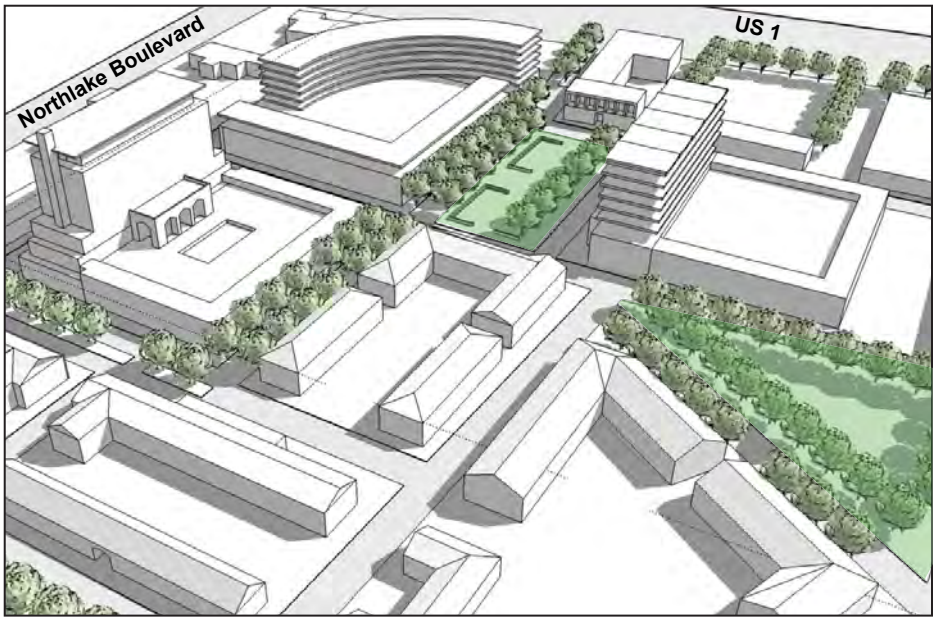
This concept plan shows how to integrate new development to create a life style center. The plan has 33,500 SF of existing retail, 101,500 SF of new retail/commercial use, 690 condominium units, and 131 townhouses.

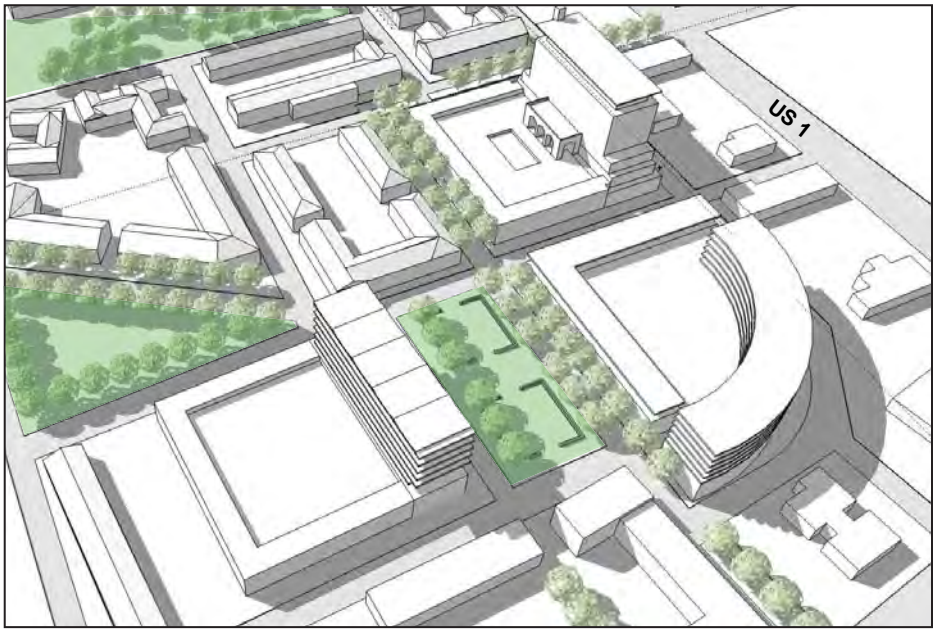
***Top**:* A view towards the northeast of the most intense, tallest buildings, which are located in the center of the development, ameliorating negative impacts from existing residences (denoted by arrow A on the plan on the previous page).

***Middle**:* A view to the northwest of the block structure created (denoted by arrow B on the plan on the previous page).

Bottom Right: A view of CityPlace, one of the examples frequently referenced by charrette participants.

Bottom Left: A view of Mizner Park, one of the examples frequently referenced by charrette participants.





Prosperity Farms Road

The Prosperity Farms Road corridor is a main north-south corridor and provides one of the entry points to the Village of North Palm Beach. Prosperity Farms Road is lined primarily by residential and civic uses. A recent streetscape project improved landscaping along the thoroughfare; however, the general consensus amoung charrette particpants was that more improvements are needed. Several opportunities were identified to provide more significant aesthetic improvements, while improving the walkability of the road, which functions as a transit corridor as well.

Bridge Feature

The most impactful opportunity identified in the master plan is the creation of a dramatic feature on the bridge over the Earman River using surplus space on the roadway. A common comment during the charrette was that more water views, access, and waterfront restaurants should be encouraged so that all residents have opportunities to enjoy the water. By transforming the bridge into a piece of civic architecture, a signature gateway in the Village is created, and a new place for walkers to pause and enjoy the river could be created.

Bus Stops and Street Furniture

Additional improvements could further augment the recent streetscaping on the corridor, particularly by upgrading lighting and street furniture. Currently, only three bus stops have benches or a trash can, and none have shelters. While certain areas on corridor are lined by single family houses where the installation of bus shelters would, in essence, be in someone's front yard, many other locations exist with room for improvement.

One of the more constrained bus stops on Prosperity Farms Road.

A view of the current bridge on Prosperity Farms Road over the Earman River.

A design that expands the sidewalk area over unused asphalt and installs trellises for shade and seating to create an area to enjoy views of the waterway.

Ideally all bus stops should provide a dignified place for riders to wait. The provision of beautiful architectural shelters is an opportunity to reinforce the identity of an area and beautify the public realm. Shelters serve riders and provide walkers and cyclists with a place of refuge from the elements if needed. Consistent use of beautifully designed shelters and street furniture throughout the Village would become part of its character. An argument can be made that transit ridership would increase if more care were given to the environment that riders experience. In the worst cases, the environment provided to riders treats them like second class citizens, leaving them to appear as loitering along the side of a busy and unsightly roadway. Installing shelters, benches, pedestrian-scaled lighting, and landscaping would improve both aesthetics and functionality. Certain locations (like the stop at the Community Center) could easily accommodate shelters. Where sufficient room is not available for improvement, determining whether relocating a stop to an area with more room (for example, at the Neighborhood Grocery property) should be evaluated.

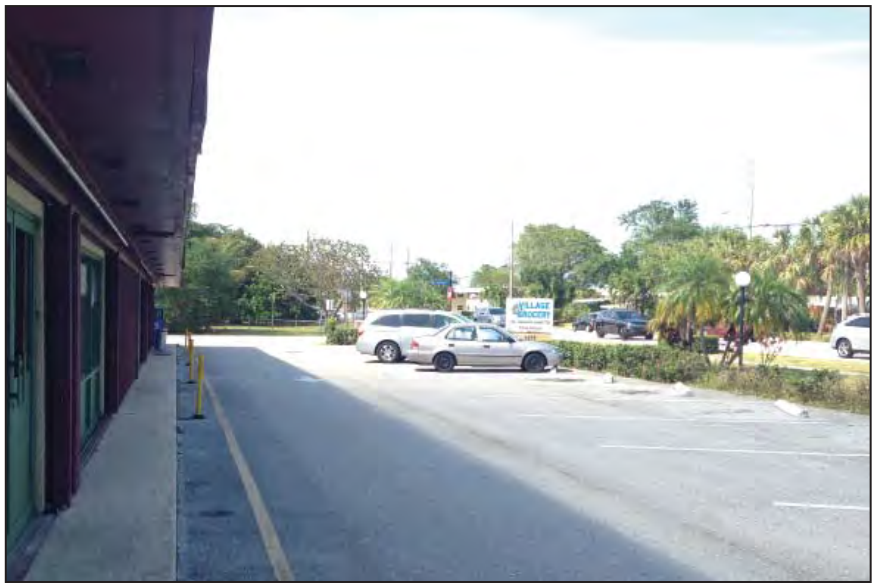
The City of Plantation has developed signature street furniture, including distinct shelters with seating, trash receptacle, bike racks, and signage.

Neighborhood Grocery & Corner Stores

On the master plan, circles depicting a 5-minute walk are used for scale to demonstrate the area most benefited by improvements. Along Prosperity Farms Road, a circle is demonstrated around the neighborhood grocery. Allowing this type of use within a neighborhood is the hallmark of a sustainable development pattern. While the building could be improved architecturally, allowing small instances of neighborhood commercial uses provides quick access to daily needs, which can improve the quality of life in the surrounding neighborhoods. The recommendation is to ensure the design of buildings with neighborhood commercial uses create assets to the area, aesthetically and functionally. Other potential locations for this type of small commercial enterprise (e.g., corner store, coffee shop, café) exist along the corridor. If desired, a coffee shop/café could be incorporated in Delacorte Park or on a corner lot in new development at Allamanda Drive.

The current store at the corner of Honey Road could be improved by updating the facade and landscaping. By reducing the width of the landscape buffer along the sidewalk, the parking area could move east to allow for a wide sidewalk along the storefronts. This expanded area could accommodate outdoor dining and landscaping. Providing a shaded environment is critical in the Florida climate. Reducing the front landscape area from 16 feet to 8 feet leaves ample room to plant a row of trees along the existing sidewalk to provide shade for pedestrians and reduce heat index of the surface lot.

A revised site plan that creates a wide, shaded pedestrian area along the storefronts and adds a row of trees to shade the parking area and the sidewalk.



***Top Left**:* A corner store located in a residential neighborhood in Salt Lake City. Parking is in the rear, and the building is small, neatly kept and cheerfully landscaped. Additional parking is provided on street (note the special 10 minute parking limit in front of the store).

***Top Right**:* A corner store located in the garden district of New Orleans. The architecture is consistent with the surrounding neighborhood.

Middle: The existing Neighborhood Grocery store on Prosperity Farms Road. The property lacks shade and landscaping with surface parking as the dominant feature.

Bottom: Shifting the parking eight feet towards the east makes room for a wide sidewalk. An installation of regularly planted trees provides shade to the sidewalk and the parking lot. Facade improvements introduce an awning to provide shade and shelter and accommodate outdoor seating, landscaping,and merchandise display.

Infill Development at Allamanda Drive

The empty site at the corner of Allamanda Drive and Prosperity Farms Road is available for redevelopment. A recent proposal for an assisted living facility was rejected as too intense for the site. The development illustrated in the master plan is consistent with the density and use recently constructed at the Estates project to the north. The infill pattern illustrated provides the following qualities:

1. Development is clustered to preserve most major trees;
2. Houses face the street with vehicular access in the rear;
3. The concept plan has a block structure that provides more than one way in and out of the project to allow traffic to disperse.
4. An option is illustrated to incorporate a small coffee shop or corner store, which could provide an amenity to this portion of Prosperity Farms Road.

Top Right: A plan with 15 houses 2,700 SF each, with a site density of 5.9 du/ac.

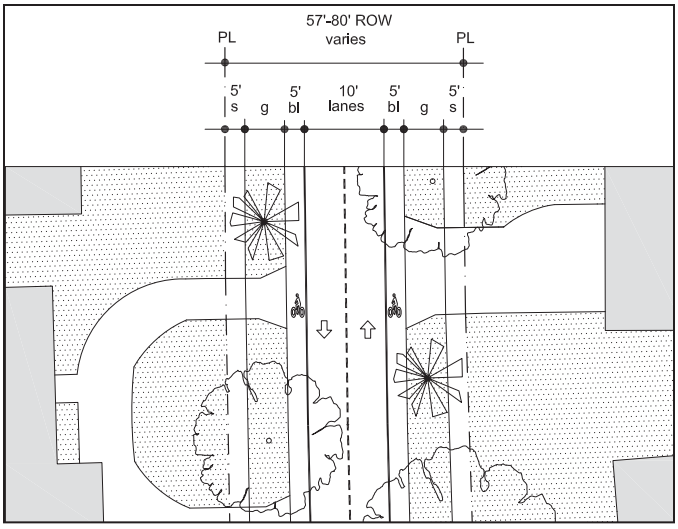
Above: An option with 14 houses and a corner coffee shop with outdoor patio seating.

Right: A similar residential development in Coral Gables with houses facing the street, parking in the rear, and a shared pool.

Lighthouse Drive

Lighthouse Drive is a key neighborhood street that connects the entire Village in an east-west route, including bridging across the North Palm Beach Waterway. Speeding was raised as a concern as well as a desire to improve the design of the road as a unifying corridor through the neighborhoods. Utilizing traffic calming techniques can help keep traffic speeds at an appropriate pace for the neighborhoods. Various techniques are listed on the following page. A key recommendation is to evaluate which elements can be incorporated on Lighthouse Drive.

Some design options for Lighthouse Drive were studied during the charrette. Using a consistent landscaping design of uniformly spaced trees reflects the civic importance of the street and visually narrows the roadway (a traffic calming technique). Incorporating bike lanes could improve mobility and safety, especially for children. Two options for adding dedicated bike lanes are illustrated. One option adds



Top: A street section of Lighthouse Drive with existing roadway widened and striped to create bike lanes.

Middle Left: Existing condition on Lighthouse Drive.

Middle Right: The visual impact of adding a row of regularly spaced royal palms.

Bottom: Location map of Lighthouse Drive.

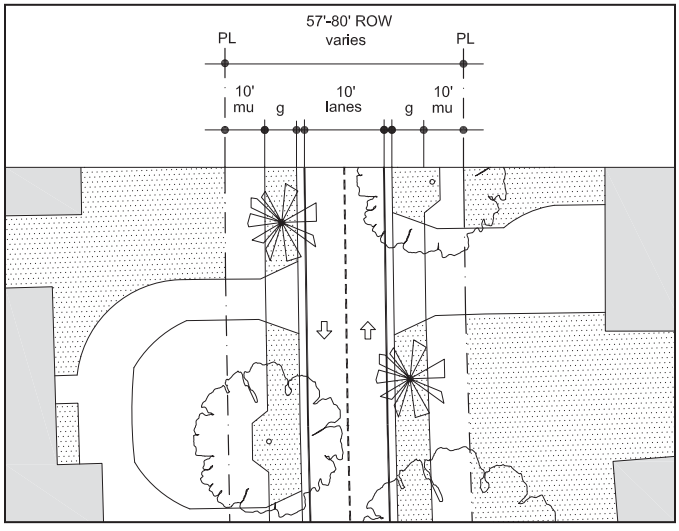
bike lanes by narrowing travel lanes and expanding the shoulders of the roadway. Alternatively, widening the sidewalks into multi-use paths provides an option that physically separates cyclists from traffic.

Traffic Calming Design Elements

The best way to calm traffic is to incorporate design elements that ensure the desired speed is the comfortable speed for drivers. Frequently, communities do not change the road design and post slower speeds on the roadway signage. This strategy relies on enforcement to achieve the intended outcome, rather than affecting the natural behavior of drivers.

An array of elements can be used in the design of a street to calm traffic. Care must be given to the design and function of the street for all users when using traffic calming design features. If designed properly, using one or more of the following traffic calming elements can both effectively slow traffic and provide civic embellishments to the village:

- narrow travel lane width
- fewer number of travel lanes
- on-street parking
- street trees to visually narrow roadway
- modern roundabouts
- mini circles
- medians
- curb extensions, chokers, and bulb-outs
- raised/textured crosswalks
- raised pedestrian tables
- bike lanes
- small radii at corners



Top: Mini-circle and textured crosswalk in West Palm Beach.

Middle: Small medians at intersections can be a beautiful way to enhance a neighborhood and reduce motorist speeds.

Bottom: This curb build-out, outlined in red, shortens the pedestrian crossing distance and helps slow traffic.

Left: A street section of Lighthouse Drive with existing sidewalks widened to multi-use paths.

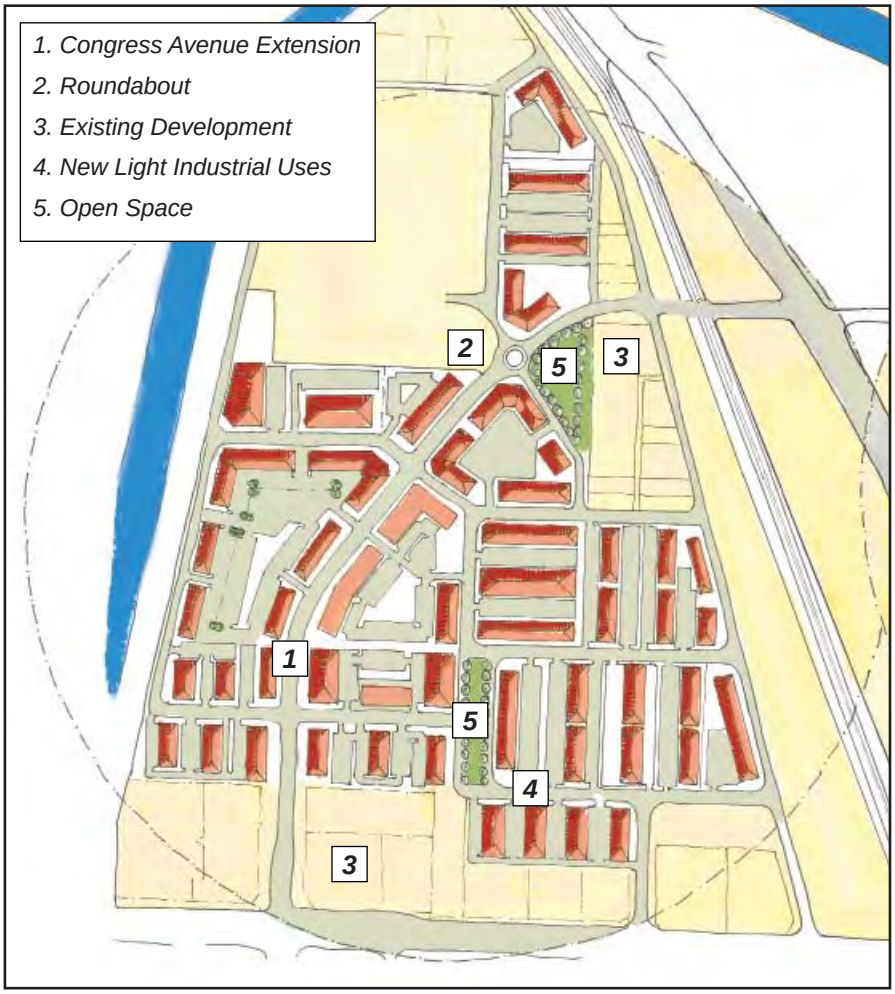
Potential Southwest Annexation Area

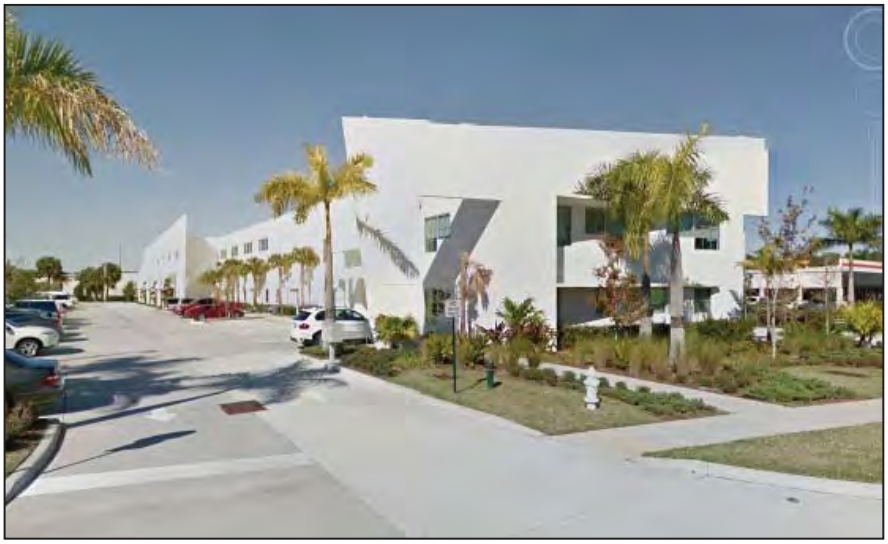
The master plan proposes to expand existing adjacent industrial and commercial uses into the annexation area. This area has easy access to major roadways (Northlake Boulevard, US1 and I-95) and is within proximity of the Port of Palm Beach, airport and future inland ports.

This expansion is proposed in the form of a District. Districts are areas of specialized use. In this particular case, the Light Industrial District proposed is intended to provide development that promotes growth and stability of light industry and its supporting uses; strengthens the economic base of the village; provides the flexibility required to meet changing technological conditions affecting light industry; protects the health and safety of the village by applying state of the art, LEED environmental and safety standards; and preserves and expands the Village's tax base and employment potential.

It is important to note the District's ultimate build-out as shown spans, ultimately, over two different jurisdictions (Village of North Palm Beach and City of Palm Beach Gardens). While the area has been planned respecting existing rights-of-way and ownership patterns, a joint effort between the Village and the City is necessary to ensure consistent and compatible land use and zoning categories. Ideally, the industrial district regulatory framework should be a single document, prepared jointly and adopted by both local governments.

The Light Industrial District suggests an interconnected network of streets suitable for larger vehicles, yet





An excellent example of light industry building in Jupiter, Florida.

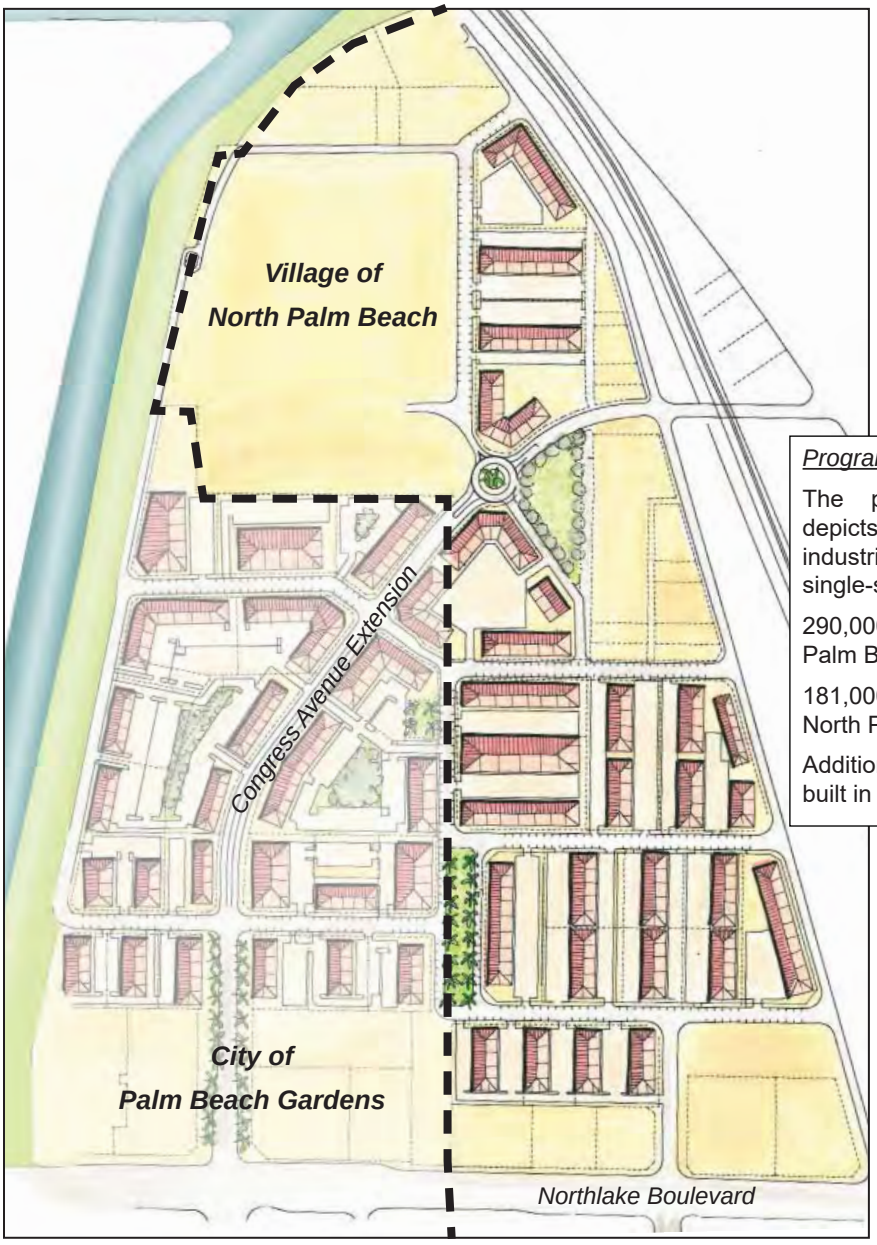
preserving and enhancing the pedestrian realm. Public open spaces are provided in the form of plazas as well as a linear, canal-front park for relief from the high impervious lot coverage. Lots are configured to accommodate and service conventional office and industrial buildings, as well as flex space. As this type of development requires ample parking/service and loading areas, much of the site is dedicated to asphalt. Developments are encouraged to locate parking to the side and to interconnect parking/service areas in an effort to preserve the character and safety of the public realm.

The district proposes a wide variety of lot sizes, with the average lot size being 150'x 200'. Recommended landscaped setbacks are 10 feet. A discussion currently underway is to move the recreational vehicle and boat storage at Anchorage Park into this district. The district could easily accommodate this type of storage. The network of streets makes access into and around the district easy.

Flex space is a term commonly used to describe light industrial space with an office/retail component. Buildings are generally free-standing within the site. One side of the building, the front (top images), is designed to house air conditioned office or showroom space. This area of the business is usually visited by the public, visible from the street, and is where the front door should be located. Parking is located to the side to provide easy access. The other side of the building, the rear (bottom images), is dedicated to warehouse. This is usually non-air conditioned space and serviced through rear loading areas. These buildings are known as "flex" given the ability to house these varying uses and subdivide into smaller or larger air conditioned spaces as needed.

The centerline alignment of the right-of-way proposed for the Congress Avenue extension has not been modified. However, the proposed design *has* been modified to better respond to existing ownership patterns, create more viable lot sizes, and improve traffic flow through the district as follows:

- A dead-end, east-west road just north of the roundabout has been eliminated;
- A fourth "leg" was added to the roundabout to allow access to the south-east section of the District;
- Two intersections are proposed south of the roundabout to ensure appropriate connectivity and block size; and,
- On-street parking is suggested along the entire length of the avenue.



Program

The proposed master plan depicts 510,000 SF of light industrial/flex space use (in single-story buildings):

290,000 SF within the City of Palm Beach Gardens and

181,000 SF within the Village of North Palm Beach.

Additional office space could be built in upper stories.

Water Taxi

As a community with more than thirty miles of waterfront, water access and waterborne transportation are distinguishing features and quality of life priorities for the Village of North Palm Beach. During the charrette, many participants indicated interest in a water taxi service operating either within the Village or providing access from the Village to other waterfront points of interest. Charrette participants suggested several key waterfront parcels for consideration as water taxi stops, including the North Palm Beach Marina, the Country Club, MacArthur State Park, Lakeside Park, Munyon Island, Anchorage Park, and Frigates restaurant. The potential for each site was evaluated:

- **The North Palm Beach Marina** offers strong potential as a limited-service water taxi stop, likely geared to special events. The marina provides appropriate dockage, but with limited parking on-site, a satellite parking area or shuttle access for users would likely be required. The Country Club property across US1 from the marina could provide satellite parking for users.
- **The Country Club** property offers waterfront access and parking; however, dock facilities would need to be added for water taxi access. Public docks at this property would also enable access to the club for private vessels, expanding the utility of dockage if integrated into the plans for the club.
- **MacArthur State Park** is a popular recreational destination; however, motorized vessels are not permitted within the park boundaries.
- **Lakeside Park** offers a prime waterfront location and close proximity to potential island destinations; however, the park has limited parking, and deed restrictions prohibit the addition of docks to the property.

A map of the potential water taxi stops evaluated.

- **Munyon Island** is a popular recreational destination in Lake Worth, located just east of the Village proper. The island is owned by Palm Beach County and could provide a destination for recreational activity.
- **Anchorage Park** is a waterfront park with docks and plenty of parking. However, the fixed bridge at US1 limits clearance heights for vessels. Therefore, water taxi operation from this location would require vessels access the property from the north, lengthening the travel time for vessels trying to access one of the several potential island destinations and reducing the utility of this location.
- **Frigates Restaurant**, the newest waterfront restaurant in the Village, has suitable docks that are well-utilized by restaurant patrons. The restaurant has sufficient parking for its primary operation but does not have enough parking to support a water taxi service.

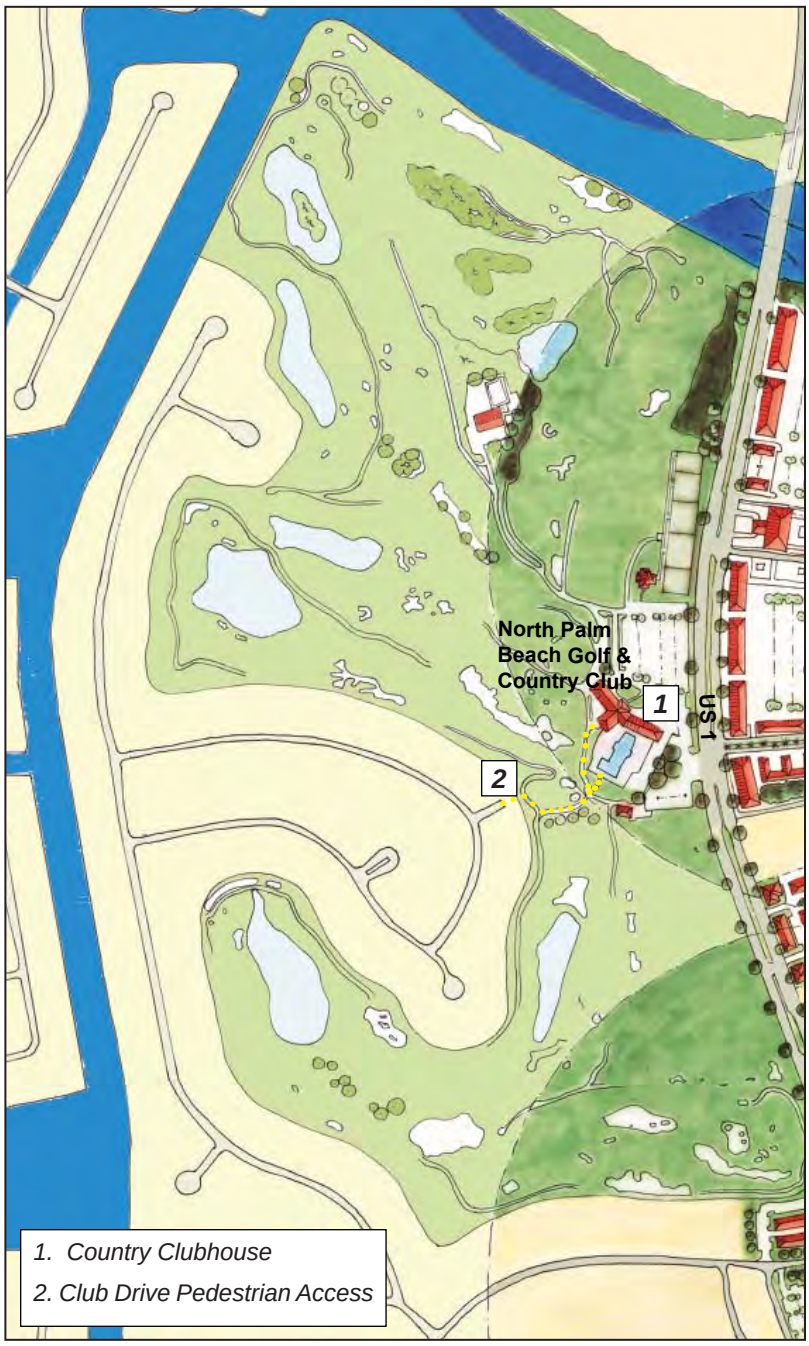
The more viable possibility is to offer a water taxi service in conjunction with scheduled events as a unique quality of life enhancement for Village residents. For upland water taxi stops, the North Palm Beach Marina and Frigates restaurant both offer existing docks; however, either location would require an off-site satellite parking arrangement for water taxi users. Two categories of feasible destinations are identified:

- Recreational destinations, including Munyon Island and Peanut Island, could be accessed via water taxi operations likely organized through the Village's recreation program. Several local water taxi operators provide regular service to Peanut Island with whom the Village could contract with to create a recreational special event such as "A Day on the Island" for Village residents.
- Special events destinations, such as SunFest and the Palm Beach Boat Show, currently are organized with water taxi service as a component of the events' transportation. Special arrangements and promotions could be made with existing operators to include a scheduled Village of North Palm Beach stop to provide residents access to these types of events.

A map of recreational destinations within 4 miles of the North Palm Beach marina.

Access to the North Palm Beach Golf & Country Club

The North Palm Beach Golf & Country Club is a hallmark facility and resource for the Village with benefits that extend across the region and beyond. The municipal facility includes an Olympic-size swimming pool, tennis center, full-service restaurant, and a Jack Nicklaus Signature golf course – one of two municipal courses of this caliber in the United States. The site is positioned along the Intracoastal Waterway, with natural oak hammocks providing a picturesque backdrop for the highly challenging "thinking man's" course.



At the time of the charrette, the Village was evaluating different options for the future programming and possible reconstruction of the Country Club. Charrette participants offered a variety of ideas for future uses including expanded catering and special event activities, additional recreational uses, and hospitality functions. Many residents reminisced about their relationship with the Country Club over time … swim teams and diving competitions; gymnastics, dance, and art classes in the former "Palm Beach Winter Mansion;" and morning or after hours walks on the golf course. Among the consistent requests from the public was for increased access to the Country Club facility generally and golf course specifically. Currently, the Village is evaluating public input and design options for the redevelopment of the Country Club facility.

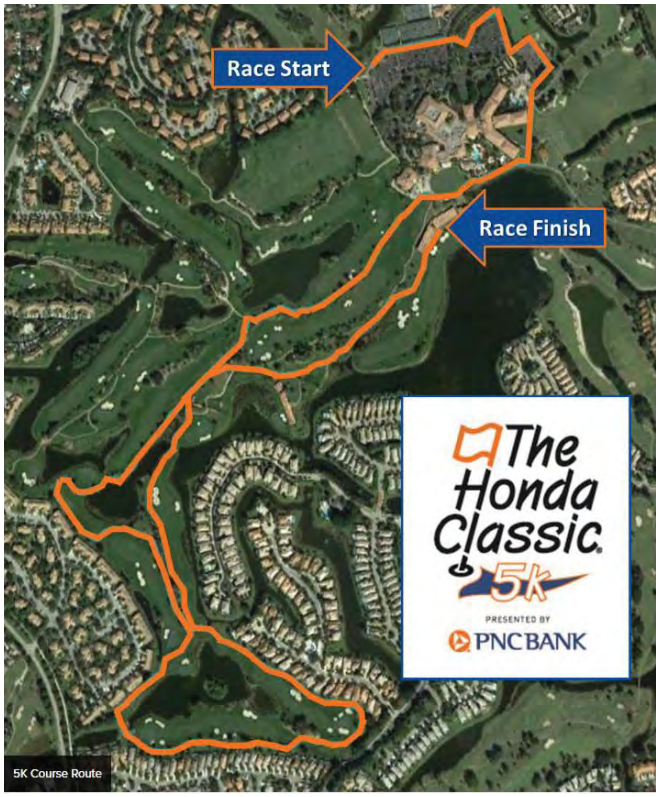
To expand the desirability of golf courses to a broader population, many golf courses have expanded programming to include family events, after-hours sessions with pros, expanded food and beverage service, and a wider selection of activities such as fitness and cultural programs. Golf courses in some communities have expanded their role as settings for special events like golf merchandise shows, community barbeques, and food truck rallies.[1] One of the oldest golf courses in the world ~ the Old Course at St. Andrews in Scotlandsince the 16th century, has remained closed to golfers on Sundays and open to the public for walking, jogging, playing fetch with canine companions, or for use as needed by community residents.[2] Another special event is the widespread use of golf courses for 5K and 10K races (for example, the Honda Classic 5 K),

[1] Bohannan, Larry, "Non-Golf Events Can Help Golf Courses," The Desert Sun, Nov. 16, 2015.
[2] Borden, Sam, "Sundays on the Old Course at St. Andrews: No Golfers Allowed," The New York Times, Jun. 12, 2015.

which broaden the utility of the course as well as raise awareness of the facility.

Golf course utilization by the community can also include physical use of the course with the integration of public use trails along or through the course for after hour usage. The broadened use of these facilities appears to be in response to community requests as well as market influence. While demand for golf courses as residential amenities has declined over the past decade, the top amenity in residential markets across the nation has become access to multi-use trails for walking, jogging, and sometimes cycling. Twain's famous "golf is a good walk spoiled" quote may have relevance to this trend.

Seattle's Soundview Trail, which runs through the Chambers Bay golf course on the edge of Puget Sound, is one such example. This municipal course, which hosted the 2015 U.S. Open, is interconnected to the Pierce County, Washington trails network. Other public golf courses that have integrated public trails include the San Francisco Bay Area (San Ramon Royal Vista and Ocean Colony golf courses) and Portland, Oregon (two private courses and three public) among others.[3] Special design considerations are recommended for instances where public trails run along or through golf courses. These include carefully placed trail alignment, fencing or netting, and signage. Hours of access are another consideration where courses include trails, such as limiting trail use to "walking hours," after the last tee time.



The Honda Classic 5K route. Image Source: http://www.thehondaclassic.com/special-events/honda-classic-5k/

The municipal Chambers Bay Golf Course, which hosted the 2015 U.S. Open, includes the Soundview Trail (depicted in purple on the map above), which connects to an extensive trail network throughout Seattle. Image source: Pierce County, Washington website (https://www.co.pierce.wa.us)

For the Village of North Palm Beach, expanded utilization of the golf course would address a desire voiced by charrette participants. The backyards of residences along the course literally merge into the edges of the course, creating a natural demand for access. A well-

[3] Alta Planning and Design. Trails and Golf Courses: Best Practices on Design and Management. July 2005. (http://atfiles.org/files/pdf/GolfTrailsAlta05.pdf)

designed trail amenity that capitalized on the beauty of the golf course would provide benefits across the Village's demographics, from elderly residents to the growing number of families with children. Further, as has been evidenced across residential markets, trail access adds value to home values, which could provide additional revenue to offset golf course costs. The course may also be an appropriate setting for a Village 5K (or 10K) run to test both the market and level of interest among the community.

An initial first step to achieving more enhanced public access to the golf course could be re-connecting Club Drive to the cart path accessing the Country Club and reinforcing this connection with lighting. As part of the Country Club redesign, the pathways should be considered for special low-level lighting treatment that would not impede golf play and would provide clear direction to where off-hour, public access to the course is permitted.

The pedestrian connection to the Clubhouse from Club Drive.

Starry Night Bike Path in the Netherlands uses glow-in-the-dark technology and solar-powered LED lights to light the way on this 600-meter trail in Eindhoven. © 2014 Daan Roosegaarde. Image Source: http://www.solaripedia.com/13/413/starry_night_solar_bike_path_(netherlands).html

This page intentionally left blank.

Implementation & Key Recommendations

The success of this (and any other) Master Plan will depend on its ability to be implemented consistently, economically and socially within a designated time frame. Towards that end, the recommendations throughout this report have been developed as independent but interrelated projects. Some, such as public infrastructure projects, are within the Village's control to pursue implementation, with funding being the primary challenge. Other recommendations are redevelopment techniques that are illustrated on private property, which are subject to each private entity's timeframe and financial situation. In order to realize these types of projects, the principles of urban design described and illustrated throughout the report and in the examples have to be embedded culturally within the Village, required by its codes, and encouraged through its programs. An Implementation Table is included at the end of this chapter. The combination of public and private efforts is required for realizing the vision of the Village Master Plan.

The Code

Municipal land development codes are the backbone for ensuring redevelopment occurs consistent with a community's vision. Over time, municipal codes tend to become layered with information, overly complicated, and plagued by contradictory instructions. In times of recession, staff is typically reduced to minimum levels needed to function and, in boom times, a larger staff is consumed by new development applications. Both conditions leave little time and resources to tackle code updates.

Codes are intended to both protect existing residents and businesses from impacts of adjacent development and to ensure a desirable physical form. Codes can also serve as a redevelopment tool –providing critical information to potential investors and a clear approval process. If it is difficult to ascertain what can be built and how long the process takes, codes can function as a disincentive for redevelopment.

Form-based codes are a tool that can be used to realize a master plan vision. Locally, both West Palm Beach and Delray Beach have relied on form-based codes to implement their master plans.

A form-based code is a land development regulation that fosters predictable built results and a high-quality public realm by using physical form (rather than separation of uses) as the organizing principle for the code. A form-based code is a regulation, not a mere guideline, adopted into city, town, or county law.

-Form-Based Code Institute.

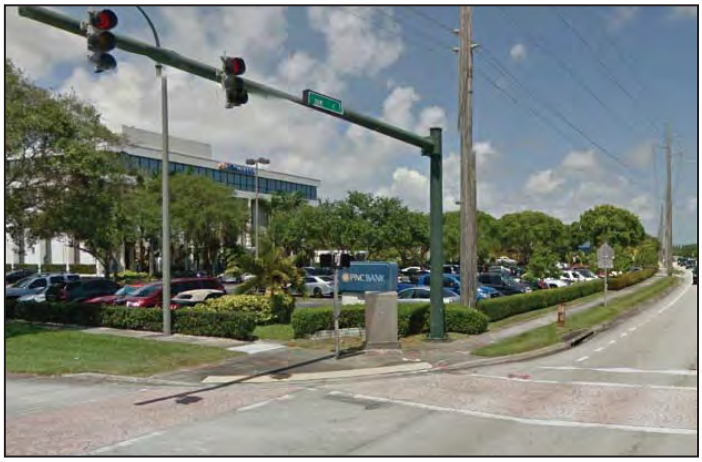
The Village's code is largely focused on uses and establishes minimum setbacks and lot coverage standards. In its current state, these instructions will not guarantee development will occur as illustrated in this plan. Current regulations distinguish between innocuous uses such as "stationary stores" and "personal gift shops." The required setbacks are large, ensuring a public realm defined largely by surface parking. The CA-commercial district requires 100 feet of setback on US 1 and the C-1 neighborhood commercial district requires at least 50 feet along Northlake Boulevard.

While comprehensive plan policies suggest mixed-use development is desirable, large lots are required and the zoning is not in place to easily allow it. Time-share units are permitted to promote a tourist industry, but townhouse projects for seasonal or full-time residents, like Mariner's Court and similar developments redefining US 1 in neighboring communities, require rezoning. Additionally, the patterns tested and supported by the market analysis suggest that market-rate densities of 17 to 24 du/acre are necessary to re-cast the commercial corridor with mixed-use centers in the desired four-story fabric.

Other code concerns were raised during the process including the following:

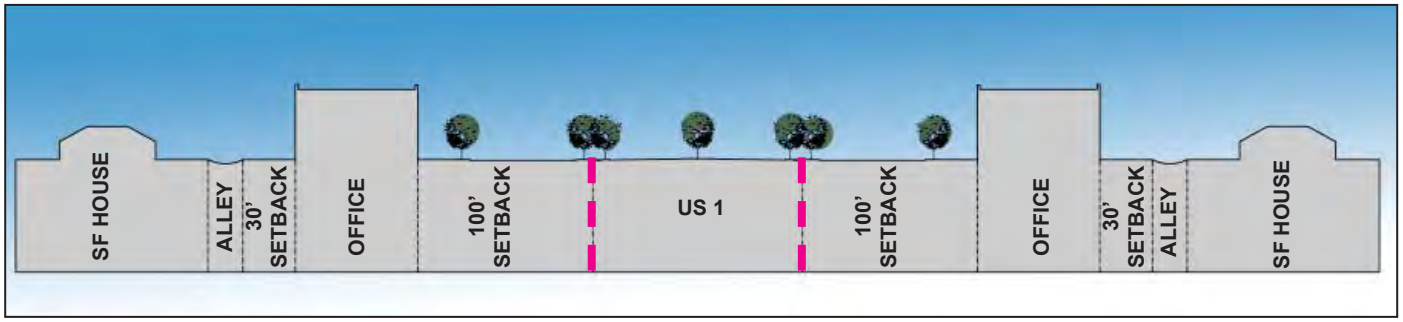
- Make the existing regulatory information more accessible and accurate
- Provide maps, applications, submittal requirements, and the Comprehensive Plan on Village website
- Adopt a color palette for commercial buildings that allows an administrative approval
- Adopt landscape requirements for major corridors
- Make sure the mass of new houses is compatible with adjacent homes.

Current Code Instructions



Left: An image of the US 1 corridor today. Code requirements guarantee a large front setback used mostly for parking.

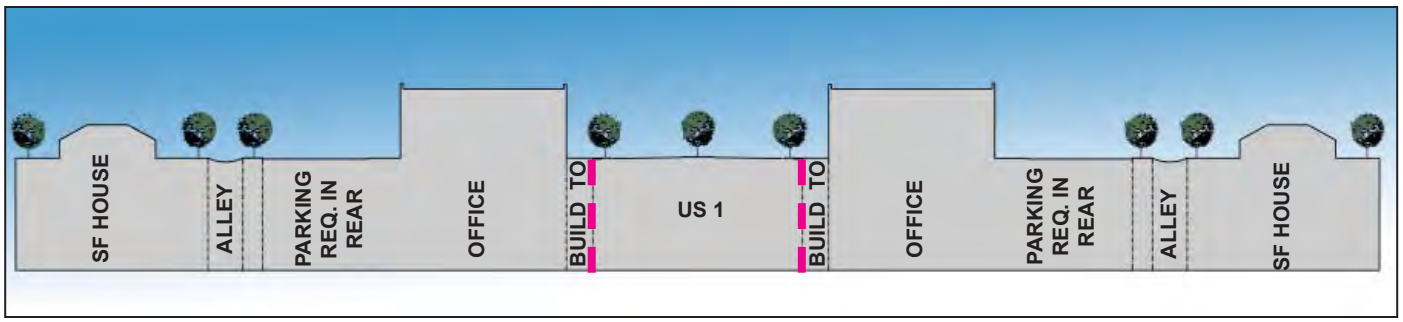
Bottom: A diagram of the current CA-Commercial District requirements

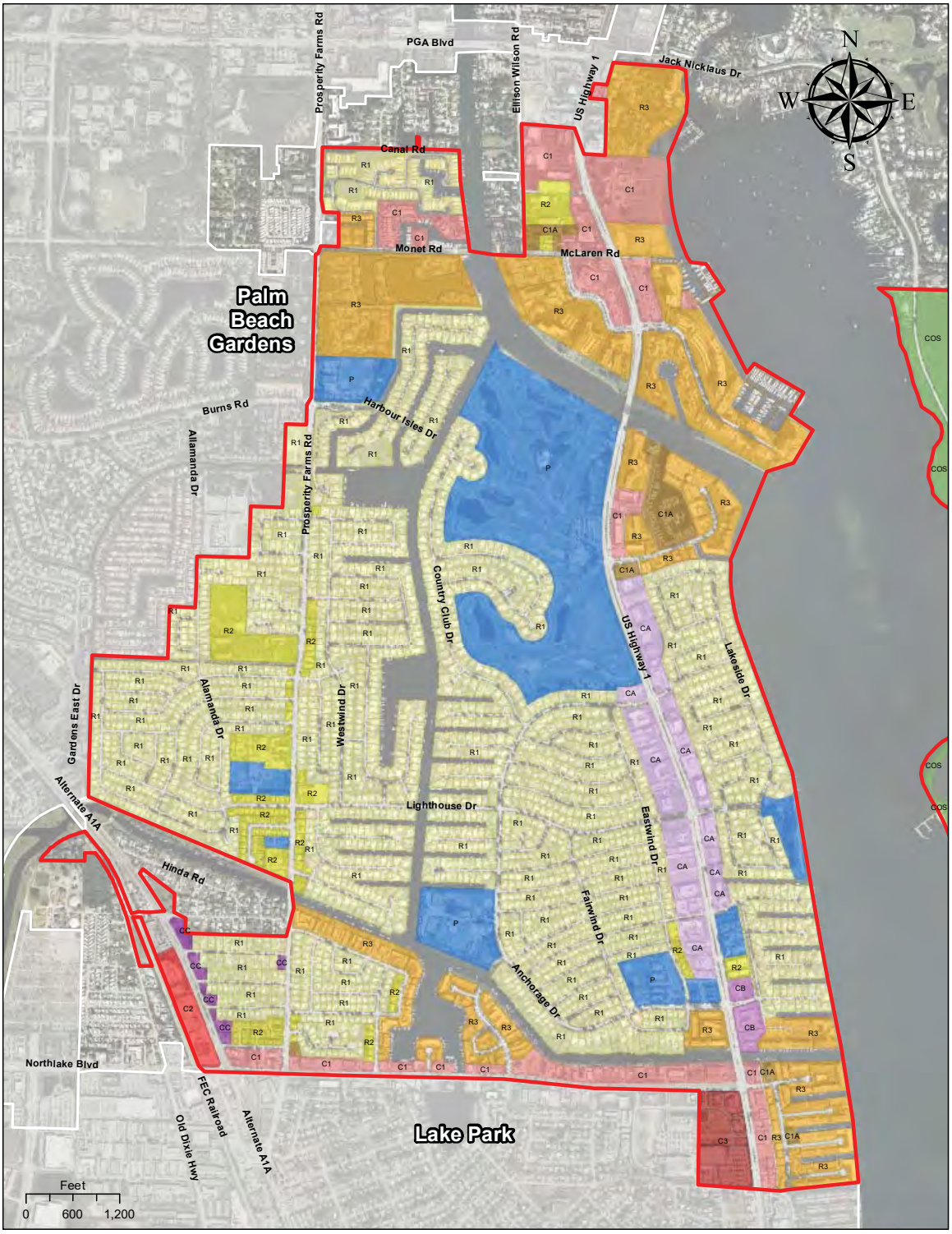


Proposed Code Instructions

Left: Walnut Creek, CA was cited as an example during the citizen table presentations. This pattern cannot be achieved on the Village's commercial corridors under the current requirements.

Bottom: A diagram of potential changes to development instructions. By using a "built to" line, instead of a minimum setback, the location of new development can be predictably prescribed. Moving buildings toward the commercial corridors and placing parking in the rear would increase the distance between new development and existing houses.



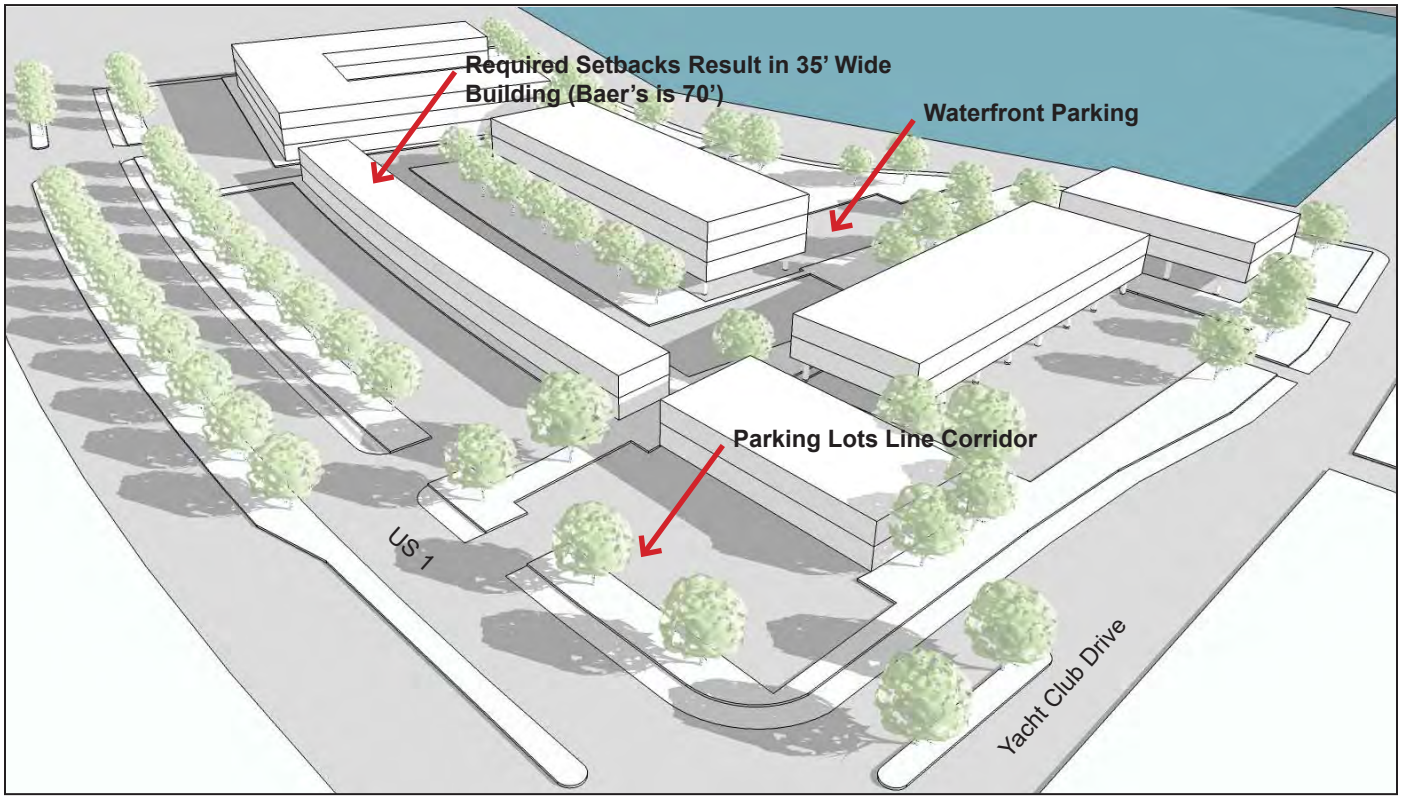


North Palm Beach

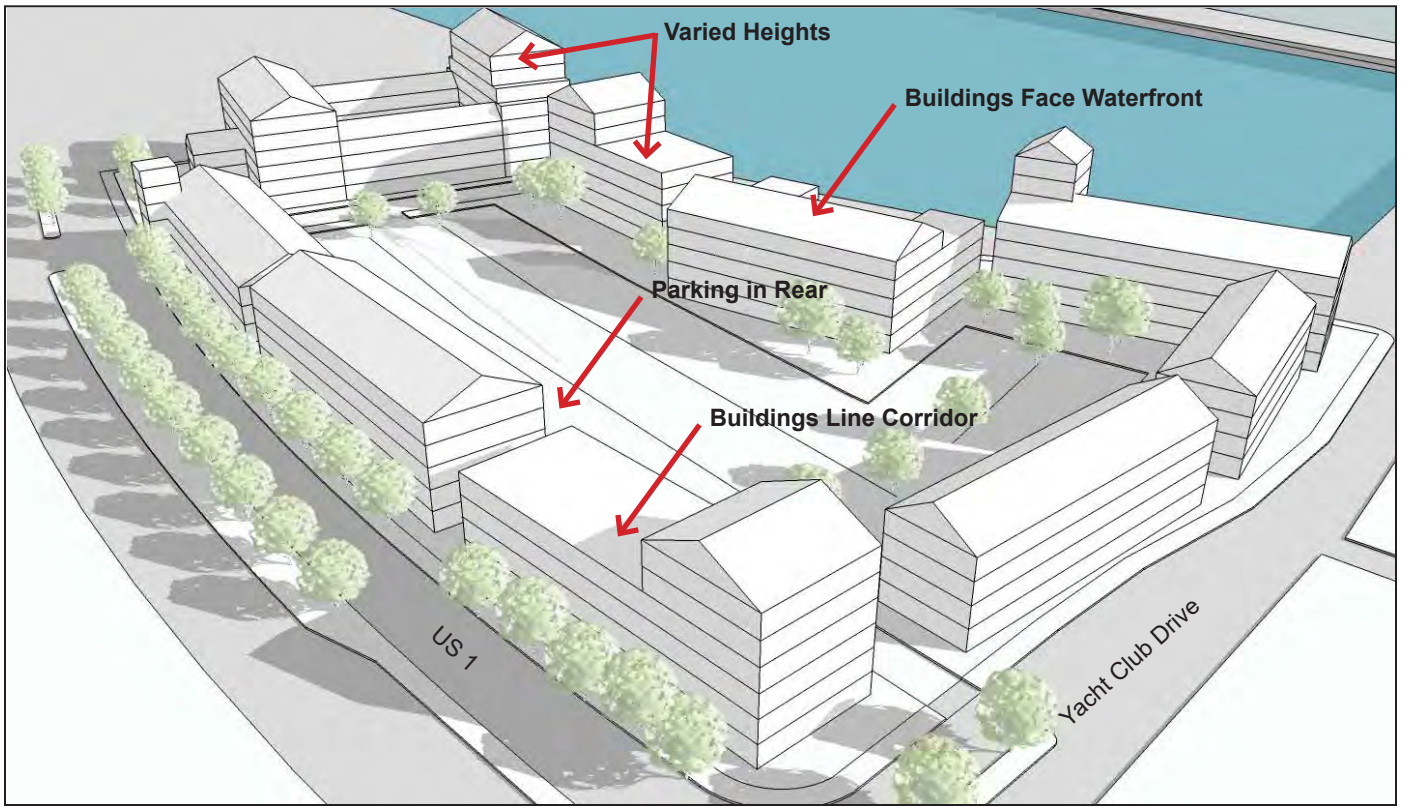
Zoning Districts

- R1 - Single Family Dwelling District
- R2 - Multiple Family Dwelling District
- R3 - Apartment Dwelling District
- C1A - Limited Commercial District
- C1 - Neighborhod Commercial District
- C2 - Commercial District
- C3 - Regional Business District
- CA - Commercial District
- CB - Commercial District
- CC - Transitional Commercial District
- P - Public District
- COS - Conservation and Open Space

Current Code Instructions



A Village Form



Form-Based Code vs. Conventional Zoning

Form-Based Code

- The physical form of buildings and the spaces they create are the key organizing principle
- The public realm expectations (streets, open spaces) are articulated as well as private development requirements
- Height is measured in number of floors, uses are more flexible, parking standards more progressive (e.g., shared parking, reduced requirements, bicycle parking requirements)
- Provides very clear instructions for development

Conventional Zoning Code

- Micro-management and segregation of uses are the key organizing principles
- The public realm expectations (streets, open spaces) are rarely defined or detailed
- Formulas are used to regulate development (e.g., FAR, density, tiered setbacks, suburban level parking ratios)
- Little certainty is provided for what future development will look like.

Comprehensive Plan & Code Recommendations

1. Create a form-based code and land use district for the US 1 and Northlake Boulevard corridors that:
   - Allows mixed-use (not requires) on all parcels;
   - Allows a market-rate density of 18 to 24 du/ac;
   - Has a lesser focus on uses;
   - Ensures a predictable built environment;
   - Allows parking to be replaced by liner buildings in large parking lots;
   - Requires consistent landscape design along the corridors; and
   - Streamlines the approval process for development that meets the code.

2. Create a form-based code and land use district for the multi-family, waterfront neighborhood areas to ensure long-term redevelopment that:
   - Creates a Village character;
   - Ensures a predictable built environment;
   - Maximizes access and views along the waterfront for the community;
   - Encourages waterfront restaurants; and
   - Streamlines the approval process for development that meets the code.

3. Consider limited-duration zoning incentives (i.e., increased height and density) to foster catalytic projects.

4. Evaluate the code for single-family housing in the neighborhoods to ensure context-sensitive infill.

5. Adopt a color palette for commercial building to allow permits to be administratively approved.

6. Provide up-to-date maps, applications, submittal requirements on the Village website.

7. Add the Comprehensive Plan in a searchable format to the Village website.

Stormwater Utility

As a community with more than thirty miles of waterfront, properties within the Village of North Palm Beach have an inextricable stormwater relationship with the surrounding water bodies. The Village fronts the Lake Worth Lagoon, and across the Lake at the eastern edge of the Village limits lies MacArthur State Park, a unique environmental preserve and ecotourism attraction for nonmotorized patrons. This pristine resource is directly affected by upland activities across Lake Worth, and its continued preservation and enhancement is a Village priority.

With every rainfall, the rainwater that is not absorbed into the ground or evaporated – called "runoff" – carries pollutants from lawns, streets, buildings, and parking lots into the waterways. With proper infrastructure, the stormwater runoff can be treated and purified so that the resulting outflow into the canals and Lake Worth Lagoon is clean. However, the development pattern in the Village includes an extensive array of stormwater outfalls, some of which discharge directly into the Lagoon without any pretreatment, resulting in the degradation of water quality. In addition, it appears some of the Village's stormwater infrastructure has surpassed its engineered life.

Development requirements to address stormwater treatment have evolved over time, beginning in earnest with the introduction of the federal Clean Water Act in the 1970s and the permit requirements of the National Pollutant Discharge Elimination System (NPDES). Florida's stormwater discharge permitting followed, with requirements for properties to treat discharge, either individually or collectively, before stormwater enters waterways. Documentation from the Environmental Protection Agency continues to advise that stormwater runoff is a principal contributor to water quality impairment of waterbodies nationwide.

Top and Bottom: The southern bank of the Earman River/C17 Canal is developed with a string of parking lots and outdoor storage areas, many of which discharge directly into the waterway with every rainfall. This development pattern is inefficient, environmentally damaging, and fails to take advantage of this valuable community asset.

Waterfront development in the Village varies considerably in scale and use, including a broad array of uses along the Earman River/C17 Canal. Many of the properties fronting this waterway were developed before modern stormwater permitting requirements were established. On the north side of the canal, uses tend to be mostly residential, both single and multi-family, along with a public park. On the south side, the uses are more intense, with a range of multi-family, commercial, and industrial uses. Within the commercial areas, several parking areas front the waterway, with rain water sheet flow across the parking areas directly into the canal after storm events.

Properties along the south side of the canal contain a high percentage of impervious surface coverage, which limits percolation on the sites and the ability

to pretreat stormwater prior to discharge. There is also a variation in the topography of properties along the waterway, wherein some parcels drain onto their neighbors. These conditions are especially challenging to retrofit on smaller parcels that have insufficient land area either for retention or exfiltration, effectively stalling redevelopment opportunities as these sites cannot meet modern requirements. Redevelopment projects are also required to comply with the Village's landscaping requirements, which often require the removal of existing paving and the installation of landscape materials. Parking requirements should be evaluated so that they are not inadvertently creating a disincentive for reducing impervious surfaces and limiting redevelopment. The Village's code requires the installation of curbing around landscaping, which prevents stormwater collection; the Village has identified the benefit of channels and inlets through curbs to enable stormwater to percolate.

Addressing the Village's stormwater requirements to improve the health of the Lake Worth Lagoon and its connected ecosystems could require extensive infrastructure improvements. While some municipalities fund these activities through general revenues, other options, such as the establishment of a stormwater utility, may prove beneficial to the Village as it seeks to implement the master plan. Similar to utilities for other infrastructure programs, a stormwater utility exists as a stand-alone service unit within a municipal government, generating revenues through fees for the services it provides. Depending on the structure desired by the parent municipality, a stormwater utility can be responsible for funding the operations, construction, and maintenance of stormwater management devices, stormwater system planning, and management. User fees and revenues from stormwater collections are deposited into a separate fund that may only be used for stormwater services.

Image Source: UF Institute for Agricultural Sciences

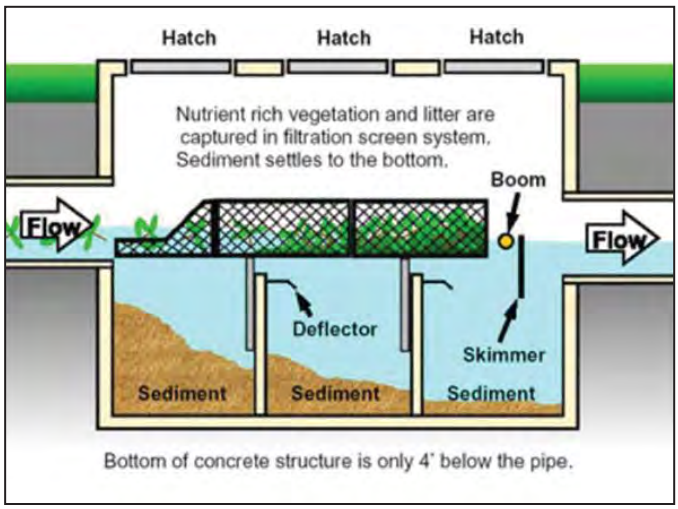


Image Source: Liquid Waste Solutions

Top and Bottom: Creative storm water treatment, such as rain gardens (top) and baffle boxes (bottom) can improve storm water discharges, improving water quality and environmental conditions.

For developed communities seeking infill development and redevelopment like the Village, stormwater utilities are especially useful to assist in master stormwater assessments and planning. While stormwater discharge can be treated on a site-by-site basis, often treatment is more effective on a larger scale, aggregated system. By aggregating stormwater treatment within a district or community, a stormwater utility can advance creative treatment techniques, such as rain gardens or baffle boxes that would be cost prohibitive on a site-by-site basis.

It appears the stormwater from Northlake Boulevard also discharges directly into the Earman River/C17 canal through underground east/west pipes. Although this discharge is untreated in the current condition, baffle boxes or other treatment infrastructure could be installed to improve the quality of this discharge as well.

Given the existing development pattern along the

Earman River/C17, the application of modern stormwater requirements and NPDES could render some of these sites unable to redevelop. Retrofitting stormwater treatment solutions in areas of older development is especially costly. However, a macro approach designed by a Village stormwater utility could enable the acquisition of sufficient property to provide higher quality stormwater treatment in an aggregated system for a district, financially enabling redevelopment to occur.

To implement the master plan, with the proposed arrangement of buildings necessary to establish the envisioned public realm, common stormwater treatment is not only desirable, but is a critical component to achieve the development quantities needed for market returns. In this manner, a stormwater utility can provide indirect redevelopment incentives through master planning, land acquisition, construction of improvements, and selling of stormwater "credits" to individual development interests. The result is the ability for a more intense development pattern that is better organized and more attractive and cleaner stormwater discharge from the sites.

In addition to the planning and construction benefits, stormwater utilities are also highly effective in providing matching funds for grant agencies, such as the South Florida Water Management District, Lake Worth Lagoon Initiative, and Florida Department of Environmental Protection, to further the Village's effectiveness in this important policy area. Stormwater utilities generate a bondable revenue stream that can be pledged towards capital projects to secure funding from other sources. The establishment and operation of a utility also communicates the Village's commitment to this policy priority to the private sector, which increases the attractiveness of local investment to financial institutions.

Image Source: http://floridalivingshorelines.com

Top: An example of a recent living shoreline improvement in the Lake Worth Lagoon.

Bottom: Living shorelines, as illustrated in the before/after images above for West Palm Beach, offer an opportunity to protect the shore and expand native plantings to enhance environmental functions along the water's edge. Below is an example of a recent living shoreline improvement in the Lake Worth Lagoon.

Image source: http://www.michaelsinger.com/philosophy/living-shorelines-initiative/

Residential Rehab & Reinvestment Section

Since its establishment in the 1950s, the Village of North Palm Beach has been hallmarked by a range of beautiful residential neighborhoods with strong property values. With a range of lot and home sizes, the community has attracted a multi-generational base within families, with grandparents downsizing from larger single family homes to smaller ones, and children and grandchildren finding residences in town for rising generations. Desirability for properties in the community is so high, many charrette participants provided anecdotal stories of former North Palm Beach residents, who grew up in the Village, searching for two years or more for the perfect house to move back to with their young family. The multi-generational shifts within the housing stock, with empty nesters vacating larger homes, have enabled families with children to acquire these homes, evidenced by the rising enrollment in local schools such as The Conservatory School at North Palm Beach.

Although the considerable majority of the Village's residential neighborhoods are intact, well-maintained, and mostly owner-occupied, some areas, particularly along Prosperity Farms Road, have begun to be stressed. In some locations, landscape and home maintenance is lacking, characterized by faded exterior paint, broken shutters, or overgrown lawns. In other instances, the short-term reduction in property values due to the U.S. "Great Recession" in 2008 yielded homes that have become rental properties in the current market. These rental properties have mushroomed into "rental neighborhoods," wherein a large number of homes exhibit reduced maintenance, higher quantities of cars, and lower degrees of building rehabilitation. National research has indicated that residential neighborhoods have a rental/owner tipping point of approximately 30%, beyond which rental properties begin to negatively affect property values; property maintenance and reinvestment are reduced; and neighborhood stability begins to reduce.

One additional trend that has impacted some Village neighborhoods is the county-wide rise in the number of residential units that have been converted into drug rehabilitation centers. Palm Beach County has become one of the most popular destinations for "sober homes," a lucrative use that enables private sector corporations to acquire residential units and offer rehabilitation to multiple individuals. Private sector companies have expanded this use under the umbrella of the federal Americans with Disabilities Act. However, the impact of these "halfway houses" within residential neighborhoods includes increases in crime, emergency services, exterior smoking, and neighborhood destabilization. Due to the lack of local regulatory controls for sober homes, there is a growing concern among local governments seeking legislative and federal intervention to create a regulatory framework to mitigate this influence in residential neighborhoods.

There are several different approaches the Village of North Palm Beach could utilize to help stabilize and enhance residential neighborhoods, including both regulatory and programmatic activities.

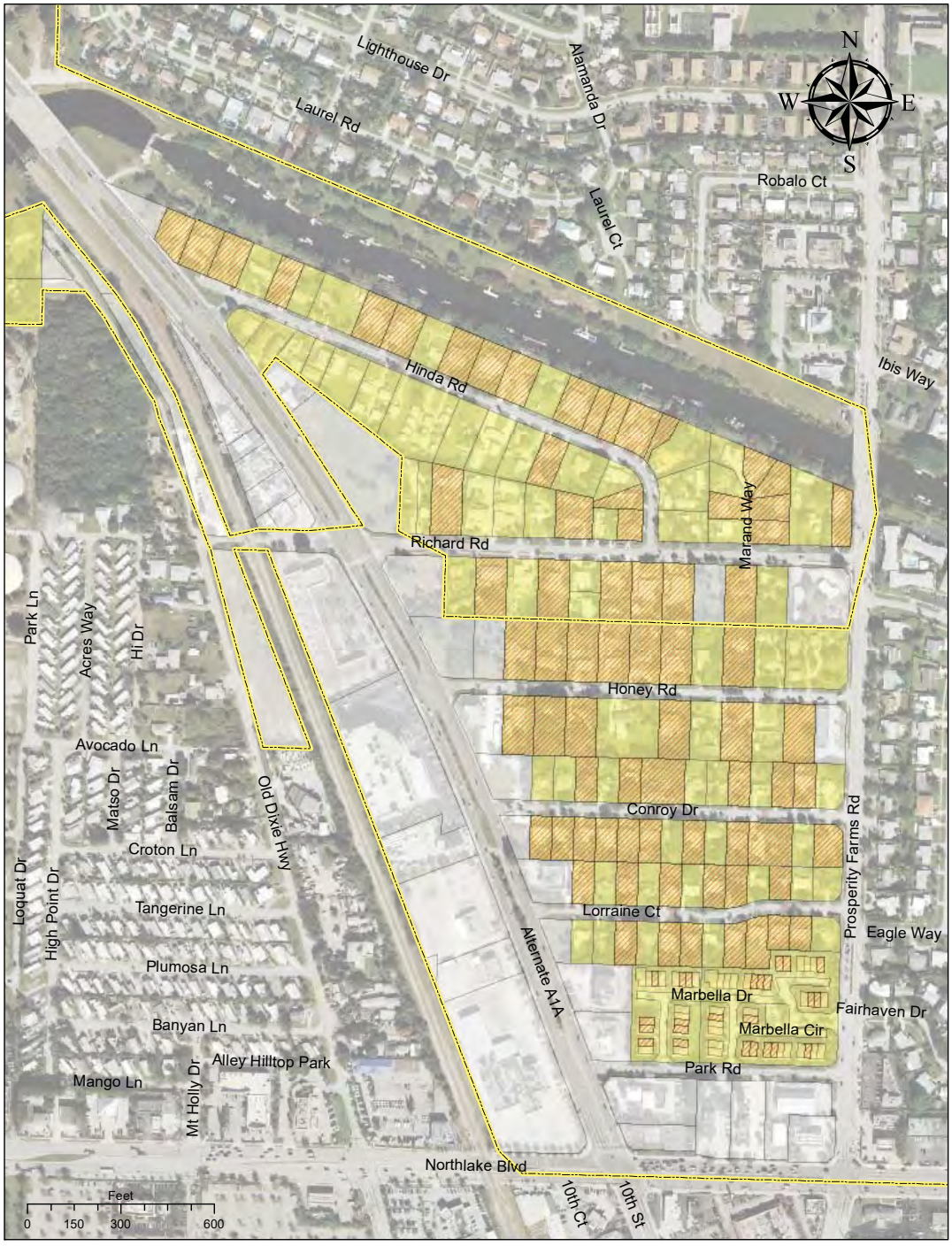
Regulatory Approaches

Code Enforcement

Where rental properties decline in maintenance and upkeep, code enforcement is a primary tool used by communities to maintain community appearance. Many municipalities with concerns over property deterioration develop community appearance standards, which can compel property owners to maintain properties to avoid code enforcement violations and fines. These regulations can address landscaping, lighting, exterior paint and trim, trash receptacles, and similar features visible from the street. Stronger code enforcement approaches in some communities include liens placed on properties that build over time.

Chronic Nuisance Ordinance

For regular violators of municipal codes, some communities have adopted chronic nuisance ordinances to strengthen their ability to regulate properties. Nuisance ordinances are focused on repeated code violations and other problems that entail police enforcement. For repeat offender



North Palm Beach

Homestead Properties

- Non Residential Properties
- Residential Properties
- Residential Properties with Homestead Exemption
- City Boundary

As evidenced in the map above, several neighborhoods along Prosperity Farms Road have begun to approach the rental/owner "tipping point," wherein more than 30% of residences have become rental. National research has documented this can lead to a reduction in property values, lesser maintenance, and impacts to neighborhood stability).

properties that present these types of conditions, a chronic nuisance ordinance enables a local government to declare a property to be a "nuisance property." Triggers for this declaration are typically keyed to a high number of violations over time, such as three or more nuisance activities within sixty days or seven or more within twelve months. Once declared a nuisance property, property owners are required to submit a proposed abatement plan to the municipality with detailed, specific proactive steps to be taken by the landlord or owner to eliminate the nuisance activities. The property owner then either implements the abatement plan or fines are significantly increased to compel compliance or the municipality corrects any physical violations (repairs, maintenance) and adds the cost to the annual tax bill.

Limits on Number of Unrelated Tenants
Where overcrowding becomes a concern, rental properties are often regulated with municipal restrictions that limit the number of unrelated persons occupying a residence to not more than three or four.

Rental Licenses
Local governments may also require the owners of residential units to register their rental units with the municipality and obtain a residential rental unit permit and business license, which can trigger inspections for compliance with community appearance and other property maintenance standards prior to the issuance or renewal of a license. Additionally, some municipalities have begun to consider rental density restrictions, wherein only a percentage of units within a district can be issued a rental license, limiting the conversion of owner-occupied units to rental uses.

Programmatic Approaches

Programs can be offered through or facilitated by local governments to encourage home ownership, property repairs, and beautification.

Residential Rehabilitation Programs
Residential Rehabilitation Programs are a popular tool for communities to help stabilize and improve residential neighborhoods. These programs offer grants or low-interest loans to property owners for major or minor structural or aesthetic improvements to properties (e.g., building repair or expansion, addition of features like porches or decorative elements as well as minor "paint-up/fix-up" efforts). Other versions of rehabilitation programs can offer design or improvement services from a list of vendors, typically within the community. At a simpler scale, these programs can also simply offer vouchers for exterior paint or other materials from pre-selected vendors. Programs can be competitive or offered on a first-come, first-serve basis depending on community needs and conditions. Typically funded and operated through community redevelopment agencies, local governments can also offer these programs with funding from other budgetary sources.

Façade Improvement Programs
Façade Improvement Programs are similar to Residential Rehabilitation Programs, but focused exclusively on exterior improvements that are visible from the street. These programs can include minor improvements, such as exterior paint, to major ones, such as roof replacements or the addition of porches or awnings.

Home Ownership Programs
Home Ownership Programs, including First-Time Homebuyers Programs, are designed to provide supplemental funding through grants or loans to assist potential homebuyers who intend to purchase and occupy residential units in a prioritized location. These programs can include direct financial assistance, such as down-payment assistance, or below-market interest rates and fees, typically arranged by an agency or local government with local financial institutions.

Additionally, programs in this category can offer "silent second" mortgages on residential properties, whereby the second mortgage, which is carried by a local government or agency, runs with the property over a specified timeframe (e.g., ten years), becoming paid in full after the owner has occupied the unit for the predetermined period of time or pro-rated over a timeframe. These programs can also be tailored to first-time homebuyers as well as "role model residents," such as local emergency

personnel, teachers, or medical employees, to encourage these residents to live within the community in which they work.

Infrastructure Programs
Infrastructure Programs are also a useful tool to reinforce residential neighborhoods that are lacking in certain types of infrastructure, such as potable water, sanitary sewer, stormwater, sidewalks, or street lighting. In these areas, local governments can install or assist in financing these improvements and connections where applicable to reduce or help finance costs to homeowners.

Neighborhood Beautification and Landscaping Programs
Neighborhood Beautification and Landscaping Programs are yet another method used by local governments to improve and stabilize residential neighborhoods. Cohesive and significant landscaping and streetscape improvements, such as benches, lighting, and neighborhood signage, help create neighborhood identity and improve property values. Improving these features often encourages existing property owners to respond in kind, with improvements that follow on private properties. The cyclical impact is the attraction of new homebuyers to improving neighborhoods, which further reinforces neighborhood stability, appearance, and desirability.

Neighborhood Association Program
Neighborhood Association Program can also assist in the stabilization and investment trends in residential neighborhoods. Either organized with the assistance of municipal staff or emerging via active community members, the identification of neighborhood associations, decorative signage and entry features, thematic landscaping and amenities, and periodic neighborhood meetings help strengthen neighborhood functionality. Local governments can offer staff assistance for facilitation of neighborhood association meetings and events as well as matching funds towards neighborhood improvements. Neighborhood associations are also often utilized to expand the effectiveness of community policing through neighborhood watches, support for local schools, and increased participation in community and recreational events.

Neighborhood associations can partner with municipalities to expand oversight and provide streetscape elements such as trash receptacles, lighting, signage, and landscaping.

Residential Rehabilitation: Suggested Programmatic Approach	
Residential Rehabilitation & Façade Improvement Program	• Focus on neighborhoods with >25% rental occupancy • Establish advisory committee to develop & screen applications • Consider matching requirement of 50% • Offer through application process with review of proposed improvements
Home Ownership Programs (First-Time Homebuyers, Role Model Residents)	• Offer on Village-wide basis • Develop program with local lending institutions • Assistance available through Palm Beach County • "Role Model Residents" could include municipal emergency personnel, teachers in Village schools, local medical employees • Require ownership commitment, prorated over time
Infrastructure Programs	• Identify appropriate neighborhoods through infrastructure assessment (e.g., water, sewer, stormwater, transportation) • Pursue matching funding through partner agencies (e.g., Palm Beach County, South Florida Water Management District, Lake Worth Lagoon Initiative)
Landscaping & Beautification Programs	• Establish advisory committee to identify eligible improvements and neighborhood selection • Focus on neighborhoods with >25% rental occupancy, older housing stock, and/or high number of code enforcement violations • Utilize neighborhood input to determine appropriate improvements
Neighborhood Association Programs	• Offer on Village-wide basis • Assign key staff as neighborhood association ombudsman • Assist in neighborhood identification through subdivision platting and natural geographic boundaries (e.g., roads, waterways) • Consider hosting annual (or semi-annual) neighborhood association gathering • Offer funding on time-limited, noncompetitive basis

Implementation Table

The implementation table in this section summarizes the recommendations made in this report that are to be carried out by Village as part of the Capital Improvement Program. Each change is described and organized according to the type of action recommended: Infrastructure Improvement or Administrative Change. Infrastructure improvements are projects that propose physical changes to public rights-of-way, property, or utilities. Other recommendations are for administrative adjustments, such as changes to the zoning code. Administrative changes have associated expenses, whether in dedicated staff time or in the procurement of assistance from consultants,but they are equally as important as infrastructure projects. The Village's code must make it easy and fast to develop consistently with the master plan vision - and ensure a longer public process for proposals not consistent with the plan.

The first step in realizing the plan is to determine which projects have the highest priority for the Village. Projects are categorized as one of the following levels of importance:

High Priority (HP) - These are projects extremely important to achieve the overall concept proposed in the Master Plan. Funding for these projects should be budgeted within the City's, CRA's and other public agency's Capital Improvement Plans.

Medium Priority (MP) - This category refers to projects that will contribute to the overall implementation of the Master Plan. They should be implemented as funding becomes available.

Low Priority (Low) - The project's early achievement is not critical

Easy (E) – Projects which are easy to implement, regardless of prioritization, and can be accomplished in a short time frame.

The purpose of the Capital Improvement Program is to provide an initial, general guide for implementing capital projects recommended within the Village Master Plan. The details of these plans, including cost and priorities, should be reviewed and updated annually as part of the City's Capital Improvement Program process. This annual budgeting process should include the reevaluation of strategies and priorities to fit changing circumstances. The availability of funds, from various funding sources, will have a direct impact on the speed and effectiveness of implementation. The Village should implement as many projects as possible, focusing on the higher priority projects.

Implementation Schedule

Following the Implementation Table is a comprehensive schedule of implementation projects and programs with detailed tasks and timeframes. This structure is intended to launch the initial high-priority projects, but also to provide a tool for planning and scheduling annual Capitol Improvement Projects. The recommended projects can be re-prioritized over time at the direction of the Village.

Infrastructure Projects	Priority Level
Reduce US 1 from 6 lanes to 4 lanes between the Parker Bridge and Northlake Boulevard	H
Install a longer turn-lanes and adjust signal timing for US1-Lakeshore Drive intersection	M
Improve signal coordination with bridge openings at Lakeshore Drive - US1 intersection	H
Undertake a Benefit/Burden analysis for replacing the Parker Bridge with a tunnel	L
Develop a streetscape plan for Marina Drive	L
Bury power lines in the neighborhoods	L
Add bike lanes and traffic calming to Lighthouse Drive.	H
Select and install Village street furniture, including bus shelters, benches, trash receptacles, and pedestrian-scaled lighting, starting on Prosperity Farms Road.	M
Support expansion of the Conservatory School at North Palm Beach to a K-12 school.	H
Create boardwalk/trail along south side of Earman River with mangrove restoration	L
Create a stormwater plan to treat un-treated discharges throughout the Village; Explore creating a Stormwater Utility	M
Create a signature design improvement on the Prosperity Farms Road bridge	H
Coordinate with Palm Beach Gardens and Palm Beach County on the alignment and configuration of the Congress Avenue extension to help create a successful, viable industrial district.	M
Move the RV storage from Anchorage Park to another location; discuss moving the boat storage with the community.	L
Connect Club Drive with lighted pathway to Country Club; evaluate lighting other trails for recreational uses.	L
Administrative Projects	**Priority Level**
Add a legible Zoning Map to the Village website	E
Add the Comprehensive Plan in a searchable PDF format to the Village website	E
Protect existing alleyways; recognize importance in Comprehensive Plan.	H
Begin a dialogue/coordination with the Town of Lake Park to encourage mutually beneficial development at the southwest corner of US 1 and Northlake Blvd.	M
Determine which of the Residential Programs outlined in this chapter are viable for the Village.	M
Encourage waterfront restaurants	L
Create uniform tree planting requirements US 1 and Northlake Boulevard.	L
Determine a color palette for administrative approval for Commercial properties	L
Adjust density levels to reflect market needs to redevelop the US 1 corridor	M
Create form-based regulations for the US 1 and Northlake Boulevard corridors	H
Create form-based regulations for multi-family, waterfront areas	M
Allow mixed use development on smaller lots	H
Establish regulations for infill single-family that ensure compatibility in the neighborhoods.	H
Allow accessory units on properties along alleys.	L
Evaluate Light Industrial District code regulations for the annexation area for consistency with proposed plan	L

VILLAGE OF NORTH PALM BEACH MASTER PLAN

RECOMMENDED IMPLEMENTATION APPROACH, INITIAL PROJECTS & TIMEFRAME

	IMPLEMENTATION PROJECTS & PROGRAMS *(est. timeframe)*	2016	2017				2018				2019				2020				2021				2022 -->
		Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	TBD
1	**VILLAGE LAND DEVELOPMENT DOCUMENTS**																						
	1A-1 Form-Based Code *(12-18 mos.)*																						
	1A-2 Comprehensive Plan Amendments *(12-18 mos.)*																						
2	**ENVIRONMENTAL & SAFETY**																						
	2A-1 Creation of Stormwater Utility (Legal, Financial, Engineering, Planning Actions) *(12-24 mos.)*																						
	2A-2 Construction of Stormwater Improvements / Retrofits *(on-going from inception)*																						
	2B Burying Overhead Power Lines																						
3	**BEAUTIFICATION**																						
	3A Prosperity Farms Road Bridge Improvement *(12-18 mos.)*																						
	3B Village-Wide Beautification Program *(on-going from inception)*																						
4	**TRANSPORTATION & MOBILITY**																						
	4A-1 US1 Corridor Feasibility Analysis *(12-24 mos.)*																						
	4A-2 US1 Corridor Improvements (as directed by Council)																						
	4B US1/Lakeshore Drive Intersection *(12 mos.)*																						
	4C Lighthouse Drive Improvements																						
	4D Marina Drive Streetscape Improvements																						
	4E Village-Wide Bicycle Network Plan																						
	4F Event-Based Water Taxi Service																						
	4G Congress Avenue Extension																						
	4H Recreational Trail Connections & Lighting (e.g., Club Drive, other)																						
	4I Parker Bridge/Tunnel Replacement Analysis																						
5	**RECREATION & WATERFRONT**																						
	5A Earman River/C17 Boardwalk																						
	5B Anchorage Park Master Plan & Renovation *(on-going)*																						
6	**HOUSING & REDEVELOPMENT**																						
	6A Conservatory School at NPB Expansion																						
	6B NPB/Lake Park Coordination for US1/Northlake Property Redevelopment (SW corner)																						
	6C NPB/Palm Beach Gardens Coordination for Congress Avenue Industrial District *(TBD)*																						
	6D Housing Program Evaluation & Prioritization																						
7	**Village Marketing & Branding Program**																						
	7A Village Marketing & Branding Program																						

VILLAGE LAND DEVELOPMENT DOCUMENTS & PROCESS

PROJECT IMPLEMENTATION SUMMARY

These projects relate to the development of a form-based code and supporting amendments to the Village Comprehensive Plan to advance the pattern of development represented in the North Palm Beach Village Master Plan.

PROJECT IMPLEMENTATION SCHEDULE

	2016	2017				2018				2019				2020				2021				2022 ->
1 VILLAGE LAND DEVELOPMENT DOCUMENTS & PROCESS	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	TBD
1A-1 Form-Based Code																						
** Initiate code amendment process, conduct public outreach & due diligence reviews*																						
** Develop Form-Based Code regulations*																						
** Identify necessary Comprehensive Plan amendments*																						
** Conduct public hearings for adoption*																						
1A-2 Comprehensive Plan Amendments																						
** Develop amendments to synchronize Comprehensive Plan with Form-Based Code*																						
** Conduct public hearings for adoption*																						

ENVIRONMENTAL & SAFETY PROJECTS

PROJECT IMPLEMENTATION SUMMARY

These projects are designed to improve environmental conditions in the Village, including upland stormwater treatment prior to stormwater discharges into the Lake Worth Lagoon. As an ancillary benefit, improving the efficiency and flexibility of stormwater treatment will enable more efficient land development patterns, potentially increasing the land development yield for parcels within the utility area. In addition, this project section addresses the potential for burying utility lines, which would present a safety improvement for residents, business and property owners, and visitors to the Village.

PROJECT IMPLEMENTATION SCHEDULE

	2016	2017				2018				2019				2020				2021				2022 ->
2 ENVIRONMENTAL & SAFETY PROJECTS	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	TBD
2A-1 Creation of a Stormwater Utility (Legal, Financial, Engineering, & Planning Actions)																						
** Coordinate with SFWMD, FDEP, Palm Beach County, service providers, agency partners*																						
** Develop utility service area; identify outfalls to Lagoon; assess watersheds within Village*																						
** Determine on-site and off-site improvement concepts; treatment capacities; equivalent ratios*																						
** Develop cost estimates for capital projects, operations, maintenance, administration*																						
** Determine equivalent rates for residential & non-residential uses*																						
** Identify potential funding sources to leverage utility investments (e.g., SFWMD, PBC, FDEP, EPA)*																						
** Conduct public hearings for adoption*																						
** Identify revisions as needed to land development regulations & Comprehensive Plan*																						
** Advance implementation as directed by Village Council*																						

2A-2 Construction of Stormwater I / Retrofits																						
** Determine project prioritization per Council direction*																						
** Develop long-term budget for utility*																						
** Implement projects per Council direction*																						
** Develop cost estimates for capital projects, operations, maintenance, administration*																						

2B Burying Overhead Power Lines																						
** Coordinate with FPL, utility providers*																						
** Develop cost estimates, potential project phasing (if any)*																						
** Present findings to Village Council for direction and prioritization*																						
** Advance implementation per Council direction*																						

Village of North Palm Beach Master Plan – Suggested Implementation Approach (DRAFT, rev. 10.20.2016)

BEAUTIFICATION PROJECTS

PROJECT IMPLEMENTATION SUMMARY

These projects are designed to improve public spaces and introduce design elements to enhance surrounding neighborhoods, property values, and improve the appearance and utility of transportation corridors.

PROJECT IMPLEMENTATION SCHEDULE

	2016	2017				2018				2019				2020				2021				2022 ->
3 BEAUTIFICATION	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	TBD
3A Prosperity Farms Road Bridge Improvement																						
** Initiate multi-agency dialogue with Palm Beach County, Palm Beach MPO*																						
** Develop preliminary design concepts for bridge improvement*																						
** Identify potential funding sources & timing*																						
** Present concepts to Village Council for direction*																						
** Advance project as directed by Village Council*																						
3B Village-Wide Beautification Program																						
** Establish Village Beautification Working Group*																						
** Develop Village streetscape elements standards (e.g., bus shelters, benches, light fixtures, trash receptacles, etc.)*																						
** Develop tree standards for residential, commercial, mixed corridors; specific neighborhoods*																						
** Identify candidate corridors for beautification (e.g., Prosperity Farms Road, Anchorage Drive, Lighthouse Drive)*																						
** Present concepts to Village Council for direction*																						
** Advance project as directed by Village Council*																						

MOBILITY PROJECTS

PROJECT IMPLEMENTATION SUMMARY

These projects related to a variety of roadway, bicycle, pedestrian, and marine improvements designed to improve the safety, utility, and efficiency of the transportation network with in the Village of North Palm Beach. Benefits include improvements to quality of life, multi-modal access, and economic development potential of properties within the Village and access for residents and visitor.

PROJECT IMPLEMENTATION SCHEDULE

	2016	2017				2018				2019				2020				2021				2022 ->
4 TRANSPORTATION & MOBILITY	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	TBD
4A-1 US1 Corridor Feasibility Analysis																						
** Explore alternatives with FDOT & conduct preliminary analysis*																						
** Determine feasibility of roadway reconfiguration*																						
** Present alternatives to Village Council; gain direction from Village Council for roadway configuration*																						
** Per Council direction, coordinate with FDOT for RRR project (anticipated 2021+/-)*																						
** Per Council direction, coordinate with Palm Beach County, Palm Beach MPO, adjacent municipalities*																						
** Per Council direction, pursue MPO TAP &/or Local Initiatives grants for improvements (e.g., bicycle, pedestrian, transit)*																						
** Per Council direction, acquire right-of-way and easements (if needed); driveway consolidation (if applicable)*																						
** Per Council direction, adopt amendments to Comprehensive Plan, thoroughfare map, form-based code (as applicable)*																						
4A-2 US1 Corridor Improvements (as directed by Council)																						
** Finalize project designs ("PD&E" and 30/60/90/100% drawings)*																						
** Secure project funding*																						
** Per Council direction, construct improvements*																						
4B US1/Lakeshore Drive Intersection																						
** Coordinate with FDOT & Palm Beach County to define project*																						
** Conduct traffic study to address signal timing, coordination bridge openings & determine turn lane lengths*																						
** Per Council direction, coordinate with FDOT for construction of improvements (as applicable)*																						
4C Lighthouse Drive Mobility Improvements																						
** Develop preliminary design plans*																						
** Conduct public outreach; refine plans as needed*																						
** Finalize improvement plans*																						
** Identify project funding sources & potential timing*																						
** Determine Council direction for project funding & timing*																						
** Per Council direction, construct improvements*																						

	2016	2017				2018				2019				2020				2021				2022 ->
4 TRANSPORTATION & MOBILITY CONTINUED	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	TBD
4D Marina Drive Streetscape Improvements																						
** Develop preliminary design concepts*																						
** Conduct public outreach; refine plans as needed*																						
** Finalize improvement plans*																						
** Identify project funding sources & potential timing*																						
** Determine Council direction for project funding & timing*																						
** Per Council direction, construct improvements*																						
4E Village-Wide Bicycle Network Plan																						
** Determine Council prioritization*																						
** Arrange stakeholder working group*																						
** Develop initial network plan concepts*																						
** Conduct public outreach; refine plans as needed*																						
** Present to committees & Village Council*																						
** Identify project funding sources & potential timing*																						
** Determine Council direction for project funding & timing*																						
** Per Council direction, construct improvements*																						
4F Event-Based Water Taxi Service																						
** Identify potential events for access by water taxi service*																						
** Identify water taxi stops within Village; secure parking permissions for event*																						
** Utilize Village social media & marketing to market service to residents*																						
** Determine supplemental funding if any*																						
** Implement program through recreation department*																						

	2016	2017				2018				2019					2020				2021				2022 ->
4 TRANSPORTATION & MOBILITY CONTINUED	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	TBD
4G Congress Avenue Extension																						
** Initiate interagency dialogue with Palm Beach County, Palm Beach Gardens, FDOT, MPO*																						
** Review preliminary design concepts*																						
** Evaluate land use impacts, ROW acquisition (if any)*																						
** Determine infrastructure impacts & opportunities*																						
** Review final design concepts*																						
** Coordinate with Palm Beach County for construction timeline*																						
4H Recreational Trail Connections & Lighting																						
** Identify missing trail links and opportunities to improve lighting (e.g., Club Drive connection to Country Club)*																						
** Develop initial improvement conceptual plan*																						
** Conduct public outreach; refine plans as needed*																						
** Present to committees & Village Council*																						
** Identify project funding sources & potential timing*																						
** Determine Council direction for project funding & timing*																						
** Per Council direction, construct improvements*																						
4I Parker Bridge/Tunnel Replacement Analysis																						
** Conduct outreach to FDOT, Palm Beach County regarding bridge work program*																						
** Coordinate with FDOT for preliminary design concepts*																						
** Initiate dialogue with permitting agencies*																						
** Commission economic assessment of tunnel vs. bascule bridge*																						
** Review of design concepts & economic assessment by Village Council for further direction*																						

RECREATIONAL & WATERFRONT PROJECTS

PROJECT IMPLEMENTATION SUMMARY

These projects are designed to enhance existing recreational and waterfront facilities, improve utility of facilities, and introduce new recreational elements to expand the benefits to residents and visitors.

PROJECT IMPLEMENTATION SCHEDULE

	2016	2017				2018				2019				2020				2021				2022 ->
5 RECREATION & WATERFRONT	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	TBD
5A Earman River/C17 Boardwalk																						
** Initiate inter-agency dialogue with SFWMD, FDEP, FDOT, PBC*																						
** Determine ROW opportunities & constraints (if any)*																						
** Develop conceptual plan to include landscaping and shoreline plantings, recreational and decorative elements*																						
** Present conceptual plan to committees & Village Council; revise as needed*																						
** Identify potential project funding sources and timing*																						
** Per Council direction, adopt amendments to Comprehensive Plan, thoroughfare map, form-based code (as applicable)*																						
5B Anchorage Park Master Plan & Renovation																						
** Continue to advance planning and implementation*																						

HOUSING AND REDEVELOPMENT PROJECTS

PROJECT IMPLEMENTATION SUMMARY

These projects and programs are varied, addressing economic development and redevelopment, housing challenges and the stabilization/improvement of the Village's residential housing stock, and the expansion of the Conservatory School at North Palm Beach, which is a unique educational asset that contributes to the sustainability and long-term growth potential of the Village.

PROJECT IMPLEMENTATION SCHEDULE

	2016	2017				2018				2019				2020				2021				2022 ->
6 HOUSING & REDEVELOPMENT	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	TBD
6A Conservatory School at NPB Expansion																						
** Continue dialogue with school administration and school board*																						
** Consider potential school expansion space as redevelopment advances in the Village*																						
6B NPB/Lake Park Coordination for US1/Northlake Property Redevelopment (SW corner)																						
** Advance discussions with Town of Lake Park administration*																						
** Review development proposals, Lake Park US1 Corridor plans and codes*																						
** Consider joint Village Council/Lake Park Town Council forum for discussion of relevant issues*																						
** Consider interlocal agreement to increase development efficiency of site*																						
6C NPB/Palm Beach Gardens Coordination for Congress Avenue Industrial District																						
** Advance discussions with City of Palm Beach Gardens administration*																						
** Review development proposals, PBG plans and codes*																						
** Consider joint Village Council/PBG City Council forum for discussion of relevant issues*																						
** Consider interlocal agreement to increase development efficiency of district*																						
6D Housing Program Evaluation & Prioritization																						
** Convene Village Council workshop to review housing conditions and available programs to reinforce housing base*																						
** Develop cost estimates for trial implementation of prioritized programs*																						
** Conduct public outreach; determine level of interest among homeowners, investors, potential participants*																						
** Allocate first-year funding for trial implementation of prioritized programs*																						

Village Marketing & Branding Program

PROJECT IMPLEMENTATION SUMMARY

The Village Marketing….

PROJECT IMPLEMENTATION SCHEDULE

	2016	2017				2018				2019				2020				2021				2022 ->
7A Village Marketing & Branding Program	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	TBD
** Assemble working group with representation from residents, realtors, investors, business & property owners*																						
** Establish structure and implementing body (RFP for firm, create Village division, etc.)*																						
** Determine Council prioritization and direction for specific projects and action items*																						
** Advance implementation per Council direction*																						

APPENDIX A
Creation of the Plan

Planning and Visioning Process

The Village of North Palm Beach Citizens' Master Plan was created during a public, seven-day charrette. This public process ensured community participation to determine how to best resolve potential impacts, maximize opportunities, and establish a vision for the future. A team of professionals, "the charrette team", helped record the citizens' ideas, tested the feasibility of the various proposals, and created a document to record and guide the citizens' vision.

Charrette

Charrette means "cart" in French. An architectural school legend holds that at the Ecole des Beaux Arts, in 19th Century Paris, work was so intense that students continued to draw after climbing onto the carts that carried their boards away to be juried.

Today charrette refers to a high speed, intense, and focused creative session in which a team works with citizens on design problems and presents solutions.

Host Committee

The first step of the charrette process was the creation of a Host Committee to plan the logistics of the charrette. Host committee members recommended times, locations, and strategies on how to best get the word out to the community about this important effort. Members also provided input on the people and agencies to interview before the public event.

Pre-Charrette Interviews

The purpose of the pre-charrette interviews is for the charrette team to gain a better understanding of the area's local issues, shortcomings, and strengths. A series of interviews with elected officials, business leaders, residents, community activists, and utility providers were conducted before the charrette. Each Host Committee member was also interviewed in this process.

Public Workshop

A public workshop was held January 30, 2016, at the Conservatory School cafeteria with approximately 150 people in attendance. An opening presentation outlined the intent of the project and issues in the area. Citizens were asked to shape a vision for the Village to improve mobility, quality of life, and economic vitality. After the presentation, participants gathered around tables with aerial photos of the study area. Each table group debated issues and drew their ideas over an aerial. At the end of the workshop, a representative from each table presented the group's ideas to the rest of the charrette participants. A summary the suggestions and concerns is contained on the following pages.

Table 1

Main Ideas

- Secondary street options to separate bikers, walkers, joggers.
- Village Center: center of town should be where the Country Club and Golf Course is as a downtown. Strong pedestrian connections already in place from Yacht Club area and west of the Golf Course.
- Streetscape improvements along the corridor.
- Key elements that can be catalysts for development: Prosperity Farms Road and Lighthouse Drive intersection; intersection of US-1 and Northlake Boulevard is the front door to the Village - entry feature (perhaps a roundabout).
- Improve pedestrian access – Ferry from Lakeside Park to the beach; connection to retail on Northlake Boulevard.
- Neighborhood center along Prosperity Farms at intersection with Lighthouse Drive.
- Currently all civic activities occur along the school, library, city hall, police station. This area serves as the Civic heart but it's not used that way.

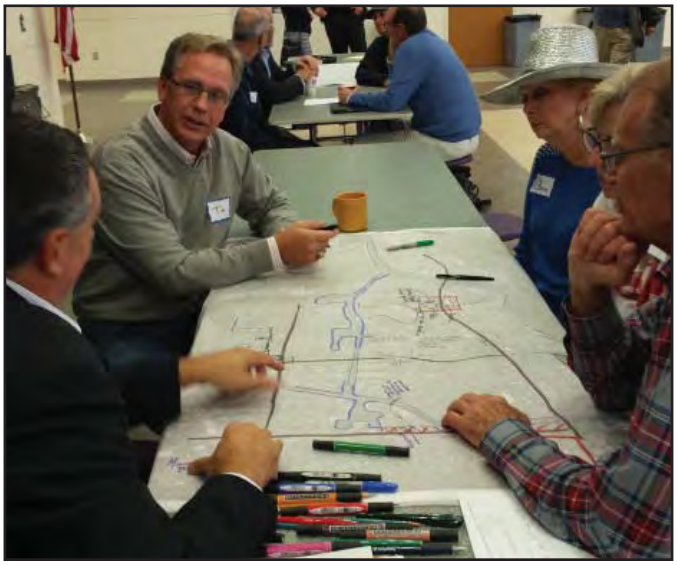


Table 1 citizens' drawing and photos from the public workshop.

Table 2

Main Ideas

- Need for a gathering place: Redevelop the Country Club and connect to a boutique hotel across the street. Physical connections needed.
- Marina: Restaurant to take advantage of the waterfront edge.
- Crosswalks!
- Village Center should be along US-1.
- Reduce lanes on US-1 to 2 in each direction with parallel parking, safer zones for pedestrians, landscape buffer and bike lanes.
- Current vacant lots should become active areas: courtyards; interject open areas along the corridor
- Parking behind in the alleyways.
- Multifamily housing behind commercial corridor and then single family housing.
- Publix plaza: destination of urban retail, structure parking.
- US-1 and Northlake Boulevard: three commercial corners, keep south edge green with trails, etc.
- Protect water views we currently have.
- No commercial uses along Prosperity Farms; beautify by incorporating street furniture, bus shelters – keeping North Palm character
- More night activity

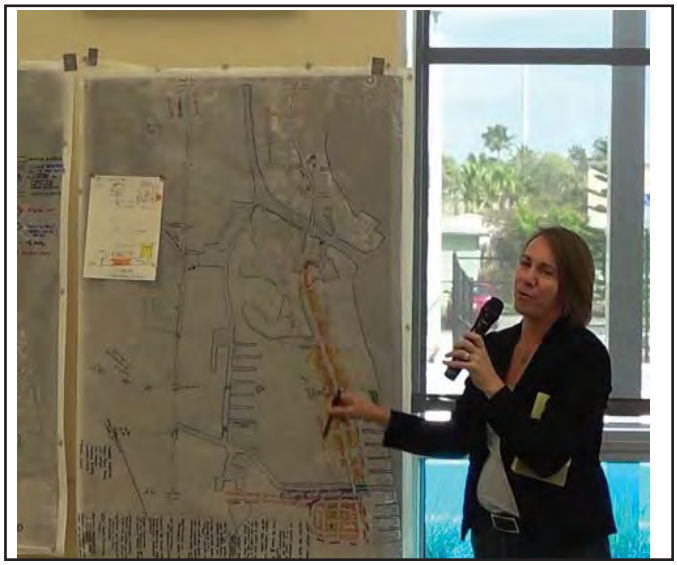


Table 2 citizens' drawing and photos from the public workshop.

Table 3

Main Ideas

- Add a park to the Country Club.
- Use the Golf Course for other activities including a "kids' club" with a pool, exercise area, arts and crafts.
- Include areas for younger kids (toddlers and newborns) with shade and space to play.
- Add more lights on 12th hole of Golf Course.
- Anchorage Park: add a soccer or football field.
- Preserve waterways.
- More shade on the Golf Course for breaks and water.
- Add a fishing dock in the Intracoastal.
- More shade on streets.
- Boat Club.
- More neighborhood parks so you don't have to drive far and can meet other neighborhood kids. These should be within a 3/4 mile walk.
- Small area for kids at the library while parents are attending meetings at Town Hall.
- More ice cream shops along the corridor.
- Improve the sidewalks: right now they are either too narrow or have bumps.
- Marina: boat ramp, restaurant, and amenities.

Table 3 citizens' drawing and photos from the public workshop.

Table 4

Main Ideas

- Northlake Boulevard corridor (before US-1) should be developed into something more commercially attractive. It should also be a pedestrian corridor with access to the water and good connection to the surrounding and connecting neighborhoods.
- Current Publix site should be redeveloped into a multi-purpose area with uses like a science museum, green market, IMAX theater, etc. The Library could be moved to this site as well.
- We don't want people in the Village to leave to go do things elsewhere.
- We want the Village to be an attraction to residents.
- Add bike lanes along the US-1 corridor.
- Make US-1 a "complete street".
- Slow down traffic on US-1, Lighthouse and Anchorage.
- Need a High School. If possible, it should be close to existing school to share facilities. "Keep children within the Village".
- Study the commercial buildings on US-1 that are possibilities for redevelopment.
- The Country Club should stay where it is and a harmonious connection between commercial and residential uses should be developed.
- Make the Country Club more attractive to parents and families with a café and kids club area.
- Develop the Camelot Hotel site into something more attractive for commercial uses with a walkable area connected to the Country Club and a connection to Yacht Club Drive. Develop an Event center in the Marina area.
- Improve Century Plaza by extending walkable areas and make it more attractive so it compliments the surrounding residential areas.
- Create community gardens.

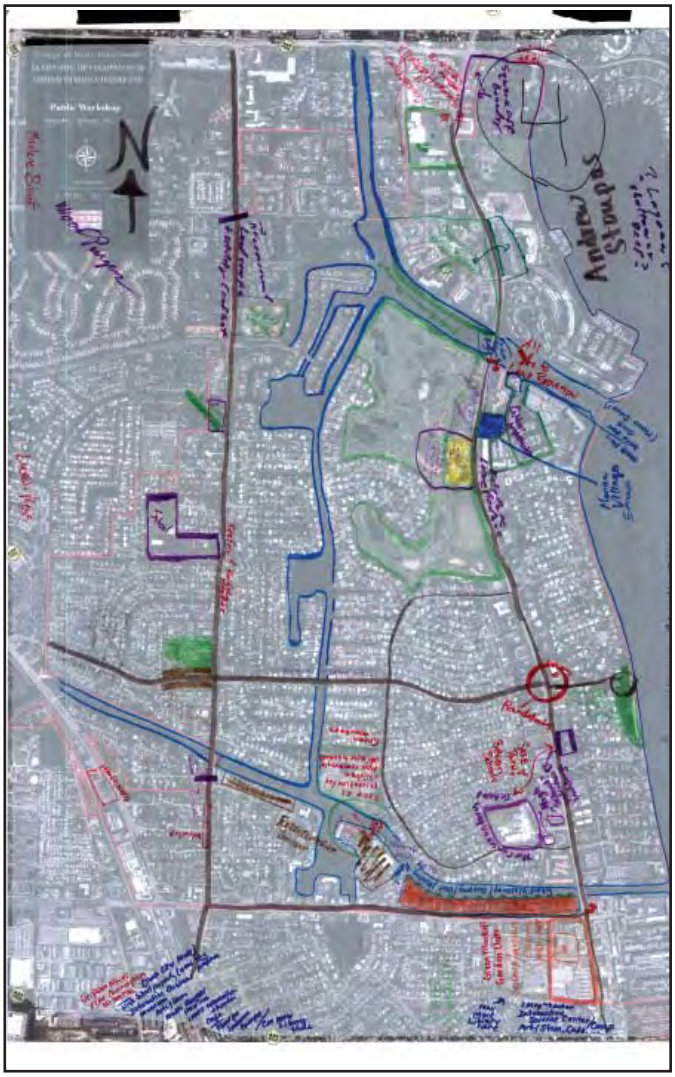


Table 4 citizens' drawing and photos from the public workshop.

Table 5

Main Ideas

- Install traffic cameras to control traffic lights on demand as needed and avoid traffic backups along the corridor
- Eliminate traffic lights where not needed.
- Reduce traffic speed along the corridor; roundabouts might help with this.
- Establish an architectural review board for architectural character of buildings.
- Use alleyways to provide access to buildings.
- Improve walking conditions at Lakeside Park.
- Create “vias” like in Palm Beach.
- There are two main areas along the corridor
  1. Country Club/Marina Area; and
  2. Civic Area (where the school, library and Town hall are.

  These two areas should be connected by the US-1 commercial corridor.

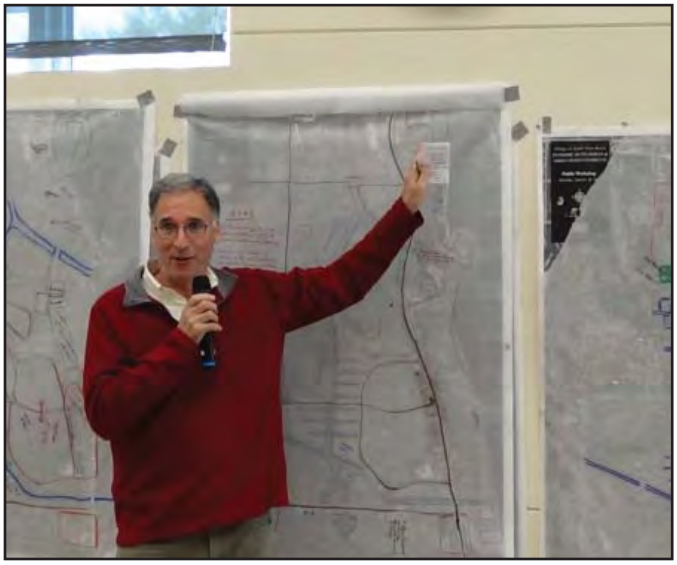


Table 5 citizens’ drawing and photos from the public workshop.

Table 6

Main Ideas

- Our acronym for the plan ~ PPAA:
  - Problems
  - Potential
  - Advantages and Disadvantages
  - Action Plan
- The intersection at PGA Boulevard, where Panama Hatties used to be, presents many traffic issues to the Village. Find a way to control traffic in this area.
- Control the traffic from opening and closing of the bridge.
- Use roundabouts to calm down traffic.
- There should be a boardwalk along Northlake Boulevard on the river side connecting to a pedestrian bridge over the water
- Any new schools should be close to the current school and not across Northlake Boulevard because children can't walk there; it's too dangerous.
- There should be a boutique hotel across from golf course and the area behind this hotel should be developed to take advantage to the water front.

Table 6 citizens' drawing and photos from the public workshop.

Table 7

Table 7 citizens' drawing and photos from the public workshop.

Main Ideas

- Keep the charm of the old family neighborhood community that characterizes the Village.
- Theme: "Put the Village back into the Village".
- Motto for development: Live, work, stay and play in the historic Village of North Palm Beach"
- Reduce US-1 to 4 lanes.
- Establish North and South entry points to know you are entering the Village: West Marina should be the North entry and Northlake Boulevard/ US-1 Intersection should be the South Entry.
- Reduce speed, slow down in the Village, but no roundabouts.
- The Village Center should be at U-1 and Lighthouse Road. This Center should have mixed use, civic uses, office, and other uses that you need on a daily basis so you don't have to leave the Village.
- More entertainment options, but local not regional types to keep charm.
- Add an "Age in Place" facility: small scale, first level living for people who want to downsize from their current homes.
- Parking should be shared between uses (some happen during day and some at night).
- The Delray Beach Atlantic Avenue Boutique Hotel and commercial area should serve as an example for shared amenities with the Golf Course area.
- Increased appeal to offices (corporate, medical, etc) between Lighthouse Road and North Anchorage.
- Bike rental facilities like in City Place.
- Better use of alleyways, beautify them.
- Incorporate an outside exercise element, connecting nodes throughout the Village.
- Riverwalk, pedestrian bridge: restaurants, shops, daytime activities (water activities).
- Create a vision for the architectural character desired throughout the Village.
- Bury power lines in residential areas.
- Traffic calming ideas should be developed.
- Make the Country Club a desirable destination.
- Ferry or water taxi

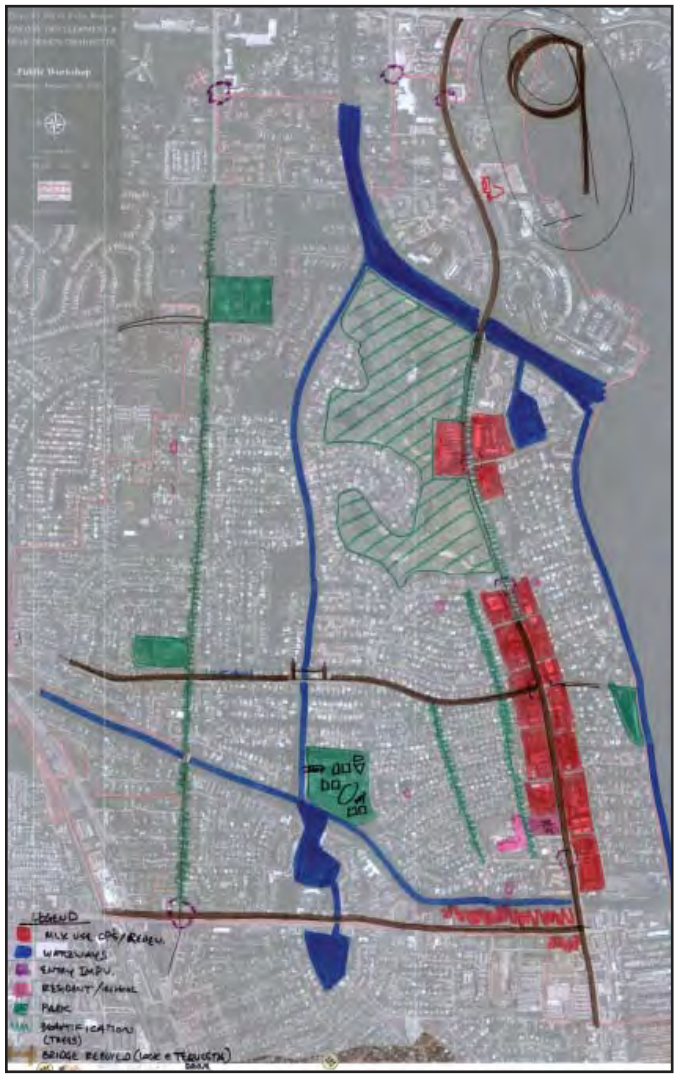
Table 8

Main Ideas

- The goal is to make North Palm Beach a destination.
- Need a K-12 school in the Village.
- The Country Clubhouse should be updated. One idea is to make the building three stories to be able to see the water and use it to for banquets, weddings, etc.
- Develop Old Camelot site to promote the water (Yacht club)
- Make everything accessible to the people that live in North Palm Beach.
- There should be a Village Square at US-1 and Lighthouse Road with shops, restaurants, etc.
- Develop the Northlake Boulevard site as mixed use, similar to Downtown the Gardens. Establish a water taxi system connecting the Village.
- Promote more nightlife north of the bridge at Crystal Tree Plaza.
- Improve the streetscape, add more trees and bigger sidewalks.
- Develop the Publix plaza as a mixed use center.

Table 8 citizens' drawing and photos from the public workshop.

Table 9



Main Ideas

- Develop the center of town at the Country Club site including the hotel site across the street.
- Establish a mini-center where our Civic uses are.
- Beautification of the Village: more trees especially on US-1 and Prosperity Farms Road.
- Redevelopment concerns with the waterway along Northlake Boulevard.
- Make the entryways to the Village, more prominent, “wow” factor.
- Parks: Anchorage Park is highly used. Other parks are not used that much but there is potential in them.
- It is very important to get a high school in the Village as soon as possible.
- Not sure if the lane reduction in US-1 should be done.
- Develop multi-family uses along the US-1 corridor.
- The north side of town is concerned about not having emergency services in that area.
- Add stop lights in the north side of town.
- We like our 5-day garbage pickup; please keep it in place but from 9am-5pm.

Table 9 citizens’ drawing and photos from the public workshop.

Table 10

Main Ideas

- Make the Country Club/Golf Course a destination. This area is a good market for a hotel. We want people to come here as a destination.
- The green areas on the map are the areas that should be mixed use redevelopment with a HUB by the Country Club as a destination.
- Right now the area across the golf course has 40% vacancy rates.
- The Boat parade is very important for the Village. There should be a facility in the area to be used for the Boat parade party.
- Several buildings on US-1, south of the Golf Course, are very run down and should be knocked down.
- Many old vacant commercial buildings along the corridor are good redevelopment opportunities.
- There are safety issues at intersections to cross US-1.
- The Publix plaza should become a mixed-use development.
- There should be more parks, including a skate park.

Table 10 citizens' drawing and photos from the public workshop.

Table 11

Main Ideas

- Safety is a concern.
- Connecting US1 from Anchorage Drive up to Prosperity Farms Roads with lighting along Anchorage Drive.
- The bridge on Anchorage is very dangerous – should be made wider.
- Create a boardwalk along the river.
- The Publix plaza should have a green.
- The Community Center to be established south of Anchorage Road.
- The Village Center feel is around the Country Club and Golf Course area.
- The golf course should be opened for walking and biking one night a week.
- In the north area of town, the buildings should be closer to the road.

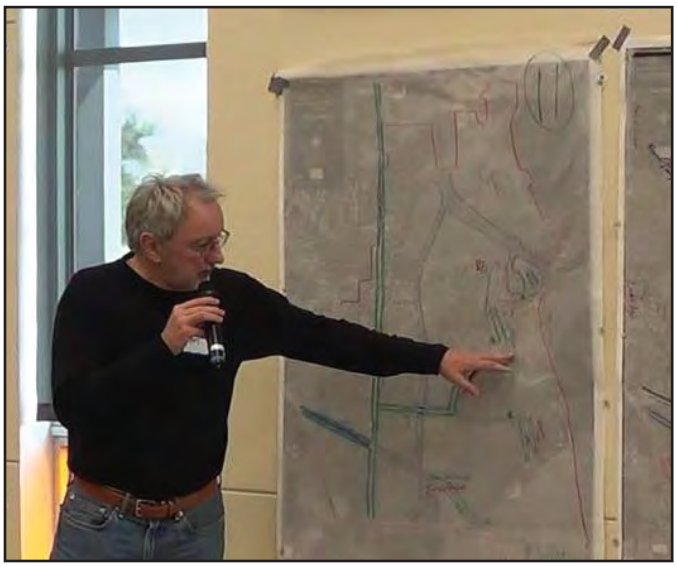


Table 11 citizens' drawing and photos from the public workshop.

Table 12

Main Ideas

- All ideas should go back to the roots of what was North Palm Beach to keep the Village character.
- The Country Club area is the center of town; it's where the Clubhouse is and where the fireworks and other activities occur.
- New projects should make a significant impact to North Palm Beach.
- Slow down cars.
- Make the alleyways with unique design features for service, drop off and have the front along US-1 with beautiful sidewalks, street furniture, etc.
- Prefer smaller scale development.
- The height of the new buildings should be that of PGA Commons.
- Establish a North-South walking corridor and connect the Village East-West, which is now separated.
- Roundabouts may work as an alternative to connect pedestrians East-West.

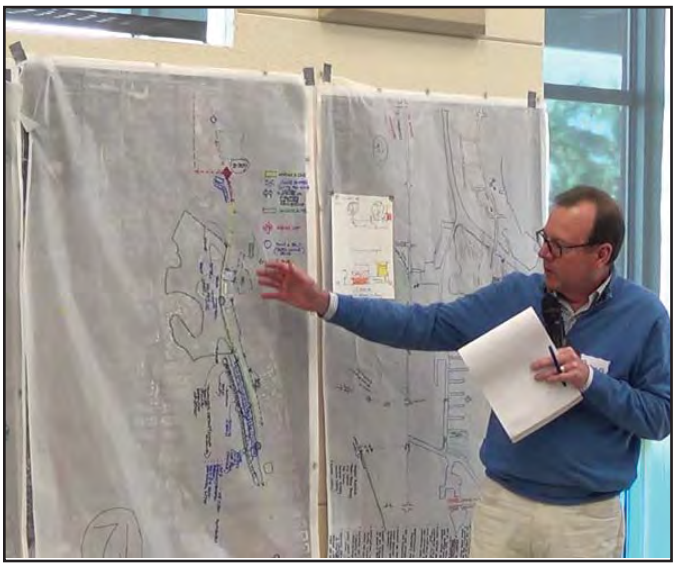


Table 12 citizens' drawing and photos from the public workshop.

Studio

The charrette team listened, recorded, and took notes on the citizens' requests. A design studio was established in the Village Council Chambers from January 31 – February 5, 2016. The purpose was to work closely and intensely on the citizens' ideas and allow the public to observe and offer additional input. Approximately 50 people, including elected officials, interacted with the team in the studio throughout the week.

Downtown Retailing and Merchandising Presentation

On Tuesday, February 2, 2016, Robert Gibbs, a leading retail and urban planning consultant who has contributed to more than 400 master plans across the country, gave a lecture on Downtown Retailing and Merchandising for the 21st Century City at the North Palm Beach Country Club.

The Village Council of North Palm Beach

Invites You to a Presentation by

ROBERT GIBBS

Tuesday, February 2, 2016, 6:00 pm

North Palm Beach Country Club
951 US Highway 1, North Palm Beach

DOWNTOWN RETAILING AND MERCHANDISING FOR THE 21ST CENTURY CITY

Robert Gibbs is a leading urban planning consultant who has contributed to over 400 master plans across the U.S., including Alexandria, Birmingham, Charleston, Detroit, Disney, Houston, Marquette and Naples. He founded GPG in 1988, and has prior experience with JJR/ Smith and Taubman Centers.

In 2012, Gibbs was honored by the Clinton Presidential Library for his life's contributions to urban planning and development and by the City of Auckland, New Zealand for his planning innovations.

Gibbs is a charter member of the Congress for the New Urbanism, gives frequent lectures and has co-authored four books. Gibbs authored the Urban Retail Form Based Code Module, and in 2012 published Principles of Urban Retail Planning and Development. The book has received wide acclaim and was described by the APA as "*…Not all sweetness and light, but one planners can ill afford to ignore*".

Gibbs has been profiled in the New York Times, Urban Land Institute and the Wall Street Journal. The Atlantic Monthly stated: *"Gibbs has an urban planning sensibility unlike anything possessed by the urban planners who usually design downtown renewal efforts."*

A professional Landscape Architect in Michigan and North Carolina, Gibbs earned an MLA from the University of Michigan's School of Natural Resources and resides in Birmingham, Michigan.

For more information please contact
Joanna Cunningham, Assistant to the Village Manager, Village of North Palm Beach,(561) 904-2122, jcunningham@village-npb.org
or, Dana P. Little, Urban Design Director, Treasure Coast Regional Planning Council, (772) 221-4060, dlittle@tcrpc.org

Work-in-Progress Presentation

A Work-in-Progress presentation was held on February 5, 2016, at the Conservatory School. Work completed by the charrette team to date was presented to the public, and additional comments and input were gathered.

APPENDIX B
Background and Existing Conditions

History of the Village

The Village of North Palm Beach has a long history of resort-style living. The Winter Club, the Village's first country club, was built in 1925 by Harry Kelsey. Mr. Kelsey owned much of the land that is now North Palm Beach until the devastating hurricane of 1928 destroyed most of his holdings, including his timber business, forcing him to sell his land.

In 1954, John D. MacArthur purchased 2,600 acres for $5.5 million. The Village was largely developed by Herbert and Richard Ross. The Rosses built the Village as a planned community – more than 75 miles of sewer lines were laid and twenty canals dredged in advance of development. The Village was incorporated in 1956, serving as the primary bedroom community for Pratt & Whitney employees.

In 1963, the country club was constructed. The Winter Club was demolished in the 1980s, despite being listed on the National Register of Historic Places. The North Palm Beach Golf and Country Club continues to serve as a public amenity for community today. The golf course is one of only two Nicklaus Signature municipal courses in the country. Mr. Nicklaus, a nearby resident, redesigned the course in 2006 for the community, charging only $1 for his services. Updating the club house is under discussion with a series of workshops underway regarding programming and community priorities.

Characteristics of the Village

The Village has nearly 30 miles of waterfront (both natural and man-made), giving the community its maritime character. The Village is approximately 5.8 square miles in size, of which 2.2 square miles are water. More than a third of the Village is technically an island, defined by the Earman River to the south, the North Palm Beach Waterway to the west, the Intracoastal Waterway to the north, and Lake Worth to the east.

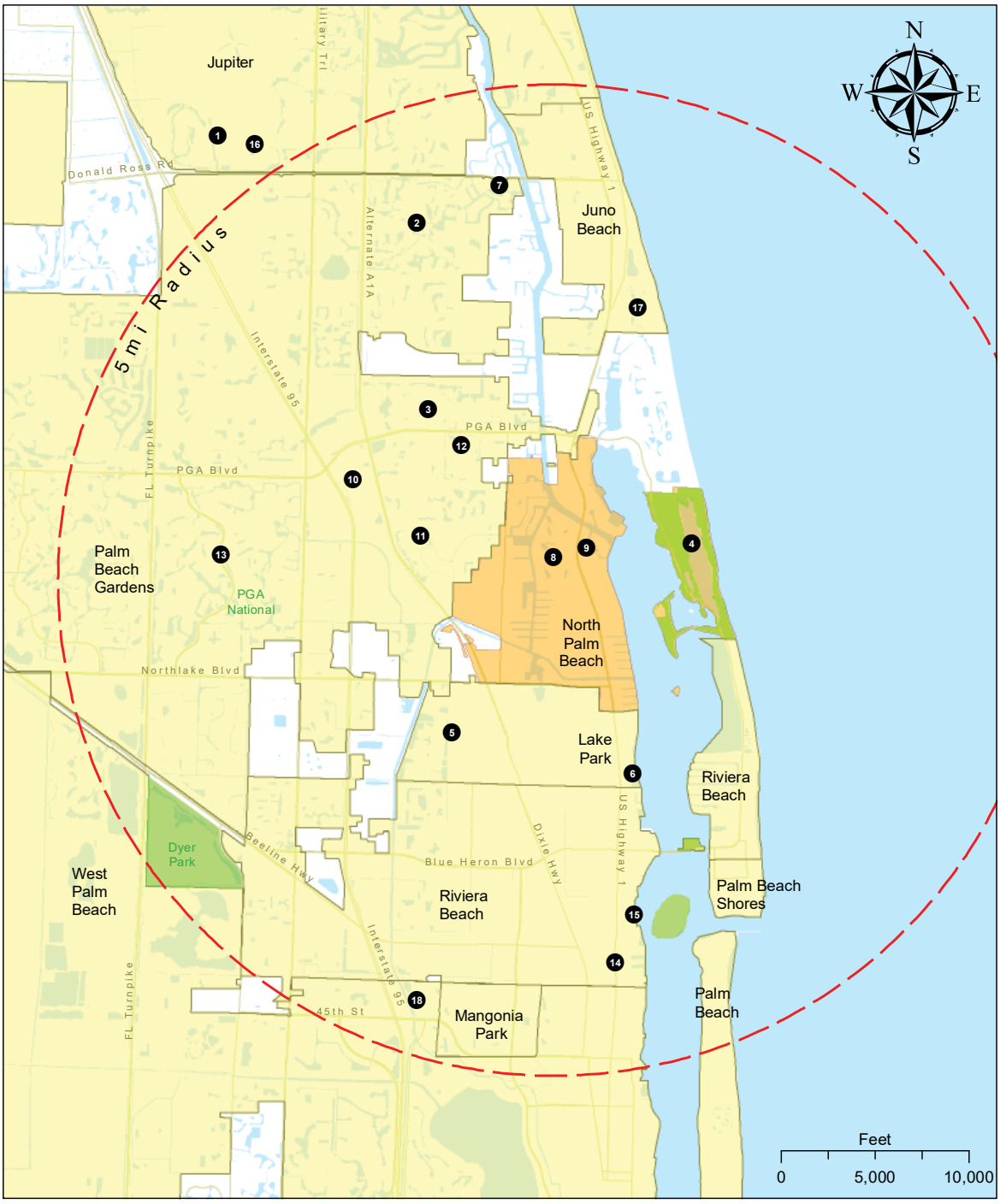
The Village of North Palm Beach is centrally located within the County, providing easy access to

Top: The Winter Club circa 1957.

Middle: An aerial view looking northeast over the golf course circa 1962.

Bottom: The "new" country club with pool and the Winter Club circa 1962.

Location Map with Regional Assets



Regional Assets

within 5-mile radius of North Palm Beach

1. Florida Atlantic University
2. Frenchman's Creek Country Club
3. Gardens Mall
4. John D. MacArthur State Park
5. Lake Park, Park of Commerce
6. Lake Park Marina
7. Loggerhead Marina (Palm Beach Gardens)
8. North Palm Beach Country Club
9. North Palm Beach Marina
10. Northcorp Corporate Park
11. Palm Beach Gardens Medical Center
12. Palm Beach State College
13. PGA National Golf Club
14. Port of Palm Beach
15. Riviera Beach Marina
16. Scripps and Max Planck Institutes
17. Seminole Golf Club
18. St. Mary's Medical Center

The Study Area

employment centers, primary shopping destinations (including the Gardens Mall and Palm Beach Outlets), and two colleges. Downtown West Palm Beach, the County seat, can be reached in 15-20 minutes via US 1.

In addition to its convenient proximity to regional resources, the community offers a family-friendly atmosphere. Both passive and recreational parks are located throughout a strong neighborhood structure. Numerous community events are held throughout the year and are well-attended by local residents.

One of the strongest draws for families to the Village is likely the excellent schools, both public and private, located within the community. The Conservatory School at North Palm Beach is a public arts elementary school and Allamanda Elementary, located adjacent to the Village boundaries, has a unique health and wellness program. The Benjamin School's lower campus and St. Clare's Catholic School offer private school options as well.

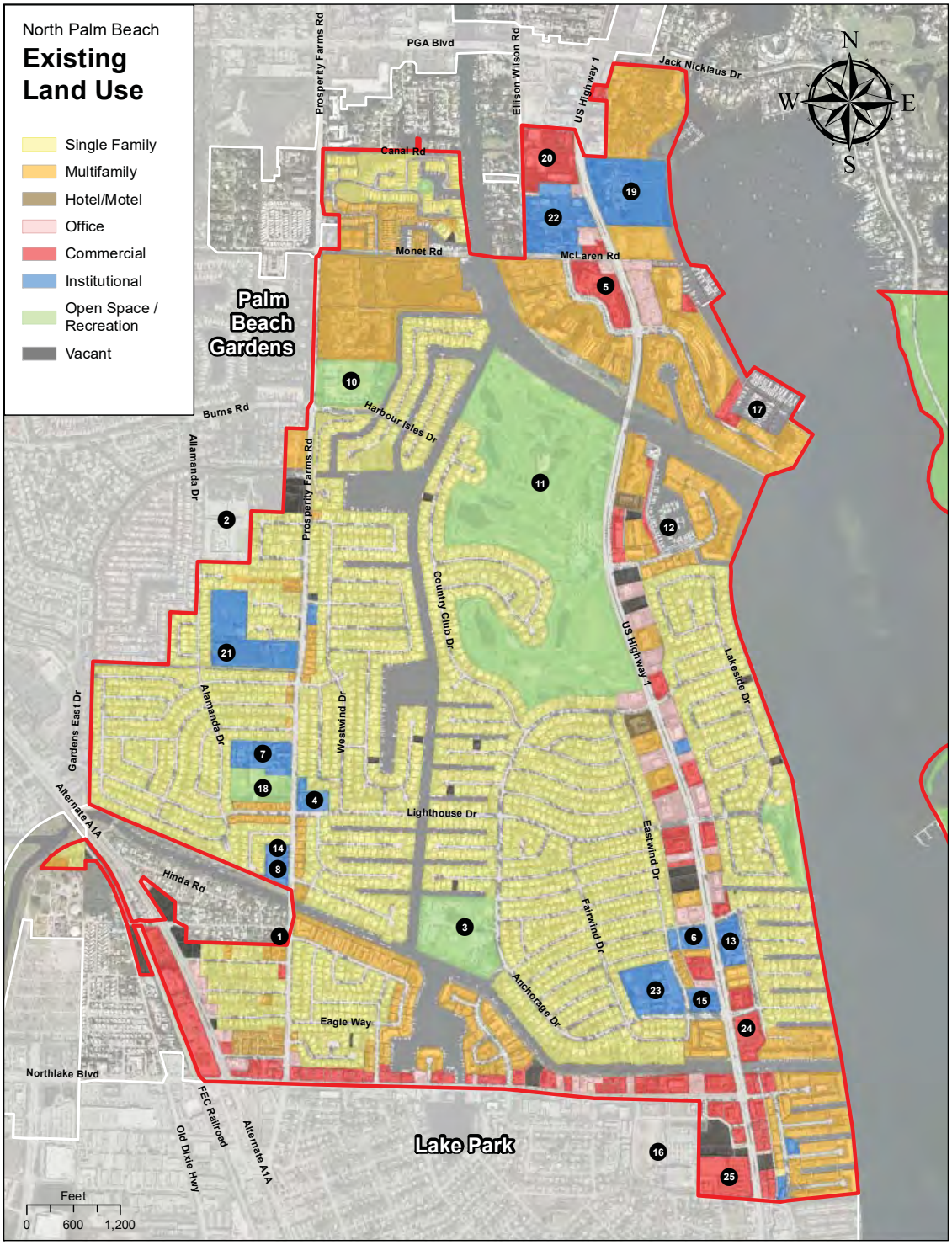
The Village has diverse residential options. The neighborhoods offer single-family homes in a range of sizes. As the neighborhoods are fully built-out, redevelopment of older houses is beginning to occur on desirable waterfront lots. Multi-family options are located predominantly along waterfront sites, with some inland options. Since most of the older waterfront buildings are condominiums, little redevelopment has occurred to date. In the 1990's and 2000's, new homes were constructed in the northwest area of the Village, east of Prosperity Farms

Top: The North Palm Beach Marina is open to the public and offers a ship's store, bait, fuel, and 107 slips.

Middle: Anchorage Park has a playground, recreational courts, community center, and provides boat ramps and storage for residents with inland lots.

Bottom: The recently redesigned North Palm Beach Golf Course maintains a prominent location within the Village. Image source: www.village-npb.org

Map of Existing Land Uses



Community Assets

1, Academy of North Palm Beach
2, Allamanda Elementary School
3, Anchorage Park
4, Bright Futures Academy Charter School
5, Crystal Tree Shopping Center
6, Faith Lutheran Church
7, First Presbyterian Church
8, First Unitarian Universalist Church
9, John D. MacArthur Beach State Park
10, North Palm Beach Community Center
11, North Palm Beach Country Club
12, North Palm Beach Marina
13, North Palm Beach Police Department
14, North Palm Beach Public Works
15, North Palm Beach Village Hall and Library
16, Northlake Promenade Shoppes
17, Old Port Cove Marina
18, Osborne Park
19, Our Lady of Florida
20, Shoppes at City Centre
21, St. Clare Catholic School
22, The Benjamin School
23, The Conservatory School
24, The Shops at Village Square
25, Village Shoppes

Road, within gated communities. Currently, Water Club, a significant waterfront condominium with over 200 units, is under construction on land located along the Intracoastal Waterway that was previously owned by a church.

US 1 and Northlake Boulevard serve as the primary commercial corridors and economic engine in the Village. US 1 is a primary route from the south or north; and Northlake Boulevard is the main access road from the west, via I-95. The Village's commercial uses are located almost exclusively along these two corridors. US 1 is comprised of four distinct segments:

Top Left: The Water Club under construction.

Bottom Left: Older condominiums line much of the waterfront.

Top Right: The neighborhoods offer houses in a range of sizes.

Middle Right: Older housing is being replaced by new homes on desirable golf course or waterfront lots.

Bottom Right: An example of inland multi-family housing

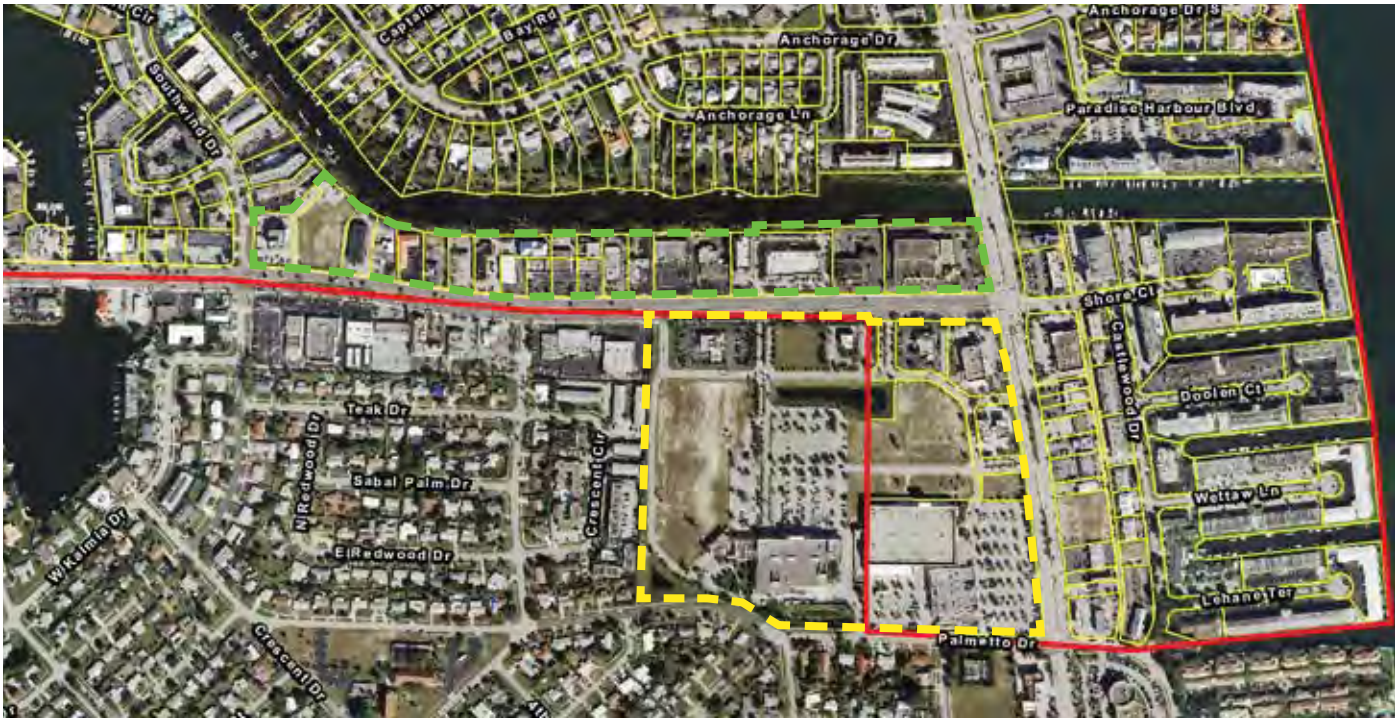
Parker Bridge North: The area north of the Parker Bridge (shown in red) is comprised of several large-scale condominium developments, including the new Water Club, and two shopping plazas. PGA Boulevard provides access to main office and shopping districts in the northern county area and connects to I-95. US 1 has two lanes in each direction in this section.

Parker Bridge to N Anchorage Drive: The area between the Parker Bridge and North Anchorage Drive (shown in blue) has the golf and country club along the western edge of US 1. The east side has the North Palm Beach marina surrounded by older, waterfront condominiums. US 1 is lined by the Camelot Inn restaurant, Baer's furniture store, Sunoco gas station, and offices of varying sizes. US 1 has three lanes in each direction in this section.

N Anchorage Drive to the Earman River: The area between North Anchorage Drive and the Earman River (shown in yellow) contains a significant concentration of offices and restaurants. A north-south alley runs continuously along both sides of US 1, providing rear access to properties, separation from the residential properties, as well as a tertiary local route. Lighthouse Drive provides important "cross town" access, connecting the Village east-west over the North Palm Beach Waterway. US 1 has three lanes in each direction in this section.

Earman River South: The section south of the Earman River to the Village's southern boundary (shown in green) is defined on the east side by a large parcel that was once the Twin City Mall and now is the Northlake Promenade Shoppes and several vacant sites. Northlake Boulevard, a main east-west connection to I-95, intersects US 1 in this section. On the west side of US 1, parking lots serving small restaurant and retail uses line the street. US 1 has two lanes in each direction in most of this section.

Top Left: The Crystal Tree Plaza located on US 1 north of the Parker Bridge. *Top right*: The Camelot Inn property located on US 1 across from the golf and country club. *Middle Left*: Office uses constructed in "garden style" buildings in the 1960s and 1970s line US 1. *Middle Right*: The previous site of the Twin City Mall remains largely undeveloped at this time at the main entry into the Village from both Northlake Blvd. and US 1. *Bottom Left*: Older office buildings line Northlake Blvd. *Bottom Right*: Recent development of a self storage facility on Northlake Blvd.



The north side of Northlake Boulevard is located within the Village. It has a wide range of commercial uses in varying conditions. A range of retail, personal service businesses, offices, and restaurants are located in buildings with parking lots located along the thoroughfare. The only business that engages the Earman River is a "Adventure Times," a kayak sales/rental business. Recent development includes self-storage facilities on waterfront properties and private docks. Landscaping is inconsistent; some properties have complied with Northlake Boulevard Overlay Zone standards and others have not.

The southwest corner of US 1 and Northlake Boulevard is located within the Village. The site of the old Twin Lakes Mall is located partially within the boundaries of the Village and partially within Town of Lake Park's jurisdiction. It is one of the largest potential redevelopment sites in the Village and coordinating with Lake Park would help ensure success.

Top: The southern area of the study area includes potential waterfront redevelopment sites along the Earman River (outlined in green) and the largest parcel (once the Twin City Mall) for potential redevelopment (outlined in yellow).

Right: Residential properties on the north side engage the Earman River in a naturalistic landscape condition.

Bottom: Most commercial development along Northlake Blvd. fails to take advantage of the use and the view of the Earman River though some have built private docks..

Image Source: visitmyrtlebeach.com

Top: An image of Marsh Walk in Murrells Inlet, which offers public access along the waterfront. *Bottom Left*: A view of Frigate's one of the Village's few waterfront restaurants. *Bottom Right*: Parking, commercial loading, and trash areas are located behind businesses facing Northlake Blvd..

Initial Observations

Maximizing the Waterfront

Though the Village has a marine-oriented character, this experience is largely limited to residential properties. Since most of the waterfront is privatized, the waterfront is not a visually significant characteristic of the village; views are limited to glimpses crossing bridges or to the golf course. Those residential lots without direct access are afforded waterfront access via parks. Few waterfront dining options exist in the Village. Frigate's is the best local example of a design which maximizes its location, both in atmosphere and boat access. Directly across the Earman River from Frigates is another restaurant (IHOP), which offers five windows with a water view.

Redefining US 1

The offices that once thrived along US 1 are now competing with newer office development and hampered by changing transportation routes. While US 1 was once the primary north-south route in the County, I-95 and the Florida Turnpike have become the main travel routes over time. PGA Boulevard offers new Class A offices, with large floor plates, high ceilings, covered parking, and other modern amenitites. The PGA corridor location is easily accessed by the interstate and is not impacted by the two drawbridges, which periodically interrupt travel along the US 1 corridor. The Village has approximately 589,700 SF. of office in buildings with an average construction date of 1976. These buildings are an average of two stories in height with floor plates that are less than 8,500 SF in size. Given the current configuration, the US 1 corridor is unlikely to compete with the newer Class A options.

Competing in other office markets (e.g. catering to start ups, office-sharing, etc.) is not advanced by the corridor's current physical environment. The predominant characteristic along US 1 is parking lots. The Millennial generation demonstrates a clear market preference for urban centers where walking or biking to work is an option and where social interaction is fostered by the surroundings. Having nearby housing options, places to eat or drink, and the ability to move among them in a comfortable, attractive atmosphere is necessary to compete with various revitalizing downtown options in the County.

> *"Sixty-two percent [of Millennials] indicate they prefer to live in the type of mixed-use communities found in urban centers, where they can be close to shops, restaurants and offices."*
>
> *- "Millennials Prefer Cities to Suburbs, Subways to Driveways." Nielsen. 3-4-14*

New residential and mixed use projects have begun appearing on US 1 in West Palm Beach, Lake Worth, and Delray Beach. Mariner's Court, a townhome development, was recently constructed on US 1 in the Village. It is buffered from the roadway with landscaping. These types of developments can be positioned to re-define the corridor.

Top: A view of existing offices along the US 1 corridor.

Middle: Mariner's Court is a small townhome community built along US 1 in the Village.

Bottom: Magnolia Court is a mixed use development facing US 1 in West Palm Beach.

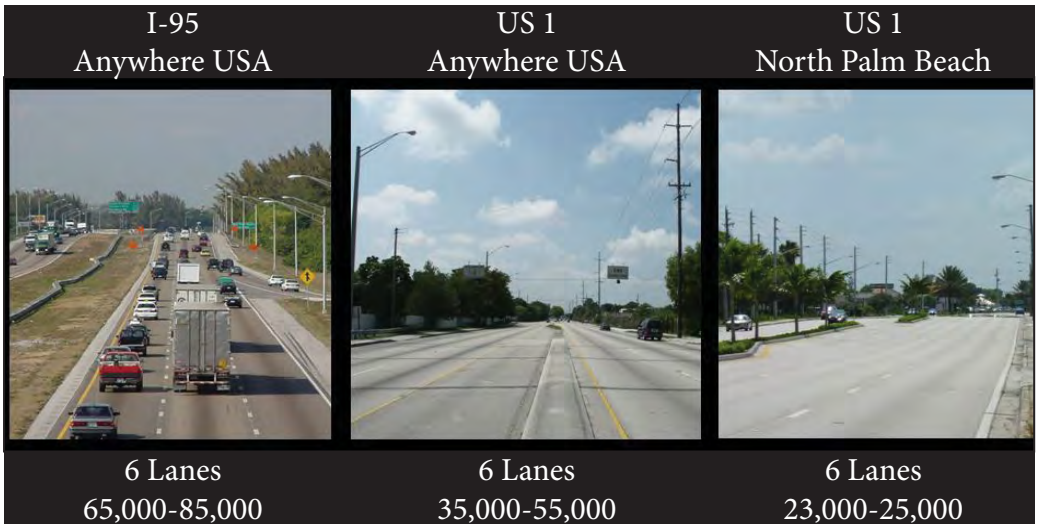
Changes to the US 1 right-of-way are also a possibility. In its current condition, US 1 widens from a 4-lane road to a 6-lane road within the heart of the Village, then transitions back to four lanes as it transitions into Lake Park. North of the Parker Bridge and south of Palmetto Drive, US-1 has four travel lanes. Based upon the current and projected demands of the roadway, the Village has the choice to redesign some of the asphalt used for vehicular travel for other uses.

US 1 Capacity (*varies with context*)
6 Lanes is 59,900 vpd
4 Lanes is 39,800 vpd

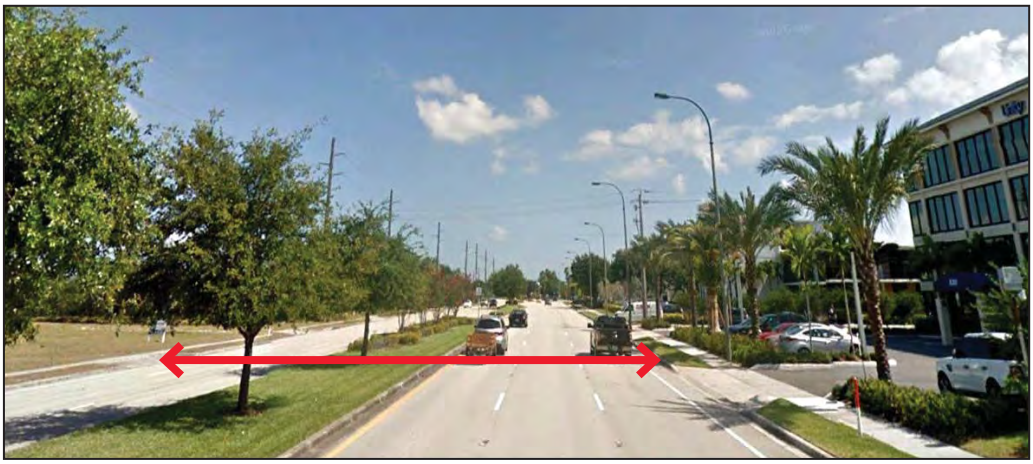
US 1 Projected Volumes
2040 = 22,000-27,000 vpd

(+/- 30,000 vpd EXTRA capacity)

Establishing a "complete street" means creating a street design that balances mobility and responds to the needs of all users (e.g., drivers, pedestrians, bicyclists). The elements that make up a "complete street" can be customized to respond to the unique character of a place or to changing conditions as a street traverses through a place.

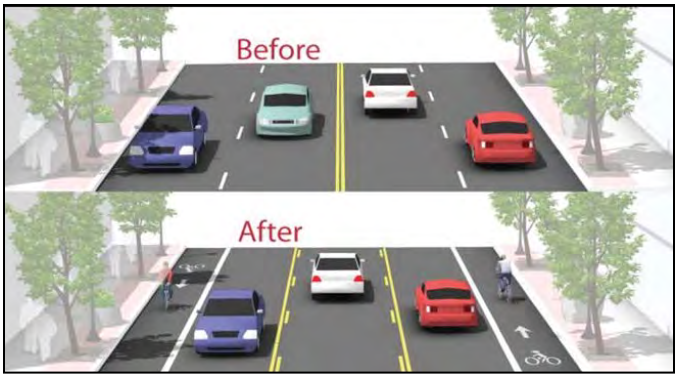


Above: A comparison of six-lane thoroughfare capacity.



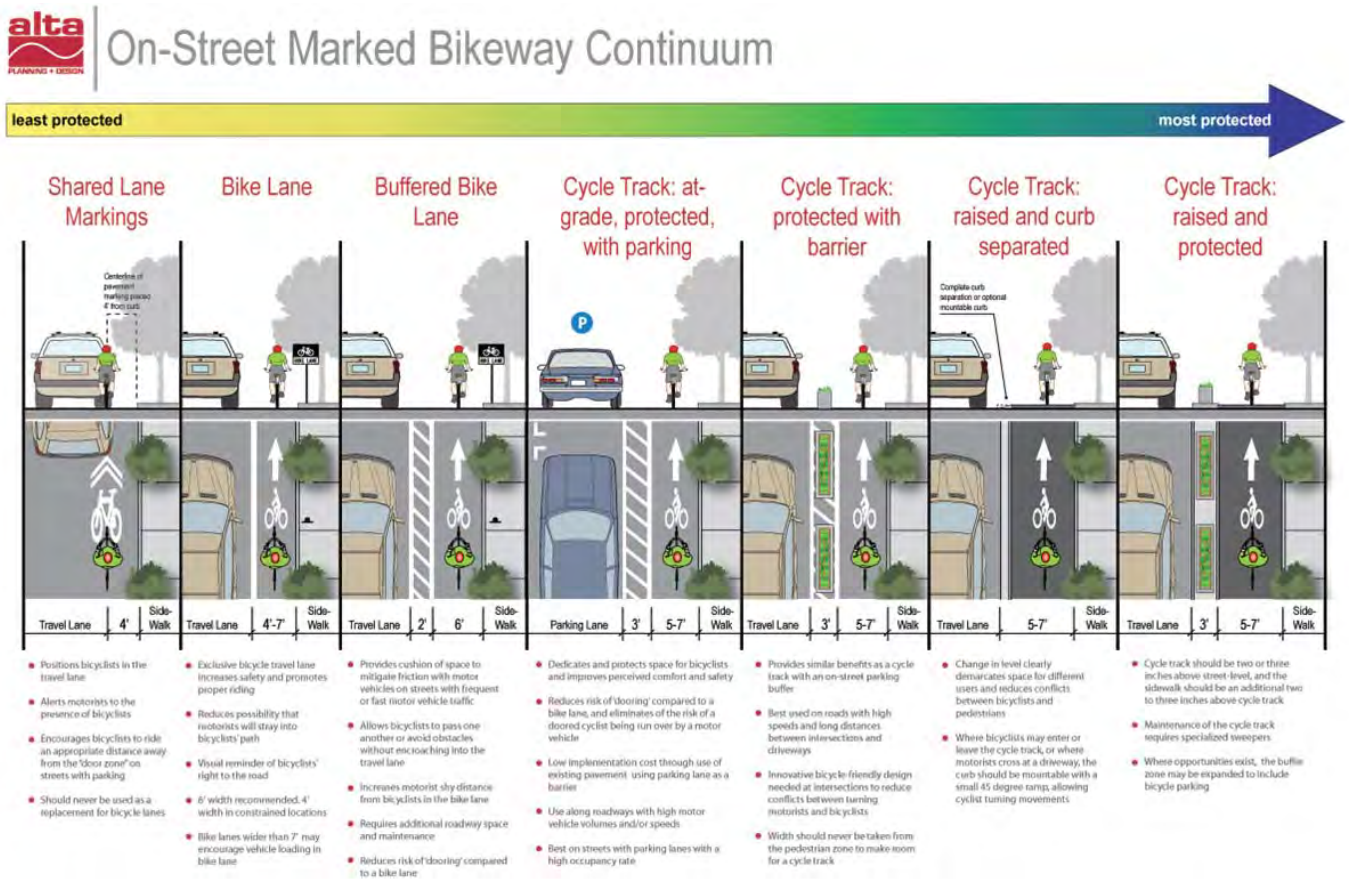
Above: The six-lane section of US 1 is approximately 98 feet from curb to curb (per the red arrow). Each side has sidewalks, which are five feet wide, and a striped shoulder that provides a substandard space for cyclists.

Top Right: Although a smaller cross-section than US 1 in the Village of North Palm Beach, the image to the right provides an excellent example of the concept of re-purposing asphalt in a right-of-way. The street design changes (within the existing right-of-way) to incorporate a center turn lane and bike lanes.



Middle: Complete streets create environments comfortable for all uses, including bicyclists and pedestrians. Shaping desirable outdoor spaces supports local businesses and healthy lifestyles.

Bottom: A wide range of detailing is possible. The image below demonstrates numerous ways bicycle paths can be incorporated onto streets. A "one size fits all" solution does not exist; designs should respond to unique conditions and the character envisioned for the place.



THIS PAGE LEFT INTENTIONALLY BLANK

APPENDIX C
Market Analysis

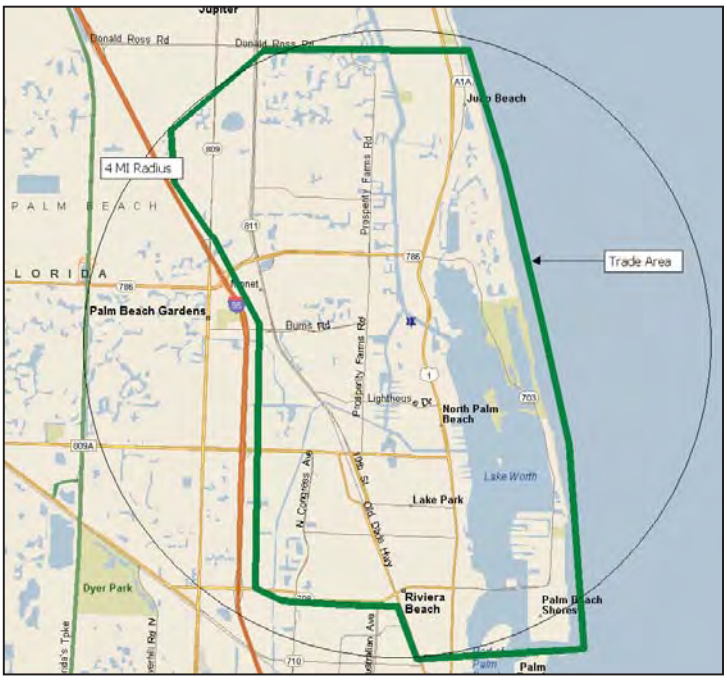
Introduction

In order to guide the recommendations and strategies of the master plan with realistic market-driven development expectations, a market analysis was performed to understand future growth potential in the Village. WTL+a focused on market/development potentials among three key uses: residential (all types), workplace (office, professional/business services), and lodging/hospitality. For the plan's retail component, Gibbs Planning Group (GPG) of Birmingham, MI, a national retail consultancy, performed a retail market analysis. This section of the master plan summarizes the findings of these studies. The full reports, The Village Master Plan Economic & Market Analysis by WTL+a and The Retail Market Analysis by Gibbs Planning Group follow this section.

The Study Area

The study area for the market analysis was focused on, but not limited to, the Village of North Palm Beach municipal boundaries. The retail market analysis estimated the Village of North Palm Beach study area has an approximately 28-square-mile primary trade area limited by:

- Donald Ross Road to the North
- Atlantic Ocean to the East
- below South Beach Shores and Peanut Island, up North Dixie Highway and across W. Blue Heron Road to the South
- Western border of I-95



Map of the Village of North Palm Beach study area's primary trade area, outlined in green.

Summary of Market/Development Potential

The market analyses forecast four sectors: market-rate housing, speculative office, lodging/hospitality, and retail demand. The findings are listed in the table below. The market potential for retail uses is further distinguished by types of goods and size of business accommodating such sales on the following page.

Summary of Market/Development Potentials

Use	Forecast Period	Market Potentials
Retail & Restaurant	5 Years	104,360 SF
Market-Rate Housing	10 years	400 to 600 Units
Speculative Office	8 years	Limited
Lodging/Hospitality	10 Years	90-120 Rooms

Retail & Restaurant Development

The Village of North Palm Beach study area can presently support an additional 104,360 SF of retail and restaurant development. This new retail demand could be absorbed by existing businesses and/or with the opening of 35 to 50 new stores and restaurants. If constructed as a new single-site center, the development would be classified as a medium neighborhood-type shopping center by industry definitions and could include 6-8 apparel stores; 4-5 limited service eating places; 4-6 general merchandise stores; 3-4 electronics and appliance stores; 3-4 office supplies and gifts stores; 3-4 drinking establishments; 2-3 full-service eating places; 2-3 book and music stores; 2-3 special food services; 1-2 grocery stores; 1-2 department store merchandise stores; and an assortment of other retail offerings.

Summary of Market for Retail Uses

16,530 SF	Grocery Stores
15,240 SF	General Merchandise Stores
13,910 SF	Apparel & Shoe Stores
9,760 SF	Limited Service Eating Places
8,250 SF	Drinking Establishments
6,780 SF	Department & Jewelry Store Merchandise
6,450 SF	Full-Service Restaurants
6,050 SF	Electronics & Appliance Stores
5,580 SF	Book & Music Stores
5,370 SF	Office Supplies and Gift Stores
5,330 SF	Special Food Services
2,730 SF	Florists
2,380 SF	Specialty Food Stores
104,360 SF	Total

Housing

The housing market in North Palm Beach is stabilized and appears to have fully recovered from the 2007-2009 recession with limited new single-family development, low vacancy rates, high rental pricing and near-term delivery of new for-sale condominium units at Water Club that have reportedly sold quickly. Over the past 15 years, the population of the Village of North Palm Beach has been generally stable with very limited growth. In fact, the Village has added only 142 new residents since 2000, for an April 2015 population of approximately 12,200 residents in 6,200 households. This reflects an average annual growth rate of only 0.1% per year over the past 15 years. The limited number of developable residential parcels in North Palm Beach is reflected in the very limited amount of new single-family residential development in the Village over the past 10 years. In fact, only 22 single-family housing starts were recorded, which translates into two units per year. By comparison, entitlements received in 2014 for the two-tower Water Club project on US 1 translated into 172 multi-family starts (with delivery expected in 2016-17), indicating a clear market demand.

To understand the potential demand for new housing, three scenarios were considered:

Scenario #1: 102 new residents and roughly 52 new housing units. Utilizing an annual (straight-line) growth rate of 0.08% per year consistent with actual Village population growth rates between 2000-2015, the pace of growth in the Village would yield only 102 new residents and roughly 52 new housing units (assuming that average household size of 1.97 remained unchanged):

Scenario #2: 1,000 new residents and more than 540 new housing units. Utilizing an annual growth rate of 0.84% per year between 2015-2020 (based on ESRI forecasts) and applying it through 2025, the growth rate in the Village would yield more than 1,000 new residents and more than 540 new housing units (assuming that average household size of 1.97 remained unchanged).

Scenario #3: 600 new housing units. Assuming an increase in average annual growth to 1.1% per year through 2025 based on a successful Village-wide economic development strategy, roughly 600 new housing units could be added in the Village over the next 10 years, even after the allocation to Water Club is considered. The strategy would result in new commerce, business recruitment and job growth, the availability of sites to accommodate residential development/redevelopment, the availability of appropriate financial and/or regulatory incentives (e.g., density, height) necessary to promote economic growth and investment returns, and a streamlined public approvals/entitlement process.

Office Market

The market analysis suggests no demand for new office space in the Village over the next eight years. Currently, the Village's share of employment in Palm Beach County is estimated at roughly 1.2%. Under this "fair share" analysis, North Palm Beach would capture approximately 1.2% of future countywide job growth, or 955 new employees, by 2022. Assuming similar proportions of office-using jobs and occupancy factors translates into gross demand for approximately 67,700 SF of office space over the next eight years. However, there is more than 113,700 SF of vacant office space available across the Village at present. In addition, the degree of functional and/or physical obsolescence in the office building inventory of the Village is not known, which may impact the extent to which future growth in office-using sectors can be accommodated in existing vacant space.

In order to strengthen the Village's office market, the following strategies are recommended:

1. Identify possible buildings/locations, such as those office properties with high vacancy rates, for conversion to alternative uses and/or demolition to accommodate new development.
2. Consider creation of a business retention and recruitment strategy designed to identify office tenants with near-term lease expirations that could be candidates for relocation to North Palm Beach.
3. Provide a package of financial (and regulatory) assistance as part of the Village's economic development strategy for office retention and recruitment.
4. Implement the placemaking strategies outlined in the Tour of the Plan section to make the environment more desirable over the long-term.

Hotel Market

Over the next 10 years, the lodging/hospitality market analysis suggests a demand for 90 to 120 rooms in the Village of North Palm Beach. To advance efforts to secure a new lodging facility, several key steps will be required to ensure the Village's competitive position for future room demand in northern Palm Beach County:

1. Identify candidate site(s). The Master Plan identifies the Camelot Motor Inn as well as the existing Super 8 Motel for redevelopment into a 3-star hotels.
2. Ensure that appropriate zoning and entitlements can be secured by prospective developers. For example, on the Camelot Motor Inn/Lodge site, building heights are limited to four floors. This may be insufficient to take advantage of views and amenity values created by the site's proximity to the North Palm Beach Marina and Intracoastal Waterway. As a rule, premium values provided by strong views of amenities such as water increase by 3% to 5% per floor.
3. Outline and secure approvals by the Village Council for appropriate incentives to secure new hotel development in the Village. These may vary and could include zoning, entitlements, and infrastructure assistance

4. Seek a well-qualified hotel developer/operator with an agreement to provide a "select-service" level hotel. Examples include Aloft (by Starwood Corporation) and Hyatt Place (Hyatt Hotels), which are not currently located in any of the four communities in northern Palm Beach County. It is worth noting that Aloft has targeted South Florida as a key market, with hotels opening in Delray Beach (2018), Fort Lauderdale (2019), Weston (2018), Coral Gables (2017) and Miami International Airport (2017). Excellent examples of "urban" Hyatt Places are located in downtown West Palm Beach and Delray Beach. This level-of-service will reinforce the branding and identity required to strengthen the Village's competitive position in the regional marketplace. Moreover, it will serve to tap multiple market segments, including both business and leisure travelers. The Village should strongly resist any proposals from developers seeking to build a "limited-service" hotel or motel, which include hotel brands such as Red Roof Inn, Super 8, Comfort Inn, Travelodge, among others.

WTL+a

Village Master Plan

DRAFT

Economic & Market Analysis

North Palm Beach, FL

Prepared for:
Treasure Coast Regional Planning Council
Stuart, FL

On behalf of:
Village of North Palm Beach
North Palm Beach, FL

April 2016

WTL +a
Real Estate & Economic Advisors
Washington, DC—Provincetown, MA
202.636.4002 301.502.4171 774.538.6070

General & Limiting Conditions

Every reasonable effort has been made to ensure that the data contained in this study reflect the most accurate and timely information possible. These data are believed to be reliable at the time the study was conducted. This study is based on estimates, assumptions, and other information developed by WTL +Associates (referred hereinafter as "WTL+a") from its independent research effort, general knowledge of the market and the industry, and consultations with the client and its representatives. No responsibility is assumed for inaccuracies in reporting by the client, its agent and/or representatives, or any other data source used in preparing or presenting this study.

No warranty or representation is made by WTL+a that any of the projected values or results contained in this study will actually be achieved. Possession of this study does not carry with it the right of publication thereof or to use the name of "WTL+a" in any manner without first obtaining the prior written consent of WTL+a. No abstracting, excerpting or summarizing of this study may be made without first obtaining the prior written consent of WTL+a. This report is not to be used in conjunction with any public or private offering of securities or other similar purpose where it may be relied upon to any degree by any person, other than the client, without first obtaining the prior written consent of WTL+a. This study may not be used for purposes other than that for which it is prepared or for which prior written consent has first been obtained from WTL+a.

This study is qualified in its entirety by, and should be considered in light of, these limitations, conditions and considerations.

Table of Contents

Tables & Figures

1 Executive Summary

Introduction

WTL+a, a national real estate and economic development consulting firm based in Washington, DC, with significant project experience throughout Florida, was retained by Treasure Coast Regional Planning Council (TCRPC), on behalf of the Village of North Palm Beach, to prepare a real estate market analysis as part of a Village Master Plan.

The Village, in collaboration with the Palm Beach Metropolitan Planning Organization (MPO), seeks to study and implement improvements to mobility, quality-of-life, and economic vitality of the Village. In its FY 2016 Council Goals and Objectives, the Village identified creation of a master plan for economic development in its business districts and community development in its neighborhoods as a key project to undertake in 2016. The Village Council identified that the plan should be completed by the end of FY 2016. Specific components of the master plan include:

- Holding a public charrette/workshop;
- Reviewing the Village Comprehensive Plan and Land Development Regulations;
- Preparing a market study and subsequent economic strategies; and
- Developing a master plan with specific recommendations and concept renderings.

TCRPC was retained to assist the Village in coordinating a meaningful public involvement process and conducting an economic development and urban design charrette to assist the

Village in accomplishing its goals. The week-long charrette, which was conducted in early February 2016, was guided by the following:

- How can we capitalize on the unique assets of North Palm Beach?
- How we can encourage growth that maintains the Village's "community character"?
- What is an appropriate type and scale of redevelopment that sustains the local economy and maintains the Village's appeal?
- How can we improve the Village's commercial corridors for all users and enhance the business climate?

For the plan's market study and economic development elements, TCRPC retained WTL+a to focus on market/development potentials among three key uses: residential (all types), workplace (office, professional/business services), and lodging/hospitality. For the plan's retail component, TCRPC retained Gibbs Planning Group (GPG) of Birmingham, MI, a national retail consultancy, to prepare the retail market analysis and strategies.

Study Area Boundaries

As illustrated in Figure 1 below, the project area for the Village Master Plan is focused on, but not limited to, the Village of North Palm Beach municipal boundaries, the US 1 and Northlake Boulevard corridors, and any areas outside of the Village where additional analysis would benefit the master planning efforts. The US 1 and Northlake Boulevard corridors comprise the Village's two primary commercial and employment corridors with a mix of workplace, commercial (retail), and residential uses.

Study Methodology

The market analysis is comprised of the following key tasks:

- **Demographic & Economic Profile**—evaluates those factors informing market demand, including: growth trends and forecasts in population and households; household consumer spending, job growth and projections in key industry sectors; and, other market indicators;
- **Real Estate Market Conditions**—examines key metrics and market performance in commercial 'workplace' (e.g., office, business and professional services) and residential uses, including: building inventory; vacant building stock; vacancy rates; annual net

Figure 1: Village of North Palm Beach

absorption (leasing activity); rental rates, housing starts, etc. over the past five to 10 years to understand the Village's competitive market position in Palm Beach County to accommodate the land uses identified above;

- **Market/Development Potentials**—considers the findings of the economic profile and market conditions findings and tests market-support for the land uses identified above. This key task serves as the basis for the Village Master Plan and direction on economic development recommendations and strategies; and
- **Economic Development Recommendations/Strategies**—outlines *preliminary* recommendations pertaining to implementation and strategies, such as improvements to the Village's business climate.

Table 1: Summary of Market/Development Potentials

Use	Forecast Period	Market Potentials
Market-rate Housing	10 Years	400 to 600 Units
Speculative Office	8 Years	Limited in Near-term
Lodging/Hospitality	10 Years	90-120 Rooms

The detailed analysis of market potentials as well as preliminary strategies/implementation considerations are contained in Section 4 of this report.

2 Demographic & Economic Profile

The following evaluates those indices that drive fundamental market demand for residential and commercial/workplace land uses that are likely to comprise future revitalization and redevelopment initiatives identified in the Village Master Plan. These indices include population and household growth, employment trends and forecasts, household consumer spending patterns, visitor behavior and spending and, other indicators based on available data that inform the depth and magnitude of potential market support for these uses.

This profile and analysis is based on data from various secondary public and private sources, including: U.S. Census Bureau; University of Florida Bureau of Business & Economic Research; State of Florida Department of Economic Opportunity (DEO); Palm Beach County; ESRI Business Analyst; Dun & Bradstreet, Inc.; Village of North Palm Beach; and other sources.

Demographic Trends & Forecasts

WTL+a evaluated historic population patterns and growth forecasts in North Palm Beach, selected nearby municipalities, and in Palm Beach County using the sources above. Key findings are summarized below, with data illustrated in Table 2 through **Error! Reference source not found.**.

Population & Households

- As illustrated in Table 2 below, over the past 15 years, the population of the Village of North Palm Beach has been generally stable with very limited growth. In fact, the Village has added only 142 new residents since 2000, for an April 2015 population of approximately **12,200 residents in 6,200 households**. This reflects an average annual growth rate of *only* 0.1% per year over the past 15 years;

Table 2: Regional Population Trends & Forecasts, 2000—2040

	2000	% of County	2010	% of County	1-Apr 2015	% of County	Change: 2000-2015 Amount	Change: 2000-2015 CAGR *(2)*	*Forecasts (3)* 2020	2030	2040	% of County	Change: 2015-2040 Amount	Change: 2015-2040 CAGR *(2)*
Population														
Palm Beach County	**1,131,184**		**1,320,134**		**1,378,417**		**247,233**	**1.3%**	**1,463,900**	**1,615,100**	**1,736,500**		**358,083**	**0.9%**
Juno Beach	3,262	0.3%	3,176	0.2%	3,240	0.2%	(22)	-0.05%	3,233	3,211	3,174	0.2%	(66)	-0.1%
Jupiter	39,328	3.5%	55,156	4.2%	59,108	4.3%	19,780	2.8%	65,701	85,481	118,448	6.8%	59,340	2.8%
Lake Park	8,721	0.8%	8,155	0.6%	8,598	0.6%	(123)	-0.1%	8,557	8,434	8,229	0.5%	(369)	-0.2%
North Palm Beach	**12,064**	**1.1%**	**12,015**	**0.91%**	**12,206**	**0.89%**	**142**	**0.1%**	**12,253**	**12,395**	**12,632**	**0.73%**	**426**	**0.14%**
Palm Beach Gardens	35,058	3.1%	48,440	3.7%	50,521	3.7%	15,463	2.5%	55,675	71,138	96,910	5.6%	46,389	2.6%
Riviera Beach	29,884	2.6%	32,488	2.5%	33,953	2.5%	4,069	0.9%	35,309	39,378	46,160	2.7%	12,207	1.2%
West Palm Beach	82,103	7.3%	100,343	7.6%	106,525	7.7%	24,422	1.8%	114,666	139,088	179,791	10.4%	73,266	2.1%
Total:	**210,420**	**18.6%**	**259,773**	**19.7%**	**274,151**	**19.9%**	**63,731**	**1.8%**	**295,395**	**359,126**	**465,344**	**26.8%**	**191,193**	**2.1%**

(1) Based on the 2015-2040 Low-Medium-High Population Forecasts prepared by BEBR. Analysis uses the Moderate Growth Scenario for Palm Beach County.

(2) CAGR=Compound Annual Growth Rate.

(3) Population projections for 2015-2040 for selected municipalities assume that each continues the same rate of growth as occurred between 2000-2015.

Source: U.S. Census Bureau; University of Florida, Bureau of Business & Economic Research; ESRI Business Analyst; WTL+a, December 2015.

- By comparison, several communities surrounding North Palm Beach grew by significantly greater amounts: Jupiter added 19,800 new residents; Palm Beach Gardens added almost 15,500 new residents; and, West Palm Beach added more than 24,400 new residents during this period;
- Notably, as a result of limited growth, **North Palm Beach's share of Palm Beach County's total population has declined over the past 15 years—from 1.1% in 2000 to a current share of 0.89%**—as a result of greater population growth elsewhere in the County;
- Palm Beach County's population also increased—from 1.13 million residents in 2000 to almost 1.38 million residents in 2015, reflecting a population increase of over 247,200 during this period, and representing *sustained* annual growth of 1.3% per year;

Since 2000, the Village's Share of the County's Population

***Declined*—from 1.1% to 0.89%**

- WTL+a notes that long-term population and household forecasts at the municipal level are *not* prepared by the University of Florida/Bureau of Economic & Business Research (BEBR). As a result, WTL+a prepared estimates of population growth under the following scenario: if North Palm Beach *maintains* its recent growth rate of 0.1% per year between 2015 and 2040 (i.e., a "straight-line" projection), future population growth would translate into more than **420 new residents**—for a 2040 population estimate of 12,630;
- By comparison, as illustrated in Table 3 below, five-year forecasts prepared by ESRI Business Analyst (a demographic forecasting service) suggest that North Palm Beach will add more than **520 new residents in 260+ new households by 2020**. However, ESRI's forecasts start from a higher base population, using an estimated year-end 2015 population of 12,305 residents. ESRI's year-end 2015 estimates (higher than the April 2015 estimate above) may, in part, reflect pre-sales of units under construction at Water Club on US 1;
- ESRI forecasts further suggest that **population growth will be greatest in three age cohorts** over the next five years, including those ages 55-64, 65-74 and 75+. WTL+a notes that this is likely to translate into opportunities for specific types of housing, such as age-

Table 3: Village of North Palm Beach Demographic Trends & Forecasts, 2000—2020

	2000	2010	2015	% Dist.	2020	% Dist.	Change: 2015-2020 No.	Change: 2015-2020 CAGR %
Demographic Profile								
Population	12,153	12,015	12,305		12,832		**527**	**0.84%**
Households	6,234	6,093	6,242		6,503		**261**	**0.82%**
Avg. HH Size	1.97	1.97	1.97		1.97			
Median Age		51.8	54.6		57.0			
Race								
White		11,215	11,345	92%	11,644	91%	299	0.5%
Black		320	391	3%	490	4%	99	4.6%
American Indian		10	12	0%	14	0%	2	3.1%
Asian, Pacific Islander		205	232	2%	282	2%	50	4.0%
Other		108	136	1%	174	1%	38	5.1%
Two or More Races		157	189	2%	228	2%	39	3.8%
Total:		**12,015**	**12,305**		**12,832**		**527**	
Hispanic *(1)*		826	1,052	9%	1,369	11%	317	5.4%
Age Distribution								
0-14		1,360	1,254	10%	1,279	10%	25	0.4%
15-24		937	994	8%	880	7%	(114)	-2.4%
25-34		1,088	1,076	9%	1,143	9%	67	1.2%
35-44		1,280	1,124	9%	1,204	9%	80	1.4%
45-54		1,974	1,795	15%	1,483	12%	(312)	-3.7%
55-64		1,856	2,156	18%	2,291	18%	135	1.2%
65-74		1,578	1,866	15%	2,298	18%	432	4.3%
75+		1,942	2,041	17%	2,254	18%	213	2.0%
Income Profile								
Households by Income								
<$15,000			9.2%		7.9%			
$15,000 - $24,999			9.2%		6.5%			
$25,000 - $34,999			8.8%		7.0%			
$35,000 - $49,999			15.4%		13.5%			
$50,000 - $74,999			18.4%		19.7%			
$75,000 - $99,999			10.1%		12.5%			
$100,000 - $149,999			12.0%		13.7%			
$150,000 - $199,999			7.2%		8.2%			
$200,000+			9.7%		10.9%			
Average HH Income			$ 92,842		$ 104,680			**2.4%**
Median HH Income			$ 57,904		$ 67,215			**3.0%**
Educational Profile								
Years of Education (2014 American Community Survey/ACS)								
Less than 9th Grade			1.6%					
9th-12th Grade, No Diploma			2.7%					
High School Graduate (Includes Equivalancy)			23.5%					
Some College, No Degree			18.4%					
Associate Degree			9.7%					
Bachelor's Degree			27.7%					
Graduate/Professional Degree			16.3%					

(1) Persons of Hispanic origin are a subset of other race categories; therefore, totals do not add.

Source: U.S. Census Bureau; American Community Survey; ESRI Business Analyst; WTL +a, December 2015.

Table 4: Palm Beach County Demographic Trends & Forecasts, 2000—2020

	2000	2010	2015	% Dist.	2020	% Dist.	Change: 2015-2020 No.	Change: 2015-2020 CAGR %
Demographic Profile								
Population	1,131,184	1,320,134	1,368,031		1,432,444		**64,413**	**0.92%**
Households	474,175	544,227	560,699		586,160		**25,461**	**0.89%**
Avg. HH Size	2.34	2.39	2.40		2.41			
Median Age		43.5	45.0		45.8			
Race								
White		970,121	976,172	71%	991,612	69%	15,440	0.3%
Black		228,690	252,513	18%	281,023	20%	28,510	2.2%
American Indian		6,043	5,933	0%	5,853	0%	(80)	-0.3%
Asian, Pacific Islander		31,870	36,577	3%	42,632	3%	6,055	3.1%
Other		53,138	61,084	4%	70,520	5%	9,436	2.9%
Two or More Races		30,272	35,752	3%	40,804	3%	5,052	2.7%
Total:		**1,320,134**	**1,368,031**		**1,432,444**		**64,413**	
Hispanic *(1)*		250,823	292,745	21%	345,292	24%	52,547	3.4%
Age Distribution								
0-14		220,616	144,614	11%	149,330	10%	4,717	0.6%
15-24		153,675	155,110	11%	148,724	10%	(6,386)	-0.8%
25-34		146,694	158,361	12%	173,935	12%	15,574	1.9%
35-44		165,576	153,897	11%	157,982	11%	4,085	0.5%
45-54		188,126	182,081	13%	168,520	12%	(13,561)	-1.5%
55-64		160,292	181,082	13%	195,116	14%	14,034	1.5%
65-74		130,427	156,814	11%	183,122	13%	26,308	3.2%
75+		154,728	163,445	12%	183,221	13%	19,776	2.3%
Income Profile								
Households by Income								
<$15,000			11.9%		10.8%			
$15,000 - $24,999			11.3%		8.3%			
$25,000 - $34,999			10.0%		8.2%			
$35,000 - $49,999			13.9%		12.9%			
$50,000 - $74,999			17.5%		19.0%			
$75,000 - $99,999			11.2%		13.0%			
$100,000 - $149,999			12.1%		13.4%			
$150,000 - $199,999			5.2%		6.6%			
$200,000+			7.0%		8.0%			
Average HH Income			$ 80,350		$ 91,264			**2.6%**
Median HH Income			$ 52,951		$ 60,599			**2.7%**
Education Profile								
Years of Education (2014 American Community Survey/ACS)								
Less than 9th Grade			5.9%					
9th-12th Grade, No Diploma			6.5%					
High School Graduate (Includes Equivalancy)			26.2%					
Some College, No Degree			20.4%					
Associate Degree			8.3%					
Bachelor's Degree			20.4%					
Graduate/Professional Degree			12.3%					

(1) Persons of Hispanic origin are a subset of other race categories; therefore, totals do not add.

Source: ESRI Business Analyst; American Community Survey; WTL +a, December 2015.

restricted and active adult. These forecasts also suggest that the median age of Village residents will increase from 54.6 years in 2015 to 57 years by 2020;

- Other demographic characteristics suggest that North Palm Beach is a generally homogeneous and affluent community, with a population that is 92% White, 3% Black, and 9% Hispanic. Average household incomes in 2015 were over $92,800 per year, and are forecast to increase by 2.4% per year, to $104,680 by 2020;

Palm Beach County demographics trends and forecasts are illustrated in Table 4 above.

Household Incomes & Retail Spending

- Village households are more affluent than their counterparts in surrounding jurisdictions as well as the County. By comparison, average household incomes range from $50,800 in Lake Park, $61,700 in West Palm Beach, $67,900 in Palm Beach Gardens, and $80,350 in Palm Beach County. This suggests greater disposable income and spending potentials among Village households. Moreover, forecast growth in incomes is expected to be above the rate of inflation, suggesting *real* growth in income over the next five years;
- Household retail spending is the primary driver of demand for retail space such as shopping centers, "Big Box" stores such as Wal-Mart or Target, food & beverage, and specialty or destination retail projects. Household retail spending patterns among households in the Village and surrounding jurisdictions are illustrated in Table 5;
- **The Village's 6,800+ households spend an average of $24,300 per year on consumer retail goods**, including clothing, entertainment/recreation, electronics, groceries, food & beverage, household furnishings and health care. While this is below that spent by household in Palm Beach Gardens ($27,100 per year), it is above other nearby jurisdictions as well as Palm Beach County as a whole, and is illustrative of higher household incomes and greater discretionary spending power in North Palm Beach;
- Retail spending generally comprises 26% to 27% of average household incomes among Village households; this proportion is also generally comparable in surrounding jurisdictions as well as Palm Beach County; and
- Gross retail spending among Village households totals $151.6 million per year.

Table 5: Annual Household Consumer Spending, 2015

	Palm Beach County	North Palm Beach	Palm Beach Gardens	Lake Park	West Palm Beach
Total Households (2015)	**560,699**	**6,242**	**24,224**	**3,383**	**43,790**
Apparel & Accessories					
Men's Wear	$ 464	$ 523	$ 595	$ 300	$ 366
Women's Wear	883	1,013	1,128	566	693
Children's Wear	381	400	476	271	317
Footwear	485	534	607	335	391
Watches & Jewelry	161	186	212	94	122
Apparel Products & Services	109	127	141	68	81
Subtotal:	**$ 2,482**	**$ 2,783**	**$ 3,160**	**$ 1,634**	**$ 1,970**
Computers					
Computers & Hardware	$ 233	$ 263	$ 301	$ 147	$ 184
Software & Accessories	49	56	63	31	38
Subtotal:	**$ 282**	**$ 320**	**$ 364**	**$ 178**	**$ 222**
Entertainment & Recreation					
Membership Fees for Clubs	$ 192	$ 230	$ 259	$ 110	$ 140
Fees for Participant Sports	139	165	180	80	99
Admission to Movie/Theatre/Opera/Ballet	182	209	237	115	140
Admission to Sporting Events	70	83	95	43	52
Fees for Recreational Lessons	126	147	173	82	92
Dating Services	0.65	0.68	0.76	0.53	0.65
Subtotal:	**$ 709**	**$ 834**	**$ 946**	**$ 431**	**$ 523**
TV/Video/Audio					
Cable & Satellite TV Services	$ 960	$ 1,116	$ 1,213	$ 633	$ 757
Televisions	160	182	203	105	127
Satellite Dishes	2	2	2	1	1
VCRs, Video Cameras & DVD Players	11	13	15	8	10
Miscellaneous Video Equipment	13	14	16	7	9
Video Cassettes & DVDs	34	38	43	22	28
Video Game Hardware/Accessories	24	25	29	17	21
Video Game Software	28	31	36	20	24
Streaming/Downloaded Video	6	7	8	4	5
Rental of Video Cassettes & DVDs	25	27	31	16	20
Installation of Televisions	1	1	2	1	1
Audio	132	152	175	87	102
Rental & Repair of TV/Radio/Audio	6	7	7	4	4
Subtotal:	**$ 1,403**	**$ 1,615**	**$ 1,780**	**$ 924**	**$ 1,110**

(1) Consumer spending data are derived from the 2011 and 2012 Consumer Expenditure Surveys conducted by the Bureau of Labor Statistics.

Table 5 (Continued): Annual Household Consumer Spending, 2015

	Palm Beach County	North Palm Beach	Palm Beach Gardens	Lake Park	West Palm Beach
Other Entertainment					
Pets	$ 596	$ 696	$ 777	$ 351	$ 439
Toys & Games	125	141	161	88	101
Recreational Vehicles & Fees	223	270	306	119	142
Sports/Recreation/Exercise Equipment	196	219	256	113	145
Photo Equipment & Supplies	88	100	115	53	68
Reading	167	204	220	102	122
Catered Affairs	26	30	34	17	19
Subtotal:	**$ 1,420**	**$ 1,659**	**$ 1,869**	**$ 843**	**$ 1,036**
Food & Alcohol					
Food at Home	$ 5,549	$ 6,329	$ 7,020	$ 3,687	$ 4,379
Food Away from Home	3,537	4,010	4,516	2,266	2,771
Alcoholic & Non-alcoholic Beverages	1,144	1,312	1,460	740	908
Subtotal:	**$ 10,229**	**$ 11,651**	**$ 12,995**	**$ 6,693**	**$ 8,057**
Household Furnishings & Equipment					
Household Textiles	$ 106	$ 123	$ 137	$ 70	$ 83
Furniture	556	628	715	353	436
Floor Coverings	25	31	35	16	18
Major Appliances	288	336	374	168	210
Housewares	79	92	102	49	60
Small Appliances	49	57	63	31	38
Luggage	10	12	14	6	8
Telephones & Accessories	54	61	67	33	42
Lawn & Garden	475	589	635	255	320
Housekeeping Supplies	777	898	988	485	592
Maintenance & Remodeling Materials	292	351	394	171	199
Subtotal:	**$ 2,711**	**$ 3,179**	**$ 3,524**	**$ 1,636**	**$ 2,004**
Health & Personal Care					
Non- & Prescription Drugs	$ 682	$ 826	$ 875	$ 404	$ 494
Optical	94	112	124	59	70
Personal Care Products	512	576	645	319	397
School Supplies	189	209	240	128	156
Smoking Products	467	523	576	341	406
Subtotal:	**$ 1,945**	**$ 2,245**	**$ 2,460**	**$ 1,251**	**$ 1,524**
TOTAL:					
Total Annual Spending	**$ 11,876,810,323**	**$ 151,592,088**	**$ 656,416,623**	**$ 45,976,222**	**$ 720,204,058**
Per Household	**$ 21,182**	**$ 24,286**	**$ 27,098**	**$ 13,590**	**$ 16,447**
As % of Average HH Income	26.4%	26.2%	26.1%	26.8%	26.7%

(1) Consumer spending data are derived from the 2011 and 2012 Consumer Expenditure Surveys conducted by the Bureau of Labor Statistics.

Source: ESRI Business Analyst; Bureau of Labor Statistics; WTL +a, December 2015.

WTL+a notes that a market analysis of retail potentials in North Palm Beach was conducted by Gibbs Planning Group as a separate component of the Village Master Plan. We are including relevant, comparable data as part of this demographic and economic profile.

Economic Characteristics

Employment Trends—Palm Beach County

Job growth is a key barometer of demand for "workplace" uses such as multi-tenant office space, industrial parks, retail centers and the like. WTL+a examined trends and forecasts in employment growth, utilizing data for Palm Beach County as prepared by the state's labor agency, the Department of Economic Opportunity (formerly known as the Agency for Workforce Innovation/AWI), for the period between 1995 and 2014. The agency defines Palm Beach County as the "West Palm Beach/Boca Raton/Boynton Beach Metro Division" for statistical purposes. This data is critical to understanding market potentials for workplace real estate, such as office buildings, in North Palm Beach.

Key findings are summarized below and illustrated in Table 6:

- **Palm Beach County added 166,600 new jobs in the 10-year period between 1995 and 2005**. This growth, which translates into more than 16,000 new jobs annually, was focused largely in specific sectors, including: Professional/Business Services (55,800), Construction (19,800) and Leisure & Hospitality (19,000). In particular, growth in Professional/Business Services fueled demand for office space in key locations across Palm Beach County during this period. Other sectors with solid job growth during this period also included: Education (18,900); Retail Trade (15,300); and Government (15,600);

Palm Beach County Gained 166,600 Jobs (1995—2005) &

Lost 57,100 Jobs in the 2007—2009 Recession

- By contrast, the economic downturn of 2007—2009 resulted in the loss of 57,100 jobs in Palm Beach County; since 2011, however, the County's economy has significantly recovered, with the creation of 63,400 new jobs, thereby offsetting the job losses caused by the recession. During the recession, job losses were greatest in specific sectors, including: Construction (-12,800), Manufacturing (-2,300) and Government (-6,400);

Table 6: Palm Beach County Employment Trends, 1995—2014

Industry Sector	1995	2000	2005	Change: 1995-2005 Amount	Change: 1995-2005 CAGR %	2007	2009	2011	2013	2014	Change: 2007-2014 Amount	Change: 2007-2014 CAGR %
In 000s												
Construction	27.7	36.4	47.5	19.8	5.5%	42.0	25.8	24.1	27.4	29.2	(12.8)	-5.1%
Manufacturing	28.0	28.5	20.9	(7.1)	-2.9%	19.2	16.0	15.4	15.8	16.9	(2.3)	-1.8%
Transp/Warehousing/Utilities	7.6	8.2	9.8	2.2	2.6%	10.3	9.3	9.3	9.9	10.8	0.5	0.7%
Trade												
Wholesale	14.8	18.1	22.5	7.7	4.3%	23.8	21.7	21.6	22.3	23.3	(0.5)	-0.3%
Retail	61.3	74.1	76.6	15.3	2.3%	76.7	69.4	71.9	75.4	77.3	0.6	0.1%
Information	9.5	13.3	11.2	1.7	1.7%	11.0	9.0	9.1	9.6	10.2	(0.8)	-1.1%
Financial Activities	29.1	37.8	41.3	12.2	3.6%	40.2	35.1	36.5	37.9	39.7	(0.5)	-0.2%
Services												
Prof'l/Business Services	41.7	82.1	97.5	55.8	8.9%	96.0	84.2	90.5	99.5	104.7	8.7	1.2%
Education/Health Services	58.1	65.3	77.0	18.9	2.9%	80.3	81.9	83.7	87.0	91.3	11.0	1.9%
Leisure & Hospitality	53.5	62.5	72.5	19.0	3.1%	74.9	68.9	73.8	77.7	81.2	6.3	1.2%
Other Services	23.1	25.6	28.6	5.5	2.2%	29.1	27.4	28.2	29.5	31.7	2.6	1.2%
Government	51.1	57.8	66.7	15.6	2.7%	68.5	66.4	63.8	63.6	62.1	(6.4)	-1.4%
Total (In 000s):	**405.5**	**509.7**	**572.1**	**166.6**	**3.5%**	**572.0**	**515.1**	**528.0**	**555.7**	**578.4**	**6.4**	**0.2%**
Change During Period:		*104.2*	*62.4*			*(0.1)*	*(57.0)*	*12.9*	*27.7*	*22.7*		

(1) As of year-end for each reported year.

http://floridajobs.org/labor-market-information/data-center/statistical-programs/current-employment-statistics

Source: Florida Department of Economic Opportunity; WTL +a, December 2015.

- Notably, the Services sector—which comprises multiple categories such as Business and Professional Services, Health, Education and Leisure/Hospitality, has recovered more quickly than others, gaining 28,600 new jobs over the past seven years; and
- In 2014, Palm Beach County contained 578,400 jobs, reflecting a jobs-to-population ratio of approximately 0.42. That is, there are 0.42 jobs per resident for the 1,368,031 residents in the county. By comparison, Florida's state jobs-to-population ratio in 2014 was 0.39, which reflects the large number of retirees in the state, while the jobs-to-population ratio for the United States in 2014 was 0.6. The ratio reflects the concentration of larger employment centers in eastern parts of Palm Beach County, such as downtown West Palm, Boca Raton, Riviera Beach, and others.

Employment Forecasts—Palm Beach County

Employment forecasts for specific jurisdictions in Florida are also prepared by the Department of Economic Opportunity. As illustrated in Table 7, these forecasts suggest that:

- **Palm Beach County (DEO Workforce Region 21) is expected to add 81,300 new jobs between 2014 and 2022**, reflecting a *sustained* annual pace of 10,200 new jobs expected annually over this eight-year period.
- The Services sector is expected to comprise fully 49% of all new jobs in the county—adding almost 46,700 new jobs—with the largest gains expected in Health Care, Professional/Business Services and Administrative sectors.

Employment in North Palm Beach

According to Dun & Bradstreet, Inc. and ESRI Business Analyst, there are a reported **1,042 businesses in the Village of North Palm Beach, providing almost 6,800 jobs**. Similar to the county as a whole, the Village's largest sector is Services, which accounts for 39% of all jobs, encompassing employment in Leisure/Hospitality, Health Care, Legal/Professional Services, and Education. Notably, another dominant sector includes Finance/Insurance/Real Estate, which provides more than 1,300 jobs in almost 200 businesses, accounting for approximately 20% of the Village's employment base. Key data are highlighted in Table 8;

6,800 Jobs in North Palm Beach

Across 1,042 Businesses

Table 7: State Employment Forecasts for Palm Beach County, 2014—2022

Employment Category	2014	% Dist.	2022	% Dist.	Change: 2014-2022 Total	CAGR
Agriculture/Mining/Construction						
Agriculture	6,171		5,486		(685)	-1.5%
Mining	78		93		15	0.0%
Construction	27,599		37,327		9,728	3.8%
Subtotal:	**33,848**	**5.6%**	**42,906**	**6.2%**	**9,743**	**3.0%**
Manufacturing						
Durable Goods Manufacturing	11,121		12,364		1,243	1.3%
Non-Durable Goods Manufacturing	4,458		4,434		(24)	-0.1%
Subtotal:	**15,579**	**2.6%**	**16,798**	**2.4%**	**1,219**	**0.9%**
Transportation/Communications/Public Utilities						
Public Utilities	1,522		1,580		58	0.5%
Transportation & Warehousing	8,109		8,552		443	0.7%
Subtotal:	**9,631**	**1.6%**	**10,132**	**1.5%**	**501**	**0.6%**
Wholesale & Retail Trade						
Wholesale Trade	21,966		23,952		1,986	1.1%
Retail Trade	71,805		79,310		7,505	1.3%
Subtotal:	**93,771**	**15.5%**	**103,262**	**15.0%**	**9,491**	**1.2%**
Finance/Insurance/Real Estate						
Information	9,631		9,780		149	0.2%
Finance & Insurance	23,480		24,612		1,132	0.6%
Real Estate, Rental & Leasing	14,828		17,336		2,508	2.0%
Subtotal:	**47,939**	**7.9%**	**51,728**	**7.5%**	**3,789**	**1.0%**
Services						
Professional, Scientific & Technical Services	43,547		50,817		7,270	1.9%
Management of Companies & Enterprises	9,516		10,079		563	0.7%
Administrative & Waste Management	47,414		55,988		8,574	2.1%
Educational Services	11,150		13,575		2,425	2.5%
Health Care & Social Assistance	77,122		93,566		16,444	2.4%
Arts, Entertainment & Recreation	16,799		19,123		2,324	1.6%
Accommodation & Food Services	60,511		67,832		7,321	1.4%
Other Services (Except Government)	24,576		26,348		1,772	0.9%
Subtotal:	**290,635**	**47.9%**	**337,328**	**49.0%**	**46,693**	**1.9%**
Government	**61,061**	**10.1%**	**67,816**	**9.9%**	**6,755**	**1.3%**
Self-Employed & Unpaid Family Workers	**54,015**	**8.9%**	**57,814**	**8.4%**	**3,799**	**0.9%**
TOTAL:	**606,479**		**687,784**		**81,305**	**1.6%**
Annual Increase (Rounded):					**10,200**	

http://www.floridajobs.org/labor-market-information/data-center/statistical-programs/employment-projections

Source: Florida Department of Economic Opportunity; WTL +a, December 2015.

Table 8: Business Mix—Village of North Palm Beach, 2015

NAICS Category	Businesses No.	Businesses % of Total	Employees No.	Employees % of Total
Mining & Natural Resources	**19**	1.8%	**62**	0.9%
Construction	**84**	8.1%	**314**	4.6%
Manufacturing	**26**	2.5%	**790**	11.6%
Transportation & Warehousing	**23**	2.2%	**139**	2.0%
Communications	**5**	0.5%	**23**	0.3%
Utilities	**2**	0.2%	**8**	0.1%
Wholesale & Retail Trade				
Wholesale	19		68	
Retail	175		1,221	
- Home Improvement	7		48	
- General Merchandise	3		6	
- Food Stores	10		71	
- Auto Dealers/Gas Stations	28		247	
- Apparel & Accessory Stores	14		30	
- Furniture/Home Furnishings	25		100	
- Eating & Drinking Places	40		509	
- Miscellaneous & Non-store Retail	48		210	
Subtotal - All Retail:	**194**	18.6%	**1,289**	19.0%
Finance/Insurance/Real Estate	**194**	18.6%	**1,338**	19.7%
Services				
- Hotel/Lodging	3		13	
- Automotive Services	12		86	
- Motion Pictures & Amusements	24		131	
- Health Services	59		368	
- Legal Services	40		390	
- Educational Institutions	14		508	
- Other Services	265		1,164	
Subtotal - Services:	**417**	40.0%	**2,660**	39.2%
Government	**10**	1.0%	**113**	1.7%
Unclassified Establishments	**68**	6.5%	**57**	0.8%
TOTAL:	**1,042**	**100.0%**	**6,793**	**100.0%**

ANALYSIS:	
2015 Employment	6,793
As Share of Palm Beach County	**1.17%**
2015 Population	12,305
Jobs/Population Ratio	**0.55**

Source: ESRI Business Analyst; InfoGroup, Inc.; Dun & Bradstreet, Inc.; WTL +a, December 2015.

- FIRE is a key sector comprised primarily of office-using employees, and job growth in this sector will fuel demand for office buildings;
- Based on current employment levels, **North Palm Beach contains approximately 1.17% of the total (i.e., at-place) jobs in Palm Beach County.** This is known as *fair share*, and has been considered in our analysis of workplace (office) market potentials in Section 4 of this report. In addition, the data suggest that the Village's current jobs-to-population ratio is 0.55, which is on par with similarly sized suburban communities; and

***Fair Share*: North Palm Beach Accounts for less than 1.2% of the County's Total Employment**

- The business mix in North Palm Beach is fairly well distributed across these industry sectors. As noted above, the largest sector is Services, which encompasses a broad range of employment—from hotel chamber maids to attorneys to healthcare—with 40% of businesses and 39% of employment. The next largest sectors include Retail Trade and Finance/Insurance/Real Estate (FIRE); these sectors fuel demand for retail centers and office buildings, respectively. As illustrated in Sections 3 and 4 of this report, the Village's weakened office market performance suggests a key economic development strategy should focus on business retention and recruitment oriented to professional services. This will serve to increase demand for office space, thereby reducing the current high vacancy rates of the Village's office inventory.

3 Real Estate Market Conditions

WTL +a evaluated real estate market conditions in North Palm Beach and other selected, competitive locations in Palm Beach County to understand how recent market trends, current economic conditions, and future growth affect opportunities for economic development and revitalization of the US 1 and Northlake Boulevard corridors. This analysis is considered a critical component when testing overall revitalization potentials.

This section of the report analyzes historic and current building inventory, occupancy and vacancy levels, annual absorption (leasing) activity, historic development trends, and other appropriate market indices for residential, lodging and workplace/office commercial uses based on available data. (Gibbs Planning Group of Birmingham, MI conducted the retail market analysis). Key findings are summarized below and illustrated in Table 9 through Table 16.

Housing

- As illustrated in Table 9, based on data from ESRI Business Analyst and the American Community Survey (ACS), North Palm Beach contains more than 7,900 housing units;
- Approximately 54.5% of the Village's housing stock is owner-occupied; another 24.5% of the Village's housing inventory is rental; and, a significant 21% is vacant (latest data available as of the 2010 Census), with more than 1,660 units that are "unoccupied". In 2015, the *median* unit value of all housing units in North Palm Beach was more than $250,500. Over the next five years, median housing values are expected to increase at a compound annual rate of 3.4% per year—to $296,800.
- More specific analysis of the Village's vacant housing stock indicates that the 1,660 vacant units are unoccupied for various reasons; notably, this does not accurately reflect actual *vacant* units. In fact, over 1,000 units are seasonally-owned (i.e., occupied for only a portion of the year, such as by snowbirds who vacation in Florida). Combined with other units that are sold but not yet occupied**, the Village's *true vacancy* is significantly lower—4.7%, or roughly 366 units.**

Table 9: Housing Profile—Village of North Palm Beach, 2010—2020

	2010	2015	% Dist.	2020	% Dist.	Change: 2015-2020 No.	Change: 2015-2020 CAGR %
Housing Tenure							
Owner-occupied	4,497	4,307		4,461		154	0.7%
% of Total	58.3%	54.5%		54.2%			
Renter-occupied	1,596	1,934		2,042		108	1.1%
% of Total	20.7%	24.5%		24.8%			
Vacant	1,617	1,666		1,732		66	0.8%
% of Total	21.0%	21.1%		21.0%			
Total Units:	**7,710**	**7,907**		**8,235**		**525**	**0.8%**
Owner-Occupied Value							
$0 - $99,999		411	10%	216	5%	(195)	-12.1%
$100,000 - $199,999		1,243	29%	915	21%	(328)	-5.9%
$200,000 - $299,999		992	23%	1,136	25%	144	2.7%
$300,000 - $399,999		600	14%	659	15%	59	1.9%
$400,000 - $499,999		326	8%	410	9%	84	4.7%
$500,000 - $749,999		337	8%	448	10%	111	5.9%
$750,000+		398	9%	677	15%	279	11.2%
Median Value		**$ 250,552**		**$ 296,776**			**3.4%**
Average Value		**$ 343,186**		**$ 422,338**			**4.2%**

Unoccupied Housing Units By Status (2010 Census)		
Unoccupied for Other Reasons		
Rented (Not Occupied)	16	1%
For Sale Only	193	15%
Sold (Not Occupied)	28	2%
Seasonal Use	1,014	81%
For Migrant Workers	-	0%
Subtotal:	**1,251**	**77%**
True Vacancies		
Other Vacant	152	42%
Vacant, For Rent	214	58%
Subtotal:	**366**	**23%**
Total Unoccupied Units:	**1,617**	**21.0%**

TRUE VACANCY:	
Vacant Units	**366**
True Vacancy Rate	**4.7%**

All Housing Units By Structure (2013 American Community Survey)		
1 Unit, Detached	2,625	33%
1 Unit, Attached	340	4%
2 Units	63	1%
3 or 4 Units	269	3%
5 to 9 Units	530	7%
10 to 19 Units	743	9%
20 to 49 Units	1,700	22%
50 or more Units	1,629	21%
Mobile Home	-	0%
Unaccounted Units	8	0%
Total:	**7,907**	**100%**

Source: ESRI Business Analyst; American Community Survey; WTL +a, December 2015.

In order to document how population and household growth affects revitalization and redevelopment potentials in North Palm Beach, WTL+a reviewed information on annual housing starts/residential building permits. This is particularly critical because, as noted, a portion of the housing stock in the Village is occupied with part-time or seasonal residents, such as second homeowners, who visit the area during tourist season. It is therefore important to distinguish between housing occupied by year-round residents and housing occupied by seasonal residents (which typically reduces market potentials for such uses as retail). Key findings indicate that:

- Since 2006 (which includes the last of the 2004-2006 boom years, the 2007-2009 recession, and subsequent recovery and economic momentum through 2015), housing starts across Palm Beach County resulted in delivery of 38,530 new housing units, producing a *sustained* annual pace of **3,850 units per year**. In terms of unit distribution, this includes 22,300 single-family units (58% of the total) and over 16,200 multi-family units (42%);
- Of the municipalities profiled in this analysis, Jupiter captured the lion's share of new residential development (almost 10% of the area's total)—with almost 3,750 unit starts. This reflects a sustained annual pace of 375 units per year;
- Palm Beach Gardens also experienced significant new residential development during this period. In fact, **Palm Beach Gardens added over 2,400 new housing units between 2006 and 2015**. This was comprised of over 1,500 single-family units and almost 900 multi-family units, thus translating into a sustained annual average of 240 new housing starts per year, or approximately 6% of Palm Beach County's total housing starts;

- The limited amount of developable residential parcels in North Palm Beach is reflected in the very limited amount of new single-family residential development in the Village over the past 10 years. In fact, only 22 single-family housing starts were recorded—which translates into two units per year; and
- By comparison, entitlements received in 2014 for the two-tower Water Club project on US 1 translated into 172 multi-family starts (with delivery expected in 2016—17). In total, **the 194 housing starts in the Village since 2006 accounts for only 0.5% of Palm Beach County's total housing starts.**

Table 10: Housing Starts—Selected Municipalities, 2006—2015

Municipality	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	Change: 2006-2015 Total Starts	Annual Average	% of County
Single-family Detached													
Juno Beach	-	-	-	7	-	2	2	6	18	16	51	5	0.2%
Jupiter	313	162	245	134	176	196	262	378	364	212	2,442	244	11.0%
Lake Park	-	-	-	1	-	-	1	-	-	-	2	0	0.0%
North Palm Beach	**1**	**1**	**-**	**-**	**5**	**3**	**6**	**-**	**-**	**6**	**22**	**2**	**0.1%**
Palm Beach Gardens	224	206	111	76	98	111	194	196	188	154	1,558	156	7.0%
Riviera Beach	275	48	45	4	1	-	2	5	3	8	391	39	1.8%
SFD-Palm Beach County:	**4,652**	**2,101**	**1,277**	**1,102**	**1,256**	**1,885**	**2,172**	**2,678**	**2,552**	**2,625**	**22,300**	**2,230**	**58%**
Multi-family													
Juno Beach	-	-	-	-	-	-	-	37	50	48	135	14	0.8%
Jupiter	159	45	5	6	2	2	148	541	342	57	1,307	131	8.1%
Lake Park	-	-	-	-	-	-	-	-	-	-	-	-	0.0%
North Palm Beach	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**-**	**146**	**26**	**172**	**17**	**1.1%**
Palm Beach Gardens	274	128	121	-	-	-	42	180	49	87	881	88	5.4%
Riviera Beach	432	4	77	-	-	-	-	-	-	-	513	51	3.2%
MF-Palm Beach County:	**3,740**	**1,029**	**905**	**329**	**255**	**614**	**2,297**	**2,336**	**2,519**	**2,206**	**16,230**	**1,623**	**42%**

http://socds.huduser.org/permits/

Source: U.S. Census Bureau; U.S. Dept. of Housing & Urban Development; WTL+a, December 2015.

Table 10 (Continued): Housing Starts–Selected Municipalities, 2006—2015

Municipality	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	Change: 2006-2015 Total Starts	Change: 2006-2015 Annual Average	Change: 2006-2015 % of Total
Total Starts													
Juno Beach	-	-	-	7	-	2	2	43	68	64	186	19	0.5%
Jupiter	472	207	250	140	178	198	410	919	706	269	3,749	375	9.7%
Lake Park	-	-	-	1	-	-	1	-	-	-	2	0	0.01%
North Palm Beach	**1**	**1**	**-**	**-**	**5**	**3**	**6**	**-**	**146**	**32**	**194**	**19**	**0.5%**
Palm Beach Gardens	498	334	232	76	98	111	236	376	237	241	2,439	244	6.3%
Riviera Beach	707	52	122	4	1	-	2	5	3	8	904	90	2.3%
TOTAL-Palm Beach County:	**8,392**	**3,130**	**2,182**	**1,431**	**1,511**	**2,499**	**4,469**	**5,014**	**5,071**	**4,831**	**38,530**	**3,853**	**100%**

http://socds.huduser.org/permits/

Source: U.S. Census Bureau; U.S. Dept. of Housing & Urban Development; WTL+a, December 2015.

Figure 2: North Palm Beach Area Apartment Submarket

As illustrated in Figure 2, North Palm Beach is located in a larger geographic submarket that includes Riviera Beach, Lake Park, Palm Beach Gardens, Juno Beach and Jupiter. Based on data from REIS, Inc. (a national real estate database) Table 11 summarizes key metrics in the area's multi-family apartment inventory, as its overall health is indicative is key to understanding market potentials for new rental housing:

- There are approximately 7,900 rental units in this submarket, accounting for almost 14% of Palm Beach County's apartment market. Notably, since 2010 the vacancy rate has declined—from 9% in 2010 to 5.9% at the end of the third quarter of 2015. The apartment industry considers "stabilization" (i.e., full market strength) to be 5%, which suggests that **the area's multi-family rental market is almost stabilized**;

Table 11: Multi-family Apartment Metrics, 2015

	Submarket	Comps
Total Inventory (Units)	7,904	2,146
As % of Palm Beach County	13.6%	3.7%
Unit Distribution by Year Built		
Before 1970	2.0%	2.6%
1970-1979	9.0%	25.3%
1980-1989	12.0%	0.0%
1990-1999	24.0%	56.8%
2000-2009	45.0%	15.3%
After 2009	7.0%	0.0%
Vacancy Rate		
Before 1970	3.9%	8.9%
1970-1979	9.2%	9.2%
1980-1989	5.0%	N/A
1990-1999	3.0%	3.6%
2000-2009	3.2%	8.7%
After 2009	3.6%	N/A
Historic Vacancy Rates		
2010	9.0%	7.7%
2011	8.8%	6.3%
2012	5.7%	5.0%
2013	5.6%	2.9%
2014	4.6%	5.2%
2015	5.9%	5.7%
Annual Average (2010-3Q/2015):	**6.6%**	**5.5%**
Average Annual Absorption		
2010	112	
2011	15	
2012	232	
2013	353	
2014	129	
2015	228	
Annual Average (2010-3Q/2015):	**178**	
Asking Monthly Rent		
One Bedroom	$ 1,069	$ 1,301
Two Bedroom	1,270	1,447
Three Bedroom	1,447	1,684
Average Effective Rent:	**$ 1,262**	**$ 1,446**
Average Unit Size (SF)		
One Bedroom	766	790
Two Bedroom	1,113	1,091
Three Bedroom	1,337	1,424
Rent Per SF		
One Bedroom	$ 1.39	$ 1.66
Two Bedroom	$ 1.14	$ 1.33
Three Bedroom	$ 1.08	$ 1.21

Source: REIS Reports; WTL+a, January 2016.

- Rental rates range from $1.39 per sq. ft. per month for one-bedrooms to $1.08 per sq. ft. for three-bedroom units; and
- Annual absorption (i.e., leasing) has averaged **178 units per year**. Since the area's apartment market is effectively stabilized, the pace of annual absorption is indicative of demand for *net new* apartment construction.

WTL+a also profiled nine rental properties in/around North Palm Beach. This profile is illustrated in Table 12 and summarized below:

- There are 2,146 units among these nine properties, which accounts for only 3.7% of the County's rental inventory. Vacancy rates have declined since 2010, albeit at a slower pace than the larger submarket. In fact, vacancies decreased from 7.5% in 2010 to 5.7% in 2015;
- No data are available on average annual absorption/leasing activity;
- Rental rates are higher than the larger submarket—ranging from $1.66 per sq. ft. per month for one-bedrooms to $1.21 per sq. ft. per month for three-bedroom units; and
- Sanctuary Cove is the only rental complex in this profile in North Palm Beach. It was built in two phases (184 units in 1996 and 236 units in 1999), and is considered by the industry as a "Class A" quality complex. Phase 1 has a current vacancy rate of 6% and Phase 2 has a current vacancy rate of only 3%; and
- Rental rates range from $1.52 per sq. ft. per month for one-bedrooms, $1.18 per sq. ft. for two-bedrooms and $1.19 per sq. ft. per month for three-bedroom units.

In summary, the housing market in North Palm Beach is stabilized, and appears to have fully recovered from the 2007—2009 recession, with limited new single-family development, low vacancy rates, high rental pricing and, near-term delivery of new for-sale condominium units at Water Club that have reportedly sold quickly.

Table 12: Profile of Selected Apartment Complexes, 2015

Project/Location	Year Built Class & Height	Current Vacancy	Unit Type	No. of Units	Size (In SF)	Monthly Rent	Rent Per SF	Project Information
1. Sanctuary Cove Ph I	1996	6.0%	1 BR	46	927	$ 1,412	$ 1.52	
700 Sanctuary Cove Drive	A		2 BR	101	1,179	1,387	1.18	
North Palm Beach	3 floors		3 BR	37	1,305	1,557	1.19	
				184	**1,141**	**$ 1,427**	**$ 1.25**	Unit Amenities: Dishwasher, Washer/Dryer Hookup Community Amenities: Health Club, Tennis, Pool/Clubhouse Pet Friendly, Surface Parking, Security Patrol
2. Sanctuary Cove Ph II	1999	3.0%	1 BR	62	927	$ 1,412	$ 1.52	
700 Sanctuary Cove Drive	A		2 BR	127	1,179	$ 1,387	1.18	
North Palm Beach	3 floors		3 BR	47	1,305	1,557	1.19	
				236	**1,138**	**$ 1,427**	**$ 1.25**	Unit Amenities: Dishwasher, Washer/Dryer Hookup, Community Amenities: Health Club, Tennis, Pool/Clubhouse Pet Friendly, Surface Parking, Security Patrol

Source: REIS Reports/REIS, Inc.; RDS/WTL+a, January 2016.

Table 12 (Continued): Profile of Selected Apartment Complexes, 2015

Project/Location	Year Built Class & Height	Current Vacancy	Unit Type	No. of Units	Size (In SF)	Monthly Rent	Rent Per SF	Project Information
3. Villas at Juno	2001	13.0%	1 BR	-	-	$ -	$ -	
12801 U.S. Route 1	A		2 BR	40	1,505	1,907	1.27	
Juno Beach	1 floor		3 BR	83	1,907	1,907	1.00	
				123	**1,776**	**$ 1,907**	**$ 1.07**	Unit Amenities Dishwasher, Washer/Dryer Hookup Community Amenities: Health Club, Pool/Clubhouse, Pet Friendly, Structured & Surface Parking
4. Gardens East Ph I	1992	2.7%	1 BR	108	755	$ 1,300	$ 1.72	
2750 Rio Vista Boulevard	A		2 BR	148	1,035	1,550	1.50	
Palm Beach Gardens	2 floors		3 BR	-	-	-	-	
				256	**917**	**$ 1,445**	**$ 1.58**	Unit Amenities Dishwasher, Washer/Dryer Hookup Community Amenities: Health Club, Tennis, Pool/Clubhouse, Pet Friendly, Surface Parking, Security Patrol

Source: REIS Reports/REIS, Inc.; RDS/WTL+a, January 2016.

Table 12 (Continued): Profile of Selected Apartment Complexes, 2015

Project/Location	Year Built Class & Height	Current Vacancy	Unit Type	No. of Units	Size (In SF)	Monthly Rent	Rent Per SF	Project Information
5. Gardens East Ph II	1994	3.1%	1 BR	50	755	$ 1,300	$ 1.72	
2750 Rio Vista Boulevard	A		2 BR	142	1,035	1,550	1.50	
Palm Beach Gardens	2 floors		3 BR	-	-	-	-	
				192	**962**	**$ 1,485**	**$ 1.54**	
								Unit Amenities Dishwasher, Patio/Balcony Community Amenities: Health Club, Tennis, Pool/Clubhouse Pet Friendly, Storage, Surface Parking, Security Patrol
6. Mira Flores	1996	3.1%	1 BR	87	715	$ 1,323	$ 1.85	
11900 Valencia Gardens Ave	A		2 BR	192	1,140	1,603	1.41	
West Palm Beach	2 floors		3 BR	73	1,270	1,800	1.42	
				352	**1,062**	**$ 1,575**	**$ 1.48**	
								Unit Amenities: Dishwasher, Washer/Dryer Hookup, Patio/ Balcony; In-Unit Security Community Amenities: Business Center, Pool/Clubhouse Tennis, Pet Friendly, Surface & Structured Parking, Health Club, Security Patrol

Source: REIS Reports/REIS, Inc.; RDS/WTL+a, January 2016.

Table 12 (Continued): Profile of Selected Apartment Complexes, 2015

Project/Location	Year Built Class & Height	Current Vacancy	Unit Type	No. of Units	Size (In SF)	Monthly Rent	Rent Per SF	Project Information
7. Opabola Square	1965	8.9%	2 BR	32	720	$ 910	$ 1.26	
939 Magnolia Drive	B/C		3 BR	24	880	1,173	1.33	
West Palm Beach	2 floors			**56**	**789**	**$ 1,023**	**$ 1.30**	Unit Amenities: None Reported Community Amenities: Shared Laundry, Surface Parking
8. The Fountains	1973	9.2%	1 BR	90	830	$ 1,123	$ 1.35	
4620 Union Square Blvd.	B/C		2 BR	406	1,078	1,295	1.20	
Palm Beach Gardens	2 floors		3 BR	46	1,300	1,595	1.23	
				542	**1,056**	**$ 1,292**	**$ 1.22**	Unit Amenities: Dishwasher, Patio/Balcony, Washer/Dryer Hook-up; Community Amenities: Business Center, Tennis, Pool/Clubhouse, Surface Parking, Storage, Health Club
9. Mariner's Key	2008	4.4%	1 BR	70	700	$ 1,330	$ 1.90	
901 Lake Shore Drive	A		2 BR	135	996	1,550	1.56	
Lake Park	3 floors		3 BR	-	-	-	-	
				205	**895**	**$ 1,475**	**$ 1.65**	Unit Amenities: Dishwasher, Patio/Balcony, Washer/Dryer Hookup Community Amenities: Health Club, Pool/Clubhouse Pet Friendly, Surface Parking, Storage
Market Average:				**2,146**	**974**	**$ 1,306**	**$ 1.23**	

Source: REIS Reports/REIS, Inc.; RDS/WTL+a, January 2016.

Multi-tenant/Speculative Office

A critical component of the market study for the North Palm Beach Master Plan includes a detailed analysis of the area's competitive office market to ensure that revitalization and redevelopment strategies are competitively positioned for success in the marketplace. Specific metrics in this profile are key to testing potential market support, and to guiding appropriate implementation strategies as part of the Master Plan.

WTL+a evaluated market performance in North Palm Beach and other relevant submarkets in Palm Beach County to understand the Village's relative competitive position in the region's office market. This is based on data from Cushman & Wakefield, Inc., a national real estate database, for 2014 and 2015, and includes the following key market indices: total inventory, construction deliveries, annual leasing (i.e., net absorption) activity, vacant stock, vacancy rates, and rental rates. Key findings are illustrated in Table 13 and noted below:

Palm Beach County

- **Palm Beach County contains 25 million sq. ft. of office space** distributed across the Central Business District (downtown West Palm Beach) and 12 suburban submarkets. **The County's office market is overbuilt, with over 4.3 million sq. ft. of vacant office space,** which reflects a current vacancy rate of more than 17%; and
- However, a host of factors have combined to strengthen overall leasing activity, including recovery from the 2007—2009 recession, net new job growth in office-using sectors and business expansions throughout the County. In fact, countywide net absorption totaled **almost 660,000 sq. ft. in 2014 and 2015**, reflecting an annual average of 330,000 sq. ft. per year over the past two years. If this pace is sustained, it will require approximately six years to reduce the County's vacant office space to stabilized levels (i.e., the office industry considers stabilized occupancies to be in the range of 93% to 95%).

North Palm Beach

- North Palm Beach is located in the Palm Beach Gardens office submarket. This submarket contains over **2.8 million sq. ft. of office space**, or roughly 11% of the County's gross inventory. According to Cushman & Wakefield, the submarket contains almost 336,000 sq. ft. of vacant space, reflecting a vacancy rate of almost 12%. **Leasing activity in the Palm Beach Gardens submarket generated a total of 174,300 sq. ft. of net absorption, or**

Table 13: Office Market Profile of Palm Beach County, 2014—2015

	Inventory		Direct Vacant Space				Overall Net Absorption				Years to Stabilized	Weighted Average Gross Rents/SF	
	2014	2015	2014	%	2015	%	2014	2015	Total	Avg. Ann'l	Occupancy	2014	2015
CBD											*(1)*		
Downtown West Palm Beach	3,208,460	3,208,460	558,272	17%	528,607	16.5%	94,705	9,487	104,192	52,096	4.7	$ 34.57	$ 34.76
Subtotal - CBD:	**3,208,460**	**3,208,460**	**558,272**	**17.4%**	**528,607**	**16.5%**	**94,705**	**9,487**	**104,192**	**52,096**	**4.7**	**$ 34.57**	**$ 34.76**
Non-CBD (Ranked by Size)													
NW Boca Raton	5,307,256	5,307,256	589,105	11.1%	685,884	12.9%	80,621	43,079	123,700	61,850	5.2	22.99	24.22
Other Suburban WPB	3,422,072	3,527,232	615,973	18.0%	689,027	19.5%	2,585	30,178	32,763	16,382	19.6	22.84	34.49
Glades Road	3,082,480	3,082,480	551,764	17.9%	586,014	19.0%	23,515	77,953	101,468	50,734	5.4	34.14	34.91
PB Gardens/N Palm Beach	**2,825,112**	**2,825,112**	**381,390**	**13.5%**	**335,757**	**11.9%**	**122,634**	**51,671**	**174,305**	**87,153**	**1.8**	**$ 29.03**	**$ 27.67**
Delray Beach	1,480,952	1,480,952	676,795	45.7%	666,737	45.0%	(9,173)	(6,779)	(15,952)	(7,976)	N/A	21.27	21.38
Federal Highway Corridor	1,468,880	1,468,880	185,079	12.6%	195,516	13.3%	23,813	(4,739)	19,074	9,537	9.5	29.07	30.37
Jupiter/Tequesta/Juno	842,973	842,973	102,000	12.1%	102,295	12.1%	14,987	4,427	19,414	9,707	4.9	33.46	31.84
Downtown Boca Raton	837,487	837,487	163,310	19.5%	111,290	13.3%	20,745	62,317	83,062	41,531	1.2	32.85	33.45
SW Boca Raton	757,399	757,399	159,054	21.0%	107,575	14.2%	21,701	(14,129)	7,572	3,786	13.2	26.24	26.05
Boynton Beach	596,468	596,468	179,537	30.1%	165,917	27.8%	(70,293)	41,713	(28,580)	(14,290)	N/A	18.01	19.64
Lake Worth	587,110	587,110	59,885	10.2%	55,869	9.5%	27,710	6,659	34,369	17,185	1.5	19.31	20.30
Palm Beach	498,478	498,478	113,653	22.8%	116,571	23.4%	8,434	(3,834)	4,600	2,300	23.6	53.81	55.71
Subtotal - Suburban:	**21,706,667**	**21,811,827**	**3,777,545**	**17.4%**	**3,818,452**	**17.5%**	**267,279**	**288,516**	**555,795**	**277,898**	**6.4**	**$ 26.72**	**$ 27.36**
TOTAL:	**24,915,127**	**25,020,287**	**4,335,817**	**17.4%**	**4,347,059**	**17.4%**	**361,984**	**298,003**	**659,987**	**329,994**	**6.1**	**$ 27.77**	**$ 28.21**
Change		*105,160*			*11,242*			*(63,981)*					*1.6%*

(1) This illustrates the estimated time (in years) to achieve stabilized occupancies (defined as 93% occupancy), based on average annual absorption for 2014 and 2015.

Source: Cushman & Wakefield of Florida, Inc.; WTL+a, January 2016.

87,150 sq. ft. per year between 2014 and 2015. If this pace is sustained, it would take less than two years to achieve 93% stabilized occupancies.

WTL+a also compiled information on market performance among the 26 office buildings located in North Palm Beach, based on data from CoStar, Inc., (a national real estate database) and provided by Cushman & Wakefield's West Palm Beach office.

Key findings indicate:

- North Palm Beach's 26 office buildings are located primarily on the US 1 corridor. These buildings contain **almost 589,700 sq. ft. of office space**, or 21% of the entire Palm Beach Gardens/North Palm Beach submarket. Notably, these buildings have an average age of construction of 1976, an average of two floors in height, an average floorplate size of less than 8,500 sq. ft. per floor, and average rent of $17.55 per sq. ft. The real estate industry would define these as "garden office" product;
- According to CoStar data, there are **113,770 sq. ft. of vacant space, reflecting an overall vacancy rate of 20.4%.** However, vacancy rates among buildings vary widely:
    - 12 buildings are fully/100% occupied
    - 10 buildings have vacancy rates of more than 15%

Table 14: Office Building Profile—North Palm Beach, 2015

Property	Address	Year Built & Bldg. Class	Floors & Average Floorplate	In SF: Rentable Bldg. Area	In SF: Direct Vacant	In SF: Sublet Vacant	% Direct Vacant	Asking Rent Per SF	Parking Spaces & Ratio
513 Building	513 US 1	1958	2 6,127	12,254	1,368	-	11.2%		24 2.0
Baypoint Building	618 US 1	1972	4 5,301	21,206	6,979	-	32.9%		70 3.3
Unity Building	630 US 1	1974	4 5,800	23,200	-	-	0.0%		61 2.6
Atrium (Condominium)	631 US 1	1984	4 15,603	62,413	7,383	-	11.8%		250 4.0
648 Building	648 US 1	1967	1 3,791	3,792	-	-	0.0%		20 5.3
649 Building	649 US 1	1975	2 6,418	12,836	-	-	0.0%		40 3.1
660 Building	660 US 1	1989	1 5,304	5,304	5,304	-	100.0%		25 4.7
700 Building	700 US 1	1967	2 3,050	6,100	-	-	0.0%		35 5.8
701 Building	701 US 1	1979	4 12,500	52,000	-	-	0.0%		208 4.0
The Pavilion	712 US 1	1985 B	4 12,022	48,089	7,798	3,518	16.2%	$ 20.00	120 2.5
721 Building (Condominium)	721 US 1	1973	2 13,400	26,800	4,200	-	15.7%		110 4.1
733 Building	733 US 1	1970	1 7,464	7,464	-	-	0.0%		65 8.7
Globe Building (Condominium)	741 US 1	1972 C	2 4,000	8,000	-	-	0.0%	$ -	50 6.3
742 Building	742 US 1	1975 C	2 5,285	10,570	-	-	0.0%	$ -	60 5.7
Hoyt Center	760 US 1	1984 B	3	18,785	8,842	-	47.1%	$ 15.00	112

Source: Cushman & Wakefield, Inc.; CoStar, Inc.; REIS Reports; WTL+a, revised April 2016.

Table 14 (Continued): Office Building Profile—North Palm Beach, 2015

Property	Address	Year Built & Bldg. Class	Floors & Average Floorplate	In SF: Rentable Bldg. Area	In SF: Direct Vacant	In SF: Sublet Vacant	% Direct Vacant	Average Asking Rent Per SF	Parking Spaces & Ratio
772 Building	772 US 1	1985	2 3,800	7,600	-	-	0.0%		38 5.0
784 Building	784 US 1	1973	2 8,500	17,000	-	-	0.0%		92 5.4
801 Building	801 US 1	1971 C	1 13,305	13,305	13,305	-	100.0%	$ 19.75	121 9.1
818 Building	818 US 1	1980	2 3,205	6,410	-	-	0.0%		26 4.0
Northpointe Prof'l Center	824 US 1	1982 B	3 9,296	27,888	7,947	-	28.5%	$ 13.00	105 3.8
Gentry Building	860 US 1	1974 B	2 12,105	24,209	7,865	-	32.5%	$ 18.32	- -
884 Building	884 US 1	1960	1 11,060	11,060	-	-	0.0%		- -
Commerce Ctr/Crystal Tree *(Office Building Only)*	1301 US 1	1982 B	4 10,029	40,115	13,996	-	34.9%	$ 22.00	-
The Towers	11300 US 1	1985 B	6 9,468	56,809	21,127	-	37.2%	$ 16.75	227 4.0
North Beach Plaza	11891 US 1	1985 B	2 8,500	17,000	1,526	-	9.0%	$ 18.09	106 6.2
Palm Court Plaza	11911 US 1	1987 B	3 16,483	49,449	6,130	3,000	12.4%	$ 15.00	224 4.5
TOTAL - Study Area:	**26 Buildings**	**1976**	**2.5** **8,473**	**589,658**	**113,770**	**6,518**	**20.4%**	**$ 17.55**	**2,188** **3.7**

Source: Cushman & Wakefield, Inc.; CoStar, Inc.; REIS Reports; WTL+a, revised April 2016.

Table 14 (Continued): Office Building Profile—North Palm Beach, 2015

Property	Address	Year Built & Building Class	Floors & Average Floorplate	In SF: Rentable Bldg. Area	In SF: Direct Vacant	In SF: Sublet Vacant	% Direct Vacant	Average Asking Rent Per SF	Parking Spaces & Ratio
Palm Beach Gardens									
Golden Bear Plaza									
West Tower	11760 US 1	1985	6	81,685	4,161	-	5.1%	$ 21.00	200
		A	13,614						2.4
East Tower	11770 US 1	1987	6	81,377	28,662	-	35.2%	$ 22.29	200
		A	13,563						2.5
North Tower	11790 US 1	1990	6	79,938	27,727	-	34.7%	$ 21.00	200
		A	13,323						2.5
Subtotal - Golden Bear Plaza:			**13,500**	**243,000**	**60,550**	**-**	**24.9%**	**$ 21.43**	**600**
									2.5
City Center									
Building A	2000 PGA	1987	2	20,697	7,004	-	33.8%	$ 16.58	85
		B	10,349						4.1
Building B	2000 PGA	1989	2	24,203	7,402	-	30.6%	$ 20.10	54
		B	12,102						2.2
Building D	2000 PGA	1999	2	27,663	2,308	-	8.3%	$ 24.00	100
		B	13,832						3.6
Subtotal-City Center:			**12,094**	**72,563**	**16,714**	**-**	**23.0%**	**$ 20.23**	**239**
									3.3
ADJACENT TO STUDY AREA:									
Total Inventory (6 Buildings):			**4**	**315,563**	**77,264**	**-**	**24%**	**$ 20.83**	**839**
			12,797						**2.7**

Source: Cushman & Wakefield, Inc.; CoStar, Inc.; REIS Reports; WTL+a, revised March 2016.

  - 5 buildings have vacancy rates of more than 30%, and
  - 2 buildings are 100% vacant;

- We note that the number of smaller, owner-occupied properties (e.g., Unity/630 US 1, Globe Building/741 US 1) tends to reduce overall vacancy. By comparison, vacancy rates are highest among speculative "multi-tenant" properties;
- **No information is available on average annual absorption/leasing activity** among the Village's office buildings. This key metric would illustrate the strength (or lack thereof) of recovery from the recession by tracking how much vacant space is being reduced; and
- In addition, there are two additional properties (with three buildings each) located in Palm Beach Gardens immediately outside of/adjacent to the North Palm Beach study area. These include: Golden Bear Plaza (11760-90 US 1), with 243,000 sq. ft. of space and City Center (2000 PGA Boulevard), with 72,600 sq. ft. of space. While these properties are considered "Class A" quality product, CoStar data indicate varying vacancies ranging from a low of 8% to a high of 35%, with an overall average of 24%.

Hotel/Lodging

WTL+a also reviewed market performance and metrics in the area's supply of hotels/lodging facilities. This was completed to understand how North Palm Beach could be positioned to accommodate additional lodging as a key economic activity (particularly given the community interest and consensus expressed during the planning charrette for additional hotel use in the Village). Importantly, from a competitive perspective, hotels serve as a critical supporting amenity to corporate and business activity generators as well as visitors, and their proximity and overall market performance is key to understanding market potentials. Notable findings are highlighted as follows and illustrated in Table 15 through Table 17:

- The tourism industry in Palm Beach County is differentiated between three geographic parts of the county—from the dense coastal development flanking the Intracoastal Waterway and 47 miles of beaches to Wellington (which has emerged as a major equine-based center) in the central County to the western end surrounding Lake Okeechobee in the Glades;
- According to Discover the Palm Beaches (DTPB, the official tourism marketing corporation for Palm Beach County), a record **6.9 million tourists visited the County in 2015.** This

represents a 10% increase over 2014. Other economic impacts of tourism on Palm Beach County in 2015 include:

- Visitors generated direct spending of $4.83 billion
- Produced an annual economic impact of $7.3 billion to the local economy
- Generated $42 million in bed-tax revenue and lodging sales of approximately $623 million, and
- Supported more than 63,000 jobs.

Hotel occupancies are a principal source of information on visitor markets, and measures of demand for hotel development follow general industry patterns that identify markets as ready to add more room capacity. The general thresholds used in the capital markets to test growth capacity for new hotel rooms include: Average Daily Rates (or ADRs) and average annual occupancy levels (allowing for possible seasonal changes). Notably, **the hotel industry considers average annual occupancy between 65% and 72% as stabilized enough to support additional capacity and warrant development of new hotel rooms.**

Palm Beach County

- As illustrated in Table 15, Palm Beach County contains more than **16,719 hotel rooms**. According to DTPB data, the countywide average annual occupancy in 2014 was 73.4%, suggesting that there is demand for additional room growth. The location and pricing of new hotels is highly dependent on proximity to available business and leisure markets as well as to the amenities that visitors require. These include: a range of offerings of restaurants and food service; nearby shopping; attractions that can draw visitors; and safe, attractive environments;
- Hotel-based room taxes are a major contributor to Palm Beach County's tourism revenues, but they do not represent a full profile of visitors who come to stay. There is another category known as VFRs (Visiting Friends & Relatives); these visitors may not be counted among those overnight visitors staying in hotels. As VFRs also spend on dining out, entertainment and gifts for their hosts, they have a demonstrably major impact on local retail businesses;

Table 15: Hotel Inventory, by Property Class & Location in Palm Beach County, 2015

Location	No. of Rooms by Property Class						Total Rooms	As % of Palm Beach County
	Economy	Mid-scale	Upper Mid-scale	Upscale	Upper Upscale	Luxury		
	(1)	*(2)*	*(3)*	*(4)*	*(5)*	*(6)*		
Belle Glade	105	-	-	-	-	-	105	0.6%
Boca Raton	445	112	491	725	1,091	1,047	3,911	23.4%
Boynton Beach	185	-	356	170	-	-	711	4.3%
Delray Beach	17	-	164	294	326	154	955	5.7%
Greenacres	48	-	-	-	-	-	48	0.3%
Highland Beach	-	-	-	-	113	-	113	0.7%
Juno Beach	-	-	197	-	-	-	197	1.2%
Jupiter	-	153	179	166	179	168	845	5.1%
Lake Worth	307	20	104	-	-	-	431	2.6%
Lantana	395	-	122	-	-	-	517	3.1%
Manalapan	-	-	-	-	-	309	309	1.8%
North Palm Beach	**152**	**-**	**-**	**-**	**-**	**-**	**152**	**0.9%**
Palm Beach	-	-	98	-	174	954	1,226	7.3%
Palm Beach Gardens	-	95	199	553	778	-	1,625	9.7%
Palm Beach Shores	-	50	-	-	-	-	50	0.3%
Riviera Beach/Singer Isl	271	-	-	31	415	-	717	4.3%
Royal Palm Beach	111	-	-	-	-	-	111	0.7%
South Bay	122	-	-	-	-	-	122	0.7%
Wellington	-	-	122	-	-	-	122	0.7%
West Palm Beach	915	666	484	1,166	1,221	-	4,452	26.6%
TOTAL:	**3,073**	**1,096**	**2,516**	**3,105**	**4,297**	**2,632**	**16,719**	**100%**
% Dist. by Class	***18%***	***7%***	***15%***	***19%***	***26%***	***16%***		

(1) Examples of economy class properties include: Days Inn; Extended Stay America; Red Roof Inn; Super 8; and Travelodge.
(2) Examples of mid-scale class properties include: Best Western; LaQuinta Inn; Quality Inn; Sleep Inn & Suites and Wingate By Wyndham.
(3) Examples of upper mid-scale properties include: Comfort Inn; Fairfield Inn; Hampton Inn; and Holiday Inn Express & Suites.
(4) Examples of upscale properties include: Marriott Courtyard; Crowne Plaza; Doubletree; Hilton Garden Inn; Hyatt Place; and Residence Inn.
(5) Examples of upper upscale properties include: Hyatt Regency; Marriott; Sheraton and Wyndham.
(6) Examples of luxury properties include: Boca Raton Resort; Seagate Hotel & Spa; Jupiter Beach Resort; The Breakers; Brazilian Court and others.

Source: STR Global; WTL+a, January 2016.

Table 16: Selected Competitive Hotel Inventory

Facility/Location	Opening Date	No. of Rooms	% of Supply	Product Class	STR Market Data
Juno Beach					
Hampton Inn	Feb 1995	89	45%	Upper Midscale Class	Yes
Holiday Inn Express Oceanview	Jun 1961	108	55%	Upper Midscale Class	Yes
Subtotal:		**197**	**8%**		
Jupiter					
Best Western Intracoastal Inn	Nov 1987	52	8%	Midscale Class	Yes
La Quinta Inns & Suites Jupiter	Jul 1989	101	16%	Midscale Class	Yes
Comfort Inn & Suites Jupiter	Dec 2004	69	11%	Upper Midscale Class	Yes
Fairfield Inn & Suites Jupiter	Apr 2000	110	17%	Upper Midscale Class	Yes
Courtyard Palm Beach Jupiter	Jun 2014	128	20%	Upscale Class	Yes
Wyndham Grand Jupiter Harbourside	Oct 2014	179	28%	Upper Upscale Class	Yes
Subtotal:		**639**	**25%**		
North Palm Beach					
Camelot Motor Lodge	N/A	52	34%	Economy Class	No
Super 8 North Palm Beach PGA Boulevard	Jun 1972	100	66%	Economy Class	Yes
Subtotal:		**152**	**6%**		
Palm Beach Gardens					
Best Western Plus	Feb 1990	83	5%	Upper Midscale Class	Yes
Hampton Inn Palm Beach Gardens	Jul 1999	116	8%	Upper Midscale Class	Yes
Hilton Garden Inn Palm Beach Gardens	Dec 2008	180	12%	Upscale Class	Yes
DoubleTree Hotel Executive Meeting Center	Nov 1970	279	18%	Upscale Class	Yes
Homewood Suites Palm Beach Gardens	Sep 2007	94	6%	Upscale Class	Yes
Marriott Palm Beach Gardens	Feb 1990	279	18%	Upper Upscale Class	Yes
Embassy Suites/PGA	Feb 1990	160	10%	Upper Upscale Class	Yes
PGA National Resort	Jun 1981	339	22%	Upper Upscale Class	Yes
Subtotal:		**1,530**	**61%**		
TOTAL ROOMS:		**2,518**			
As % of Palm Beach County Inventory		***15%***			

Source: STR Global; WTL+a, January 2016.

North Palm Beach & Area

- As illustrated in Table 16, STR Global (the industry leader in hotel market performance) data indicate that there are **2,518 hotel rooms in 20 properties located in North Palm Beach, Juno Beach, Jupiter and Palm Beach Gardens.** These properties account for 15% of the county's total hotel room inventory. West Palm Beach and Boca Raton are the County's two largest hotel submarkets, comprising a 27% and 23% share of the County's entire lodging inventory, respectively.
- By comparison, North Palm Beach contains only two hotel properties, accounting for a very limited 0.9% share of Palm Beach County's total inventory:
  - ✓ Camelot Motor Lodge (52 rooms; does not report performance to STR Global)
  - ✓ Super 8 Motel (100 rooms)

WTL+a compiled performance data from STR Global on 19 of the 20 properties in/around North Palm Beach. We note that STR has strict criteria regarding the release of aggregated performance data in key metrics (e.g., occupancy levels, average daily rates/ADRs, and revenues per available room).

- As illustrated in Table 17, hotel **occupancies have improved *significantly*—from a recession-based low of 57.4% in 2010 to 73.8% in 2014**. This reflects a *sustained* compound annual increase of 5.1% per year;
- The Camelot Motor Inn/Lodge does not report its performance to STR Global. At 52 rooms, it is not considered to be "investment-grade" property, as the hotel industry typically considers 80 rooms as the standard/threshold for financing purposes;
- Indicative of the overall strength of the area hotel market, two new properties were opened in 2014: Marriott Courtyard (128 rooms) and the Wyndham Grand Harbourside (179 rooms), both located in Jupiter; and
- Other metrics indicating the strength of the area's hotel market include significant improvements in average daily rate/ADR, which jumped from $107 per room per night in 2009 to $123 per room per night in 2014. In addition, revenue per available room (or RevPAR), which considers simultaneous changes in both room rates and annual

occupancies, improved from $61 per room per night to $91 per room per night. This reflects a remarkable compound annual increase of 8.2% per year over this five-year period.

In conclusion, these performance metrics in the area's lodging market are very solid, and indicate strong market potentials to support new hotel development. Section 4 of this report analyzes overall market demand and identifies both locational and market considerations for new lodging prospects in North Palm Beach.

Table 17: Hotel Performance Metrics—Selected Properties, 2009—2014

	2009	2010	2011	2012	2013	2014	Nov YTD 2015	CHANGE: 2009-2014 Average	CHANGE: 2009-2014 CAGR
Performance Characteristics									*(1)*
Number of Rooms	2,162	2,162	2,162	2,167	2,158	2,465			
Available Room Nights (Supply)	789,130	789,130	789,130	790,505	788,878	831,530		796,384	1.05%
Occupied Room Nights (Demand)	453,232	472,463	528,427	546,989	578,619	613,347		532,180	6.24%
Annual Occupancy (%)	**57.4%**	**59.9%**	**67.0%**	**69.2%**	**73.3%**	**73.8%**	**73.1%**	**66.8%**	5.13%
Average Daily Rate	$ 106.74	$ 102.09	$ 104.65	$ 108.60	$ 116.17	$ 123.32	$ 133.59	$ 110.92	2.93%
(2) Revenue Per Available Room	$ 61.31	$ 61.12	$ 70.08	$ 75.14	$ 85.21	$ 90.97	$ 97.65	$ 74.12	8.21%
Year-to-Year % Growth									
Annual Occupancy	-	4.2%	11.8%	3.3%	6.0%	0.6%	(0.9%)		
Average Daily Rate	-	(4.4%)	2.5%	3.8%	7.0%	6.2%	8.3%		
Revenue/Available Room	-	(0.3%)	14.6%	7.2%	13.4%	6.8%	7.3%		

Selected Property	Rooms	% Dist.	Year Open
Hampton Inn	89	4%	1995
Holiday Inn Express Oceanview	108	4%	1961
Best Western Intracoastal Inn	52	2%	1987
La Quinta Inns & Suites Jupiter	101	4%	1989
Comfort Inn & Suites Jupiter	69	3%	2004
Fairfield Inn & Suites Jupiter	110	4%	2000
Courtyard Palm Beach Jupiter	128	5%	2014
Wyndham Grand Jupiter Harbourside	179	7%	2014
Camelot Motor Lodge	52	2%	N/A
Super 8 North Palm Beach PGA Boulevard	100	4%	1972
Best Western Plus	83	3%	1990
Hampton Inn Palm Beach Gardens	116	5%	1999
Hilton Garden Inn Palm Beach Gardens	180	7%	2008
DoubleTree Hotel Executive Meeting Center Palm I	279	11%	1970
Homewood Suites Palm Beach Gardens	94	4%	2007
Marriott Palm Beach Gardens	279	11%	1990
Embassy Suites/PGA	160	6%	1990
PGA National Resort	339	13%	1981
Total:	**2,518**	**100%**	

(1) CAGR=Compound Annual Growth Rate.

(2) Revenue per available room is total annual room revenue divided by available rooms. It is the best measure of year-to-year growth because it considers simultaneous changes in both room rate and annual occupancies.

Source: STR Global; WTL+a, January 2016.

4 Market Potentials & Strategies

The primary objective of the market study is to test opportunities for new economic development (whether in the form of revitalization or redevelopment) for the Village of North Palm Beach. More specifically, the market study is intended to measure market potentials for 'workplace' uses (office, business/professional services); market-rate rental and/or for-sale housing; and lodging/hospitality uses. The market study is intended to guide preparation of the Master Plan and subsequent public policies, such as zoning regulations, future infrastructure, and/or other public realm improvements intended to enhance the overall marketability of, and business climate in, the Village.

Setting the Stage: Development Context

As noted previously, the two areas of special focus in the Master Plan include the US 1 and Northlake Boulevard corridors. These corridors are characterized by several key physical elements/factors that are likely to affect their overall marketability for economic development and private investment in particular revitalization/redevelopment initiatives. These include:

- Linear commercial corridors that are both vehicular in scale and behavior
- Physical environments that are less pedestrian-friendly and not walkable
- Generally smaller parcels, narrow lot depths, and diversified/fragmented ownership patterns that may hinder assemblage opportunities
- Adjacency to lower-density single-family detached and moderate-density multi-family residential that may be impacted by future uses and redevelopment, such as higher densities
- A mix of commercial uses—at generally very low densities/floor area ratios (FAR)—with no dominant or prevailing use cluster and no clear 'place-identity' defined by these uses

- Commercial corridors that are affected by significant market competition for specific uses (such as office) from adjacent/nearby areas, including PGA Boulevard to the west; and
- A limited number of "easy assembly" sites to aggregate for larger-scale redevelopment, such as the former Twin City Mall parcel.

Each of these elements will be a factor in identifying appropriate economic development initiatives and revitalization/redevelopment strategies for the Village. Each may require different responses, incentives, redevelopment approaches, or changes in zoning and development policies if North Palm Beach (and the US1 and Northlake Boulevard corridors in particular) is to plan for its long-term future. Moreover, priorities and preferences of stakeholders interviewed as well as ongoing discussions during the public charrette about an appropriate 'scale' and 'character' (which reflect the wide-ranging and sometimes conflicting views of local residents, property owners and businesses) suggest that implementing change to accommodate economic development in North Palm Beach will be complex, incremental in scale and timing, and dependent on creating a community-supported, long-range vision and Master Plan that is grounded in economic and market realities. These various factors have been considered in the market analysis of each use that follows.

Market-rate Housing

The demand analysis that measures market potentials for new housing considers three scenarios:

- **Scenario #1**—Utilizes an annual (straight-line) growth rate of 0.08% per year consistent with actual population growth rates that occurred in the Village between 2000—2015
- **Scenario #2**—Utilizes an annual growth rate of 0.84% per year between 2015—2020 (based on ESRI forecasts in Table 2) and applies them through 2025
- **Scenario #3**—Assumes an increase in average annual growth to 1.1% per year through 2025 predicated on a Village-wide economic development strategy that results in new commerce; business recruitment and job growth; the availability of sites to accommodate residential development/redevelopment; the availability of appropriate financial and/or regulatory incentives, such as density, necessary to promote economic growth and investment returns; and a streamlined public approvals/entitlement process.

In each scenario, the only known residential project (at this time), Water Club (180 units under construction), is allocated its share of future unit demand. Moreover, the analysis estimates that 30% of the units at Water Club will be sold to non-residents (i.e., part-time/seasonal). Since it is unknown how long seasonal residents occupy their units (i.e., or their resident status), seasonal units are netted out of the analysis.

Scenario #1

- As noted in the demographic profile, the population of North Palm Beach has remained generally stable over the past 15 years—increasing by only 140 or so residents since 2000. If the *pace* of growth in the Village continues at this historic rate of 0.08% per year, it would yield *only* 102 new residents and roughly 52 new housing units (assuming that average household size of 1.97 remains unchanged):

Table 18: Housing Potentials—Scenario #1, 2015—2025

Municipality	2015	Forecasts *(1) (2)* 2025	Population Change	Average Household Size *(3)*	2025 Housing Units
Scenario 1: Straight-line Forecast					
Average Annual Growth Rate (2000-2015)	**0.08%**				
Current & Future Population	**12,305**	**12,407**	**102**	**1.97**	**52**
Allocation to Known Residential Projects					
Water Club					180
Less Non-Resident (Seasonal) Units @ 30%					(54)
Subtotal - Allocated Units:					**126**
Scenario #1 - Unallocated Units:					**(74)**

- In effect, **Scenario #1 illustrates that future growth generates only limited demand for new housing**. Even after allocating units to Water Club, there remains insufficient market opportunities to support new residential growth over the next 10 years.

Scenario #2

- Scenario #2 utilizes five-year growth forecasts prepared by ESRI of 0.84% per year and applies them to the 10-year analysis period. As noted in the demographic profile, ESRI

considers multiple factors in its forecasts (e.g., it is likely to have accounted for delivery of new units at Water Club, among others). This growth rate yields more than 1,000 new residents and over 540 new housing units (assuming that average household size of 1.97 remains unchanged):

Table 18 (Continued): Housing Potentials—Scenario #2, 2015—2025

Municipality	2015	Forecasts *(1) (2)* 2025	Population Change	Average Household Size *(3)*	2025 Housing Units
Scenario 2: Alternative Forecast (4)					
Average Annual Growth Rate (2015-2020)	**0.84%**				
Current & Future Population	**12,305**	**13,382**	**1,077**	**1.97**	**546**
Allocation to Known Residential Projects					
Water Club					180
Less Non-Resident (Seasonal) Units @ 30%					(54)
Subtotal - Allocated Units:					**126**
Scenario #2 - Unallocated Units:					**420**

- By comparison, **Scenario #2 illustrates market potentials for upwards of 400 new housing units in the Village over the next 10 years**—even after netting out the allocation to Water Club.

Scenario #3

- Scenario #3 is predicated on a number of key assumptions, including: an increase in average annual growth to 1.1% per year through 2025 based on a successful Village-wide economic development strategy that results in new commerce; business recruitment and job growth; the availability of sites to accommodate residential development/redevelopment; the availability of appropriate financial and/or regulatory incentives, such as density, necessary to promote economic growth; and a streamlined public approvals/entitlement process.

Table 18 (Continued): Housing Potentials—Scenario #3, 2015—2025

Municipality	2015	Forecasts *(1) (2)* 2025	Population Change	Average Household Size *(3)*	2025 Housing Units
Scenario 3: Alternative Forecast (5)					
Assumed Average Annual Growth Rate	1.1%				
Current & Future Population	**12,305**	**13,728**	**1,423**	**1.97**	**722**
Allocation to Known Residential Projects					
Water Club					180
Less Non-Resident (Seasonal) Units @ 30%					(54)
Subtotal - Allocated Units:					**126**
Scenario #3 - Unallocated Units:					**596**

- **Scenario #3 estimates market potentials for roughly 600 new housing units in the Village over the next 10 years**—even after the allocation to Water Club is considered.

In outlining potential implementation strategies for housing, WTL+a notes that the estimates identified in the second and third scenarios should be considered "planning targets". That is, as development proposals for specific sites (other than the proposed third tower for Water Club) are unknown at this time, we are illustrating planning targets because of a range of uncertainties. These include: unknown sites and assemblage opportunities; unknown/proposed densities and product mix; market competition in nearby/proximate locations such as Palm Beach Gardens/PGA Boulevard; height limits and/or other zoning and regulatory restrictions; and "macro-economic" issues such as interest rate fluctuations, hard and soft development costs, land costs, and availability of construction financing. These, and other, conditions are likely to affect overall market demand for new housing in the Village.

As detailed in the demographic profile, population forecasts suggest that growth will be highest in selected age cohorts, including: 55—64 (empty nesters/active adults) and 65+ (retirees/elderly). As such, a key element of an implementation strategy for housing should include opportunities to provide for a range of housing product specifically aimed at these age cohorts. For example, a proposal to construct an assisted living facility on Prosperity Farms Road was rejected. The Village should ensure that, as opportunities for new housing, including assisted living units, independent living units, congregate care facilities, etc., are presented, due consideration should be given to issuing public approvals and entitlements for such housing.

Multi-tenant/Speculative Office

The first step in measuring support for new office space in North Palm Beach examines market potentials for office use countywide and allocates demand to the Village. As illustrated in Table 19 (Part I), the analysis translates growth forecasts (for 2014—2022) among specific industry sectors prepared by the Florida Department of Economic Opportunity (DEO) into demand by applying an occupancy factor (of occupied space per office employee), and estimates the proportion of employees in each sector who are office workers. We note that DEO employment forecasts are issued only in eight-year periods.

The analysis also considers demand generated by other market factors, such as vacancy adjustments, part-time/self-employed individuals (who may or may not occupy multi-tenant office space), and cumulative replacement; these estimates either increase or reduce future demand for office space. Cumulative replacement, for example, considers tenants that move when a building is removed from the inventory due to physical and/or functional obsolescence.

The office analysis is illustrated in Table 19 and Table 20 and summarized below:

Palm Beach County

- The analysis indicates *gross* demand for 6.9 million sq. ft. of office space across Palm Beach County between 2014 and 2022, generated by growth in office-using jobs and inclusive of adjustments related to vacancy, cumulative (building) replacements, tenant churn, etc.;
- From a financing perspective, however, some portion of the County's existing 4.3 million sq. ft. of vacant office space (see Table 13) would need to be leased before new office space could be financed. It is also not known how much of the remaining existing vacant inventory suffers from physical and/or functional obsolescence, will be converted to other uses such as residential, or could be demolished. For purposes of this analysis, WTL+a conservatively assumes that fully 50% of the County's vacant office inventory is leased before financing is provided for new office construction. This serves to reduce the County's office vacancy rate (to roughly 9%), and lowers demand generated by job growth in office-using sectors to approximately 4.7 million sq. ft. of *net new* space;

Table 19: Office Market Potentials—Palm Beach County, 2014—2022

Industry Sector	New Jobs 2014-2022	% Office-Using	SF Occupancy Factor	2022 Demand (In SF)
Palm Beach County (Workforce Region #21)				
Agriculture/Mining & Construction	9,743	10%	175	170,500
Manufacturing	1,219	20%	200	48,800
Transp/Communications/Utilities	501	40%	200	40,100
Wholesale & Retail Trade	9,491	20%	175	332,200
Finance/Insurance/Real Estate	3,789	85%	275	885,700
Services				
Professional, Scientific & Technical Services	7,270	90%	250	1,635,800
Management of Companies & Enterprises	563	60%	250	84,500
Administrative & Waste Management	8,574	35%	175	525,200
Educational Services	2,425	20%	225	109,100
Health Care & Social Assistance	16,444	35%	200	1,151,100
Arts, Entertainment & Recreation	2,324	20%	175	81,300
Accommodation & Food Services	7,321	20%	175	256,200
Other Services (Except Government)	1,772	35%	225	139,500
Government	6,755	60%	150	608,000
Self-Employed	3,799	10%	175	66,500
Total/Weighted Average:	**81,305**	**36%**	**194**	**6,134,500**
+ Vacancy Adjustment @		5%	*(1)*	306,700
+ Cumulative Replacement Demand		7.5%	*(2)*	460,100
2022 Gross Demand - Palm Beach County:				**6,901,300**
Existing Vacant Office Space		4,347,059		
- *Lease-up Required @*	*50%*	(2,173,530)	*(3)*	(2,173,530)
Remaining Vacant Space:		**2,173,530**		
% Vacant		*8.7%*		
2022 Net Demand - Palm Beach County:				**4,727,800**

Village of North Palm Beach

- The next step in the analysis is illustrated in Table 20. This estimates opportunities for new office development in North Palm Beach based on the Village's current share of employment (see Table 8), which is estimated at roughly 1.2% of Palm Beach County;
- Under this "fair share" analysis, North Palm Beach would capture approximately 1.2% of future countywide job growth, or 955 new employees, by 2022. Assuming similar proportions of office-using jobs and occupancy factors translates into **gross demand for approximately 67,700 sq. ft. of office space over the next eight years**;

Table 20: Office Market Potentials—North Palm Beach, 2014—2022

Industry Sector	New Jobs 2014-2022	% Office-Using	SF Occupancy Factor	2022 Demand (In SF)
North Palm Beach				
Total Village Employment (Table 11)			*(4)*	**6,793**
As % of Palm Beach County				**1.17%**
Fair Share Analysis				
2014-2022 Employment Growth (If Fair Share Maintained)				955
% Office-using Jobs				36%
SF Occupancy Factor				194
2022 Gross Demand (In SF):				**67,700**
Existing Vacant Office Space				113,770
2022 NET DEMAND (In SF):				**(46,070)**

(1) This allows for a 5% "frictional" vacancy rate in new office space delivered to the market (i.e., this accounts for tenant movement to new space).

(2) This represents new space required by existing businesses to replace obsolete or otherwise unusable office space. This is assumed to represent 7.5% of total demand.

(3) From a financing perspective, some portion of existing vacant office space in Palm Beach County will need to be leased before financing of new construction is viable. The analysis assumes that 50% of existing vacant office space is leased, thereby reducing the overall vacancy rate to approximately 9%.

(4) This reflects current employment in North Palm Beach. The analysis assumes that the Village maintains its "fair share" of the County's total employment base in the future.

Source: Florida Dept. of Economic Opportunity; Cushman & Wakefield, Inc.; CoStar, Inc.; WTL +a, revised April 2016

- However, as discussed in Section 3 (see Table 14), there are more than 113,700 sq. ft. of vacant office space across the Village. As such, **future demand generated by growth in office-using jobs could easily be accommodated *in its entirety* in the Village's *existing* vacant office buildings.** Even if only 50% of existing vacant space is considered leasable, it could still accommodate demand generated by future job growth in office-using sectors;
- It is not known, however, the degree of functional and/or physical obsolescence in the office building inventory of the Village. This may impact the extent to which future growth in office-using sectors can be accommodated in existing vacant space.
- **In conclusion, the analysis suggests no demand for new office space in the Village over the next eight years.**

In terms of outlining an appropriate range of economic development and implementation strategies for office development in North Palm Beach, this analysis reveals the weakened conditions of the Village's office market. As the Village's office market is oriented primarily to professional and business services (e.g., accounting, legal, etc.) generated by nearby household "rooftop" demand, it suggests that opportunities to increase the Village's population could translate into additional demand for similar professional/business service office tenancies.

Notably, brokers and other specialists in the area's office industry indicated that the Village is a secondary (or even tertiary) location for office development. That is, impediments to attracting additional office development include the drawbridges (that hinder ready access, particularly during rush hours), lack of immediate connections to I-95, and competition generated by major nearby office clusters such as PGA Boulevard, downtown West Palm, etc. As a secondary or tertiary office market, North Palm Beach also has no logical or ready-made demand generators such as hospitals, universities, courthouses and the like that serve to generate demand and provide opportunities for similar businesses (such as law firms) to cluster.

Other considerations to strengthening the Village's office market include identifying possible buildings/locations, such as those office properties with high vacancy rates, for conversion to alternative uses and/or demolition to accommodate new development. As specific properties are considered, this may necessitate relocation of existing office tenants to "backfill" vacant space in other buildings. This will serve a twofold purpose—reducing existing office vacancies among remaining buildings and/or eliminating properties with functional and/or physical obsolescence. Of course, candidate properties will have to be identified and will require willing property owners interested and capable of conversion and/or demolition and redevelopment. Such a strategy will also serve to add other uses such as new housing, which in turn may serve to strengthen demand for professional/business services with new population and households in the Village.

WTL+a also recommends that the Village consider creation of a business retention and recruitment strategy designed to identify office tenants with near-term lease expirations that could be candidates for relocation to North Palm Beach. This may necessitate the assistance of commercial brokers that track local and regional office leases and tenant movement. Consideration should also be given to creating and providing a package of financial (and regulatory) assistance as part of the Village's economic development strategy for office retention and recruitment. This should include an understanding of incentives packages offered by other communities for this sector.

Lodging/Hospitality

During the Master Plan visioning and planning charrette, Village residents expressed interest in attracting a new hotel to North Palm Beach, with many identifying redevelopment of the Camelot Inn/Motor Lodge as part of an assemblage of an adjacent commercial property (a vacant 7-11 convenience store). This site takes advantage of both views of the golf course as well as the North Palm Beach Marina and Intracoastal Waterway.

Demand for new hotel rooms is typically driven by several segments—overnight visitors/tourists to Palm Beach County, proximity to commercial development clusters such as office parks, adjacency to highway interchanges, and/or demand generated by specific users such as a medical complex. The following examines market potentials for new hotel development in North Palm Beach generated by growth in the County's visitor/tourist market based on data from the

County's tourist marketing entities, Discover the Palm Beaches (formerly the Convention & Visitors Bureau) and Tourist Development Council (TDC):

- As illustrated in Table 21, the County's visitor market has expanded rapidly in recent years, increasing at a sustained annual rate of 8% per year since 2012—to 6.9 million visitors in 2015. While information on the number of overnight visitors is unknown, the analysis assumes a 50% ratio. Other factors required to evaluate demand include average party size and average length of stay (both inputs in Palm Beach County were last studied in 2009);
- This analysis illustrates that 3.45 million overnight visitors generated 5.9 million roomnights countywide in 2015;
- Second, roomnights are allocated to the northern end of the County (comprising Jupiter, Juno Beach, North Palm Beach and Palm Beach Gardens). Based on STR hotel performance data, this area contained 2,465 hotel rooms and generated annual occupancies of more than 73% per year between 2013 and 2015. This performance translates into annual roomnights of more than 600,000 per year, which accounts for 10% to 11% of the County's total roomnight demand;
- Third, **600,000+ roomnights translates into annual demand for roughly 1,600 to 1,700 hotel rooms at 100% occupancy**. As noted, the northern end of the County contains 2,465 hotel rooms, which would suggest an **over-supply of approximately 800 rooms**. In other words, there are no "unaccommodated" rooms;
- However, as the breakeven threshold in the hotel industry is 65%, and the capital markets typically seek *sustained* annual occupancies of 65% to 72%, this analysis suggests that the area's hotel market has achieved equilibrium (particularly in the past three years as occupancies have exceeded 72% per year). Therefore, demand for additional hotel rooms will be predicated on the assumptions outlined above—including additional growth in key drivers such as overnight visitors, growth in the area office market, etc. A 10-year forecast and analysis is illustrated in Table 22 and summarized below;
- To be conservative, the analysis assumes sustained annual growth in the County's visitor market of 4% per year (between 2012 and 2015, compound annual growth was 8% per year). The analysis assumes no changes in the proportion of visitors who stay overnight, average party size or length of stay;

Table 21: Recent Overnight Visitor Roomnight Demand, 2012—2015

	2012	2013	2014	2015	Change: 2012-2015 Amount	Change: 2012-2015 %
Palm Beach County						
All Visitors-Entire County	5,470,000	6,000,000	6,279,000	6,900,000	**1,430,000**	**8.0%**
Compound Annual Growth Rate		9.7%	4.6%	9.9%		
Stay in Hotel/Motel	2,735,000	3,000,000	3,139,500	3,450,000	**715,000**	
(1) As % of All Overnight Visitors	50.0%	50.0%	50.0%	50.0%		
(2) / Average Party Size	2.10	2.10	2.10	2.10		
(2) x Average Length of Stay	3.60	3.60	3.60	3.60		
Annual Roomnights:	**4,688,571**	**5,142,857**	**5,382,000**	**5,914,286**	**1,225,714**	
(3)						
Northern Palm Beach County						
Existing Room Inventory						
Competitive Properties	2,167	2,158	2,465	2,466	299	
New Deliveries	-	-	-	-	-	
Existing Hotel Rooms:	**2,167**	**2,158**	**2,465**	**2,466**	**299**	**4.4%**
% Annual Increase		*0%*	*14%*	*0%*		
Annual Occupancy						
Competitive Properties	69.2%	73.3%	73.8%	73.1%		**1.8%**
Total Annual Roomnights:	**546,989**	**578,619**	**613,347**	**601,924**	**54,935**	
(4) Share of PBC Roomnights	***11.7%***	***11.3%***	***11.4%***	***10.2%***		**-4.4%**
Supportable Annual Rooms (@ 100% Occupancy)						
Annual Roomnights	546,989	578,619	613,347	601,924		
/ Days Per Year	365	365	365	365		
Total Hotel Rooms:	**1,499**	**1,585**	**1,680**	**1,649**	**151**	
MARKET POTENTIALS:						
Existing Supply	**2,167**	**2,158**	**2,465**	**2,466**		
(5) **Unaccommodated Rooms**	**(668)**	**(573)**	**(785)**	**(817)**		

(1) WTL+a reviewed various reports produced by the Tourist Development Council as well as Discover the Palm Beaches (formerly the Convention & Visitors Bureau) to ascertain annual visitor statistics and behavior.

(2) The only data available on average party size and average length of stay is from a 2009 report prepared by Profile Marketing Research for the TDC.

(3) Annual roomnights are determined by dividing total overnight visitors staying in a hotel by party size and multiplying the result by average length of stay.

(4) Northern Palm Beach County's share of the County's total hotel roomnights was determined based on occupied room-nights for competitive hotel properties.

(5) Unaccommodated rooms illustrates the number of supportable rooms in the market. A negative number indicates an over-supply of rooms.

Source: STR Global; Discover the Palm Beaches/Convention & Visitors Bureau; Tourist Development Council of Palm Beach County; WTL+a, revised April 2016.

Table 22: Hotel/Lodging Potentials, 2016—2025

	Estimate 2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Palm Beach County										
Overnight Visitors	6,900,000	7,177,689	7,466,554	7,767,044	8,079,627	8,404,790	8,743,039	9,094,901	9,460,923	9,841,676
(1) Annual Growth Rate		4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%	4.0%
Stay in Hotel/Motel	3,450,000	3,588,845	3,733,277	3,883,522	4,039,813	4,202,395	4,371,519	4,547,450	4,730,461	4,920,838
(2) As % of All Overnight Visitors	**50.0%**	**50.0%**	**50.0%**	**50.0%**	**50.0%**	**50.0%**	**50.0%**	**50.0%**	**50.0%**	**50.0%**
/ Average Party Size	2.10	2.10	2.10	2.10	2.10	2.10	2.10	2.10	2.10	2.10
x Average Length of Stay	3.60	3.60	3.60	3.60	3.60	3.60	3.60	3.60	3.60	3.60
Annual Roomnights:	**5,914,286**	**6,152,305**	**6,399,903**	**6,657,466**	**6,925,394**	**7,204,105**	**7,494,033**	**7,795,629**	**8,109,363**	**8,435,722**
(3)										
Northern Palm Beach County										
Existing Room Inventory	**2,466**	**2,466**	**2,466**	**2,466**	**2,466**	**2,466**	**2,466**	**2,466**	**2,466**	**2,466**
(4) Share of Roomnights Increases	**11.4%**	**11.7%**	**12.0%**	**12.6%**	**12.6%**	**12.6%**	**12.6%**	**12.6%**	**12.6%**	**12.6%**
Annual Roomnights:	**676,469**	**721,285**	**769,071**	**840,023**	**873,830**	**908,997**	**945,579**	**983,634**	**1,023,220**	**1,064,399**
/ Days Per Year	365	365	365	365	365	365	365	365	365	365
Gross Supportable Rooms:	**1,853**	**1,976**	**2,107**	**2,301**	**2,394**	**2,490**	**2,591**	**2,695**	**2,803**	**2,916**
Removal-Obsolete Rooms	-	-	(100)	(150)	(150)	(150)	(150)	(150)	(150)	(150)
Net Supportable Rooms:	**1,853**	**1,976**	**2,207**	**2,451**	**2,544**	**2,640**	**2,741**	**2,845**	**2,953**	**3,066**
MARKET POTENTIALS:										
Existing Rooms	**2,466**	**2,466**	**2,466**	**2,466**	**2,466**	**2,466**	**2,466**	**2,466**	**2,466**	**2,466**
(4) **Unaccommodated Rooms**	**(613)**	**(490)**	**(259)**	**(15)**	**78**	**174**	**275**	**379**	**487**	**600**

(1) The number of visitors to Palm Beach County has increased at a compound annual rate of 8% per year between 2012 and 2015, as reported by Discover the Palm Beaches/ CVB. The analysis uses a more conservative compound annual rate of growth of 4% per year for the 10-year forecast period.

(2) The rate of increase in overnight visitors staying in a hotel/motel in Palm Beach County is unknown. The analysis assumes no change from the 50% estimate.

(3) Annual roomnights are determined by dividing total overnight visitors staying in a hotel by party size and multiplying the results by average length of stay.

(4) The analysis assumes that new hotel development in North Palm Beach (and/or other locations in North County) increases the submarket's share of rooms relative to Palm Beach County. It assumes an increase of 10% in market share.

(5) Unaccommodated rooms illustrates the number of supportable rooms in the market. Negative demand indicates an over-supply of rooms.

Source: STR Global; Discover the Palm Beaches/CVB; Tourist Development Council of Palm Beach County; WTL+a, revised April 2016.

- The analysis also assumes that additional hotel development in the northern part of the County increases the submarket's share of rooms relative to the County as a whole, utilizing an increase of 1% per year during the forecast period. It also assumes that 100 to 150 obsolete rooms/properties are removed from the inventory (specific properties are unknown); and
- Over the 10-year forecast period, the analysis reveals that the number of unaccommodated rooms turns positive after year five. In other words, performance metrics generated by growth in overnight visitors results in opportunities for new hotel rooms that vary from year-to-year as "snapshots" in time. **Market opportunities suggest 80 to 600 rooms are supportable after year five of the analysis period**. The analysis illustrates room demand over the entire submarket (comprising the four communities identified above). Some communities, such as Palm Beach Gardens, are likely to capture a disproportionate share due to locational advantages—like proximity to I-95 and office concentrations on PGA Boulevard.

In terms of preliminary steps toward implementation to secure a new lodging facility in North Palm Beach, this suggests that key steps will be required to ensure the Village's competitive position for future room demand in northern Palm Beach County. These include:

- Identifying candidate site(s)
- Ensuring that appropriate zoning and entitlements can be secured by a prospective developer. For example, on the Camelot Motor Inn/Lodge site, building heights are limited to four floors. This may be insufficient to take advantage of views (and amenity values) created by the site's proximity to the North Palm Beach Marina and Intracoastal Waterway. As a rule, premium values provided by strong views of amenities such as water increase by 3% to 5% per floor.
- Outlining and securing approvals by the Village Commission of any incentives that may be necessary to secure new hotel development in the Village. This may vary, but is likely to include zoning and entitlements, infrastructure assistance, closing of the (possible) public way between the Camelot and the vacant 7-11 and/or financial assistance based on detailed feasibility studies, and other public commitments as necessary.

In conclusion, WTL+a's analysis of hotel development potentials suggests **opportunities for a 90-120 room lodging facility**. As illustrated in Table 22, approximately one to three years may be required to secure entitlements, complete any necessary infrastructure improvements, and attract development interest as the market readies itself to accommodate additional/future hotel development.

We recommend that the Village seek a well-qualified hotel developer/operator with an agreement to provide a "select-service" level hotel. Examples include aloft (by Starwood Corporation) and Hyatt Place (Hyatt Hotels), which are not currently located in any of the four communities in northern Palm Beach County. Interestingly, aloft has targeted South Florida as a key market, with hotels opening in Delray Beach (2018), Fort Lauderdale (2019), Weston (2018), Coral Gables (2017) and Miami International Airport (2017). An excellent example of an "urban" Hyatt Place is located in downtown Delray. This level-of-service will reinforce the branding and identity required to strengthen the Village's competitive position in the regional marketplace. Moreover, it will serve to tap multiple market segments—including both business and leisure travelers. We strongly recommend that the Village resist any proposals from developers seeking to build a "limited-service" hotel or motel. Examples include: Red Roof Inn, Super 8, Comfort Inn, Travelodge, among others.

Appendix

Table 23: Preliminary Stabilized Year Financials—Candidate Sites for Residential

	701 US 1 Site #1	801 US 1 Site #2	Village Center Site #3	860 & 872 US 1 Site #4
Site Information & Development Program				
Site & Building				
Land Area (In SF)	128,066	71,499	109,880	127,683
Land Area (In Acres)	2.94	1.64	2.52	2.93
Building Area (In SF)	52,004	13,305	-	27,630
2015 Taxable Value				
Improvements	$ 4,214,300	$ 1,447,338	$ -	$ 1,860,980
Land	1,344,900	750,750	1,153,740	551,051
Total Taxable Value:	**$ 5,559,200**	**$ 2,198,088**	**$ 1,153,740**	**$ 2,412,031**
Value/SF of Land	**$ 43.41**	**$ 30.74**	**$ 10.50**	**$ 18.89**
Development Program				
Units (Townhouses)	71	31	44	54
Assumed Unit Size	2,000	2,000	1,500	2,000
Gross Building Area:	**141,120**	**62,373**	**66,000**	**108,000**
FAR/Density	1.10	0.87	0.60	0.85
Units Per Acre	24	19	17	18
(1) % of Residential Use on Site	100%	100%	71%	89%
Hard & Soft Construction Costs (Excluding Land & Profit)				
Hard Costs	$ 125	$ 125	$ 110	$ 125
(2) Construction Financing	18	18	23	18
(3) General Infrastructure	15	15	15	15
Other Soft Costs	10	10	8	10
Total Per SF:	**$ 168**	**$ 168**	**$ 156**	**$ 168**
Subtotal-Construction:	**$ 23,637,600**	**$ 10,447,511**	**$ 10,318,000**	**$ 18,090,000**
Land Acquisition & Demolition Costs				
Improvements & Land	$ 5,559,200	$ 2,198,088	$ 818,783	$ 2,152,887
(4) Demolition	208,016	53,220	-	98,646
Subtotal-Land Acquisition:	**$ 5,767,216**	**$ 2,251,308**	**$ 818,783**	**$ 2,251,533**
Per Unit	$ 81,735	$ 72,188	$ 18,609	$ 41,695
Market Will Bear	$ 80,000	$ 80,000	$ 75,000	$ 75,000
Overrun/Below-Market:	**$ (1,735)**	**$ 7,812**	**$ 56,391**	**$ 33,305**
TOTAL BASE COSTS:	**$ 29,404,816**	**$ 12,698,819**	**$ 11,136,783**	**$ 20,341,533**
Per Unit	$ 416,735	$ 407,188	$ 253,109	$ 376,695
All-in Per SF	$ 208	$ 204	$ 169	$ 188
Return-on-Investment (ROI) Analysis				
+ Assumed Profit @ 20%	$ 83,347	$ 81,438	$ 50,622	$ 75,339
(5) **+ Residual Shortfall/(Excess)**	**1,735**	**(7,812)**	**(56,391)**	**(33,305)**
REQUIRED UNIT SALES PRICE:	**$ 501,800**	**$ 480,800**	**$ 247,300**	**$ 418,700**
Per SF	$ 251	$ 240	$ 165	$ 209

(1) For Sites #3 and #4, land acquisition costs were proportionally allocated between housing and commercial based on the gross building area for each use.

(2) Assumes sales and marketing costs at $35,000 per unit.

(3) Assumes general infrastructure costs at $30,000 per unit.

(4) Assumes $4 per sq. ft. in demolition costs for prototype sites with existing buildings. Similarly, demolition costs were proportionally allocated to the amount of housing and commercial on the site.

(5) Residual value reflects the difference between estimated land acquisition costs and what the market will bear. An amount in red reflects an overrun (i.e., additional cost), while an amount in blue reflects excess residual that can be used to either a) reduce unit costs; b) increase developer profit; or c) fund public realm improvements or infrastructure. In this case, the excess is shown as a (negative) because it is used to writedown unit sales prices.

Source: Treasure Coast Regional Planning Council; WTL+a, February 2016.

Table 24: Preliminary Stabilized Year Financials—Candidate Sites for Commercial/MXD

		701 US 1 Site #1	801 US 1 Site #2	Village Center Site #3	860 & 872 US 1 Site #4
Site Information & Development Program					
Site & Building					
	Land Area (In SF)	128,066	71,499	109,880	127,683
	Land Area (In Acres)	2.94	1.64	2.52	2.93
	Building Area (In SF)	52,004	13,305	-	27,630
2015 Taxable Value					
	Improvements	$ 4,214,300	$ 1,447,338	$ -	$ 1,860,980
	Land	1,344,900	750,750	1,153,740	551,051
Total Taxable Value:		**$ 5,559,200**	**$ 2,198,088**	**$ 1,153,740**	**$ 2,412,031**
Value/SF of Land		**$ 43.41**	**$ 30.74**	**$ 10.50**	**$ 18.89**
Development Program					
	Commercial SF	-	-	27,000	13,000
Gross Building Area:		**-**	**-**	**27,000**	**13,000**
	FAR/Density	-	-	0.25	0.10
	Units Per Acre	-	-	-	-
(1)	% of Commercial Use on Site	0%	0%	29%	11%
Hard & Soft Construction Costs (Excluding Land & Profit)					
	Hard Costs	$ -	$ -	$ 140	$ 140
(2)	Construction Financing	-	-	11	11
(3)	Landscaping/Surface Parking	-	-	18	15
	Other Soft Costs	-	-	7	7
Total Per SF:		**$ -**	**$ -**	**$ 176**	**$ 173**
Subtotal-Construction:		**$ -**	**$ -**	**$ 4,751,000**	**$ 2,249,000**
Land Acquisition & Demolition Costs					
	Improvements & Land	$ -	$ -	$ 334,957	$ 259,144
(1)	Demolition	-	-	-	11,874
Subtotal-Land Acquisition:		**$ -**	**$ -**	**$ 334,957**	**$ 271,018**
TOTAL BASE COSTS:		**$ -**	**$ -**	**$ 5,085,957**	**$ 2,520,018**
	All-in Per SF	$ -	$ -	$ 188	$ 194
Return-on-Investment (ROI) Analysis					
(4)	+ Assumed Profit @ 18%	$ -	$ -	$ 915,472	$ 453,603
TOTAL COSTS:		**$ -**	**$ -**	**$ 6,001,429**	**$ 2,973,621**
	Per SF	$ -	$ -	$ 222	$ 229
REQUIRED COMMERCIAL RENTS:		*(5)*		**$ 22.23**	**$ 22.87**

(1) Assumes $4 per sq. ft. in demolition costs for prototype sites with existing buildings. Demolition costs were proportionally allocated to the amount of housing and commercial on the site.
(2) Financing costs are assumed at 6% of total base costs.
(3) Assumes site improvement costs (landscaping/streetscape, surface parking) of $5,000 per parking space.
(4) Developer profit in mixed-use projects generally targets returns in the range of 15% to 18%.
(5) Calculates commercial rents based on a 10% cap rate to reflect degree of risk.

Source: Treasure Coast Regional Planning Council; WTL+a, February 2016.

Table 25: Estimated Ad Valorem Tax Revenues Accruing to Village

		701 US 1 Site #1	801 US 1 Site #2	Village Center Site #3	860 & 872 US 1 Site #4	TOTAL
Existing (2015)						
	Taxable Values	$ 5,559,200	$ 2,198,088	$ 1,153,740	$ 2,412,031	**$ 11,323,059**
(1)	Mil Rate (Per $1,000 AV)	$ 7.33	$ 7.33	$ 7.33	$ 7.33	
2015 Total Ad Valorem:		**$ 130,533**	**$ 50,581**	**$ 25,229**	**$ 58,508**	**$ 264,851**
Proposed						
All-in Construction Costs						
	Residential	$ 29,404,816	$ 12,698,819	$ 11,136,783	$ 20,341,533	**$ 73,581,951**
	Commercial	-	-	5,085,957	2,520,018	**7,605,975**
Assumed Taxable Value:		**$ 29,404,816**	**$ 12,698,819**	**$ 16,222,740**	**$ 22,861,551**	**$ 81,187,926**
Residential Homestead Deductions						
	Units	71	31	44	54	**200**
(2)	Assumed Owner-Occupied	54.5%	54.5%	54.5%	54.5%	
	Annual Homestead	$ 50,000	$ 50,000	$ 50,000	$ 50,000	
Total:		**$ 1,921,727**	**$ 849,378**	**$ 1,198,356**	**$ 1,470,709**	**$ 5,440,171**
New Taxable Value:		**$ 27,483,089**	**$ 11,849,441**	**$ 15,024,384**	**$ 21,390,842**	**$ 75,747,755**
Net New Taxable Value						
Ad Valorem @ Buildout		$ 201,451	$ 86,856	$ 110,129	$ 156,795	**$ 555,231**
	Existing Ad Valorem	130,533	50,581	25,229	58,508	**264,851**
ANNUAL NET NEW TAXES:		**$ 70,918**	**$ 36,275**	**$ 84,900**	**$ 98,287**	**$ 290,380**

(1) For ad valorem taxes accruing to the Village of North Palm Beach only (i.e., excludes revenues accruing to other taxing districts such as Palm Beach County, School District, Library, Water Management District, etc.).

(2) The analysis assumes that the number of owner-occupants in new housing is similar to the 2015 rate of homeownership in North Palm Beach (54.5%) (see Table 13).

Source: Palm Beach County Property Appraiser; WTL+a, February 2016.

APPENDIX B

Retail Market Analysis

Village of North Palm Beach, Florida

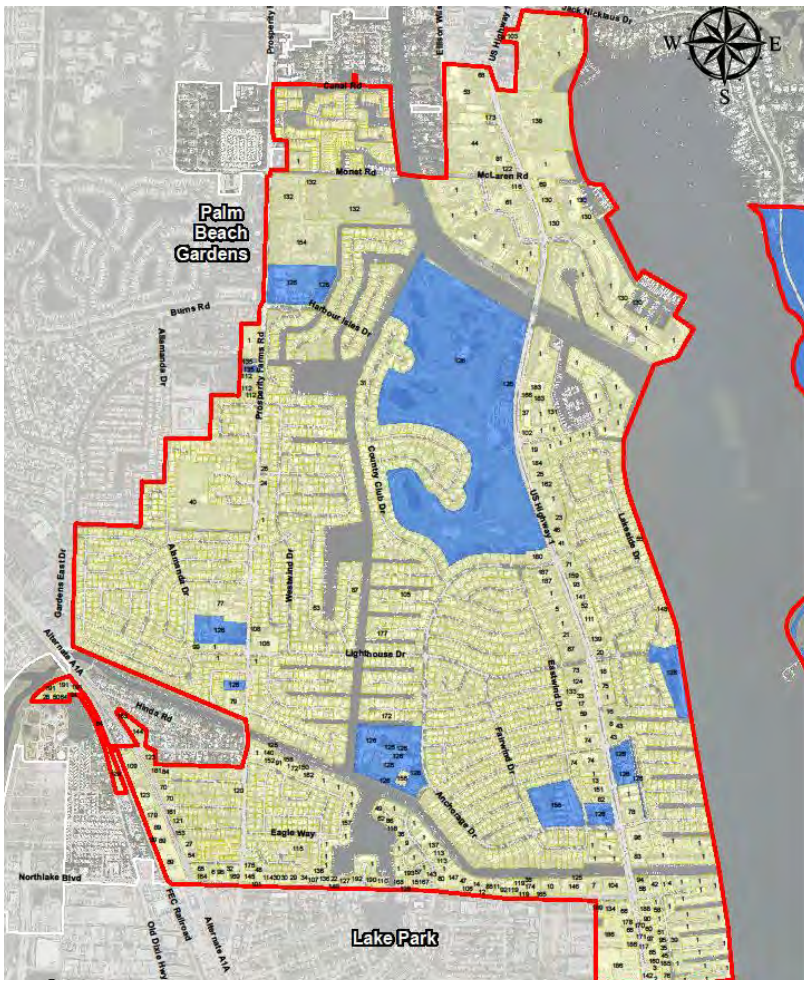
Prepared for:

Village of North Palm Beach

Prepared by:

Gibbs Planning Group

26 January 2016



Village of North Palm Beach Property Ownership Map:

Private

Public

Executive Summary

This study finds that the Village of North Palm Beach designated study area has an existing demand for up to 104,360 square feet (sf) of new retail and restaurant development producing up to $36 million in sales. By 2021, due to household income growth and economic development within the study area, this demand will likely generate up to $37.9 million in gross sales.

Please find below a summary of the 2016 supportable retail:

Figure 1: *The Village of North Palm Beach study area can presently support an additional 104,360 sf of retail and restaurant development.*

16,530	sf	Grocery Stores
15,240	sf	General Merchandise Stores
13,910	sf	Apparel & Shoe Stores
9,760	sf	Limited Service Eating Places
8,250	sf	Drinking Establishments
6,780	sf	Department & Jewelry Store Merchandise
6,450	sf	Full-Service Restaurants
6,050	sf	Electronics & Appliance Stores
5,580	sf	Book & Music Stores
5,370	sf	Office Supplies and Gift Stores
5,330	sf	Special Food Services
2,730	sf	Florists
2,380	sf	Specialty Food Stores
104,360	**sf**	**Total**

This new retail demand could be absorbed by existing businesses and/or with the opening of 35 to 50 new stores and restaurants. If constructed as a new single-site center, the development would be classified as a medium neighborhood type shopping center by industry definitions and could include 6-8 apparel stores; 4-5 limited service eating places; 4-6 general merchandise stores; 3-4 electronics and appliance stores; 3-4 office supplies and gifts stores; 3-4 drinking establishments; 2-3 full-service eating places; 2-3 book and music stores; 2-3 special food services; 1-2 grocery stores; 1-2 department store merchandise stores; and an assortment of other retail offerings.

Trade Area Boundaries

This study estimates that the Village of North Palm Beach study area has an approximately 28-square-mile primary trade area, limited by:

- Donald Ross Road to the North
- the Atlantic Ocean to the East
- below South Beach Shores and Peanut Island, up North Dixie Highway and across W. Blue Heron Road to the South
- to the Western border of I-95.

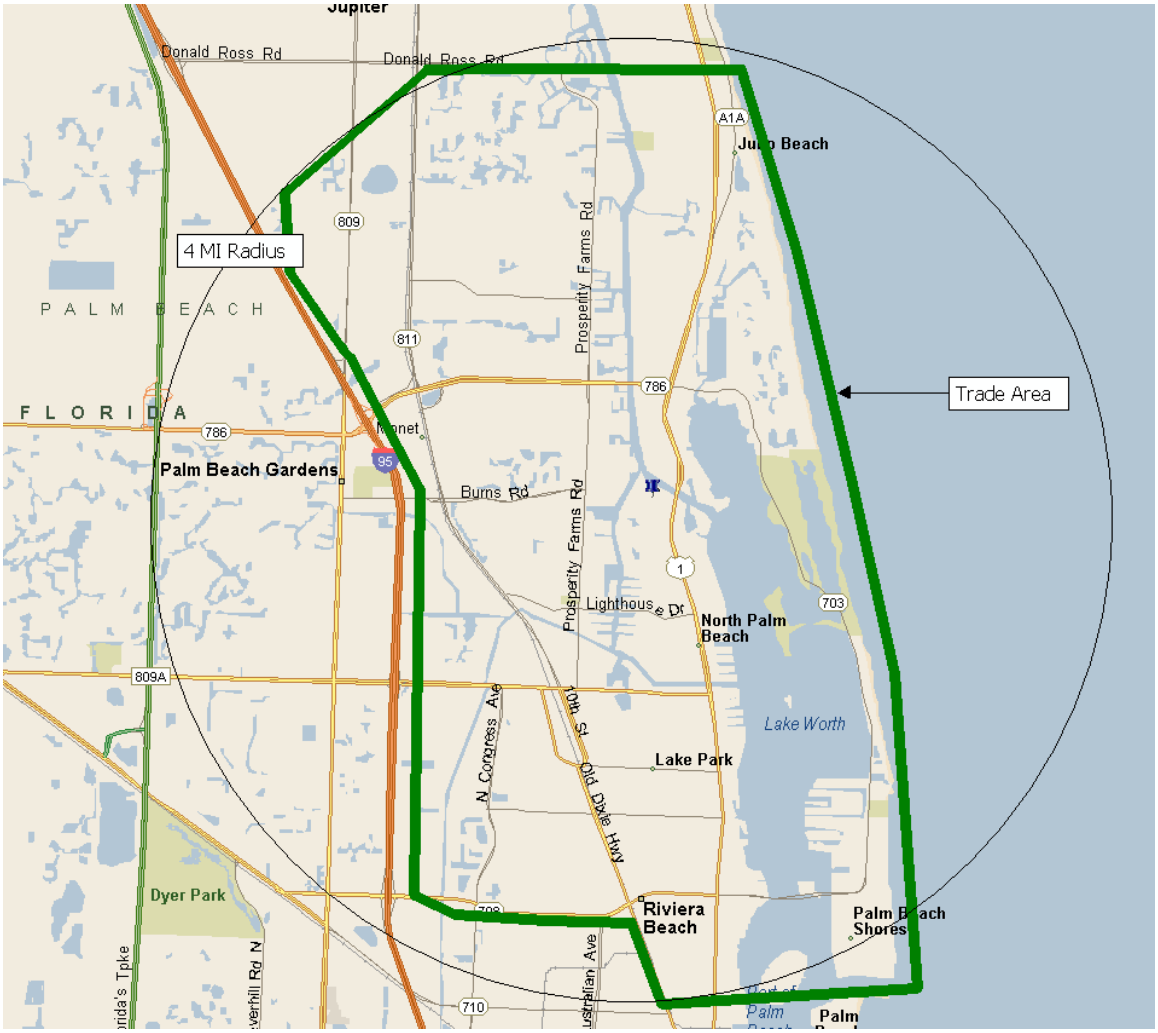


Figure 2: *Map of the Village of North Palm Beach study area's primary trade area, outlined in green.*

Shopping Competition

Gardens Mall

The Palm Beach Gardens Mall is the premier shopping destination in the study area. The luxurious 1.4 million sf regional shopping center is conveniently located one mile east of I-95 on PGA Blvd. and features over 160 shops anchored by Bloomingdale's, Macy's, Nordstrom, Saks Fifth Avenue and Sears. With a full-service post office onsite, shoppers can even conveniently ship their new finds to friends throughout the globe.

Figure 3: *Palm Beach Gardens Mall (left) and Legacy Place (right) are the study area's two premier shopping locations*

Legacy Place

Legacy Place in Palm Beach Gardens offers a "Main Street" experience with a large selection of retail stores and restaurants, in addition to an abundance of loft office space. Located at 11280 Legacy Avenue, less than a half mile from The Gardens Mall, it was built in 2007. This 424,100 sf power center includes retailers Arhaus, Barnes & Noble, Best Buy, Jos. A. Banks, Lane Bryant, Men's Wearhouse and Petco, as well as a Publix GreenWise Market

Figure 4: *Downtown at the Gardens (left) offers family entertainment attractions in addition to its retail, while the Promenade Shopping Plaza was recently in foreclosure.*

Downtown at the Gardens

Rounding out a triumvirate of shopping options in Palm Beach Gardens is Downtown at the Gardens, which offers child friendly play areas complete with a traditional carousel and train rides in addition to unique shopping, restaurants and the Cobb 16 Movie Theatre. Approximately a half mile from The Gardens Mall and Legacy Place, the 50 stores and restaurants include Cheesecake Factory, Urban Outfitters, West Elm, and Z Gallerie, as well as a Whole Foods grocery, The 32-foot wide carousel of 27 handmade wooden animals is a big family attraction.

Promenade Shopping Plaza

Located on the northeast corner of Alternate A1A and Lighthouse Drive is the 205,800 sf Promenade Shopping Plaza. The center is anchored by Publix, CVS, JoAnn Fabrics and Crafts, and Planet Fitness. Miller's Gardens Ale House, a sporting goods store and several fast casual restaurants are an added draw. Built in 1989 by Gardens East Plaza LLC, the 23-acre plaza went into foreclosure in May 2015.

The Shoppes at City Center

Located at 11241 US Highway 1 in North Palm Beach, this 100,600 sf neighborhood center is anchored by West Marine, a Carrabba's restaurant and a health club, and now features a just-opened gourmet grocer, Doris Italian Market and Bakery. The property is 90 percent leased, and was built in 1999.

Figure 5: *The Shoppes at City Center (left) is located on Rte. 1 near Lake Worth and the Intercoastal Waterway. Northlake Promenade Shoppes (right) is anchored by Publix.*

Northlake Promenade Shoppes

Publix Supermarket anchors the 92,500 sf Northlake Promenade neighborhood center, located on Northlake Boulevard and US-1 in North Palm Beach. Built in 2006, it also offers a CVS, TD Bank and Wendy's.

Northlake Commons

Northlake Commons is a 241,500 sf retail property situated at the gateway to the Northlake Boulevard retail corridor, in the same area as the Gardens Town Square, at I-95 & Northlake Blvd. The retail space features JoAnn and Ross Dress For Less, Home Depot, and a variety of other retail and restaurants. Built in 1987, American Realty Capital – Retail Centers of America Inc. bought the center in 2014 for 31.5 million.

Northlake Boulevard Retail Corridor

East of Northlake Commons is the Northlake Retail Corridor, offering a plethora of big box retailers. These include Costco, Kohl's, LA Fitness, Lowe's, Edwin Watts, Gander Mountain, PetSmart, Sports Authority and Target.

Trade Area Demographics

The study site's primary trade area includes 69,200 people, which is expected to increase at an annual rate of 0.93 percent to 72,500 by 2021. The current 2016 households number is 29,400, increasing to 30,900 by 2021 at an annual rate of 0.95 percent. The trade area's 2016 average household income is $64,400 and is estimated to increase to $73,000 by 2021. Median household income in the trade area in 2016 is $43,000 and estimated to increase to $50,700 by 2021. Moreover, 25.5 percent of the households earn above $75,000 per year. The average household size of 2.34 persons is expected to remain the same through 2021; the 2016 median age is 43.5 years old.

Table 1: Demographic Characteristics

Demographic Characteristic	*N Palm Beach Primary Trade Area*	*Palm Beach County*	*State of Florida*
2016 Population	**69,200**	1,368,000	19,603,900
2016 Households	**29,400**	560,700	7,718,700
2021 Population	**72,500**	1,432,400	20,654,200
2021 Households	**30,900**	586,200	8,130,900
2016-2021 Annual Pop. Growth Rate	**0.93%**	0.92%	1.05%
2016-2021 Annual HH Growth Rate	**0.95%**	0.89%	1.05%
2016 Average Household Income	**$64,400**	$80,400	$66,700
2016 Median Household Income	**$43,000**	$53,000	$47,300
2021 Average Household Income	**$72,900**	$91,300	$75,700
2021 Median Household Income	**$50,700**	$60,600	$54,500
% Households w. incomes $75,000 or higher	**25.5%**	35.5%	29.4%
% Bachelor's Degree	**18.9%**	21.3%	17.9
% Graduate or Professional Degree	**10.6%**	12.6%	9.8%
Average Household Size	**2.34**	2.40	2.48
Median Age	**43.5**	45.0	41.9

Table 1: *Key demographic characteristics of the study area's primary trade area, compared to county and state figures.*

In comparison, Palm Beach County's income and population rates are substantially higher than the primary trade area. The county includes 1,368,000 people and 560,700 households, with the former's growth expected to increase at an annual rate of 0.92 percent, and the latter projected to increase at a slower annual rate of 0.89 percent to 2021, when the county's projected population will be 1,432,400 with 586,200 households. The county reports a current average household income of $80,400 that is estimated to grow to $91,300 by 2021, while median household income is currently $53,000, and estimated to grow in five years to $60,600. County statistics show that 35.5 percent earn more than $75,000 annually. Average household size is 2.40 persons, projected to remain the same through 2021; the 2016 median age is 45.0 years old.

The comparable state income figures are slightly higher than the trade area numbers but much less than the county. For instance, the state average and median household income figures are

$66,700 and $47,300, respectively, and 29.4 percent of households report incomes $75,000 or higher. The state's 2016-2021 annual population and household growth rate is more robust than the trade area and county figure at 1.05 percent each. By 2021, state average and median household income figures are projected to reach $75,700 and $54,500, respectively.

Table 2: 2016 & 2021 Supportable Retail Table

Retail Category	Estimated Supportable SF	2016 Sales/SF	2016 Estimated Retail Sales	2021 Sales/SF	2021 Estimated Retail Sales	No. of Stores
Retailers						
Apparel Stores	11,670	$305	$3,559,350	$320	$3,734,400	6-8
Book & Music Stores	5,580	$250	$1,395,000	$265	$1,478,700	2-3
Department Store Merchandise	4,900	$375	$1,837,500	$395	$1,935,500	1-2
Electronics & Appliance Stores	6,050	$350	$2,117,500	$370	$2,238,500	3-4
Florists	2,730	$225	$614,250	$235	$641,550	1
General Merchandise Stores	15,240	$325	$4,953,000	$340	$5,181,600	4-6
Grocery Stores	16,530	$405	$6,694,650	$425	$7,025,250	1-2
Jewelry Stores	1,880	$450	$846,000	$475	$893,000	1
Office Supplies & Gift Stores	5,370	$310	$1,664,700	$325	$1,745,250	3-4
Shoe Stores	2,240	$315	$705,600	$330	$739,200	1-2
Specialty Food Stores	2,380	$300	$714,000	$315	$749,700	1-2
Retailer Totals	**74,570**	**$328**	**$25,101,550**	**$345**	**$26,362,650**	**24-35**
Restaurants						
Bars, Breweries & Pubs	8,250	$360	$2,970,000	$380	$3,135,000	3-4
Full-Service Restaurants	6,450	$385	$2,483,250	$405	$2,612,250	2-3
Limited-Service Eating Places	9,760	$375	$3,660,000	$395	$3,855,200	4-5
Special Food Services	5,330	$350	$1,865,500	$370	$1,972,100	2-3
Restaurant Totals	**29,790**	**$368**	**$10,978,750**	**$388**	**$11,574,550**	**11-15**
Retailer & Restaurant Totals	**104,360**	**$339**	**$36,080,300**	**$356**	**$37,937,200**	**35-50**

Table 2: *The study site's primary trade area has demand for almost 104,360 sf of new retail and restaurants.*

Assumptions

The projections of this study are based on the following assumptions:

- No other major retail centers are planned or proposed at this time and, as such, no other retail is assumed in our sales forecasts.
- No other major retail will be developed within the trade area of the subject site.
- The region's economy will stabilize at normal or above normal ranges of employment, inflation, retail demand and growth.
- The new retail development will be planned, designed, built, leased and managed as a walkable town center, to the best shopping center industry practices of the American

Planning Association, Congress for New Urbanism, the International Council of Shopping Centers and Urban Land Institute.

- Parking for the area is assumed adequate for the proposed uses, with easy access to the retailers in the development.
- Visibility of the shopping center or retail is assumed to meet industry standards, with signage as required to assure good visibility of the retailers.

Limits of Study

The findings of this study represent GPG's best estimates for the amounts and types of retail tenants that should be supportable in the Village of North Palm Beach study area's primary trade area by 2021. Every reasonable effort has been made to ensure that the data contained in this study reflect the most accurate and timely information possible and are believed to be reliable. It should be noted that the findings of this study are based upon generally accepted market research and business standards. It is possible that the study site's surrounding area could support lower or higher quantities of retailers and restaurants yielding lower or higher sales revenues than indicated by this study, depending on numerous factors including respective business practices and the management and design of the study area.

This study is based on estimates, assumptions and other information developed by GPG as an independent third party research effort with general knowledge of the retail industry, and consultations with the client and its representatives. This report is based on information that was current as of January 26, 2016, and GPG has not undertaken any update of its research effort since such date.

This report may contain prospective financial information, estimates, or opinions that represent GPG's view of reasonable expectations at a particular time. Such information, estimates, or opinions are not offered as predictions or assurances that a particular level of income or profit will be achieved, that particular events will occur, or that a particular price will be offered or accepted. Actual results achieved during the period covered by our market analysis may vary from those described in our report, and the variations may be material. Therefore, no warranty or representation is made by GPG that any of the projected values or results contained in this study will be achieved.

This study ***should not*** be the sole basis for designing, financing, planning, and programming any business, real estate development**,** or public planning policy. This study is intended only for the use of the client and is void for other site locations, developers**,** or organizations.

Appendix EXHIBIT A1: Community Profile

Gibbs Planning Group

Community Profile

N Palm Beach Primary Trade Area
Area: 28 square miles

Prepared by Gibbs Planning Group, Inc.

Population Summary	
2000 Total Population	69,371
2010 Total Population	73,963
2015 Total Population	77,227
2015 Group Quarters	498
2020 Total Population	81,133
2015-2020 Annual Rate	0.99%
Household Summary	
2000 Households	30,784
2000 Average Household Size	2.23
2010 Households	33,363
2010 Average Household Size	2.20
2015 Households	34,819
2015 Average Household Size	2.20
2020 Households	36,584
2020 Average Household Size	2.20
2015-2020 Annual Rate	0.99%
2010 Families	19,139
2010 Average Family Size	2.84
2015 Families	19,726
2015 Average Family Size	2.86
2020 Families	20,564
2020 Average Family Size	2.87
2015-2020 Annual Rate	0.84%
Housing Unit Summary	
2000 Housing Units	37,166
Owner Occupied Housing Units	57.3%
Renter Occupied Housing Units	25.5%
Vacant Housing Units	17.2%
2010 Housing Units	43,596
Owner Occupied Housing Units	50.0%
Renter Occupied Housing Units	26.5%
Vacant Housing Units	23.5%
2015 Housing Units	45,336
Owner Occupied Housing Units	46.5%
Renter Occupied Housing Units	30.3%
Vacant Housing Units	23.2%
2020 Housing Units	47,105
Owner Occupied Housing Units	46.8%
Renter Occupied Housing Units	30.9%
Vacant Housing Units	22.3%
Median Household Income	
2015	$51,724
2020	$58,708
Median Home Value	
2015	$226,287
2020	$268,725
Per Capita Income	
2015	$36,492
2020	$41,011
Median Age	
2010	45.7
2015	47.4
2020	48.4

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

Appendix EXHIBIT A2: Community Profile

Gibbs Planning Group

Community Profile

N Palm Beach Primary Trade Area
Area: 28 square miles

Prepared by Gibbs Planning Group, Inc.

2015 Households by Income	
Household Income Base	34,819
<$15,000	11.8%
$15,000 - $24,999	11.1%
$25,000 - $34,999	10.1%
$35,000 - $49,999	15.2%
$50,000 - $74,999	18.2%
$75,000 - $99,999	11.3%
$100,000 - $149,999	9.9%
$150,000 - $199,999	5.0%
$200,000+	7.5%
Average Household Income	$80,842
2020 Households by Income	
Household Income Base	36,584
<$15,000	10.7%
$15,000 - $24,999	8.1%
$25,000 - $34,999	8.1%
$35,000 - $49,999	14.1%
$50,000 - $74,999	20.2%
$75,000 - $99,999	13.4%
$100,000 - $149,999	11.2%
$150,000 - $199,999	5.8%
$200,000+	8.4%
Average Household Income	$90,859
2015 Owner Occupied Housing Units by Value	
Total	21,082
<$50,000	2.5%
$50,000 - $99,999	10.4%
$100,000 - $149,999	15.6%
$150,000 - $199,999	16.0%
$200,000 - $249,999	10.4%
$250,000 - $299,999	7.7%
$300,000 - $399,999	12.1%
$400,000 - $499,999	7.4%
$500,000 - $749,999	7.2%
$750,000 - $999,999	3.0%
$1,000,000 +	7.6%
Average Home Value	$343,164
2020 Owner Occupied Housing Units by Value	
Total	22,037
<$50,000	1.5%
$50,000 - $99,999	6.4%
$100,000 - $149,999	10.3%
$150,000 - $199,999	16.1%
$200,000 - $249,999	12.4%
$250,000 - $299,999	8.9%
$300,000 - $399,999	12.3%
$400,000 - $499,999	7.8%
$500,000 - $749,999	9.2%
$750,000 - $999,999	5.4%
$1,000,000 +	9.7%
Average Home Value	$402,770

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.
Source: U.S. Census Bureau, Census 2010 Summary File 1 Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

Appendix EXHIBIT A3: Community Profile

Gibbs Planning Group

Community Profile

N Palm Beach Primary Trade Area
Area: 28 square miles

Prepared by Gibbs Planning Group, Inc.

2010 Population by Age	
Total	73,964
0 - 4	5.0%
5 - 9	4.9%
10 - 14	5.1%
15 - 24	10.5%
25 - 34	11.5%
35 - 44	12.0%
45 - 54	15.4%
55 - 64	13.8%
65 - 74	10.8%
75 - 84	7.8%
85 +	3.3%
18 +	81.7%
2015 Population by Age	
Total	77,229
0 - 4	4.6%
5 - 9	4.9%
10 - 14	4.9%
15 - 24	10.0%
25 - 34	11.4%
35 - 44	11.1%
45 - 54	14.0%
55 - 64	15.0%
65 - 74	12.6%
75 - 84	7.6%
85 +	3.9%
18 +	82.7%
2020 Population by Age	
Total	81,136
0 - 4	4.5%
5 - 9	4.7%
10 - 14	5.0%
15 - 24	9.3%
25 - 34	11.2%
35 - 44	11.4%
45 - 54	12.0%
55 - 64	15.1%
65 - 74	14.1%
75 - 84	8.6%
85 +	4.0%
18 +	82.9%
2010 Population by Sex	
Males	35,748
Females	38,215
2015 Population by Sex	
Males	37,273
Females	39,954
2020 Population by Sex	
Males	39,036
Females	42,097

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

Appendix EXHIBIT A4: Community Profile

Gibbs Planning Group

Community Profile

N Palm Beach Primary Trade Area
Area: 28 square miles

Prepared by Gibbs Planning Group, Inc.

2010 Population by Race/Ethnicity	
Total	73,962
White Alone	68.2%
Black Alone	25.8%
American Indian Alone	0.2%
Asian Alone	2.3%
Pacific Islander Alone	0.1%
Some Other Race Alone	1.6%
Two or More Races	1.8%
Hispanic Origin	7.9%
Diversity Index	54.5
2015 Population by Race/Ethnicity	
Total	77,227
White Alone	66.4%
Black Alone	26.8%
American Indian Alone	0.2%
Asian Alone	2.5%
Pacific Islander Alone	0.1%
Some Other Race Alone	1.9%
Two or More Races	2.1%
Hispanic Origin	9.4%
Diversity Index	57.4
2020 Population by Race/Ethnicity	
Total	81,134
White Alone	64.5%
Black Alone	27.9%
American Indian Alone	0.2%
Asian Alone	2.8%
Pacific Islander Alone	0.1%
Some Other Race Alone	2.2%
Two or More Races	2.3%
Hispanic Origin	11.2%
Diversity Index	60.4
2010 Population by Relationship and Household Type	
Total	73,963
In Households	99.4%
In Family Households	75.6%
Householder	25.9%
Spouse	18.3%
Child	25.2%
Other relative	4.1%
Nonrelative	2.2%
In Nonfamily Households	23.7%
In Group Quarters	0.6%
Institutionalized Population	0.3%
Noninstitutionalized Population	0.3%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

Appendix EXHIBIT A5: Community Profile

Gibbs Planning Group

Community Profile

N Palm Beach Primary Trade Area
Area: 28 square miles

Prepared by Gibbs Planning Group, Inc.

2015 Population 25+ by Educational Attainment	
Total	58,336
Less than 9th Grade	3.0%
9th - 12th Grade, No Diploma	5.9%
High School Graduate	22.7%
GED/Alternative Credential	2.4%
Some College, No Degree	20.1%
Associate Degree	9.4%
Bachelor's Degree	23.0%
Graduate/Professional Degree	13.6%
2015 Population 15+ by Marital Status	
Total	66,069
Never Married	31.3%
Married	44.3%
Widowed	8.5%
Divorced	15.9%
2015 Civilian Population 16+ in Labor Force	
Civilian Employed	93.6%
Civilian Unemployed	6.4%
2015 Employed Population 16+ by Industry	
Total	36,949
Agriculture/Mining	0.5%
Construction	5.8%
Manufacturing	4.3%
Wholesale Trade	2.0%
Retail Trade	11.4%
Transportation/Utilities	5.4%
Information	1.6%
Finance/Insurance/Real Estate	9.4%
Services	55.2%
Public Administration	4.4%
2015 Employed Population 16+ by Occupation	
Total	36,947
White Collar	61.5%
Management/Business/Financial	14.9%
Professional	20.2%
Sales	14.5%
Administrative Support	11.9%
Services	24.1%
Blue Collar	14.4%
Farming/Forestry/Fishing	0.3%
Construction/Extraction	3.9%
Installation/Maintenance/Repair	3.0%
Production	2.7%
Transportation/Material Moving	4.6%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

Appendix EXHIBIT A6: Community Profile

Gibbs Planning Group

Community Profile

N Palm Beach Primary Trade Area
Area: 28 square miles

Prepared by Gibbs Planning Group, Inc.

2010 Households by Type	
Total	33,363
Households with 1 Person	34.1%
Households with 2+ People	65.9%
Family Households	57.4%
Husband-wife Families	40.6%
With Related Children	12.5%
Other Family (No Spouse Present)	16.8%
Other Family with Male Householder	4.4%
With Related Children	2.2%
Other Family with Female Householder	12.4%
With Related Children	7.6%
Nonfamily Households	8.5%
All Households with Children	22.6%
Multigenerational Households	3.2%
Unmarried Partner Households	7.2%
Male-female	6.3%
Same-sex	0.8%
2010 Households by Size	
Total	33,361
1 Person Household	34.1%
2 Person Household	38.1%
3 Person Household	12.6%
4 Person Household	8.6%
5 Person Household	3.8%
6 Person Household	1.5%
7 + Person Household	1.2%
2010 Households by Tenure and Mortgage Status	
Total	33,363
Owner Occupied	65.4%
Owned with a Mortgage/Loan	40.2%
Owned Free and Clear	25.1%
Renter Occupied	34.6%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

Gibbs Planning Group

Business Summary

Exhibit A N Palm Beach TA

Prepared by Gibbs Planning Group, Inc.

Data for all businesses in area	
Total Businesses:	5,571
Total Employees:	59,628
Total Residential Population:	69,160
Employee/Residential Population Ratio:	0.86:1

			Employees	
by SIC Codes	Number	Percent	Number	Percent
Agriculture & Mining	91	1.6%	592	1.0%
Construction	451	8.1%	3,462	5.8%
Manufacturing	215	3.9%	4,099	6.9%
Transportation	159	2.9%	2,384	4.0%
Communication	46	0.8%	1,138	1.9%
Utility	18	0.3%	2,107	3.5%
Wholesale Trade	265	4.8%	4,410	7.4%
Retail Trade Summary	1,167	20.9%	11,057	18.5%
Home Improvement	109	2.0%	921	1.5%
General Merchandise Stores	33	0.6%	942	1.6%
Food Stores	104	1.9%	1,166	2.0%
Auto Dealers, Gas Stations, Auto Aftermarket	197	3.5%	2,432	4.1%
Apparel & Accessory Stores	70	1.3%	227	0.4%
Furniture & Home Furnishings	123	2.2%	577	1.0%
Eating & Drinking Places	236	4.2%	3,166	5.3%
Miscellaneous Retail	296	5.3%	1,626	2.7%
Finance, Insurance, Real Estate Summary	707	12.7%	6,574	11.0%
Banks, Savings & Lending Institutions	211	3.8%	636	1.1%
Securities Brokers	84	1.5%	505	0.8%
Insurance Carriers & Agents	82	1.5%	3,072	5.2%
Real Estate, Holding, Other Investment Offices	330	5.9%	2,361	4.0%
Services Summary	2,094	37.6%	21,060	35.3%
Hotels & Lodging	35	0.6%	1,348	2.3%
Automotive Services	201	3.6%	1,222	2.0%
Motion Pictures & Amusements	134	2.4%	914	1.5%
Health Services	287	5.2%	4,995	8.4%
Legal Services	87	1.6%	587	1.0%
Education Institutions & Libraries	76	1.4%	2,110	3.5%
Other Services	1,274	22.9%	9,884	16.6%
Government	84	1.5%	1,659	2.8%
Unclassified Establishments	274	4.9%	1,086	1.8%
Totals	5,571	100.0%	59,628	100.0%

Gibbs Planning Group

Business Summary

Exhibit A N Palm Beach TA

Prepared by Gibbs Planning Group, Inc.

	Businesses		Employees	
by NAICS Codes	Number	Percent	Number	Percent
Agriculture, Forestry, Fishing & Hunting	9	0.2%	118	0.2%
Mining	1	0.0%	4	0.0%
Utilities	7	0.1%	2,054	3.4%
Construction	485	8.7%	3,665	6.1%
Manufacturing	267	4.8%	3,734	6.3%
Wholesale Trade	260	4.7%	4,353	7.3%
Retail Trade	881	15.8%	7,520	12.6%
Motor Vehicle & Parts Dealers	169	3.0%	2,331	3.9%
Furniture & Home Furnishings Stores	56	1.0%	283	0.5%
Electronics & Appliance Stores	39	0.7%	181	0.3%
Bldg Material & Garden Equipment & Supplies Dealers	108	1.9%	919	1.5%
Food & Beverage Stores	104	1.9%	1,015	1.7%
Health & Personal Care Stores	61	1.1%	419	0.7%
Gasoline Stations	27	0.5%	102	0.2%
Clothing & Clothing Accessories Stores	96	1.7%	303	0.5%
Sport Goods, Hobby, Book, & Music Stores	59	1.1%	334	0.6%
General Merchandise Stores	33	0.6%	942	1.6%
Miscellaneous Store Retailers	113	2.0%	634	1.1%
Nonstore Retailers	15	0.3%	59	0.1%
Transportation & Warehousing	124	2.2%	2,255	3.8%
Information	81	1.5%	2,070	3.5%
Finance & Insurance	385	6.9%	4,246	7.1%
Central Bank/Credit Intermediation & Related Activities	217	3.9%	661	1.1%
Securities, Commodity Contracts & Other Financial Investments	85	1.5%	507	0.9%
Insurance Carriers & Related Activities; Funds, Trusts & Other	84	1.5%	3,078	5.2%
Real Estate, Rental & Leasing	376	6.7%	2,467	4.1%
Professional, Scientific & Tech Services	466	8.4%	3,440	5.8%
Legal Services	95	1.7%	670	1.1%
Management of Companies & Enterprises	5	0.1%	18	0.0%
Administrative & Support & Waste Management & Remediation	282	5.1%	1,790	3.0%
Educational Services	102	1.8%	2,241	3.8%
Health Care & Social Assistance	387	6.9%	7,666	12.9%
Arts, Entertainment & Recreation	96	1.7%	866	1.5%
Accommodation & Food Services	276	5.0%	4,620	7.7%
Accommodation	35	0.6%	1,348	2.3%
Food Services & Drinking Places	241	4.3%	3,273	5.5%
Other Services (except Public Administration)	720	12.9%	3,689	6.2%
Automotive Repair & Maintenance	164	2.9%	916	1.5%
Public Administration	84	1.5%	1,685	2.8%
Unclassified Establishments	275	4.9%	1,126	1.9%
Total	5,571	100.0%	59,628	100.0%

APPENDIX D
Principles of Urban Design

Florida is Facing New Challenges

Local governments are increasingly employing planning strategies and methods that provide predictability, balance land uses and mobility, and promote economic resilience and physical beauty in future growth. For coastal cities who faced near abandonment during the 1970s, the trend over the last two decades has been to re-cast themselves as viable, sustainable downtowns. For the first time in 40 years, ongoing discussions are engaged about restoring passenger rail service to the FEC corridor. Florida residents are playing a much more active role in planning and urban design decisions. And perhaps most importantly, Floridians in general are recognizing how fragile the state is ecologically and that future growth and redevelopment must be more compact, require less fuel consumption, and promote a legacy of responsibility for both the natural and built environments.

This chapter discusses and describes time-tested principles that have historically shaped communities into sustainable, multi-modal, healthy, and attractive places.

John Nolen's 1925 plan for Venice, Florida, is one of 54 master plans the landscape architect designed in Florida in the 1920s. Nolen's plans are exemplary representations of many of the principles of urban design outlined in this report.

Historic Patterns of Growth in Florida

Historically, towns, cities, and individual projects have been developed following one of two general patterns of development: a suburban pattern or a traditional pattern.

A) The Suburban Pattern

The suburban pattern of development segregates uses by creating single use, disconnected areas. As a result, shopping, housing, schools, and recreation are not organized in an intrinsically connected, compact manner. In order to access each of these disconnected areas, the use of an automobile is typically required. As a result, parking becomes a dominant feature of a sprawling landscape. This sprawling and disconnected development relies upon a limited roadway network that gradually degrades and limits mobility options of a community.

***Top**:* Conventional suburban pattern of development. Uses are strictly separated.

***Bottom**:* Traditional pattern of development. Uses coexist and form multi-use neighborhoods.

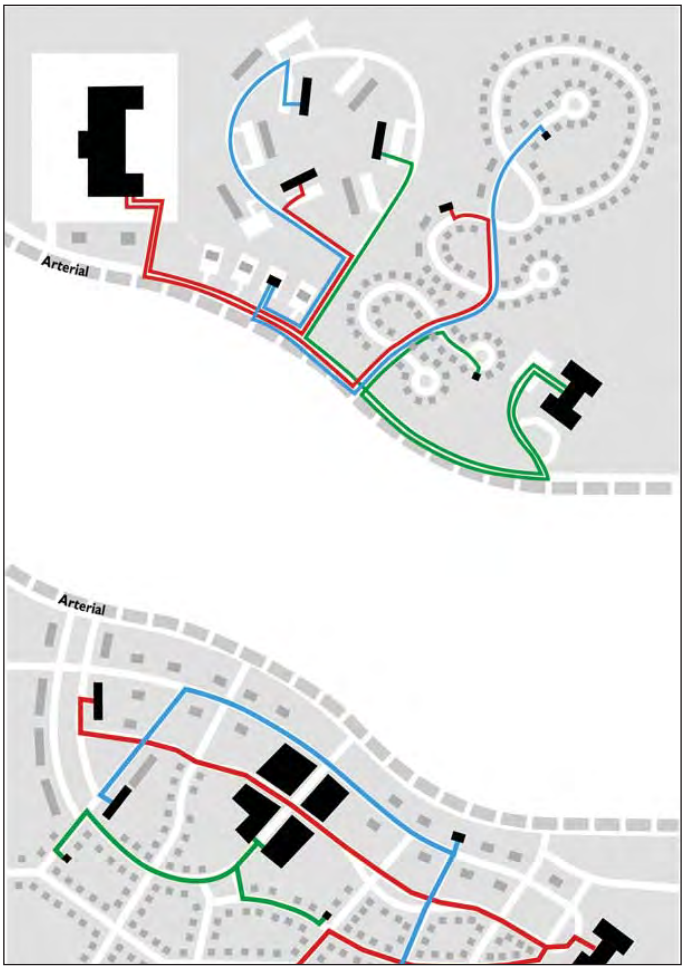
This erosion of mobility is centered around the inevitable result that most vehicular trips must occur on collector or arterial roads. Local roads that are comfortable and safe for pedestrians and cyclists as well as motorists are either disconnected from most destinations or no longer sufficient to handle the vehicular demands of the suburban pattern of settlement. With most of the traffic volume accommodated on fewer and fewer local roads, the connecting thoroughfares become increasingly wide, auto-dominant, and unable to provide a safe or desirable environment for cyclists and pedestrians.

As roadways become less desirable, new development naturally "turns its back" to the road. This common development model further exacerbates the degraded physical environment, making suburban development self-perpetuating and very difficult to reverse. The necessity of an automobile is reinforced, and the situation worsens. Under the suburban pattern of development, the more an area develops, the worse the traffic congestion becomes.

The degree to which a community is auto-dependent is a result of its development patterns (suburban or traditional) and the network and size of its streets and blocks. The effect of the suburban pattern is particularly difficult for children and the elderly who either cannot drive or are losing their ability to drive. Many elderly residents of isolated communities find they must move from their homes and neighbors when they can no longer drive. This is due, in part, to another hallmark of the suburban pattern: low density. Low-density development has made the critical mass needed for a viable transit system almost impossible to achieve, thereby giving the transportation disadvantaged limited options.

B) The Traditional Pattern

The traditional pattern of development is how cities, towns, and neighborhoods were built prior to World War II. In contrast to the suburban pattern, the traditional pattern mixes and interconnects different uses through a dense network of streets, blocks, and public spaces. This network of streets allows for the dispersion of vehicle trips throughout the community, rather than forcing all cars onto a limited number of through streets.



***Top**:* Conventional suburban pattern of development. All traffic collects on one road.

***Bottom**:* Traditional pattern of development. A street network creates many alternatives to get from one location to another.

Dispersing vehicular trips into multiple routes allows roadways to be smaller with fewer lanes. Smaller roadways, unlike collector or arterial roads, easily accommodate bicyclists and pedestrians in a safe and often beautiful environment. One could easily travel from home to work or shopping on local streets without having to engage larger, auto-dominant thoroughfares. Additionally, a system of interconnected neighborhood streets reduces the number of local trips that rely on arterial and collector roads. As a result, the interconnected neighborhood streets also allow the larger, faster moving thoroughfares to remain a civilized size, serve primarily "through" traffic, and maintain efficiency as well.

Many of South Florida's older coastal downtowns - Stuart, West Palm Beach, Lake Worth, and Delray Beach - are great examples of the traditional pattern of development. Each of these areas has places to live, work, and shop all within very close proximity. Their higher densities are more transit-supportive and the balance of uses lessens the need for vast parking areas and creates livelier places throughout the day.

A Shifting Paradigm

The majority of the metropolitan areas in south Florida have been built following the suburban model of single-use, disconnected pods that rely almost entirely on limited collector and arterial roadway networks. An interesting experiment is to visit any of the older downtowns listed above, find a major east-west roadway (Kanner Highway, Southern Boulevard, Lake Worth Road, Atlantic Avenue, etc.), and drive west. What one typically discovers is a road that progressively widens while the number of cross streets diminishes, and a public realm that becomes unattractive and auto-dominant. Having experienced the impacts of the suburban pattern of development for decades, many in South Florida desire a change. In the early 1980s, this dissatisfaction led to a resurgence of interest in areas developed in the traditional pattern. In fact, during the past twenty years, a nation-wide trend to develop and restore urban environments has been evident.

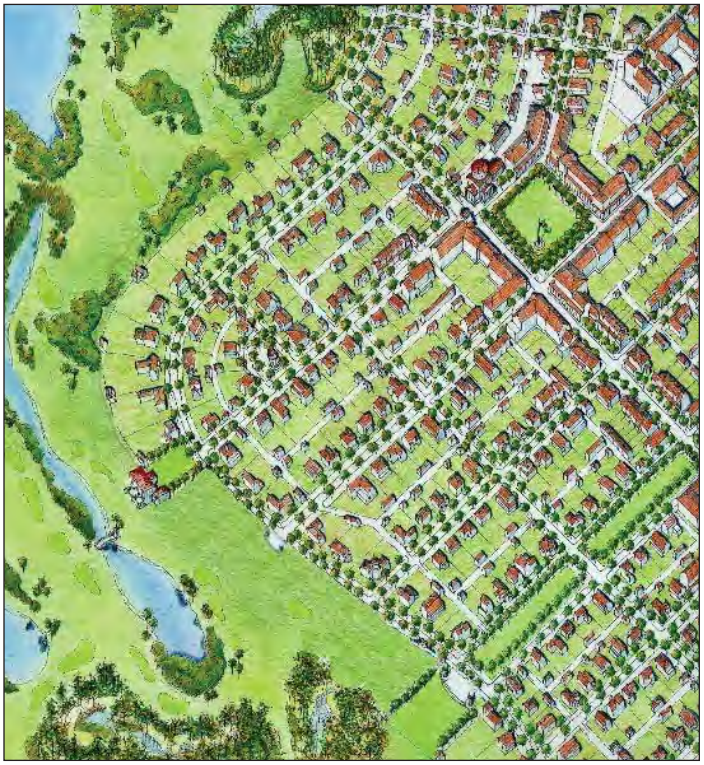
PRINCIPLES OF URBAN DESIGN

Every community has unique characteristics and conditions and boasts a unique identity. However, common fundamental planning principles have successfully shaped great cities, towns, and neighborhoods for centuries, and still describe successful, sustainable places today. These planning principles guide the designs and recommendations of the North Palm Beach citizen's master plan.

History and research have demonstrated that the most successful, livable and economically resilient communities share the same basic, time-tested planning principles that guide:

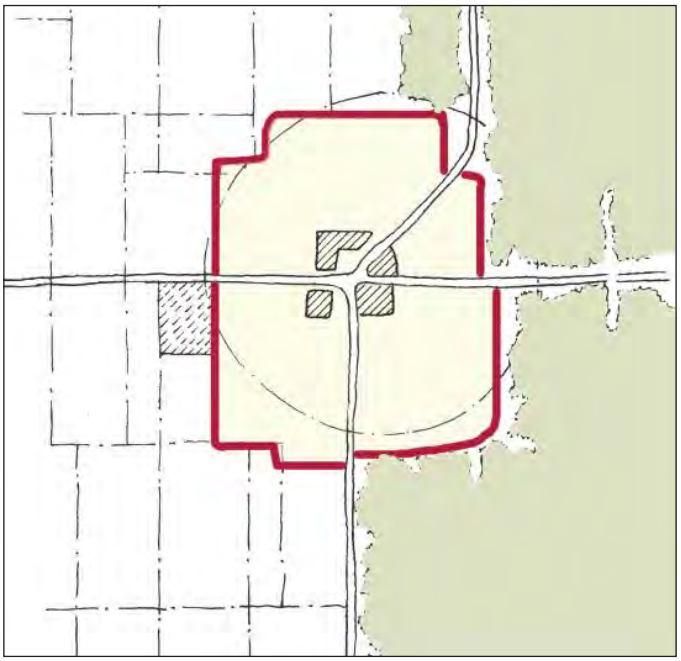
a) Neighborhood Size
b) **Neighborhood Center** and Edge
c) Interconnected Network of Streets
d) **Mix of Uses**
e) Mix of Building Types
f) **Proper Building Placement**
g) **Proper Parking Placement**
h) Civic Buildings
i) Public Open Space

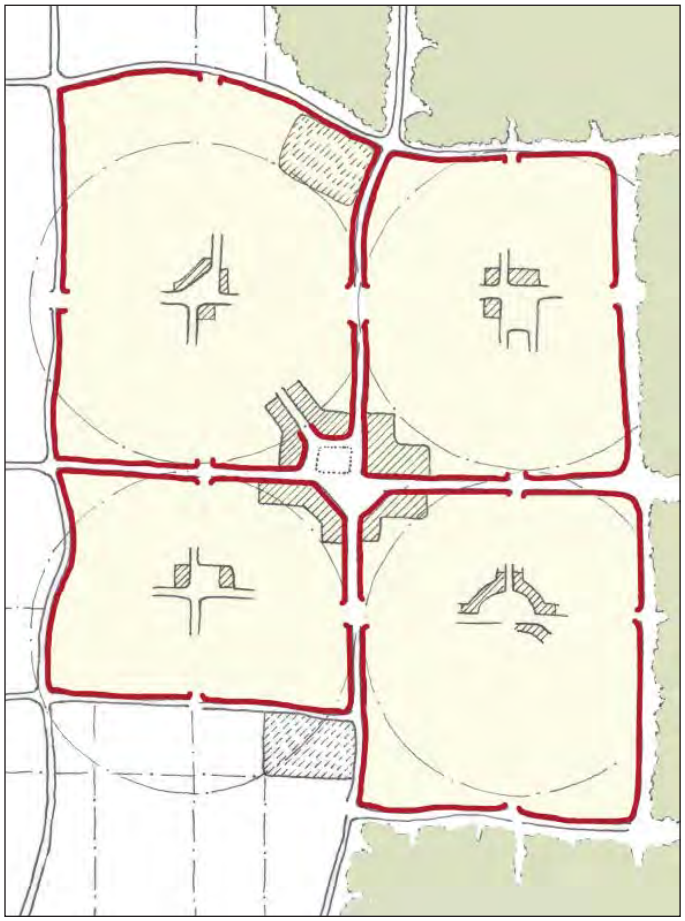
North Palm Beach is a built-out city where several of these principles have been successfully implemented over time. This chapter describes the basic characteristics of each principle and their interdependency. While all principles are essential to the creation of place and to achieve physical and economic resilience for North Palm Beach, some require more attention than others moving forward. This public master planning effort is evidence that the Village is looking to guide redevelopment of vacant land and future options for buildings that are obsolete or approaching obsolescence, as well as to grow successful businesses. The goal is to create predictability, establish a strong identity through the creation of place and to ensure the Village is both physically and economically resilient for generations to come. To that effect, it is important that special attention be paid to the principles with particular attention to those highlighted above in bold: **Neighborhood Center, Mix of Uses, Proper Building Placement** and **Proper Parking Placement**.



***Top**:* Diagram of an ideal neighborhood, depicting a center and edge, an appropriate mix of uses and building types, diverse housing affordabilities, properly arranged public open spaces, and preserved natural areas. When combined, multiple neighborhoods form towns and cities.
Image Courtesy of Dover Kohl & Partners

***Bottom**:* Diagram of the fundamental planning principles applied to a neighborhood.





***Top**:* Diagram of a neighborhood. When isolated in the countryside it is a Village.
***Bottom**:* Diagram of a Town: a combination of two or more neighborhoods.

A) Neighborhood Size

The Neighborhood is the basic increment of development of traditional towns and cities. When clustered with other neighborhoods it becomes a town or city; when standing free in the landscape, it is a village.

The Neighborhood is limited in size. Each neighborhood typically ranges in size from 40 to 125 acres. This results in a majority of the population living within a 5-minute walking distance (1/4 mile) of the neighborhood center. This distance represents the average most people will walk to satisfy their daily needs (whether this means reaching an actual destination, or accessing transit that provides transportation to the ultimate destination). When two or more neighborhoods are combined they form towns and cities.

The density of a residential neighborhood typically averages between 6 and 10 units per acre. Such density allows for a wide spectrum of housing options and lot sizes. Downtown cores and the more urban neighborhoods typically have much higher average densities given the larger occurrence of multi-family buildings. With higher densities, a greater variety of service is possible within close proximity to homes. Neighborhoods mostly dedicated to a specialized use or activity are Special Districts (i.e. industrial, entertainment, etc).

B) Center, Edge and Neighborhood Transition

Center, Edge and the Transect

A traditional neighborhood has a clearly defined Center and Edge and is generally structured so that a wide range of building types, density, and uses are accommodated in close proximity and arranged by intensity (more rural-to- more urban). This orderly, gradual transition is commonly referred to as the "Transect".

Transitions between Uses and Scale

Buildings have fronts and backs. In order to ensure compatibility, buildings of like scale and massing and compatible uses should face each other on a street. The front a building is much more relevant to the public realm than its rear. Ideally, transitions between differing intensities, uses, and scales should occur at the rear of buildings (parking areas or back yards) or along alleys.

Neighborhood Edge

The lowest densities and less intense uses are placed towards the edge of the neighborhood. Neighborhood edges can be natural (i.e. rivers, natural preserves, farmland), or manmade (i.e. wide, high traffic streets).

Illustration of transition of uses, scale, and massing. Note the use of roads and alleys in the transition between varying intensities.

"A" AND "B" STREETS

"A" streets are where the primary pedestrian activity and vehicle traffic occur. They have active ground floor uses, the primary building façade, the main building entrance, and limited or restricted curb cuts.

"B" Streets are the secondary streets and can accommodate parking, service and shipping entrances, driveways, and curb cuts.

***Center & Bottom**: Streets, whether in commercial or residential areas, are centers for human interaction and should be designed with great care for pedestrians, bicyclists and automobiles alike.*

C) An Interconnected Network of Streets

Streets are the Center for Human Activity

Streets are centers of human activity. As such, they should be inviting and comfortable places for people, whether driving, walking, or cycling.

Approximately thirty percent of developed areas in a neighborhood are dedicated to streets, which is why the way streets are designed and shaped by adjacent development has significant impacts on the safety, comfort, and quality of life. Street design should be undertaken with the same care given to any other important public or civic space.

The Power of the Grid

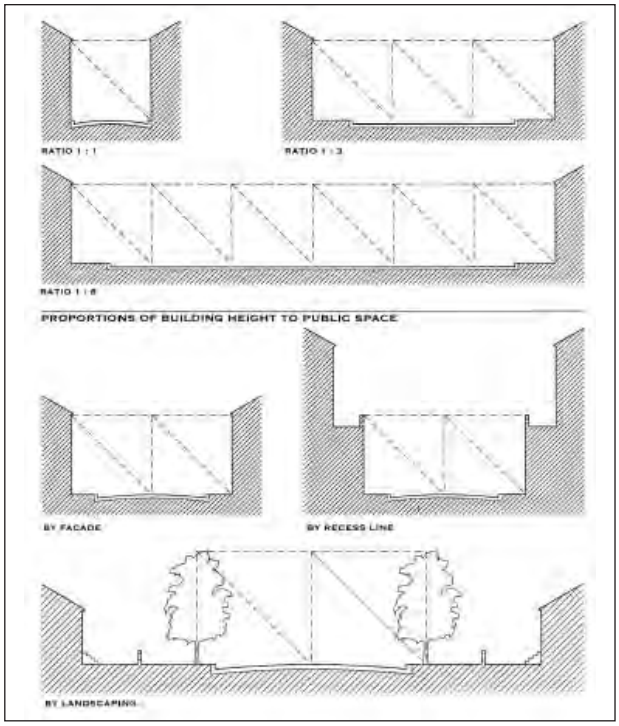
The grid is the most efficient system of street planning and circulation. When streets intersect with other streets, a fine network of alternative transportation routes results. Users of the system have many more routes to choose from, improving convenience for all modes of transportation. Another benefit of utilizing a dense network of streets, is intersections can be smaller and safer to cross for both motorists and non-motorists.

Block Size

The "block" is an essential, central element of urban planning. Blocks are areas surrounded by streets containing lots for private or public development. They are the basic unit of neighborhood planning.

Traditional neighborhoods are composed of blocks in a variety of sizes and shapes. In order to establish a walkable environment, a dense grid of interconnected streets is necessary, which ultimately affects block size. To achieve both walkability and a strong network of streets, blocks should have an average perimeter no greater than 1,320 feet.

Communities with a grid in place should protect it and its effectiveness by not closing streets to public use. As growth occurs, the opportunity to expand and enhance the grid with new connections must be taken in order to equitably distribute new traffic demands and accommodate a range of transportation options in the community.



***Top**: Ideal height-to-width ratios. (Architectural Graphic Standards, American Institute of Architects).*

***Bottom**: As stated in Architectural Graphic Standards, a height to width ratio of one-to-three is the minimum height to width ratio if a sense of spatial enclosure is to result. The smaller the ratio, the higher sense of place and generally the higher the property values.*

Diversity of Street Types

Great towns have a hierarchy of streets that are different in size, function, and configuration. Streets in business districts are usually wider with on-street parking lanes and broad sidewalks to accommodate street furniture, formal landscaping, and a large number of pedestrians. Local streets in residential areas are narrower, accommodating slower vehicular speeds with informal on-street parking arrangements, narrower sidewalks, and planting strips between the sidewalk and the travel lanes. General street types include highways, corridors (boulevards, avenues, etc.), commercial streets (main street), residential streets, and alleys.

Street to Building Height Ratio

As stated in Architectural Graphic Standards, published by the American Institute of Architects, a ratio of one-to-three is the minimum to create a sense of spatial enclosure. The smaller ratio is typically more desirable as frequently indicated by higher real estate values. Consequently, recommended building heights will vary in accordance with the width of the street and sidewalks and the building setbacks. Wider streets accommodate taller buildings while narrower streets accommodate smaller buildings. In order to achieve the desired sense of enclosure on very wide streets, like boulevards, tall buildings frame the space, frequently reinforced with formally aligned street trees planted in medians. In lower density neighborhoods where single-family homes set back from the street, the proper enclosure can be provided with a continuous alignment of street trees. A proper building height relative to the width of the street is important to provide a sense of enclosure and definition to the street space.

Speed is Key to Safety

In order to have streets conducive to human interaction, they must be and feel safe. Vehicular speed is directly linked to street safety. The chart to the right shows the increase in pedestrian fatalities as vehicles travel faster. Fatality rates increase significantly when vehicular speeds reach 30 miles per hour; fatality rates rise significantly, to about 80%, when vehicular speeds reach 40 miles per hour. The most effective way to keep traffic moving slowly is to design the roads to physically encourage the speed vehicles are intended to travel. Roadways should not be designed for faster speeds (through lane width, number of lanes, etc.), and rely upon posted speeds to control traffic.

Pedestrian Safety Graph: Pedestrian safety decreases as vehicle speed increases

Roadway Design Speed

A network of two-lane parallel routes is the most efficient way to move traffic, and since the streets are narrower, pedestrians and cyclists feel safer, thereby encouraging the use of other modes of transportation. Speeds generally increase on wider roads, As lanes are added to a roadway, the incremental gain in capacity per lane mile is reduced because distances between vehicles becomes greater. Longer following distances between vehicles creates less compactness, less capacity, and consequently result in less efficient streets.

Traffic Calming Design Elements

The best way to calm traffic is to design streets for the actual speed desired, as opposed to designing for higher speeds and posting slower speeds on the roadway signage. An array of elements can be used in the design of a street to calm traffic. Care must be given to the design and function of the street for all users when using traffic calming design features.

Bulb-out and median create a lateral shift in the travel route. Image courtesy of Ian Lockwood.

Sidewalks and Pathways

Sidewalks are an integral part of the street and should be installed parallel to roadways. Sidewalks along streets create predictable, intuitive pedestrian routes. Installing sidewalks on both sides of the street encourage walking. A dense network of streets with sidewalks and/or multi-use paths offers choices, disperses foot and cycle traffic, and reduces unnecessary and dangerous road crossings.

Multi-use paths are routes designed for pedestrians, cyclists, skaters and other forms of non-motorized travel. These paths are intended for both transportation and recreation activities. The widths of sidewalks and multi-uses paths vary according to the location and level of use.

Active commercial streets with wide sidewalks, with space for pedestrians, strollers, and outdoor cafes.

Street Trees

Properly planted, street trees serve three purposes: beautification, safety, and shelter. The most beautiful streets typically display strong alignments of formal, regularly spaced street trees. Trees planted between the sidewalk and the roadway help shield those using the sidewalk from passing cars. Street trees are also an effective traffic-calming device. The trees create a feeling of enclosure, and drivers tend to slow, becoming more aware of pedestrians. Trees provide shelter from the sun, which encourages walking.

Street Furnishings and Lighting

Benches, shelters, fountains, and signage should be detailed and designed as furniture to be placed within the outdoor room of the city that constitutes the street. The community should use locally distinctive, durable, and easy to maintain materials for street furniture.

Seating

Seating on key pedestrian routes should be provided every 300 to 600 feet to offer rest and afford opportunities for natural surveillance. Seating encourages street activity and offers respite to those who may be physically disadvantaged.

Signs

The excessive or insensitive use of traffic and business signs can also have a negative impact on the street. Too many signs compete for a driver's attention. Messages on the street should be necessary and not distract the driver. Important messages should not be competing with unnecessary messages.

Lighting

Pedestrian-scaled lighting in appropriate places will encourage use by cyclists and pedestrians. Lighting should be pedestrian in scale and full spectrum. Mixed-use and commercial districts are generally active later than residential neighborhoods and require brighter lighting solutions to ensure safety.

Cycle Parking

Cycle parking should be made as convenient as car parking and considered part of the necessary infrastructure.

.

Beautiful streets are a civic amenity that also accommodates motorists, pedestrians, cyclists, and outdoor diners.

D) A Balanced Mix of Uses

Places that have a sustainable pattern of development tend to have a balanced mix of land uses, which means people can live, work, shop, recreate and satisfy most daily needs within their community. Providing easy access to these uses does not mean people will stop traveling outside their community, but it greatly reduces (or even eliminates) the necessity to travel longer distances. A balanced mix of uses decreases the financial burden of providing spread-out infrastructure for the municipality, reduces reliance on fossil fuels, allows children and older people to be self-sufficient, and a reduces the number of vehicles a household needs to function.

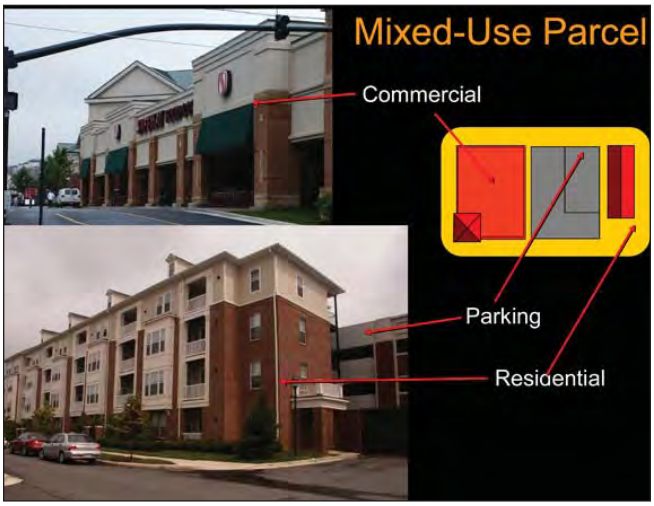
Mixed-use buildings lining a commercial street in downtown Delray Beach.

A general desire for cities and neighborhoods to be more sustainable has led to a renewed interest in mixed-use districts. Mixed-use districts combine uses to accommodate diverse functions within an area. The mix can be a combination of residential, commercial, industrial, office, institutional, or other land uses. Allowing a mix of uses contributes to the sustainability of a city by legalizing the close proximity of various destinations.

Mixed use building integrating retail office and residential uses in Palm Beach, Florida.

The most successful mixed-use communities are compact, allowing ease of access between uses, and efficiently allocating resources such as water, electricity, roads, lighting, and street furnishings. Land is utilized resourcefully, typically occupied by higher density and intensity buildings. Parking requirements are reduced since a single trip provides access to many destinations. Compactness also supports alternative modes of transportation including walking, cycling, and mass transit.

Mixed-use can occur vertically within a building or horizontally across a parcel or district.



Mixed use can occur both vertically within a building, or horizontally within a given block. The image above shows a single block that accommodates a diversity of uses.

E) Appropriate Mix of Housing Types

A balanced community has all types of individuals, earning a spectrum of incomes requiring a broad spectrum of housing options. To serve these individuals, a community should offer a palette of building types: single-family homes, townhouses, multi-family buildings, mixed-use buildings, outbuildings (containing accessory dwelling units), and estate homes. People should have choices that reflect their preferred lifestyle and income level, all of which can vary over time. A mix of housing types allows people to stay in one community all of their lives, if they so choose. How the types are arranged is paramount to sustainability. When housing types are separated into large, single-type developments, the result is a segregated community. Housing segregation contributes to road congestion and widening.

F) Proper Building Placement and Alignment

Controlling building placement and alignment ensures that a predictable public realm is established. On commercial streets or higher density areas, buildings are generally set close to the sidewalk, aligned in a continuous façade to shape the street and encourage walking. Drivers tend to slow in response to a feeling of enclosure, becoming more aware of both the businesses and pedestrians. Pedestrians and cyclists feel safer in a visually defined street and have a more interesting environment where buildings line the route instead of parking lots and landscape buffers. In lower density, single-family areas, a more generous setback for the front yards is appropriate.

Top: *Outbuildings, which are ancillary to the main dwelling unit, constitute a simple way of providing housing affordability within any neighborhood.*

Center & Bottom*: Houses and mixed use buildings line the street and define the pedestrian space.*

G) Proper Parking Placement and Quantities

Parking is an essential component of development. Sufficient parking should be provided in reasonable proximity to the destination it serves. In a traditional development form, parking opportunities take many different forms, including on-site, on-street, shared, or garaged. In a sprawl form, parking lots are a dominant feature of the landscape. Placemaking design practice suggests utilizing many parking options to provide choices and to ensure parking supports, rather than detracts from, the desired environment.

On-Street Parking

On-street parking should be provided whenever possible. On-street parking can take two forms: a dedicated lane or an informal arrangement. In commercial, mixed-use, or higher density areas, on-street parking should be accommodated within a dedicated lane. The availability of on-street parking is directly related to increased sales in commercial streets. In addition, on-street parking physically shields pedestrians from moving cars, allows quick, convenient access to buildings, and acts as an effective traffic calming device.

In lower density areas, on-street parking occurs in informal arrangements. Intermittent parking along the sides of a road in a staggered fashion, results in a yield traffic pattern whereby on-coming drivers must slow and take turns moving around parked vehicles. This type of movement contributes to slowing traffic, resulting in safer neighborhood streets.

Off-Street Parking

Off-street parking should be shielded from the view of the street to ensure an attractive, interesting pedestrian environment. Buildings provide the best screening. Other strategies can be used, including landscape buffers and low walls, but these are most successful if a building facade comprises most of the area along the street.

District-Wide Parking Strategy

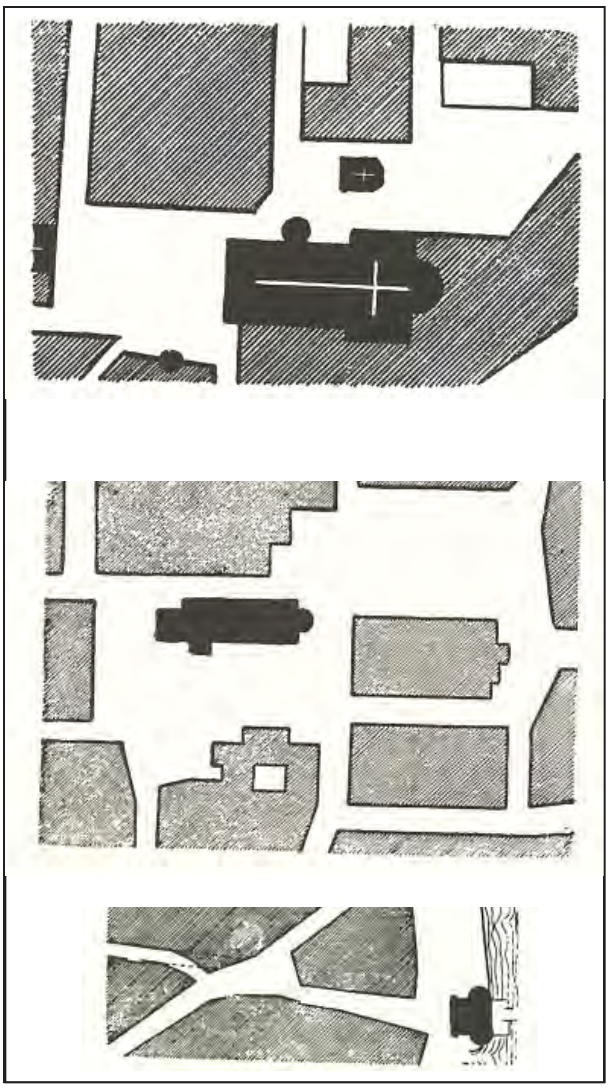
Parking requirements for destination areas of a city should be determined using a district-wide strategy rather than expecting all parking be provided on a parcel-by-parcel basis. For areas intending to become or maintain “park once” environments, reduced individual requirements and district-wide solutions are possible. “Park once” areas are places that easily allow a person to park and then walk between multiple destinations, instead of driving to and parking at each specific destination. Examples of district-wide strategies include incorporating public on-street parking, municipal lots, and mixing land uses to share spaces. For example, in areas with commercial, office and residential uses, the residents generally vacate parking spaces during working hours, freeing them for use by businesses. Or workers/customers live nearby, lessening the parking demand.

Parking in a structure is shielded from view by buildings that address the street.

H) Civic Buildings

Public buildings, such as schools, places of worship, and libraries, are important components of a community. These civic buildings help define the identity of a place and foster a sense of community pride. Significant public buildings, such as city halls, libraries, courthouses, and universities, should serve as centerpieces for downtown areas. To reflect their importance in the community and public nature, these buildings should be prominently located. Appropriate sitings for civic buildings include facing a public plaza, occupying a town square, or terminating the view of a street. Diagrams (shown below) by Camillo Sitte demonstrate various organizations celebrating civic buildings within city fabric. These studies are included in the book The American Vitruvius: An Architects' Handbook of Civic Art, by Hegemann & Peets, first published in 1922, which remains, over 65 years later, an excellent guide for civic building placement and design.

The Polk County Historical Museum, originally the courthouse, in Bartow, Florida faces a town square.



Studies of Civic Building Placement by Camillo Sitte.
***Top**: Piazza del Duomo in Ravenna, Italy.*
***Center**: Eglise Saint-Martin in Brunswick, Germany.*
***Bottom**: Gentpoort Gate in Brugge, Belgium.*

I) Public Open Space

Parks and open space are critical for the livability of any community. To ensure the success of public open spaces, they must be properly designed and placed. Parks need to be naturally monitored, without requiring the constant patrol of police or security personnel. By surrounding public open spaces with the fronts of buildings and interconnecting streets, natural surveillance of the space is provided. In neighborhoods, people living around and visiting the park provide oversight. In mixed-use areas, parks and plazas are frequented by shoppers and workers during the day and by residents in the evening. This 24-hour activity ensures a level of safety. Neighborhoods, towns, and cities should aspire to have many public open spaces, serving diverse purposes:

Regional Parks
Regional parks are usually composed of many acres of preserved land with trails and room for active recreational fields. This type of open space should ideally coincide with natural land areas.

Multi-Use Play Fields
Multi-Use Play Fields are active parks that provide sports fields. These fields may be incorporated and shared with schools.

Greens
Greens are open spaces generally surrounded on all sides by homes or other building types, with streets along at least two sides. Greens are informally landscaped and are generally for passive use or informal sport activities (i.e. throwing a frisbee).

Plazas
Plazas are open spaces generally surrounded on all sides by buildings, with streets along at least two sides. Plazas are formally landscaped, frequently incorporating hardscape to accommodate both passive use and community gatherings.

Squares
Squares are formally landscaped urban open spaces. Squares provide a setting for civic buildings or monuments. Squares can either be part of a block or surrounded by streets on all sides.

Regional park with a natural lake in Winter Haven, Florida.

Multi-use fields

This Florentine plaza serves as a gathering space and a market for both residents and visitors.

The square offers a formal setting for a civic building.

THIS PAGE LEFT INTENTIONALLY BLANK