



Neighborhood Economic Development and Market Analysis of the Pine Hills Area

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This document was developed under the guidance and input of the Pine Hills Business Redevelopment Task Force whose members were appointed by the Orange County Board of Commissioners.

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EXECUTIVE SUMMARY

The Pine Hills community is one of Orange County's oldest and largest neighborhoods. The area on which the following study focused is generally bounded by Apopka-Vineland Road to the west, Clarcona-Ocoee Road to the north, City of Orlando to the east, and the East –West Expressway to the south. While the analysis factors in the entire community, a greater emphasis was placed upon specific commercial corridors within the neighborhood, which included West Colonial Drive, Pine Hills Road and Silver Star Road.

Significant time and resources have been spent in the area to assist in redevelopment efforts over the past 10 years. Consequently, the following study does not attempt to recreate or recycle strategies presented in these plans. The study is an extension of prior work, specifically the 2004 Pine Hills Land Analysis and Strategic Plan.

The study focus has been based on the County's request for proposal, the initial emphasis of the contractual services was to develop data, analyze existing demographics and census information and prepare a market assessment for the Pine Hills Road, Silver Star Road, Hiawasse Road and Colonial Drive corridors. With the results of the market analysis, the next step was to determine how a "town center" for the Pine Hills/Silver Star Road intersection could be developed. All of the above was to be coordinated through Orange County's Neighborhood Services staff and the Pine Hills Business Redevelopment Task Force.

After a series of meetings with the Task Force and input from the community, there was greater emphasis placed on the key redevelopment issues, the new Evan High School's impact, and how to develop an implementation strategy that would lead to success. Toward this end, the following were identified as elements that were integrally related:

- Strong neighborhoods
- Intermodal Connectivity
- Enhanced Corridor Development
- Creation of a "Town Center"
- Establishing an implementing organization

Within the limitations of the contracted services, each of these elements were addressed, options considered, maps reviewed, data analyzed and ultimately goals and objectives prioritized. With each of the five planning elements, specific action steps were recommended and then the five key recommendations concluded the Task Force's report.

The study is divided into multiple chapters within two parts. Part One discusses the current conditions of the neighborhood, which includes discussion related to zoning and land use, business environment, and key socio economic trends. Also included in Part One is a market assessment addressing the current and potential demand for commercial activities. Part Two considers the findings from Part One and formulates specific redevelopment initiatives as well as implementation strategies necessary to achieve success.

The summary of the report is as follows:

PART ONE: AREA CHARACTERISTICS AND MARKET ASSESSMENT

Area Characteristics

The Pine Hills community is comprised of approximately 70,500 residents and 24,300 households. The population has grown by about 5% since 2000 and is expected to increase by over 6% by 2015. Growth in new household formations has been modest and lagged population growth, leading to an increase in persons per household. The three target corridors exhibit distinct locational characteristics and range from neighborhood to regional uses. There is a mix of residential and non-residential uses which include single-family and multi-family residences, retail, food service, and office uses. The unemployment rate has slightly increased since 2000 to 10.5%. The top five industry sectors which employ nearly 55% of all community residents include retail, accommodation/food services, healthcare, construction, and finance, insurance and real estate services. The 2010 data reflect a median household income of \$40,013, with more than 43% of the households earning less than \$35,000 per year.

Market Assessment

The project team analyzed current and future market demand for retail goods and service-oriented office space at the intersections of Pine Hills Road and Silver Star Road, Powers Drive and Silver Star Road, and Hiawasse Road and Silver Star Road. Although each analysis considered the market areas of 0.25 miles, 0.50 miles and 1.50 miles from each respective intersection, the 1.50 mile radius was defined in the study area as the appropriate distance for a mix of neighborhood and community-oriented tenant types. The Pine Hills and Silver Star intersection became the main focus of the market assessment due to the new Evans High School, redevelopment opportunities, location within the neighborhood, and accessibility by multiple modes of transportation.

Based on the analysis specific to the market area at the Pine Hills and Silver Star intersection, there is an estimated demand for approximately 284,500 square feet (SF) to 385,000 square feet (SF) of retail, restaurant and service-oriented office space that can be captured at this location over the next 20 years. These figures can be construed as conservative as they do not include any transient, drive-by shopping behaviors.

Accounting for the total existing commercial space in the target area, there is a surplus of approximately 50,000 total SF. The findings from the physical survey of properties at the intersection indicate a mismatch of existing space compared to the demands of the community. For example, of the approximate 400,000 SF of existing space, 80% is comprised of retail oriented offerings and less than 5% is made up of office and professional service tenants. This is further evidenced by the high vacancy rate in the area of over 30%. The demand analysis, however, suggests a more balanced distribution of retail and service-oriented office space.

In an effort to address the imbalance of market demand and existing inventory, particularly with regard to the need for more office space, and to strengthen the area's marketability, the following conclusions are provided:

- There are too many unattractive and uninviting structures, as well as too many tenants offering identical products (e.g. check cashing/cash advance outlets).
- Some of the retail space should be repositioned through redevelopment of the southwest quadrant of the Pine Hills and Silver Star intersection to enhance retail and mixed use offerings.

- Additional resources are needed to allow for land assembly, environmental mitigation and other public-private partnership opportunities.
- Land use code modifications are necessary to encourage better quality office redevelopment along the Pine Hills Road corridor, and the inclusion of mixed use developments.
- Additional uses such as art studios and/or business incubation activities compatible with current zoning should be explored to create a more vibrant corridor.

PART TWO: REDEVELOPMENT INITIATIVES AND IMPLEMENTATION STRATEGIES

Implementing Organization

In the various meetings and from public comments, there was a compelling sense that this planning effort should result in specific recommendations with an implementation schedule. There was frustration expressed that previous plans had not resulted in meaningful results. The Task Force determined that some type of entity was needed to advocate for the specific recommendations, assist in seeking resources, and being accountable for the implementation of the programs and activities identified in this plan.

Key Recommendation: Request of the Board of County Commission to authorize the Task Force, working with county staff, to explore in detail, an organizational structure that could be established to serve as the accountable entity to implement the recommendations in this plan and be the “keeper of the vision” for Pine Hills. It is specifically recommended that a combination of County staff, possibly in a department format, be assigned to coordinate the process in which a Neighborhood Improvement District would be formally established in accordance with state statutes.

Creating a “Town Center”

With close to unanimous consensus, the Task Force and community-at-large have acknowledged that the intersection of Pine Hills Road and Silver Star Road is the “center of the community”. As such, it is this location where the goal of creating a Town Center has been envisioned. This has been reinforced by its proximity to the new Evans High School campus. This study has identified the redevelopment opportunities and constraints for each of the intersection’s four corners, addressing ownership, current zoning entitlements, vacancies, and building and environmental conditions in preparing concepts and strategies.

Key Recommendation: Based on existing factors, it is recommended that all available resources be used to enable the County, or another public/private entity, to assemble the property at the northeast corner of the intersection, clean up the environmental contamination, and make it available for the development of facilities for the continuing education of Pine Hills residents as a complementing development to the new Evans High School.

Corridor Development

While the scope of the work entailed an analysis of the three corridors, the Task Force placed an emphasis on Pine Hills and Silver Star Roads. Pine Hills Road was deemed the key “entry corridor” to the community, where people received their “first impression” of the neighborhood. Silver Star Road is the community’s most significant east-west corridor, “home” to the new Evans High School and three neighborhood commercial centers at the intersections of Pine Hills Road, Powers Drive and Hiawassee Road. The appearance and function of these corridors directly impact on connectivity, safety, economic opportunity and public perception of Pine Hills.

Key Recommendation: Develop a specific implementation strategy for Pine Hills Road corridor that will address the enhanced appearance, “taming” of the traffic, infrastructure upgrades, connectivity to Barnett Park and proposed Pine Hills Trail, as well as making modifications to current land use entitlements.

Effective Intermodal Community Connections

Effectively connecting Pine Hills’ resident and businesses within the community as well as outside the area was deemed essential. Mobility throughout the neighborhoods should include infrastructure that better accommodates the pedestrian, cyclist, and transit as alternatives to the automobile. Regardless of the mode of transportation within Pine Hills, the facilities should allow for good access to schools, parks, businesses, and jobs. In addition, better access is desired outside of the area to employment centers, higher education campuses, and future regional transit systems (SunRail and High Speed Rail).

Key Recommendation: Work with Lynx to enhance transit frequency along Silver Star Road with express route to SunRail Station at Florida Hospital; similarly, request greater transit frequency down Kirkman Road to Valencia Community College and the tourist employment center.

Strong Neighborhoods

It was concluded that an unappreciated attribute of the Pine Hills community is the overall strength of its neighborhoods. With more the 61% of the residences being owner-occupied, Pine Hills has one of the highest homeownership rates in the entire metro area, an asset of significant importance and reflected in the extensive resident participation in the various community meetings. Building on this stakeholder strength will be key to future redevelopment success.

Key Recommendation: A detailed neighborhood plan should be a next step in developing specific goals and strategies to strengthen residential areas.

PART THREE: COMMUNITY PARTICIPATION

This section of the document was prepared by the County’s Neighborhood Services Department. Under their administration, the meetings, agenda, programs and public solicitation were implemented. The success of their efforts was evident by the significant number of attendees and participants in the community meetings. Their use of surveys and focus groups broadened the opportunities for a large cross section of the Pine Hills community to provide input. The result of these efforts provided the Task Force and consultant team with the key issues that needed to be addressed regarding the strategy for future redevelopment recommendations.

Prioritization of Action Steps

Recommended Actions	Near Term ¹	Long Term ²
To Establish an Effective Implementing Organization:		
<ul style="list-style-type: none"> Have the County Commission recognize that a permanent entity should be established to be accountable for the implementation of redevelopment activities and programs in Pine Hills. 	√	
<ul style="list-style-type: none"> It is recommended that a combination of the “department” and the NID be used to establish the entity to implement the Task Force recommendations. 	√	
To Develop a Vibrant Mixed Use Town Center:		
<ul style="list-style-type: none"> Recognize the importance of the investment in the new Evans High School campus and support the redevelopment of the northeast corner of Pine Hills/Silver Star Road intersection into complementary educational facilities. 		√
<ul style="list-style-type: none"> Reinforce the community desire to make the intersection the “Town Center” for Pine Hills and advocate for resources to stimulate reinvestment. 	√	
<ul style="list-style-type: none"> Provide resources to allow for land assembly and environmental mitigation in the Town Center area. 	√	
<ul style="list-style-type: none"> Provide incentives to enclose/relocate outside storage “eyesores” in northwest quadrant. 	√	
<ul style="list-style-type: none"> Engage property owner in southwest quadrant with incentives for the redevelopment of site to mixed use, including land assembly to improve access and circulation. 	√	
<ul style="list-style-type: none"> Protect the residential neighborhood character in the southeast quadrant. 		√
<ul style="list-style-type: none"> Prepare and adopt urban design guidelines for all four quadrants of intersections along Silver Star Road at Pine Hills, Powers Drive and Hiawasse Road. 	√	
To Develop Attractive and Functional Community Corridors:		
<ul style="list-style-type: none"> “Tame” Pine Hills road through reconfigured roadway, adding pedestrian amenities, slowing traffic, increasing number of safe pedestrian crossings. 		√
<ul style="list-style-type: none"> Review County’s land development code to identify changes necessary to encourage quality redevelopment along Pine Hills road as exemplified in prototype sketches. 	√	
<ul style="list-style-type: none"> Explore additional uses compatible with current zoning along Pine Hills Road that can be accommodated within the existing buildings (i.e. artists, incubator businesses, etc.) 	√	
<ul style="list-style-type: none"> Continue to monitor Silver Star Road to control access and improve aesthetic quality. 	√	
<ul style="list-style-type: none"> Extend West Colonial Drive urban design standards to incorporate the link between Hiawasse Road east to the Orlando city limit. 	√	
<ul style="list-style-type: none"> Improve pedestrian and bike facilities on the main corridors and connecting community streets. 		√
To Establish Effective Multi-modal Connections:		
<ul style="list-style-type: none"> Complete sidewalk system, especially along corridors. 		√

<ul style="list-style-type: none"> Redesign main roads to be more compatible with residential character of community. 		√
<ul style="list-style-type: none"> Plan for two express transit service routes: Down Silver Star to SunRail Station at Florida Hospital and down Pine Hills/Kirkman Road to High Speed Rail Station at convention center; improve frequency of transit circulation within Pine Hills. 		√
<ul style="list-style-type: none"> Develop initial phase of Pine Hills Trail. 	√	
<ul style="list-style-type: none"> Improve access and signage to Barnett Park from the Pine Hills Road and the neighborhoods. 	√	
<ul style="list-style-type: none"> Provide internet access for the general public in the area. 		√
To Create and Sustain Strong Neighborhoods:		
<ul style="list-style-type: none"> Recommend that a Neighborhood Plan be developed either in-house by County staff or contracted for services. 	√	

PART ONE:

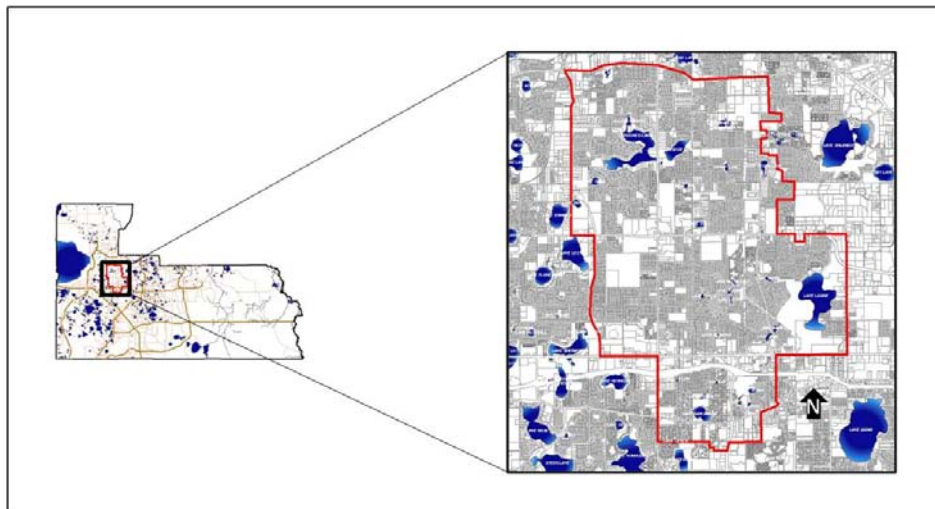
AREA CHARACTERISTICS & MARKET ASSESSMENT

1. AREA CHARACTERISTICS

Before determining where Pine Hills should be in the future in terms of neighborhood economic development, it is important to first see where the community is today. The following section provides a current snapshot by summarizing the physical characteristics of the three targeted corridors in the study area, the number and size of vacant parcels that are suitable for redevelopment, and the business mix.

The Pine Hills neighborhood study area (“study area”) is one of Orange County’s oldest and largest neighborhoods. It is located in northwest unincorporated Orange County and is generally bound by Apopka-Vineland Road to the west, Clarcona-Ocoee Road to the north, Pine Hills Road and the city limits of Orlando to the east and the East-West Expressway to the south. Located approximately 7 miles from downtown Orlando, the study area falls within County Commission Districts 2 and 6, and contains approximately 66,000 residents and 22,000 households. The main zip codes covering this area are all of 32808 and most of 32818. See **Figure 1.1** below.

Figure 1.1: Study Area Boundary



Source: Orange County Property Appraiser (2010)

The study area is traversed by three major business corridors: Pine Hills Road, Silver Star Road and West Colonial Drive. These corridors provide significant and varied opportunities for retail and food services for the residents of the study area. See **Figure 1.2**.

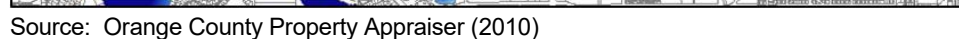
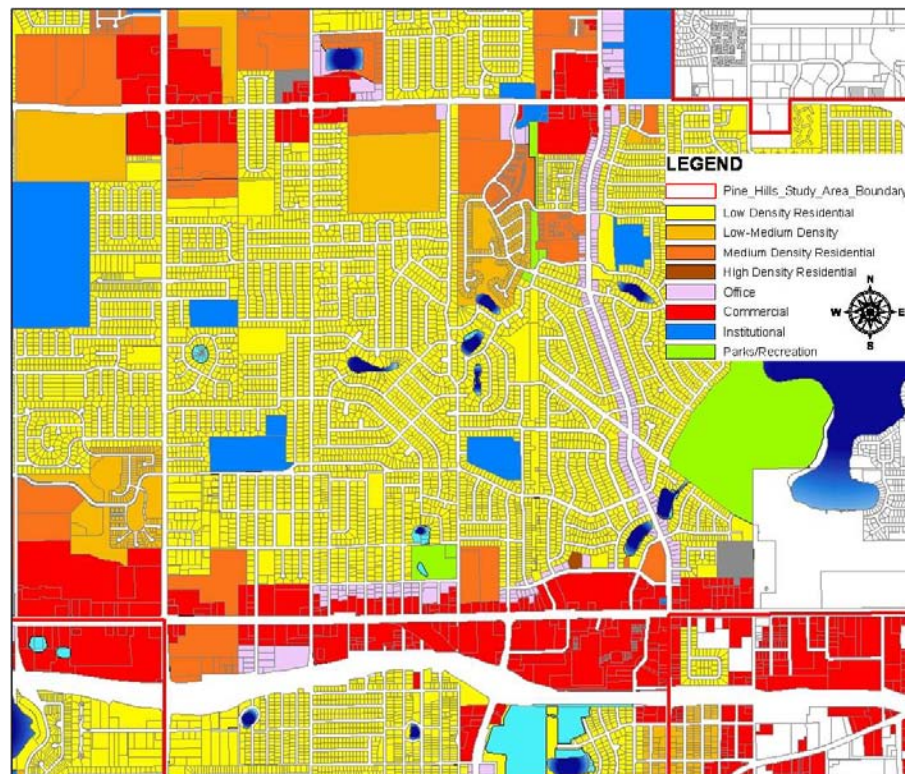


Figure 1.3: Future Land Use Map



Source: Orange County Planning Division (2010)

The predominant future land use designation along all three corridors is commercial and office with intermittent single-family residential uses on Pine Hills Road which are poised for conversion and redevelopment. **Table 1.1** lists the occurrence of each use along each corridor.

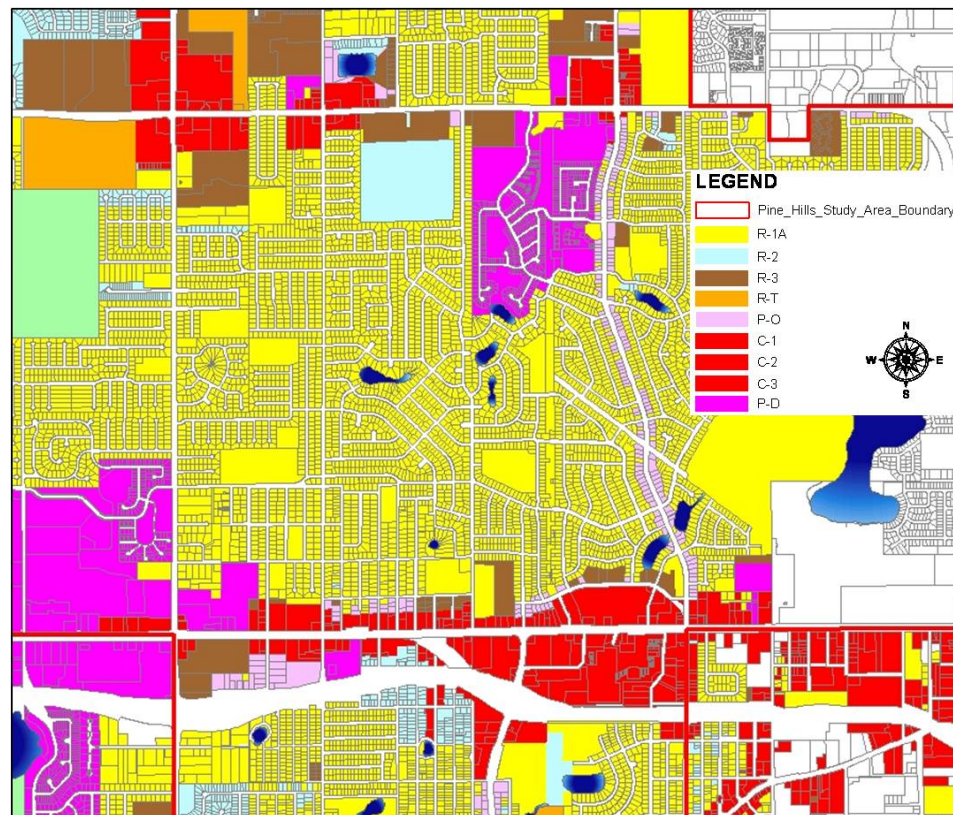
Table 1.1: Future Land Use Categories

Future Land Use	Pine Hills Road	Silver Star Road	W. Colonial Drive
Low Density Residential	■	■	
Medium Density Residential	■	■	■
Office	■	■	■
Commercial	■	■	■
Institutional	■	■	

Source: Orange County Planning Division (2010)

Figure 1.4 illustrates the Zoning District which provides the site-specific and building performance standards in order to accommodate development or redevelopment of each parcel.

Figure 1.4: Zoning District Map



Source: Orange County Zoning Division (2010)

As shown in **Table 1.2 - Zoning Districts**, all three corridors include residential and non-residential districts which correspond to the underlying future land use designations.

Table 1.2: Zoning Districts

Zoning District	Pine Hills Road	Silver Star Road	W. Colonial Drive
R-1A - Single-Family Dwelling	■	■	
R-2 - Residential District		■	
R-3 - Multiple-Family Dwelling	■	■	■
R-T - Mobile Home Park		■	
P-O - Professional Office	■	■	
P-D - Planned Development	■	■	■
C-1 - Retail Commercial	■	■	■
C-2 - General Commercial	■	■	■
C-3 - Wholesale Commercial			■

Source: Orange County Zoning Division (2010)

Business Parcel Inventory

The Orange County Property Appraiser's data indicates that there are approximately 19,821 parcels within the study area which cover more than 13 square miles. The Pine Hills Road business corridor accounts for 270 parcels or approximately 123 acres at an average size of 0.45 acres. The Silver Star Road business corridor accounts for 58 parcels or approximately

192 acres at an average size of 3.31 acres. The W. Colonial Drive business corridor accounts for 327 parcels, or approximately 376 acres at an average size of 1.14 acres (see **Table 1.3**).

With the relatively small average parcel size for Pine Hills Road, one immediate challenge is the ability to assemble parcels in order to redevelop in a manner that allows for quality non-residential development that accommodates adequate parking, retention and landscaping.

Table 1.3: Business Parcel Inventory

	Pine Hills Study Area	Pine Hills Road	Silver Star Road	W. Colonial Drive
Acreage (acres)	8,367	123	192	376
# of Parcels	19,821	270	58	327
Average Parcel Size (acres)	0.42	0.45	3.31	1.14
Active Business Parcels		113	46	
Inactive Business Parcels		38	3	
Vacant Parcels		6	8	
Single-Family Homes		69	27	

Source: Orange County Property Appraiser (6/17/10)

Business / Employment Mix. As indicated previously, the three corridors exhibit a range of neighborhood, pass-by, and regional uses. Due to the regional nature of business along the W. Colonial Drive corridor, the business mix discussion was recommended to the Task Force to be limited to the Pine Hills Road and Silver Star Road corridors.

Both Pine Hills Road and Silver Star corridors have an array of uses which include six multi-tenant shopping centers. The multi-tenant shopping centers include the Park Promenade, Westgate Square, and Haymaker Square shopping centers at the intersection of Hiawassee Road and Silver Star Road. At the intersection of Silver Star Road and Powers Drive is the Silver Star Plaza shopping center, and at the intersection of Pine Hills Road and Silver Star Road there are the Silver Pines and Silver Hill shopping centers. At least three of these shopping centers contain a major grocery store chain including Winn-Dixie, Save-a-Lot, and Bravo. In addition to these grocery chain stores, there are a few other smaller national brand retail stores and pharmacies such as Family Dollar, Beall's Outlet and Walgreens. **Figures 1.5 and 1.6** depict the mix of business types along the Pine Hills Road and Silver Star corridors.

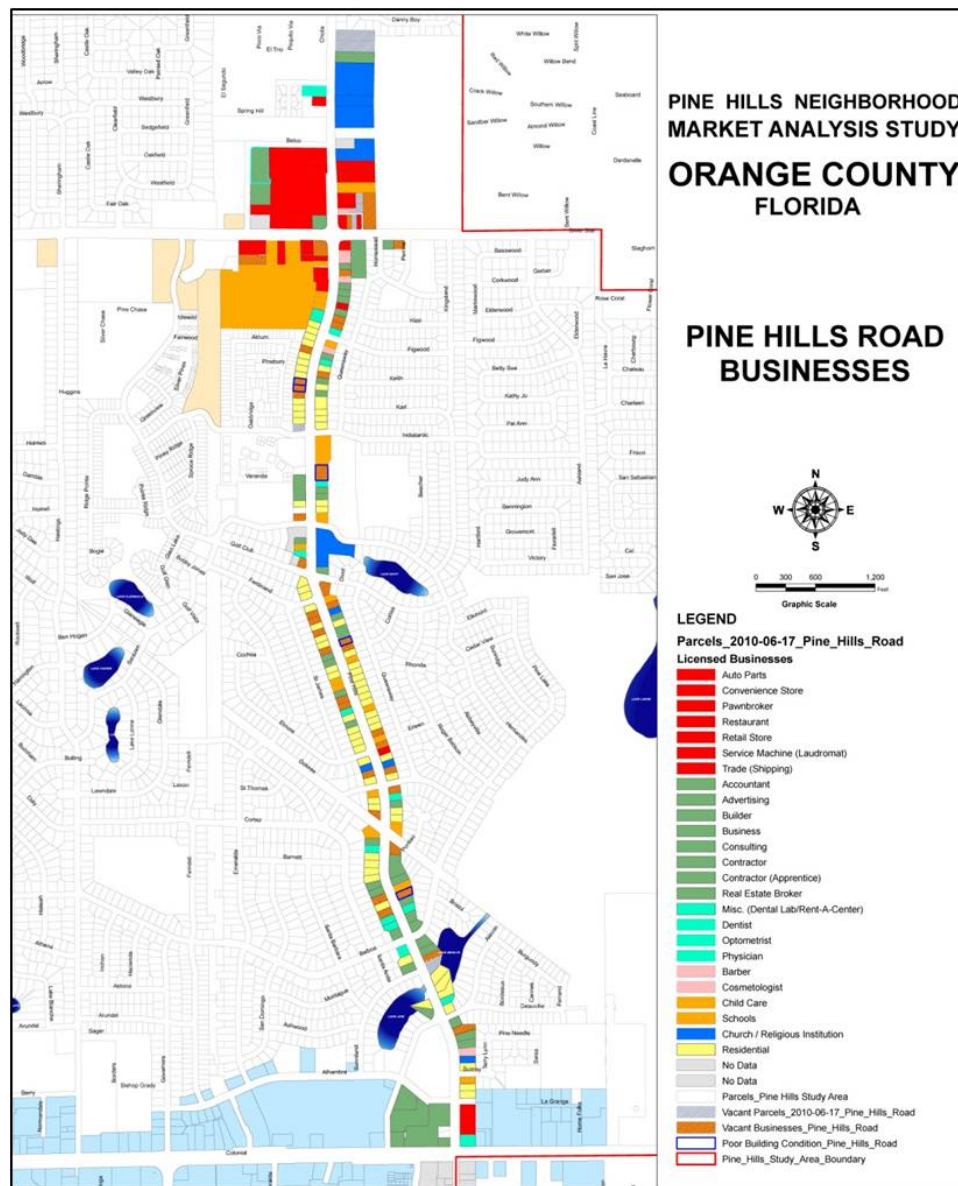
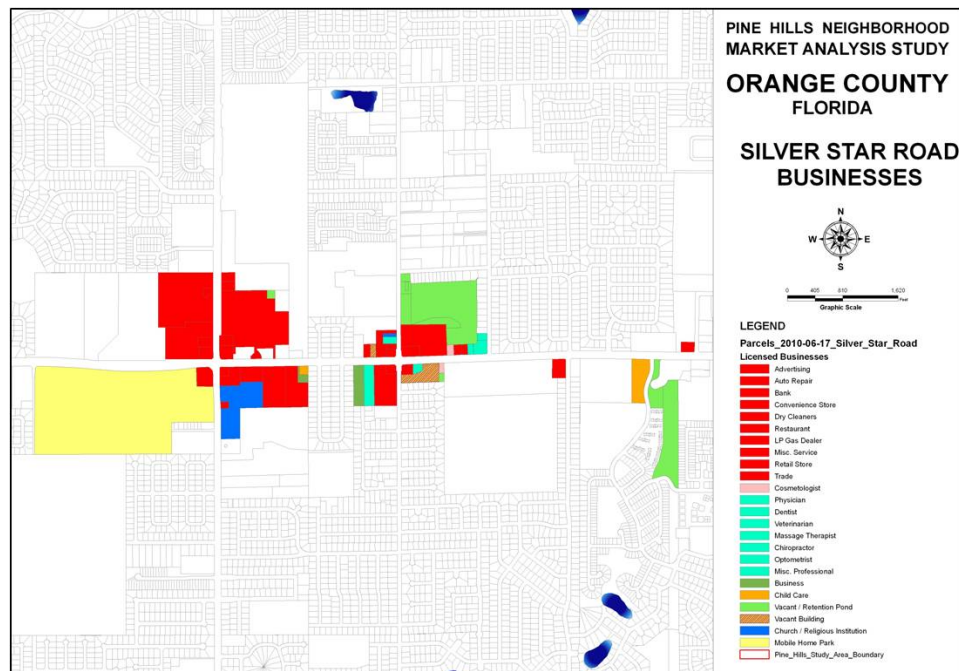


Table 1.4: 25 Major Employers

Institution Name	Emp	Year Opened	Industry
Bridges Of America	301	2007	Drug Abuse Treatment
Orange County Parks & Rec Dept	267	1989	Parks
Sam's Club	250	1999	Warehouses-Commodity/Mdse.
Maynard Evans High School	235	1984	Schools
Home Depot	206	1990	Home Improvements
Super Target	175	1991	Department Stores
Magnolia School Exceptional	160	1988	Schools
Robinswood Middle School	150	1988	Schools
Olive Garden Italian Rstrnt	130	1990	Foods-Carry Out
Meadowbrook Middle School	130	1988	Schools
Pine Hills Elementary School	130	1988	Schools
Estes Express Lines	125	1991	Trucking-Motor Freight
Winn-Dixie	120	1995	Grocers-Retail
Hiawassee Elementary School	115	1988	Schools
US Post Office	105	1989	Post Offices
Lake Gem Elementary School	105	1998	Schools
Rolling Hills Elementary School	101	1988	Schools
First National Bank-Central FI	100	1987	Banks
Environmental Protection Division	100	2002	County Govt-Environ. Programs
Schools Public Orange County	100	2003	County Govt-General Offices
Orlando Rehab & Health Ctr	100	2006	Health Resorts
Logan's Roadhouse	100	1998	Restaurants
Red Lobster	100	1984	Restaurants
Chili's Grill & Bar	100	1992	Restaurants
West Oaks Elementary School	100	2004	Schools

Source: InfoUSA (2010)

Figure 1.6: Silver Star Road Businesses


Source: Orange County Property Appraiser (2010) / Orange County Tax Collector (2010)

There is some vacancy within each of the six multi-tenant shopping centers ranging from 5% vacancy (Silver Star Plaza) to as high as 75% (Silver Pines). The average vacancy is 34% which equates to approximately 200,000 square feet (SF) of available retail space. This amount of vacant SF of retail space is in addition the individual vacant parcels and businesses along Pine Hills and Silver Star roads. **Table 1.5** illustrates the estimated vacancy for each center.

Table 1.5: Shopping Center Vacancy

	Bldg. Size (SF)	Bldg. Occupied (SF)	Vacancy (%)	Available (SF)
Park Promenade	135,478	88,060	35%	47,418
Westgate Square	133,132	86,535	35%	46,597
Haymaker Square	30,870	23,152	25%	7,717
Silver Star Plaza	53,650	50,967	5%	2,683
Silver Pines	143,300	35,825	75%	107,475
Silver Hill	109,351	109,351	0%	0
TOTAL	605,781	393,890	34%	211,891

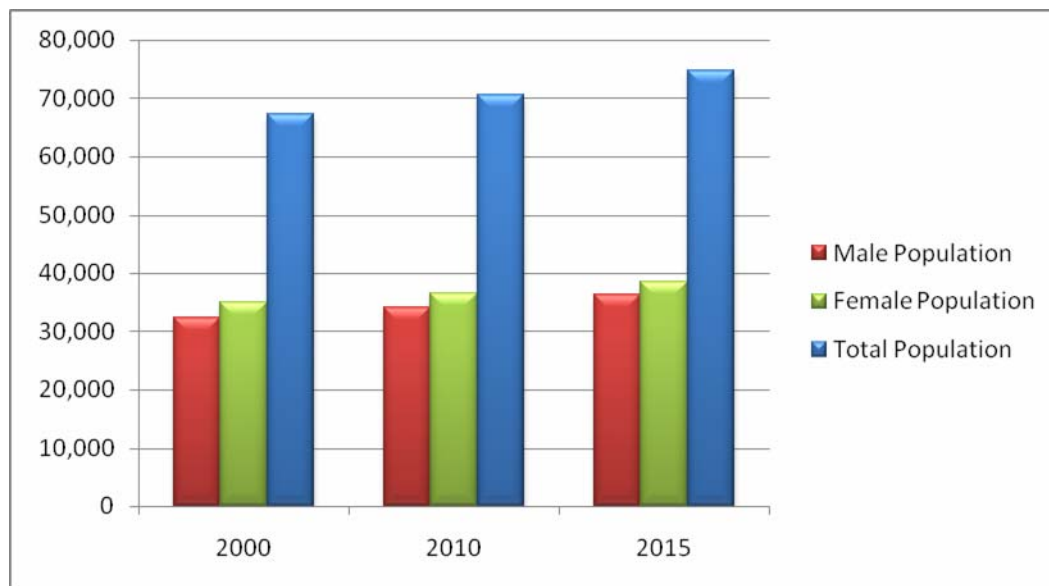
Source: Orange County Property Appraiser (2010)

2. DEMOGRAPHIC AND SOCIO-ECONOMIC PROFILE

Population

The 2010 estimates provided by Nielsen Claritas indicate that the study area has a population of 70,527. The area has grown by 3,309 residents since 2000 and is projected to reach 74,768 persons by 2015. More than 51% of area residents are female as shown in **Figure 2.1**.

Figure 2.1: Population Profile



Source: Nielsen Claritas (2010)

Approximately 47.6% of area residents over the age of 15 are married. The remaining 52.4% include divorced and widowed persons (17.1%), and those who have never been married (35.3%).

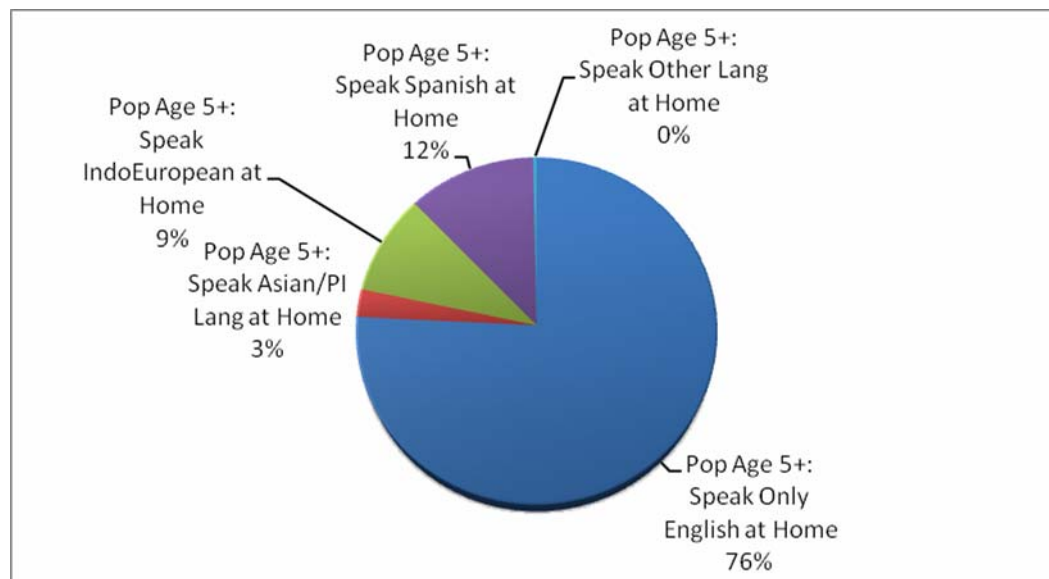
More than 56% of neighborhood residents, 25 years of age or older, have an educational level of high-school diploma or less, while 23.5% hold some form of a college degree (Associates, Bachelors, Masters, Ph.D., etc.). This represents an improvement over 2000 educational levels, where 59.7% held a high school diploma or less, and 18.8% had a college degree.

About 36,328 area residents are labor force participants, with 32,497 currently employed. This reflects an area unemployment rate of 10.5%, an increase of 3 percentage points over year 2000 estimates. More than 29% of persons aged 16 years or older (15,148) in Pine Hills do not participate in the labor force.

Between 2000 and 2010, the 45-64 age group realized the most substantial share of population growth within Pine Hills, increasing by 5,054 residents. The number of children 4 years or less increased by a modest amount, with growth of 992 persons. This is in contrast with other age cohorts in the area, which experienced slow growth, no growth, or actual losses. The median age in Pine Hills is 30.68 years for males, 33.42 for females. The median age for both sexes has increased by approximately 1.5 years since 2000.

Based on 2009 Nielsen Claritas datasets, 75.8% of the neighborhood population over the age of 5 speaks only English in the home, as shown in **Figure 2.2**. Approximately 12% of the area residents speak Spanish, and 9.4% speak an Indo-European language. The remaining 2.9% of residents speak either Asian or some other language.

Figure 2.2: Language Spoken at Home

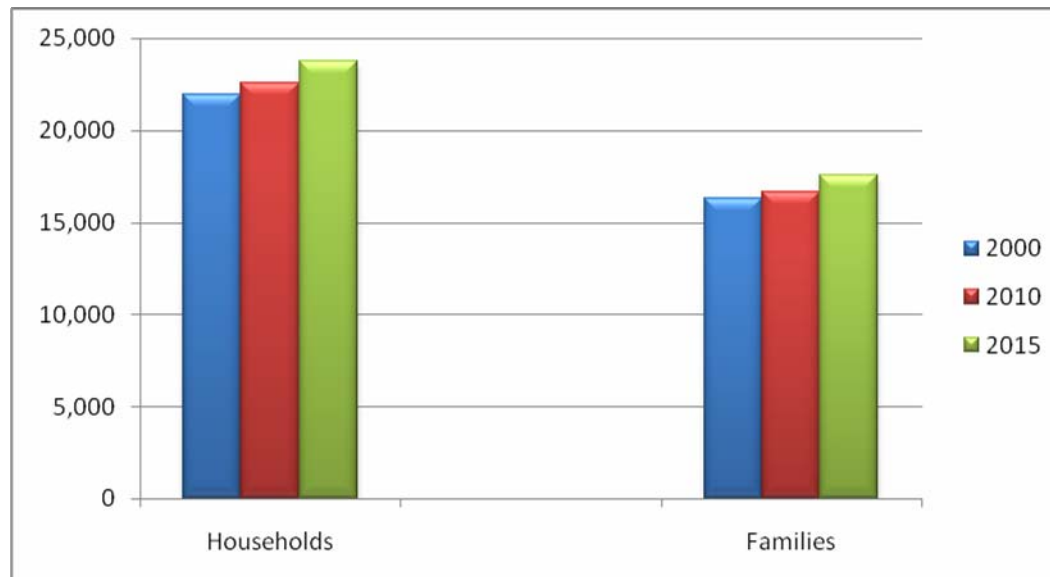


Source: Nielsen Claritas (2009)

Detailed population estimates and projections can be found in Sections I, IV and VI of the Appendix tables.

Households. The 2010 Nielsen Claritas estimate of 22,600 neighborhood households represents an increase of only 657 households since 2000 as shown in **Figure 2.3**. New family household formation was modest (357) over this period as well. Approximately 16,674 families currently reside in Pine Hills. Contrasting the household and population growth numbers, there appears to be a trend of substantial population growth coming from natural increase (births within existing family households). This is supported by the 2000-2010 growth in the 0-4 age group.

Figure 2.3: Households & Families

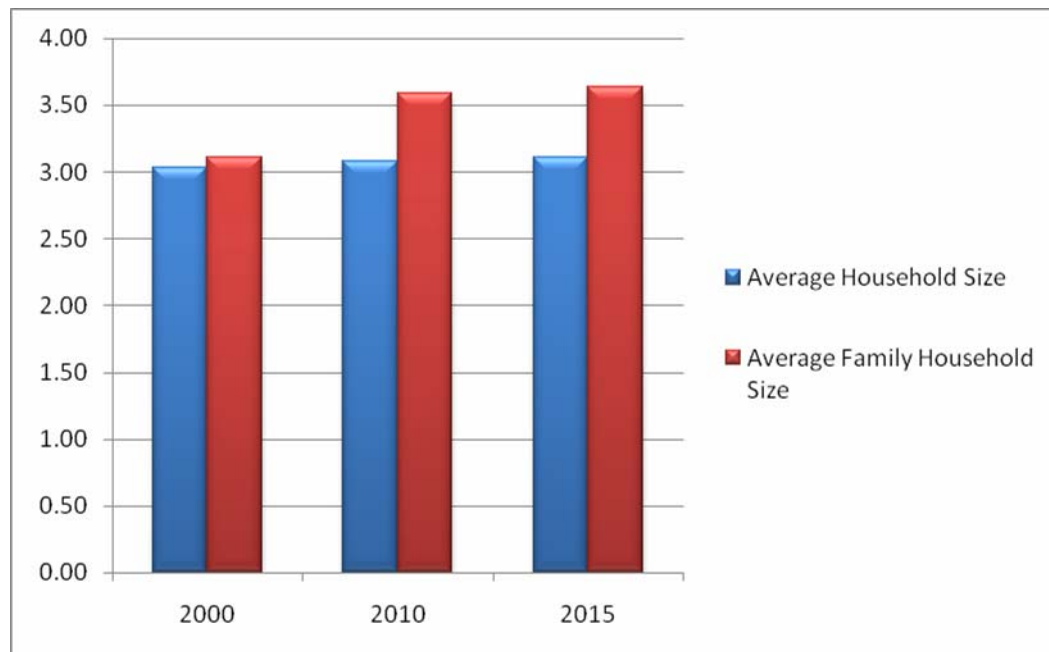


Source: Nielsen Claritas (2010)

As **Figure 2.4** illustrates, the neighborhood average household size is 3.08 persons, up from 3.03 persons in 2000. The average family size is 3.59 persons, up sharply from the 2000 estimate of 3.11 persons. Again, these are indicators of local population growth due to increasing births, or multi-generational family units.

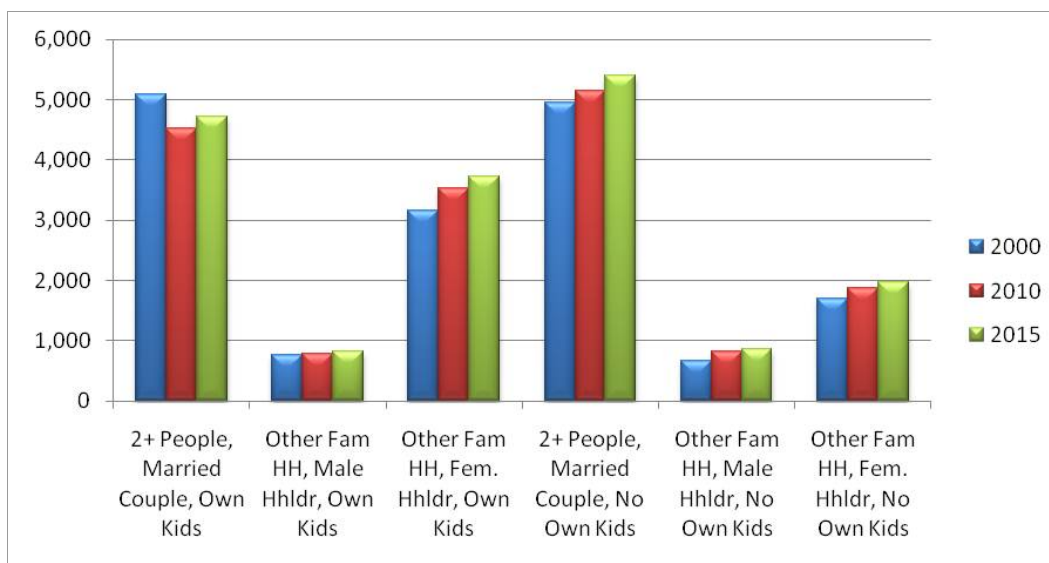
About 58% of Pine Hills' family households are married couples, representing a 3.5% decline in the share of married families over the last decade. The total number of married family households with children also declined from 2000 to 2010, dropping from 5,081 to 4,528 (see **Figure 2.5**). These statistics provide additional descriptive detail to the observation that a significant amount of neighborhood population growth is coming from within, via births. The data suggests (1) that these births are occurring in households where children were already present, and (2) single-parent households are on the rise.

Figure 2.4: Average Household Size



Source: Nielsen Claritas (2010)

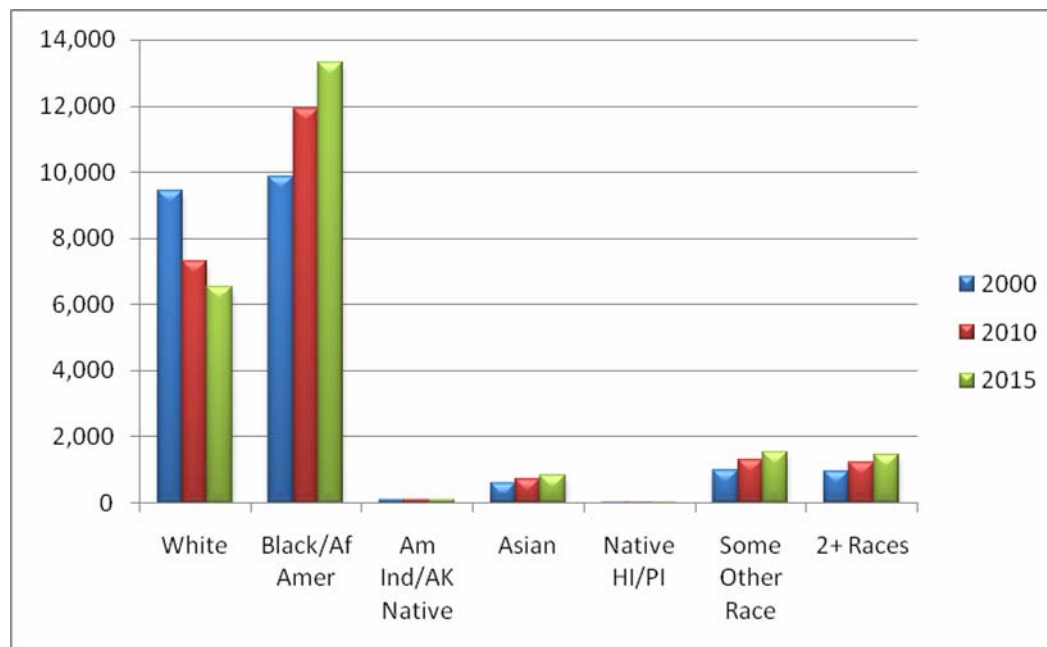
Figure 2.5: Family Household by Number of Children



Source: Nielsen Claritas (2010)

Non-Hispanic African-American households account for 51.8% of neighborhood households and 25.9% are non-Hispanic Caucasian (see **Figure 2.6**). The total number and share of non-Hispanic African-American households have increased since 2000, while non-Hispanic Caucasian households are declining in both numbers and share. The number of Hispanic households, across all racial segments, has increased by 647 occupied units since 2000.

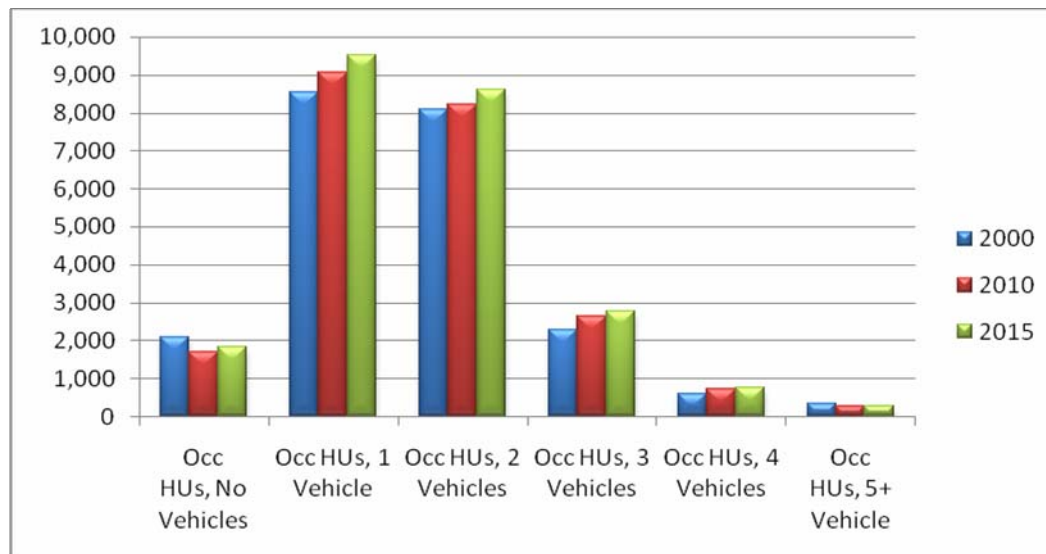
Figure 2.6: Population by Ethnicity



Source: Nielsen Claritas (2010)

Vehicle ownership appears to be on the rise in Pine Hills. Approximately 92.4% of households own at least one vehicle, up from 90.5% in 2000 as show in **Figure 2.7**. Just around 40.1% of neighborhood households own one car, while 36.4% own 2 cars.

Figure 2.7: Vehicle Ownership



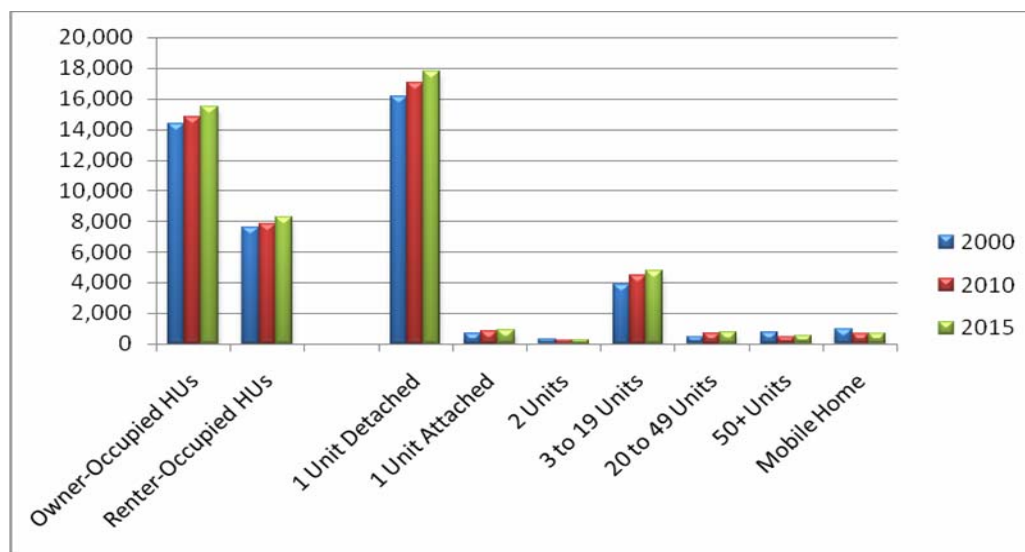
Source: Nielsen Claritas (2010)

There is a modicum of transience within Pine Hills, although signs of increasing stability are present. More than 59% of neighborhood's current households moved in within the past decade. The median length of residence is 8.45 years. In 2000, 74.4% of the neighborhood population had moved in within the previous 10-year period.

Detailed household estimates and projections can be found in Section II of the Appendix.

Housing Units. Nielsen Claritas estimates a year 2010 inventory of 24,378 units in Pine Hills, with 14,778 owner-occupied units, 7,822 renter-occupied units, and 1,778 vacant units. **Figure 2.8** depicts the breakdown of housing units for 2000, 2010 and projected to 2015.

Figure 2.8: Housing Units by Type



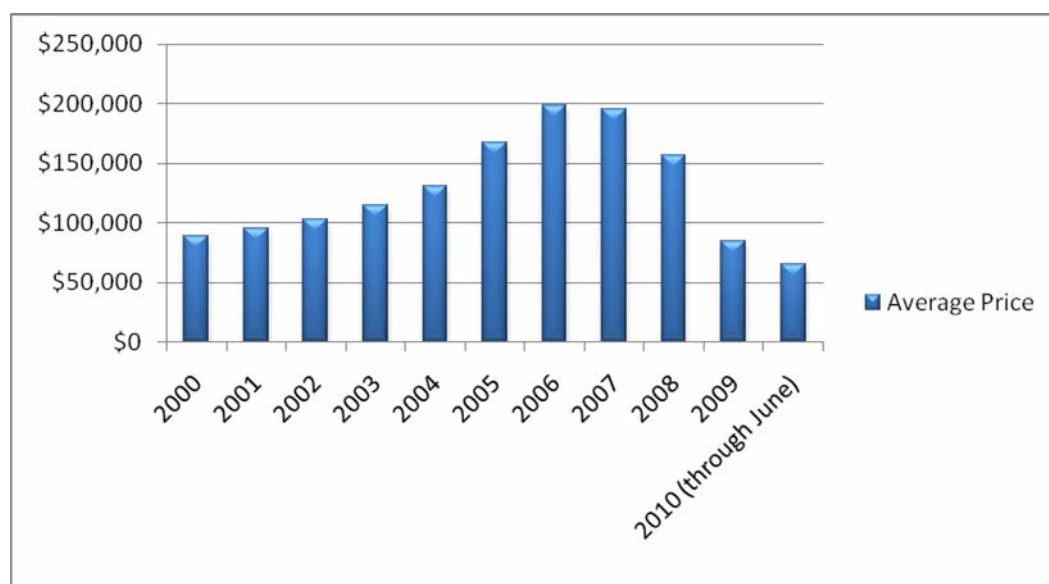
Source: Nielsen Claritas (2010)

The total neighborhood inventory is up by 1,132 units from the year 2000 count of 23,246, and the 65/35 owner-to-renter split has remained largely unchanged. The share of vacant housing units within the neighborhood has increased, from 5.6% in 2000 to 7.3% in 2010.

The neighborhood housing stock is 69.8% single-family detached, 3.5% single-family attached, 24% multifamily, and 2.6% mobile home/other. Neighborhood housing inventory that was delivered prior to 1990 is at 77.7%, with a unit median age of 32 years.

The 2010 median value of owner-occupied housing in Pine Hills is estimated at \$141,410, up from \$81,732 in 2000. The current average value of an owner-occupied unit is \$96,960. More than 71% of owner-occupied units are valued between \$100,000 and \$199,999. Housing price trends are presented in **Figure 2.9**. Monthly data for renter-occupied housing for year 2000 indicate over 54% of year 2000 rental units had monthly rates of \$500 to \$699. Approximately 29% had monthly rates of less than \$500, while 16.3% had rates of \$700 per month or higher.

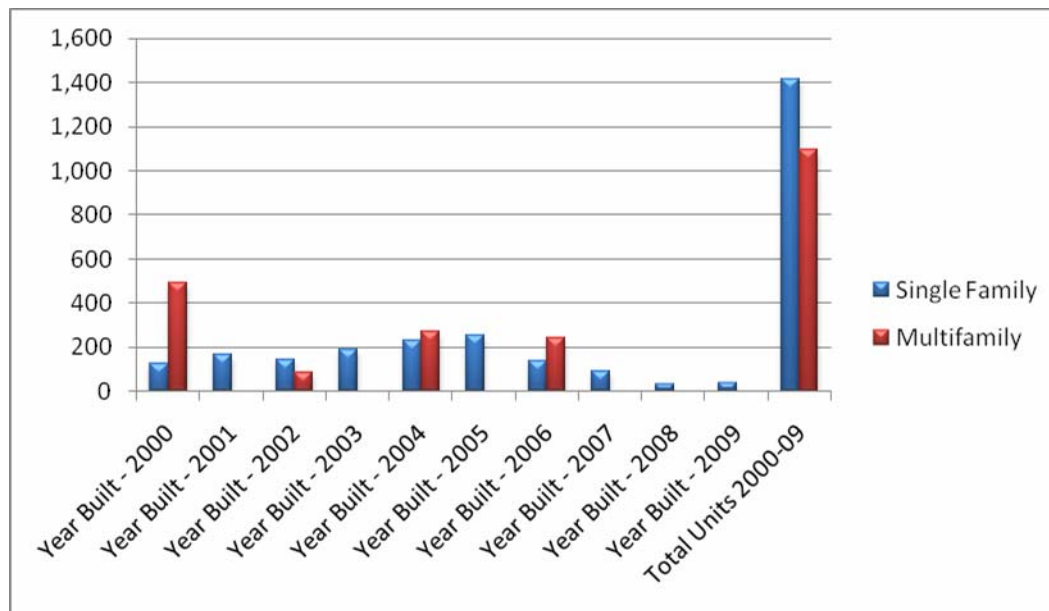
Figure 2.9: Average Housing Price Trend



Source: Orange County Property Appraiser (2010)

Neighborhood parcel records provided by the Orange County Property Appraiser's Office indicate that 1,416 single family units and 1,094 multifamily units were constructed during the 2000-2009 period. 88.2% of the period's single family construction and 100% of the period's multifamily construction occurred prior to 2007 (see **Figure 2.10**).

Figure 2.10: Residential New Construction



Source: Orange County Property Appraiser (2010)

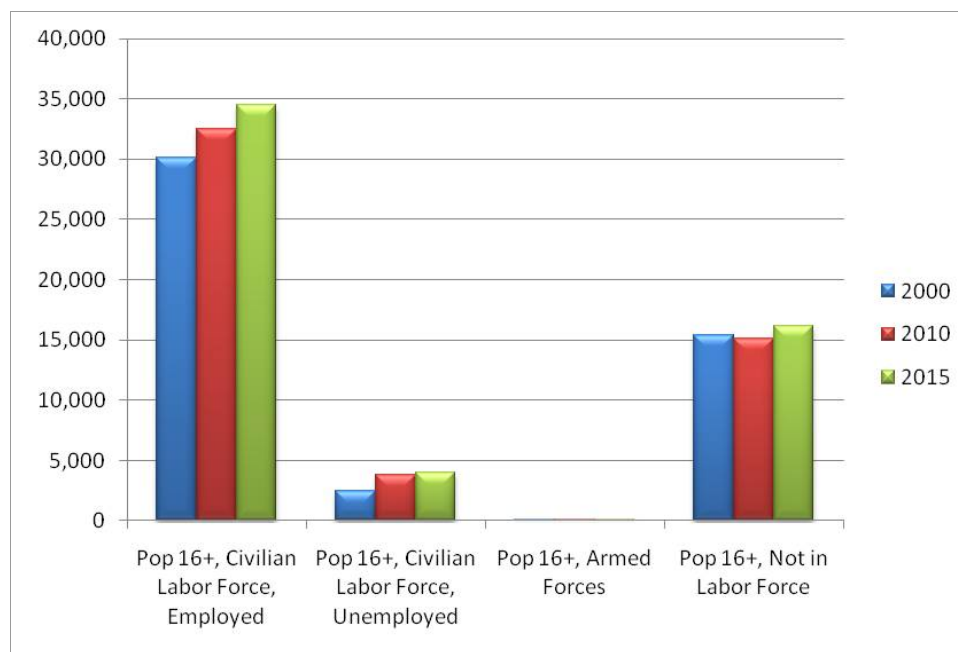
Data supplied by Orange County indicates that 419 home loans are in a state of foreclosure in Pine Hills, with the typical foreclosure action occurring on a 3-bed, 2-bath unit.

From 2004 to 2008 home loan data indicates that the volume of conventional home loans and home improvement loans peaked during the 2005-2006 period, substantially declining in later years. The 2008 volumes were less than one-tenth of 2006 volumes for conventional loans and less than one-third for home improvement loans.

Detailed household estimates and projections can be found in Sections III, VIII, XII, XIII, XIV, and XV of the Appendix tables.

Employment. As previously referenced in the population section, 36,328 area residents are labor force participants, with 32,497 currently employed. This reflects an area unemployment rate of 10.5%, an increase of 3 percentage points over year 2000 estimates (see **Figure 2.11**). Approximately 29.4% of persons aged 16 years or older (15,148) in Pine Hills do not participate in the labor force.

Figure 2.11: Employment Profile



Source: Nielsen Claritas (2010)

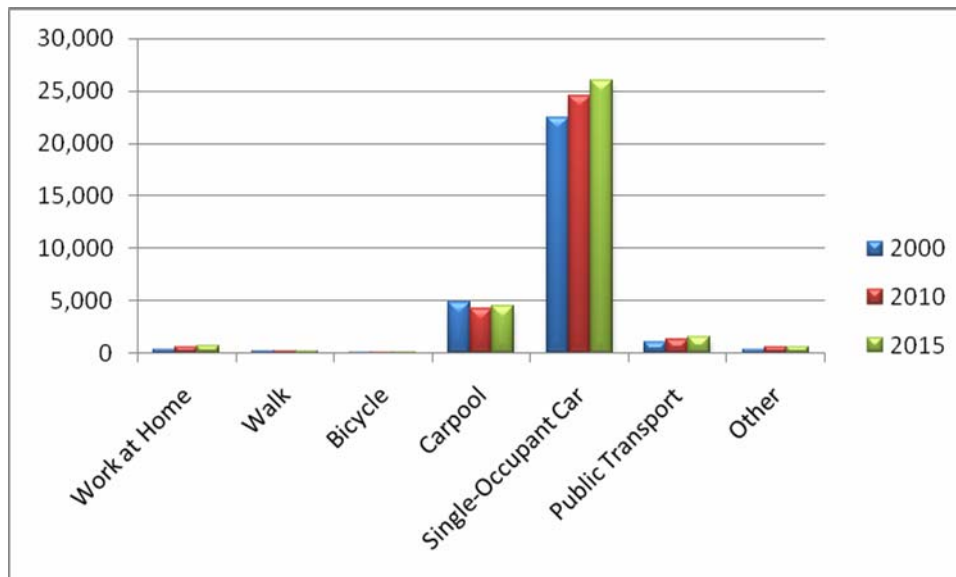
17,856 females in Pine Hills are currently in the labor force, with an unemployment rate slightly less than the neighborhood average, at 10.2%. 15,148 neighborhood females are not labor force participants. Over the last 10 years female labor force participation has increased, moving from 48.9% in 2000 to 53.4% in 2010.

The top 5 industry sectors employing neighborhood residents include retail trade (4,176), accommodation/food services (4,067), health care/social assistance (3,748), construction (3,668) and finance, insurance, & real estate (2,068). These five sectors employ 54.5% all of all neighborhood residents currently employed.

The top 5 occupations of working neighborhood residents include office/administrative support (4,771), sales (3,679), construction/extraction (3,197), building/grounds maintenance (2,853) and transportation/moving (2,513). These occupations account for 52.3% all of all resident employment in the neighborhood.

Driving to work alone is the dominant means of transportation for local residents, and the trend continues to increase as presented in **Figure 2.12**. 75.3% of employed residents in Pine Hills drove alone to work in 2010, up from 74.6% in 2000. The share of those who carpool has declined, dropping from 16.0% in 2000 to 13.1% in 2010. More neighborhood residents are taking public transportation to their workplace, with 4.3% currently using public transit, compared to 3.5% in 2000. The share of residents commuting to work by walking or bicycle has remained largely unchanged at 1%.

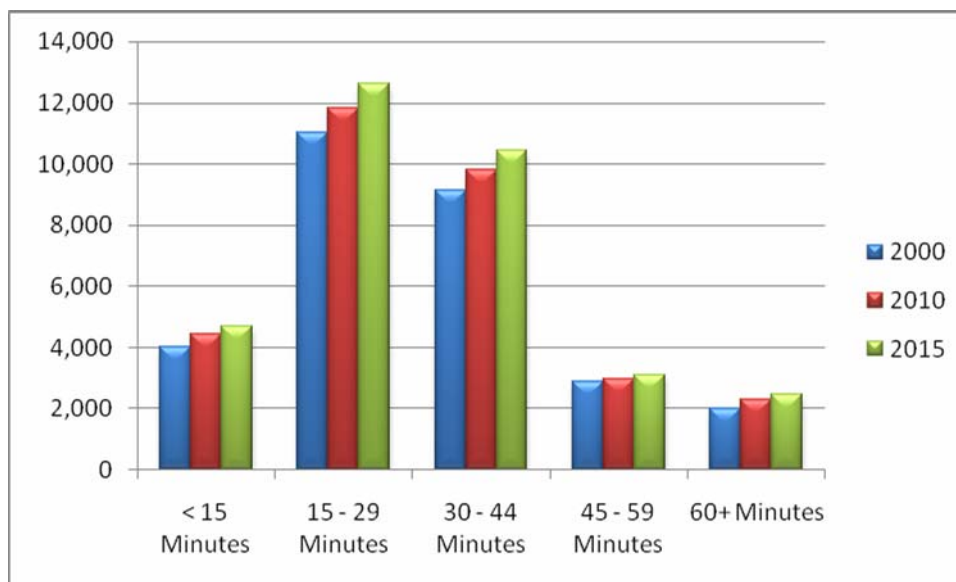
Figure 2.12: Workers Mode of Transportation



Source: Nielsen Claritas (2010)

Approximately 36.3% of working neighborhood residents have commute times ranging from 15 to 29 minutes. 30.2% have commutes to and from work of 30 to 44 minutes. 16.3% have travel times of 45 minutes or longer, while 13.6% have a commute of less than 15 minutes. These percentage shares are essentially unchanged from a decade ago (see **Figure 2.13**).

Figure 2.13: Workers Commute Time



Source: Nielsen Claritas (2010)

In terms of neighborhood commerce and attendant employment (those whose workplace is within the neighborhood area), the neighborhood's 1,706 businesses¹ employ a total of 12,179

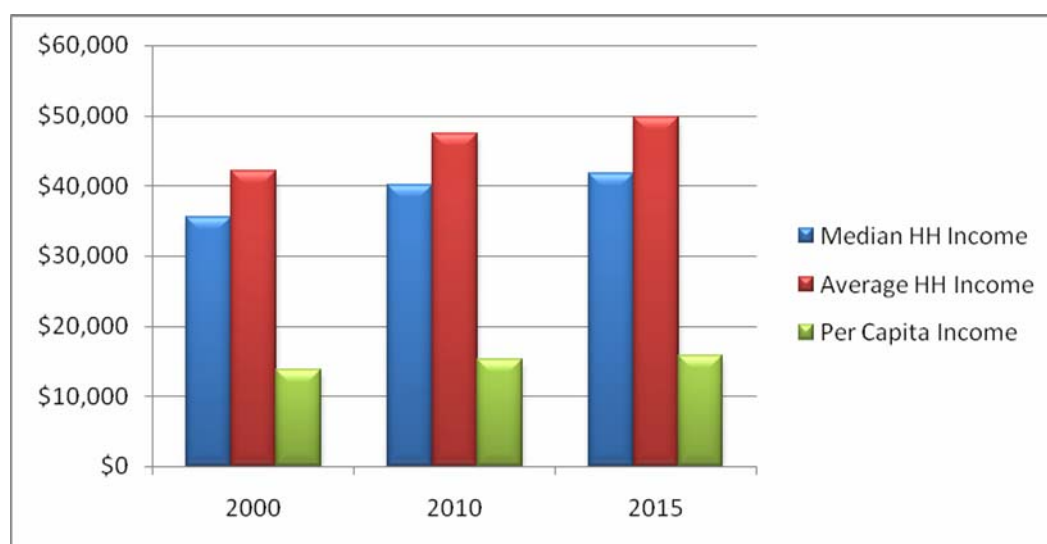
¹ Nielsen Claritas estimate. InfoUSA estimate is 1,454 businesses.

workers². InfoUSA reports that there are 25 businesses within Pine Hills that employ 100 or more employees. These major employers account for 3,605 jobs, or 29.6% of Pine Hills' attendant employment.

Detailed employment estimates and projections can be found in Sections I, IV, X, and XI of the Appendix tables.

Income. Figure 2.14 illustrates the area's average and median household incomes. The neighborhood's estimated 2010 median household income is \$40,043, with an average household income of \$47,429, and a per capita income of \$15,198. The County's overall 2010 median household income is 30% higher at \$52,261, with an average household income of \$69,228 (45% higher), and a per capita income of \$25,879 (70% higher). Pine Hills' income density is estimated at \$110,915 per acre while at the County level it is only \$44,638. This significant difference in income density can be explained by the fact that there are very large vacant tracts of land in unincorporated Orange County which skews the data in favor of a much lower income density.

Figure 2.14: Average and Median Household Incomes

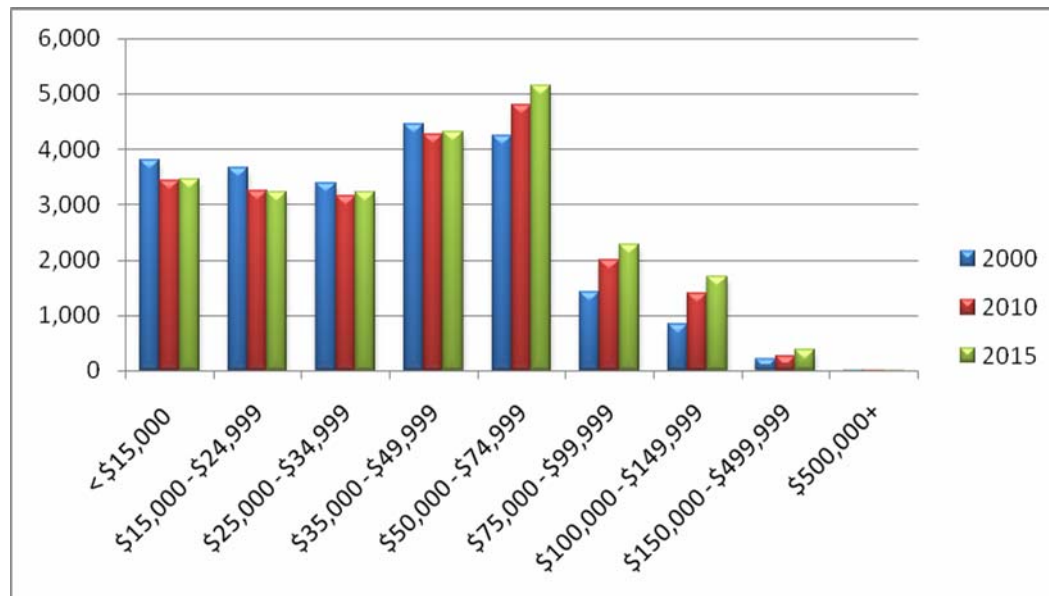


Source: Nielsen Claritas (2010)

Figure 2.15 illustrates that more than 43% of the neighborhood households have incomes of less than \$35,000 per year. While 40.1% have annual incomes of \$35,000 to \$74,999, and 16.3% have incomes of \$75,000 or more per year. Median incomes are highest among householders aged 35-44, at \$47,275. This age group is followed closely by 45-54 householders at \$44,667, and 55-64 householders at \$42,407. Not surprisingly, median incomes drop significantly in senior age groups and for those just entering the labor force.

² Nielsen Claritas estimate. InfoUSA estimate is 12,807 employees.

Figure 2.15: Households by Income



Source: Nielsen Claritas (2010)

2009 Nielsen Claritas estimates indicate neighborhood households have an average net worth of \$197,474, and a median net worth of \$35,431. This sizeable divergence between the median and average measures suggests a highly uneven distribution of wealth within Pine Hills, and this hypothesis is validated upon more detailed review. Wealth distribution data indicates that 47.1% of households had a 2009 net worth of less than \$25,000, while 20.1% had net worth of \$250,000 or more, including 4.2% of households having a net worth in excess of \$1 million. Put simply, the average wealth in Pine Hills is being pulled up by a small minority of wealthy households that have a disproportionately high net worth.

According to InfoUSA, a total of nine payday loan/check cashing businesses operate within the Pine Hills neighborhood. These institutions often serve as a bank of last resort for people who do not have traditional bank accounts. By providing cash advances against credit cards and paychecks, these businesses also serve people who need additional cash for emergencies. The interest rates tend to be very high as these companies recognize and take advantage of the customer's need for cash. Only three of these businesses have opened since 1999, with those opening in the 2004-2007 timeframe. According to the InfoUSA data, there are 11 commercial banks in Pine Hills of which also, only 3 were established since 1999. When check cashing business are compared to full-service commercial banks, these numbers seem to indicate an equivalent need for alternate banking operations that are not based on savings deposits, but rather on check cashing transactions. The data seems to imply that there is an at least equal amount of persons that need to conduct financial transactions who may or may not have a tradition bank account.

Detailed income estimates and projections can be found in Sections V, VII, and IX of the Appendix tables.

3. MARKET ASSESSMENT

Purpose

In light of the current and near term market conditions in the Orlando Metropolitan Statistical Area (MSA), retail and office markets continue to seek equilibrium in terms of supportable demand and values. While the near term will likely be a period of correction of overbuilt local conditions relative to historically high unemployment levels, mid- and long-term growth in population and employment along with major investment initiatives in transit, downtown community venues and corresponding private investment will ultimately stabilize the market and provide favorable conditions for new real estate development.

As discussed in detail in prior sections, the Pine Hills neighborhood has historically experienced slow to moderate growth in population and employment, which has supported deliberate incremental additions to building inventory. The following market assessment of the Silver Star Road and Pine Hills Road corridors is based on primary research conducted by the project team – including selected students from Evans High School – in the field, analysis of public agency and third party private vendor data, and interviews conducted with market participants and key stakeholders in the study area. The market assessment provides a basic platform that supports discussion of potential opportunities along the corridor generally, and at targeted redevelopment sites specifically.

Market Areas

Within the study area there are three primary commercial corridors – Colonial Drive, Pine Hills Road and Silver Star Road. Because of the nature of Colonial Drive and how the commercial activity along this corridor is oriented more towards a regional trade area, this analysis put greater emphasis on Pine Hills Road and Silver Star Road. These corridors are more reflective of commercial areas attracting residents residing within Pine Hills.

More specifically, the analysis assessed the current and potential market demands at three major intersections in the center of the neighborhood. These intersections include Hiawasse Road and Silver Star Road, Powers Drive and Silver Star Road, and Pine Hills Road and Silver Star Road. Trade area radii of 0.25 miles, 0.50 miles and 1.50 miles from each intersection were analyzed. Rather than using larger radii such as 3 or 5 miles from the intersections, the shorter radii are more reflective of commercial activity nodes. These are oriented towards the immediate surrounding residents in the community and ultimately, a more pedestrian friendly activity node enabling access by walking, biking, transit, or the automobile. A map illustrating the trade areas of each intersection is presented in **Figure 3.1**.

- Department stores & general merchandise
- Discount stores
- Furniture & home furnishings
- Appliances & electronics
- Building materials & hardware
- Apparel & accessories
- Miscellaneous retail stores
- Food stores & supermarkets
- Beer, wine & liquor
- Drug stores & pharmacies
- Convenience stores & gasoline
- Cosmetic, Health, & Beauty
- Full service restaurants
- Limited service restaurants
- Specialty food service
- Drinking places
- Finance, Insurance, & Real Estate
- Personal services
- Medical services
- Legal services
- Social services
- Professional & business services

The analysis considers both existing and incremental, or increased, demand. The term incremental demand is defined as the amount of commercial space supportable by the estimated new households.

Each of the intersections assessed have existing shopping centers currently open and operating. To identify the amount of net demand within the market areas, specific to the Pine Hills and Silver Star intersection, the project team completed a physical survey of commercial properties along the Pine Hills and Silver Star corridors. Survey results indicate how much space is unoccupied and what type of activity is occurring within occupied space. **Table 1.4** presented in the previous chapter illustrates the results of the physical survey of properties along the Pine Hills Corridor.

Demographic Analysis

The project team analyzed demographic trends to define each trade area's socioeconomic context and compare its characteristics to Orange County (the county). Five-year projections (2010 to 2015) for attribute data were used to analyze near-term trends for all three intersections. The Silver Star and Pine Hills intersection became a main focus of this study, therefore projections out to 2030 were used to analyze longer-term trends for the surrounding neighborhoods. The future data included here indicate general trending and are in no way predictive of actual outcomes. Third party population and household projections are consistent within standard industry practices and are included as one perspective in the analysis.

Silver Star Road and Pine Hills Road. **Table 3.1** illustrates the data analyzed for the Silver Star and Pine Hills intersection. The population surrounding the intersection has historically lagged the county in growth during the last three decades, even losing population between 2000 and 2010. For the next 20 years, a modest rate of growth is projected to occur in these neighborhoods.

The trade areas have a noticeably lower median household income when compared to the county, as well as a higher number of persons per household. With an owner/renter split of approximately 60/40 the make-up of occupied households is consistent with the county. The average household income and the percentage of households in the highest income bracket lag both measures in the county. Median and average household income in the trade areas are also projected to grow at a slower rate than the county. Much of the housing stock is older in the trade areas with about 75% of all housing built between 1940 and 1979.

Table 3.1: Demographic Trends Analysis – Pine Hills / Silver Star Intersection

Demographics Trends Analysis					
		Mile Radius from Intersection			Orange County
		0.25	0.50	1.50	
Population	2000 Census-based	626	4,944	35,409	896,344
	2010 Estimated	610	4,812	35,147	1,119,867
	2015 Projected	628	4,946	36,461	1,232,522
	2030 Projected	718	5,483	40,526	1,681,758
	<i>Historical Annual Growth 2000 to 2010</i>	<i>-0.26%</i>	<i>-0.27%</i>	<i>-0.07%</i>	<i>2.25%</i>
	<i>Projected Annual Growth 2010 to 2015</i>	<i>0.58%</i>	<i>0.55%</i>	<i>0.74%</i>	<i>1.94%</i>
Households	2000 Census-based	193	1,572	11,482	336,286
	2010 Estimated	184	1,495	11,159	414,325
	2015 Projected	187	1,518	11,449	454,045
	2030 Projected	196	1,563	11,946	609,137
	<i>Historical Annual Growth 2000 to 2010</i>	<i>-0.48%</i>	<i>-0.50%</i>	<i>-0.28%</i>	<i>2.11%</i>
	<i>Projected Annual Growth 2010 to 2015</i>	<i>0.32%</i>	<i>0.31%</i>	<i>0.51%</i>	<i>1.85%</i>
	Average Household Size	3.39	3.28	3.20	2.71
Household Income	2010 \$0 - \$49,000	126	1,042	7,716	199,198
	\$50,000 - \$74,999	25	291	2,137	88,083
	\$75,000 - \$99,999	11	103	745	51,339
	\$100,000 - \$149,999	5	60	457	46,773
	\$150,000 or more	2	23	124	28,932
	<i>Median Household Income</i>	<i>\$31,774</i>	<i>\$35,005</i>	<i>\$35,269</i>	<i>\$52,261</i>
	<i>Average Household Income</i>	<i>\$41,060</i>	<i>\$43,653</i>	<i>\$42,829</i>	<i>\$69,228</i>
	2015 \$0 - \$49,000	96	769	5,812	201,581
	\$50,000 - \$74,999	26	301	2,247	94,986
	\$75,000 - \$99,999	11	111	826	58,731
	\$100,000 - \$149,999	5	68	521	59,929
	\$150,000 or more	1	24	140	38,818
	<i>Median Household Income</i>	<i>\$32,097</i>	<i>\$35,954</i>	<i>\$36,464</i>	<i>\$56,696</i>
	<i>Average Household Income</i>	<i>\$43,100</i>	<i>\$45,734</i>	<i>\$44,838</i>	<i>\$75,443</i>
	<i>Projected Annual Growth in Median (2010-2015)</i>	<i>0.20%</i>	<i>0.54%</i>	<i>0.67%</i>	<i>1.64%</i>
	<i>Projected Annual Growth in Average (2010-2015)</i>	<i>0.97%</i>	<i>0.94%</i>	<i>0.92%</i>	<i>1.73%</i>
Household Units	2010 Total Housing Units	184	1,656	12,207	458,908
	Total Occupied Units	168	1,520	11,179	414,325
	% Owner	60.7%	57.4%	60.0%	61.4%
	% Renter	39.3%	42.6%	40.0%	38.6%
	2015 Total Housing Units	188	1,681	12,527	503,491
	Total Occupied Units	172	1,543	11,474	454,045
	% Owner	59.9%	56.9%	59.6%	61.3%
	% Renter	40.1%	43.1%	40.4%	38.7%
	<i>Projected Annual Growth of Total Occupied Units (2010-2015)</i>	<i>0.47%</i>	<i>0.30%</i>	<i>0.52%</i>	<i>1.85%</i>
Homes by Year Built	Prior to 1939	3	10	98	8,756
	1940 to 1959	49	263	1,972	45,707
	1960 to 1979	91	974	6,646	100,636
	1980 to 1989	14	261	2,240	93,440
	1990 to 1999	22	115	837	101,718
	2000 or after	6	31	414	108,651

Silver Star Road and Powers Drive. Table 3.2 illustrates the data analyzed for the Silver Star and Powers intersection. The population surrounding the intersection has historically lagged the county in growth during the last three decades, but has experienced some growth between 2000 and 2010. For the next five years, the modest rate of growth is projected to continue in these neighborhoods.

The trade areas for the Powers Drive intersection have a noticeably lower median household income when compared to the county, as well as higher number of persons per household. With an owner/renter split of approximately 60/40 within 0.25 and 0.50 miles from the intersection the make-up of occupied households is consistent with the county. However, at 1.50 miles from the intersection this split leans even more heavily towards owner occupied households with a split of nearly 70/30. The average household income and the percentage of households in the highest income bracket lag both measures in the county. Median and average household income in the trade areas are also projected to grow at a slower rate than the county. Within 0.25 miles of the intersection about 80% of all housing was built prior to 1980. Within 0.50 and 1.50 miles from the intersection, about 60% of all housing was built prior to 1980. Only one-third of the housing units in the county were built prior to 1980.

Table 3.2: Demographic Trends Analysis – Silver Star / Powers Intersection

Demographics Trends Analysis					
		Mile Radius from Intersection			Orange County
		0.25	0.50	1.50	
Population	2000 Census-based	578	5,009	38,869	896,344
	2010 Estimated	606	5,335	40,813	1,119,867
	2015 Projected	631	5,641	43,092	1,232,522
	<i>Historical Annual Growth 2000 to 2010</i>	<i>0.95%</i>	<i>1.27%</i>	<i>0.98%</i>	<i>2.25%</i>
	<i>Projected Annual Growth 2010 to 2015</i>	<i>0.82%</i>	<i>1.12%</i>	<i>1.09%</i>	<i>1.94%</i>
Households	2000 Census-based	181	1,655	12,156	336,286
	2010 Estimated	187	1,742	12,600	414,325
	2015 Projected	190	1,804	12,987	454,045
	<i>Historical Annual Growth 2000 to 2010</i>	<i>0.33%</i>	<i>0.51%</i>	<i>0.36%</i>	<i>2.11%</i>
	<i>Projected Annual Growth 2010 to 2015</i>	<i>0.29%</i>	<i>0.70%</i>	<i>0.61%</i>	<i>1.85%</i>
	Average Household Size	3.25	3.07	3.25	2.69
Household Income	2010 \$0 - \$49,000	119	1,041	7,681	199,198
	\$50,000 - \$74,999	39	362	2,600	88,083
	\$75,000 - \$99,999	14	142	1,043	51,339
	\$100,000 - \$149,999	8	88	655	46,773
	\$150,000 or more	2	22	177	28,932
	<i>Median Household Income</i>	<i>\$39,313</i>	<i>\$40,958</i>	<i>\$39,592</i>	<i>\$52,261</i>
	<i>Average Household Income</i>	<i>\$44,989</i>	<i>\$47,491</i>	<i>\$47,009</i>	<i>\$69,228</i>
	2015 \$0 - \$49,000	119	1,060	7,721	201,581
	\$50,000 - \$74,999	41	388	2,705	94,986
	\$75,000 - \$99,999	15	162	1,182	58,731
	\$100,000 - \$149,999	9	104	777	59,929
	\$150,000 or more	2	27	216	38,818
	<i>Median Household Income</i>	<i>\$40,305</i>	<i>\$42,255</i>	<i>\$40,934</i>	<i>\$56,696</i>
	<i>Average Household Income</i>	<i>\$46,241</i>	<i>\$49,202</i>	<i>\$48,867</i>	<i>\$75,443</i>
	<i>Projected Annual Growth in Median (2010-2015)</i>	<i>0.50%</i>	<i>0.63%</i>	<i>0.67%</i>	<i>1.64%</i>
	<i>Projected Annual Growth in Average (2010-2015)</i>	<i>0.55%</i>	<i>0.71%</i>	<i>0.78%</i>	<i>1.73%</i>
Household Units	2010 Total Housing Units	198	1,782	13,078	458,908
	Total Occupied Units	182	1,655	12,155	414,325
	% Owner	60.4%	64.0%	68.2%	61.4%
	% Renter	39.6%	36.0%	31.8%	38.6%
	2015 Total Housing Units	204	1,875	13,551	503,491
	Total Occupied Units	187	1,742	12,600	454,045
	% Owner	60.4%	63.8%	68.0%	61.3%
	% Renter	39.6%	36.2%	32.0%	38.7%
	<i>Projected Annual Growth of Total Occupied Units (2010-2015)</i>	<i>0.54%</i>	<i>1.03%</i>	<i>0.72%</i>	<i>1.85%</i>
Homes by Year Built	Prior to 1939	2	9	90	8,756
	1940 to 1959	25	145	1,599	45,707
	1960 to 1979	132	913	6,246	100,636
	1980 to 1989	27	458	2,713	93,440
	1990 to 1999	5	130	1,635	101,718
	2000 or after	16	222	1,268	108,651

Silver Star Road and Hiawassees Road. Table 3.3 illustrates the data analyzed for the Silver Star and Hiawassees intersection. The Hiawassees intersection is the most western intersection along the Silver Star Road corridor in Pine Hills. As such, growth over past 50 years has reflected a more suburban type of development pattern. Additionally, housing units in surrounding neighborhoods are likely to be newer and reflect higher household incomes than those shown within the Powers Drive and Pine Hills Road intersections. The population surrounding the intersection has historically lagged the county in growth during the last three decades, but has experienced some growth between 2000 and 2010. For the next five years, the rate of growth is projected to slightly increase in these neighborhoods.

The trade areas for the Hiawassees Road intersection have a lower median household income when compared to the county as well as higher number of persons per household. With an owner/renter split of approximately 70/30, there are a larger percentage of owner occupied housing units than represented across the county. Interestingly, within 0.50 miles from the intersection the data shows the highest ownership rate of 75%. The average household income and the percentage of households in the highest income bracket lag both measures in the county. Median and average household income in the trade areas are also projected to grow at a slower rate than the county. Within 0.25 and 1.50 miles of the intersection about 60% of all housing was built after 1980. Within 0.50 from the intersection, about 70% and of all housing was built after 1980. About two-thirds of the housing units in the county were built after 1980.

Table 3.3: Demographic Trends Analysis – Silver Star / Hiawassee Intersection

Demographics Trends Analysis					
		Mile Radius from Intersection			Orange County
		0.25	0.50	1.50	
Population	2000 Census-based	688	5,730	36,065	896,344
	2010 Estimated	736	6,193	38,397	1,119,867
	2015 Projected	788	6,727	41,290	1,232,522
	<i>Historical Annual Growth 2000 to 2010</i>	<i>1.36%</i>	<i>1.57%</i>	<i>1.26%</i>	<i>2.25%</i>
	<i>Projected Annual Growth 2010 to 2015</i>	<i>1.38%</i>	<i>1.67%</i>	<i>1.46%</i>	<i>1.94%</i>
Households	2000 Census-based	232	1,828	11,346	336,286
	2010 Estimated	245	1,947	11,932	414,325
	2015 Projected	258	2,074	12,548	454,045
	<i>Historical Annual Growth 2000 to 2010</i>	<i>0.55%</i>	<i>0.63%</i>	<i>0.50%</i>	<i>2.11%</i>
	<i>Projected Annual Growth 2010 to 2015</i>	<i>1.02%</i>	<i>1.27%</i>	<i>1.01%</i>	<i>1.85%</i>
	Average Household Size	3.01	3.19	3.23	2.69
Household Income	2010 \$0 - \$49,000	135	1,024	6,850	199,198
	\$50,000 \$74,999	54	429	2,462	88,083
	\$75,000 - \$99,999	23	212	1,091	51,339
	\$100,000 - \$149,999	16	128	749	46,773
	\$150,000 or more	4	33	195	28,932
	<i>Median Household Income</i>	<i>\$43,777</i>	<i>\$44,993</i>	<i>\$41,350</i>	<i>\$52,261</i>
	<i>Average Household Income</i>	<i>\$51,190</i>	<i>\$52,393</i>	<i>\$49,387</i>	<i>\$69,228</i>
	2015 \$0 - \$49,000	135	1,054	6,957	201,581
	\$50,000 \$74,999	58	451	2,572	94,986
	\$75,000 - \$99,999	27	245	1,246	58,731
	\$100,000 - \$149,999	20	157	903	59,929
	\$150,000 or more	6	41	255	38,818
	<i>Median Household Income</i>	<i>\$46,094</i>	<i>\$46,540</i>	<i>\$42,901</i>	<i>\$56,696</i>
	<i>Average Household Income</i>	<i>\$53,796</i>	<i>\$54,627</i>	<i>\$51,687</i>	<i>\$75,443</i>
	<i>Projected Annual Growth in Median (2010-2015)</i>	<i>1.04%</i>	<i>0.68%</i>	<i>0.74%</i>	<i>1.64%</i>
	<i>Projected Annual Growth in Average (2010-2015)</i>	<i>1.00%</i>	<i>0.84%</i>	<i>0.91%</i>	<i>1.73%</i>
Household Units	2010 Total Housing Units	245	1,928	12,133	458,908
	Total Occupied Units	232	1,828	11,346	414,325
	% Owner	72.0%	75.9%	69.5%	61.4%
	% Renter	28.0%	24.1%	30.5%	38.6%
	2015 Total Housing Units	259	2,055	12,755	503,491
	Total Occupied Units	245	1,948	11,932	454,045
	% Owner	71.8%	75.7%	69.4%	61.3%
	% Renter	28.2%	24.3%	30.6%	38.7%
	<i>Projected Annual Growth of Total Occupied Units (2010-2015)</i>	<i>1.10%</i>	<i>1.28%</i>	<i>1.01%</i>	<i>1.85%</i>
Homes by Year Built	Prior to 1939	0	0	65	8,756
	1940 to 1959	8	57	970	45,707
	1960 to 1979	98	575	5,227	100,636
	1980 to 1989	80	691	2,885	93,440
	1990 to 1999	39	417	1,960	101,718
	2000 or after	34	315	1,650	108,651

The areas studied in this analysis are located in transitional areas of the county. A more urban environment – the City of Orlando – is directly to the east while the suburban City of Ocoee is to the west. This is evidenced by the data above when comparing the Pine Hills Road intersection with the intersection at Hiawasse Road. At Pine Hills Road, housing units tend to be older within more established neighborhoods. The neighborhoods around Hiawasse Road intersection comprise newer residential units, have a higher rate of home ownership, and higher household incomes.

Market Overview

Each of the intersections analyzed have at least one existing shopping center. According to records from the office of the Orange County Property Appraiser, these shopping centers together comprise over 784,500 SF.

The largest amount of commercial space is located at the Silver Star and Hiawasse intersection. Between two shopping centers, small in-line strip center and various outparcels there is about 370,000 SF of commercial space built. The majority of the existing commercial space was built between 25 and 30 years ago.

With a small shopping center anchored by a discount grocery store, the intersection of Powers and Silver Star currently has about 106,000 SF of commercial space built. Much of this space, including the Silver Star Plaza was built over 20 years ago.

As noted above, the analysis focused primarily on the Pine Hills Road and Silver Star Road corridors, with an emphasis on the area surrounding the intersection of these roads.

The Pine Hills and Silver Star intersection comprises two shopping centers and a number of outparcels offering a variety of services and products. The commercial space already built at the intersection totals over 400,000 SF. According to the physical survey conducted for the analysis, over 30% of this space is currently inactive or vacant. The Silver Hill center located on the northwest corner is nearly fully leased with lease rates of \$15 per SF for the smaller tenants, while the Silver Pines center on the southwest corner is less than 50% leased with lease rates of about \$4 to \$6 per SF.

Market Area Demand

The market assessment focuses on the demand for retail and restaurant sales and service-oriented office space. Applying the proprietary models previously mentioned, the overall potential market demand is generated in the trade area by the households and household income within each trade area. The 1.50 mile radius is defined as the study area which is an appropriate distance for a mix of neighborhood and community oriented tenant types. The numbers presented in the following tables (**Table 3.4** through **Table 3.7**) represent the estimated demand from current and future households within the study area. These figures should be considered conservative since the analysis does not reflect transient business from customers traveling through the area and living outside the 1.50 mile radius. The high traffic volumes on Pine Hills and Silver Star Roads suggest transient business would not be insignificant.

Table 3.4: Supportable Demand - 1.50 Miles from Silver Star / Powers Drive Intersection, 2010-2015

	Supportable SF	
Retail		
Grocery Store	79,510	- 107,570
Convenience Goods	97,820	- 132,340
Shopper Goods	<u>718,220</u>	- <u>971,720</u>
<i>Subtotal</i>	<i>895,550</i>	- <i>1,211,630</i>
Restaurants		
Full Service Restaurants	60,820	- 82,280
Limited Service Restaurants		
Restaurants	43,160	- 58,400
Specialty Food	18,710	- 25,310
Drinking Places	<u>2,220</u>	- <u>3,000</u>
<i>Subtotal</i>	<i>124,910</i>	- <i>168,990</i>
Services	<u>165,290</u>	- <u>223,630</u>
Total	1,185,750	- 1,604,250

Table 3.5: Supportable Demand - 1.50 Miles from Silver Star / Hiawasse Road Intersection, 2010-2015

	Supportable SF	
Retail		
Grocery Store	148,960	- 201,540
Convenience Goods	183,260	- 247,940
Shopper Goods	<u>1,345,650</u>	- <u>1,820,590</u>
<i>Subtotal</i>	<i>1,677,870</i>	- <i>2,270,070</i>
Restaurants		
Full Service Restaurants	60,660	- 82,060
Limited Service Restaurants	43,070	- 58,270
Specialty Food	18,650	- 25,230
Drinking Places	<u>2,200</u>	- <u>2,980</u>
<i>Subtotal</i>	<i>124,580</i>	- <i>168,540</i>
Services	<u>191,870</u>	- <u>259,590</u>
Total	1,994,320	- 2,698,200

Table 3.6: Supportable Demand - 1.50 Miles from Silver Star / Pine Hills Road Intersection, 2010-2015

	Supportable SF		
Retail			
Grocery Store	65,200	-	88,210
Convenience Goods	80,220	-	108,540
Shopper Goods	<u>589,020</u>	-	<u>796,900</u>
Subtotal	734,440	-	993,650
Restaurants			
Full Service Restaurants	49,880	-	67,480
Limited Service Restaurants	35,400	-	47,900
Specialty Food	15,330	-	20,750
Drinking Places	<u>1,820</u>	-	<u>2,460</u>
Subtotal	102,430	-	138,590
Services	<u>1,129,630</u>	-	<u>1,528,330</u>
Total	1,966,500	-	2,660,570

To assess the potential demand over a longer period of time, the modeling analysis was extended out 20 years for the Pine Hills and Silver Star intersection.

Table 3.7: Supportable Demand - 1.50 Miles from Silver Star / Pine Hills Road Intersection, 2010-2030

	Supportable SF	
Retail		
Grocery Store	79,800	- 107,960
Convenience Goods	98,180	- 132,840
Shopper Goods	<u>720,890</u>	- <u>975,320</u>
Subtotal	898,870	- 1,216,120
Restaurants		
Full Service Restaurants	61,050	- 82,590
Limited Service Restaurants	18,780	- 25,400
Specialty Food	2,230	- 3,010
Drinking Places	<u>0</u>	- <u>0</u>
Subtotal	82,060	- 111,000
Services	<u>1,255,570</u>	- <u>1,698,710</u>
Total	2,236,500	- 3,025,830

To estimate the amount of demand within the study that could be captured at the intersection, the demand analysis employed a fair share allocation method to distribute current and future demand among existing geographic concentrations of retail, restaurant and service-oriented office space in the study area. For example, a 1.50 mile radius around the intersection of Silver Star and Powers overlaps with the study areas of both Hiawassee and Pine Hills intersections. Thus, an adjustment to the total supportable demand is required to reflect the amount of demand that could be captured at the intersection.

The following tables (**Table 3.8** through **Table 3.11**) illustrate the estimated demand captured at each intersection based on the current and future supportable demand.

Table 3.8: Demand Captured at Site - 1.50 Miles from Silver Star / Hiawassee Road Intersection, 2010-2015

	On-Site Capture (SF)		
Retail			
Grocery Store	36,350	-	49,170
Convenience Goods	43,270	-	58,540
Shopper Goods	<u>78,370</u>	-	<u>106,030</u>
Subtotal	157,990	-	213,740
Restaurants			
Full Service Restaurants	7,670	-	10,370
Limited Service Restaurants	6,530	-	8,830
Specialty Food	1,570	-	2,130
Drinking Places	<u>370</u>	-	<u>510</u>
Subtotal	16,140	-	21,840
Services	<u>16,570</u>	-	<u>22,410</u>
Total	190,700	-	257,990

Table 3.9: Demand Captured at Site - 1.50 Miles from Silver Star / Powers Drive Intersection, 2010-2015

	On-Site Capture (SF)	
Retail		
Grocery Store	8,640	- 11,700
Convenience Goods	10,290	- 13,930
Shopper Goods	<u>18,630</u>	- <u>25,210</u>
<i>Subtotal</i>	<i>37,560</i>	- <i>50,840</i>
Restaurants		
Full Service Restaurants	4,960	- 6,700
Limited Service Restaurants	4,220	- 5,720
Specialty Food Services	1,010	- 1,370
Drinking Places	<u>250</u>	- <u>330</u>
<i>Subtotal</i>	<i>10,440</i>	- <i>14,120</i>
Services	<u>9,250</u>	- <u>12,510</u>
Total	57,250	- 77,470

Table 3.10: Demand Captured at Site - 1.50 Miles from Silver Star / Pine Hills Road Intersection, 2010-2015

	On-Site Capture (SF)	
Retail		
Grocery Store	19,790	- 26,770
Convenience Goods	23,560	- 31,880
Shopper Goods	<u>42,660</u>	- <u>57,720</u>
<i>Subtotal</i>	<i>86,010</i>	- <i>116,370</i>
Restaurants		
Full Service Restaurants	11,350	- 15,350
Limited Service Restaurants	9,670	- 13,090
Specialty Food	2,330	- 3,150
Drinking Places	<u>550</u>	- <u>750</u>
<i>Subtotal</i>	<i>23,900</i>	- <i>32,340</i>
Services	<u>122,120</u>	- <u>165,220</u>
Total	232,030	- 313,930

To assess the potential demand over a longer period of time, the modeling analysis was extended out 20 years for the Pine Hills and Silver Star intersection.

Table 3.11: Demand Captured at Site - 1.50 Miles from Silver Star / Pine Hills Road Intersection, 2010-2030

On-Site Capture (SF)			
Retail			
Grocery Store	24,900	-	33,680
Convenience Goods	29,640	-	40,100
Shopper Goods	<u>53,680</u>	-	<u>72,620</u>
<i>Subtotal</i>	<i>108,220</i>	-	<i>146,400</i>
Restaurants			
Full Service Restaurants	14,280	-	19,320
Limited Service Restaurants	12,160	-	16,460
Specialty Food	2,920	-	3,960
Drinking Places	<u>700</u>	-	<u>940</u>
<i>Subtotal</i>	<i>30,060</i>	-	<i>40,680</i>
Services	<u>146,290</u>	-	<u>197,930</u>
Total	284,570	-	385,010

The physical survey of Pine Hills Road and Silver Star Road corridors provided a detailed look at the existing commercial activity. The survey discovered how much square footage is occupied and what type of activity is occurring in those locations. Accounting for the space currently built, such as the Silver Pines and Silver Hills shopping centers as well as the outparcels around the intersection, there is a *projected surplus* over the next 20 years of approximately 50,000 SF of total commercial space. As previously noted, however, over 30% of the space already built is vacant or inactive.

Also worthy of note is the distribution of existing space as presented in **Table 3.12**. Over 80% of the total space built is comprised of retail oriented activities. Space oriented to office activities such as professional and financial services make up less than 5% of the total space built. The remainder of the space built is comprised of food service, 3%, industrial/light manufacturing, 2%, and auto repair shops and service stations make up 10%. As shown in **Table 3.11**, the demand analysis indicates a more balanced distribution of retail and service-oriented office space is needed.

Table 3.12: Distribution of Commercial Space by Tenant Type - Pine Hills/Silver Star

Tenant Type	Distribution of Building Area
Retail / Commercial	82%
Office / Professional Services	4%
Restaurants	3%
Industrial / Light Mfg	2%
Repair Shops / Service Stations	<u>10%</u>
Total	100%

The mismatch of demand and existing tenant-types is evident in the vacancies and the quality of structures at the intersection. Currently there is a mixture of unattractive and uninviting structures, as well as many of the same type of product offerings such as cash advance/check cashing service providers, which offer little incentive for outside investment or tenant relocation to the area. The findings indicate the need for repositioning through redevelopment of the southwest quadrant of the Pine Hills and Silver Star intersection to enhance the retail and mixed-use offerings. Redevelopment initiatives in this quadrant should essentially contract some of the retail, restaurant and service offerings into an attractive town center style of development accessible by multiple modes of transportation – including pedestrian accessibility – to best serve the promotion of increased investment along the Silver Star Road and Pine Hills Road corridors. Resources should be provided to allow for land assembly and environmental mitigation.

Additionally, the analysis of the market demand potential and physical survey indicate the need to support land use code modifications encouraging better quality office redevelopment along Pine Hills Road. Additional uses such as art studios or business incubation activities compatible with current zoning along Pine Hills Road and can be accommodated within the existing buildings should also be explored. While there may be potential for limited retail or residential development along the corridor, these activities would be best served in a town center style of development as discussed in Chapter 5.

PART TWO:

*REDEVELOPMENT INITIATIVES & IMPLEMENTATION
STRATEGIES*

4. IMPLEMENTING ORGANIZATION

Overview of Issues

The Task Force indicated in their earliest meetings the necessity to establish an ongoing entity that would be responsible for implementing the recommendations to be forwarded to the Board of County Commissioners. It was also a desire that this organization have a dedicated funding source that would enable it to be a catalyst for redevelopment. Below, the consultant team has identified several types of organizational structures.

- A private, not-for-profit development corporation
- A Neighborhood Improvement District Board
- A Community Redevelopment Agency
- A separate Orange County “Pine Hills” Department

Private, Not-for-profit Development Corporation

This organization would be predominantly privately funded, with the possibility of seed money from state or local sources. It would be chartered to provide development services, buy and sell land, lease property, enter into contractual arrangements for legal, architectural, engineering and related services necessary to bring a project to completion. It can own and manage residential or commercial investments. Its long term viability is determined by its success in developing, managing, leasing and/or selling properties. An example of a successful such entity is the Orlando Neighborhood Improvement Corporation.

Neighborhood Improvement District (Governing Board / Advisory Council)

Under F.S. Chapter 163.501-522, a city or county may establish a Neighborhood Improvement District (NID) for the purpose of creating an organization for supporting the future growth, development and reduction in crime of a specified area within its jurisdiction. A NID may be established by the County/City by ordinance through their normal adoption process. There are four different kinds of NIDs under the state statute. The NID that most closely addresses the Task Force objectives would be the Local Government Neighborhood Improvement District (NID). Such a NID has the following characteristics:

- The district must be comprised of either 75% commercial properties or 75% residential properties.
- Governing Board is typically a City Council or County Commission.
- An Advisory Council of property owners within the NID.
- Advisory Council may be granted significant authority by the Governing Board
- No automatic sunset provision.
- Advisory Council made up of 3-7 members, all of whom own property within district.

The NID would have the following powers:

- Assess additional ad valorem up to two mills subject to referendum approval by property owners within district
- Assess up to \$500 per parcel subject to referendum by electors within district
- Establish the district boundaries
- Enter into contracts; sue and be sued as a body corporate
- Acquire, own, convey, lease, construct, manage property
- Promote and advertise the district

- Create and adopt community plans and financing plan
- Improve street lighting, parks, streets, drainage, utilities
- Establish and adopt annual budget
- Hire necessary staff as appropriate
- Seek and accept grants

Miscellaneous NID laws include the following:

- NID is a “state agency” for purposes of sovereign immunity
- May not borrow money
- Must produce a crime reduction plan
- District capital improvement plan must be consistent with County’s comp plan
- Budgeting must comply with Ch. 200, Florida Statutes
- NID must comply with the Uniform Special District Accountability Act of 1989

Similar, successful entities would be Downtown Development Board and the Orange Blossom Trail Neighborhood Improvement District. Are you sure OBT is an NID? They have a CRA and MSTU?

Community Redevelopment Agency

Also authorized under FS Chapter 163(3) is the establishment of a Community Redevelopment Agency (CRA). Within Orange County there are numerous such agencies, one or more within most of the municipalities as well as two administered by the County itself: Orange Blossom Trail and International Drive.

Similar to the NID, the governing board is usually the City Council or the County Commission. The CRA has all of the same powers as described in the previous section describing the NID. The main differences between the two entities rests with the way they are created and the way they are funded.

A CRA may be created after a formal finding of “slum and blight” as prescribed by the statutes, and the adoption of a redevelopment plan directing resources to address the “slum and blighting” conditions. No referendum is required, simply a resolution adopting the “findings” and the “plan”, after formal public hearings.

In the adoption process, the funding mechanism is established. The resources are commonly known as “tax increment funds” (TIF) whereby the future increment of ad valorem tax valuation within the CRA area for the City and the County no longer goes to the respective general funds but is deposited into a Trust Fund for that specific redevelopment area. The Trust Fund resources can only be spent within the CRA area in accordance with adopted redevelopment plan. There is also a thirty (30) year “sunset” provision, in which the agency will be dissolved at the end of that time.

There are over 150 such CRA’s throughout the state and 10 within Orange County.

County Created Department

Another option for implementing the recommended program would have the County create an internal entity, or department, focused solely on Pine Hills. This would vary from the existing staffing which assigns staff members from various departments to respond to issues on a project-by-project basis. It could be advocated that as one of the largest and oldest unincorporated communities in the County, that a multi-discipline staff could be exclusively

assigned to address Pine Hills' many governmental service and redevelopment issues. This "department" would have its own annual budget and administrator. It would be recommended that such a department have equal "standing" with all other non-constitutional created departments and answer directly to the office of the County Mayor.

The purposes of the department would be to :

- Coordinate planning and economic efforts of all public and private entities within Pine Hills;
- Develop strategic plan for revitalization of project area;
- Produce private commitment to invest in, improve, or revitalize area;
- Prepare comprehensive plan of action for area including financing program;
- Serve as a forum to locate and negotiate private interests and encourage project implementation;
- Finance and implement projects;
- Seek and receive grants and contributions;
- Serve as the community "keepers of the vision".

The most significant advantage of the establishment of such a department would be the ability to receive greater resources upfront than would be available under the other options. In short, the creation of such a department would be the political support for a long term, comprehensive effort to respond to systemic issues that need to be addressed to increase private investment and leverage the significant investment manifested in the new Evans High School.

In summary there are really only two types of organizational structures: a private not-for-profit or a public entity. The public entity could take one of the basic three forms – Neighborhood Improvement District (NID), Community Redevelopment Agency (CRA), or County department. Within each of these structures are a variety of funding and financing tools that could serve the community: Municipal Service Taxing Units (MSTU's), Brownfield grants, Community Development Block Grants (CDBG), special assessment areas, and host of other state and federal programs.

Actions

It is recommended that the County Commission acknowledge the need for the creation of an entity to be specifically responsible and accountable for the economic and physical redevelopment programs of Pine Hills. It is also recommended that a combination of the "department" and the NID be used to establish the entity to implement the Task Force recommendations. Specifically, this would entail the county establishing a "department", or staffing, for the exclusive purpose of shepherding the process over a specified time frame by which a Neighborhood Improvement District would be statutorily created with all the authority and powers allowed under the state enabling statutes.

5. THE PROPOSED PINE HILLS TOWN CENTER

Purpose

The purpose of this chapter is to build on the results of the previous chapters and conclude with a location in Pine Hills that can serve as the central point for the Pine Hills Community. An understanding of neighborhoods, community connections, regional corridors and community streets provides the frame work for the presentation of the proposed Pine Hills Town Center. The previous chapter addressed the need for a sustainable organization that can activate and perpetuate the “town center” and the other community planning actions recommended in this plan.

The Idea of Town Centers

Every community needs a place that serves as its base, its center, its focus...a place for community gatherings, a place for casual encounters with neighbors, and a place to celebrate community accomplishments. Pine Hills is fortunate to have Barnett Park that can serve many of these needs. The addition of an active, commercial, mixed-use town center will complete the pallet of places the Pine Hills Community needs to be complete.

Many cities have downtowns, many new communities have town or village centers, and many existing communities without such a place resurrect an existing remnant of a downtown or find the appropriate location for a new center.

The Existing Situation

The Pine Hills community has been planned and studied many times. The most recent plan prepared by Orange County recommended a town center to be located at the intersection of Pine Hills Road and Silver Star Road. This current study, supported by the thoughts of the Task Force and several community meetings reinforces this conclusion. The Pine Hills Town Center should be created, and it should be located at the designated location.

This intersection, in many ways, is already a focal place for the community. The northeast (NE) quadrant is the home of the new Evans High School that is nearing completion; a \$74 million investment that is greatly anticipated by the residents and business owners in Pine Hills. This quadrant is also the location of several businesses that are marginal in their contribution to the community. The northwest (NW) quadrant and the southwest (SW) quadrants are occupied by commercial centers.

The southeast (SE) quadrant is mostly residential with a veneer of commercial businesses fronting Pine Hills Road. The intersection also accommodates the crossing of a four lane and six lane road. The intersection is busy with traffic and dominated by asphalt. A tough environment for a new, mixed use, pedestrian friendly center of town, but the location is viable and the following discussion presents a plan for the creation of a successful town center at this spot.

Pine Hills Town Center Location. The aerial photograph (**Exhibit 5.1**) shows the current development on the four quadrants of the intersection of Pine Hills Road and Silver Star Road. The photo shows the old Evans High Schools which has been demolished and is being replaced on-site. The photo also gives a peek at the fact that residential development surrounds the commercialized intersection.

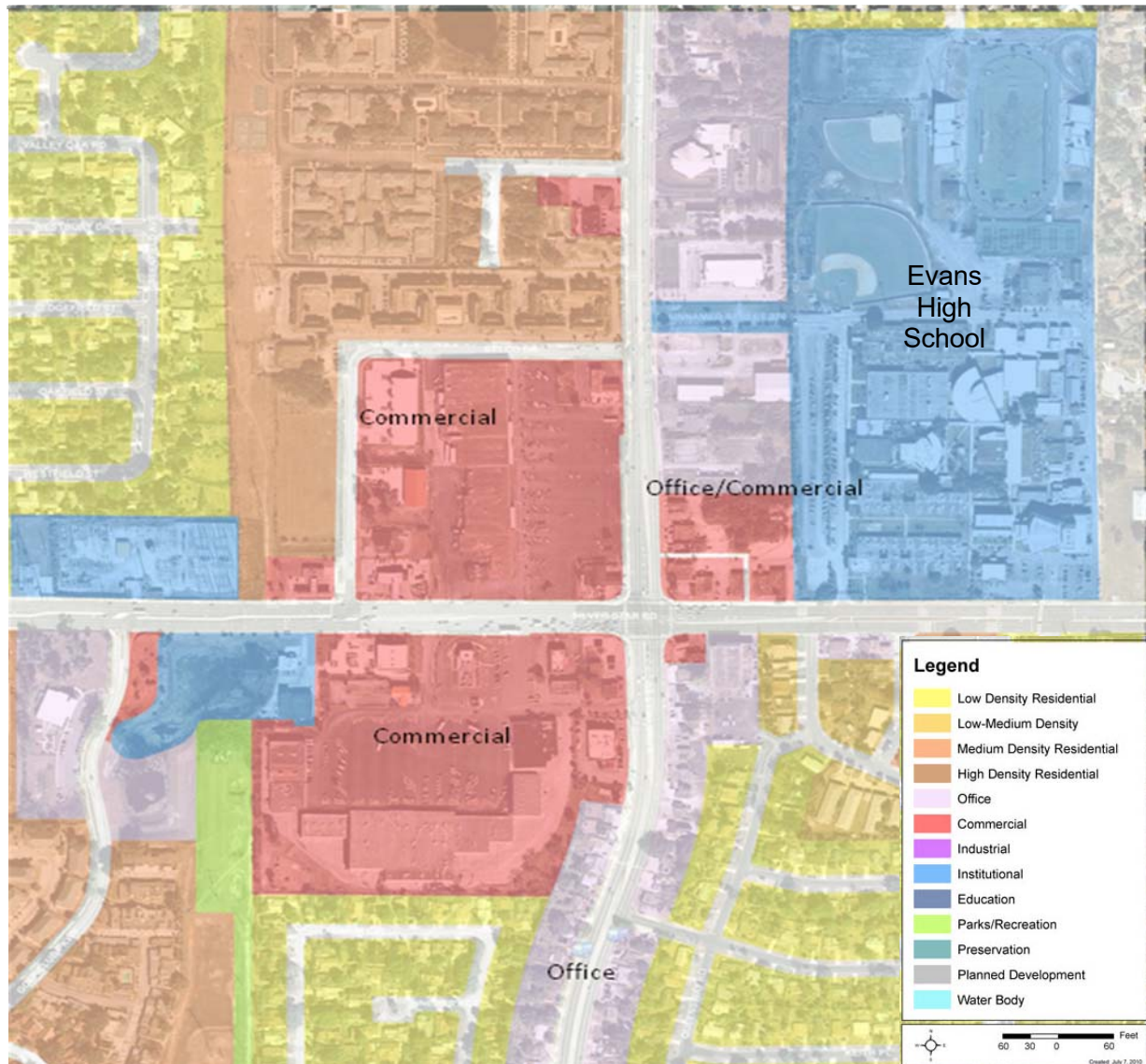
Exhibit 5.1: Aerial Photograph – Pine Hills / Silver Star Intersection



Source: ESRI World Imagery Database, 2008

Existing Land Use. Exhibit 5.2 illustrates how the land at the intersection is currently developed. The multi-family dwellings in the northwest and southwest quadrants are essential, even if they need modernization, because it is important to have large numbers of residents within walking distance with a safe and convenient pedestrian and bikeway system that enables them to comfortably partake in the town center offerings and activities. The large blue area is the new Evans High School which dominates the area and needs to be leveraged to strengthen the entire community.

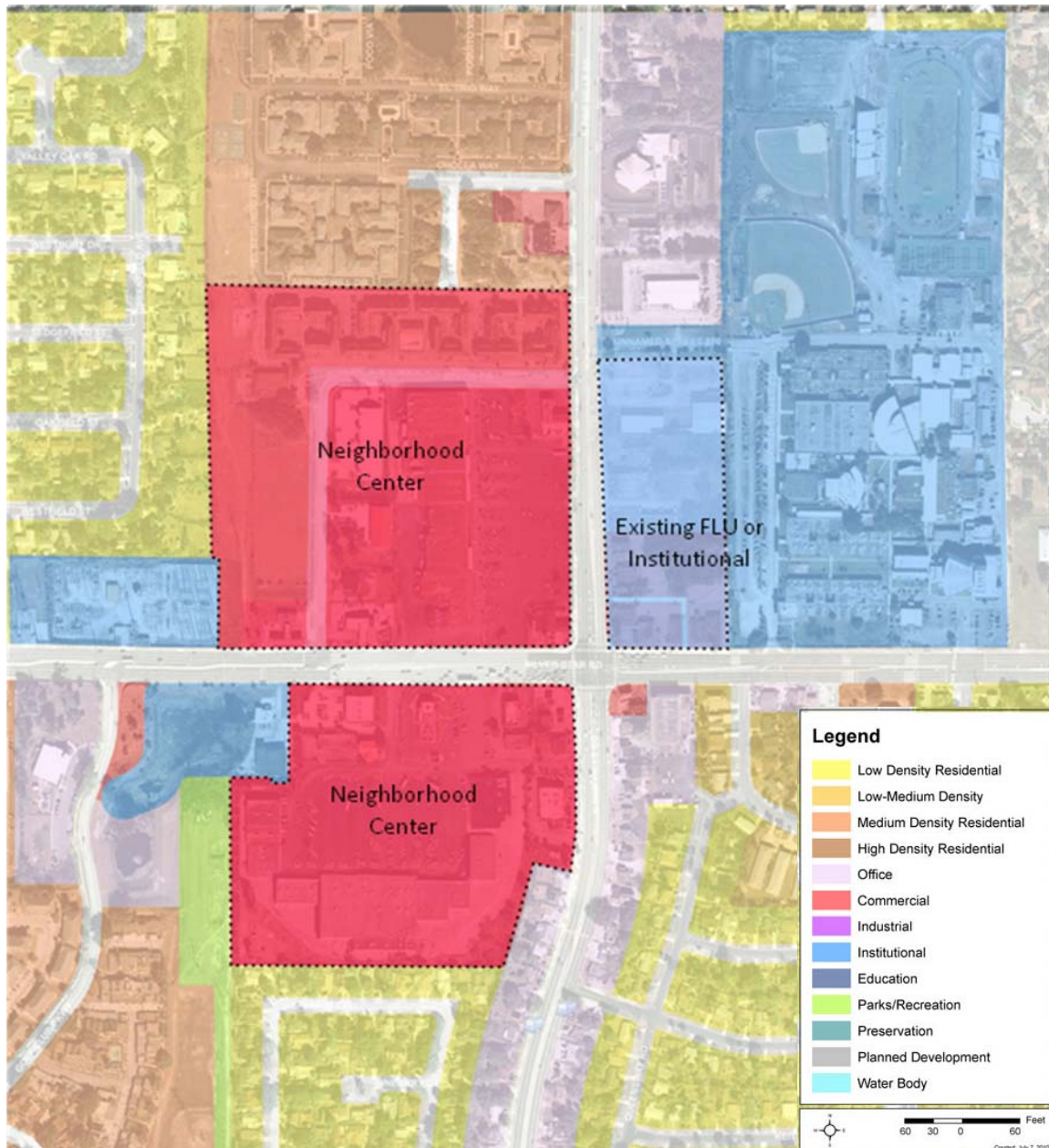
Exhibit 5.2 Existing Land Use



Source: Orange County Planning Department

Proposed Land Uses. Orange County has designated the Future Land Uses in the town center area as part of their Comprehensive Plan. The future of the area is anticipated to be a continuation of the current activities. The NW Neighborhood Center is about 28 acres in size, including the apartments to the north; the SW center is sized at about 20 acres. The actions recommended at the end of this Chapter will propose an increase in densities and intensities of use along with a more aggressive approach to a mix of uses, including residential uses in the town center.

Exhibit 5.3: Proposed Land Use



Source: Orange County Comprehensive Plan

The Proposed Pine Hills Town Center

The Town Center proposed has always been anticipated to be an active place with a mix of activities serving the Pine Hills community. The inclusion of residential dwellings, apartments, townhomes and/or condominiums was not previously included, but recent local experience with town centers seems to support the importance of including residents in the mix.

A review of similar centers in the Orlando region reveals that such places usually occupy sites ranging from 20 to 40 acres in size. **Table 5.1** illustrates the approximate site size of selected shopping centers.

Table 5.1: Site Size of Select Shopping Centers

Center	Site Size (Acres)
Winter Park Village	40
SoDo	22
Avalon Town Center	45
Lake Baldwin Town Center	40
Downtown Winter Garden	15

Either the NW or SW quadrants are sufficient in size to accommodate a new town center; but only one of the quadrants is necessary, and appropriate. The review process discussed below explains the situation with each quadrant and recommends a course of action.

The Town Center in Four Quadrants

The Southeast Quadrant. The SE quadrant is primarily residential with the Pine Hills Road frontage developed as small-scale commercial/office uses. The main mission for this quadrant is to preserve the peace and tranquility of the residential neighborhood as the Town Center activity increases, the new Evans High School opens and improved access from Pine Hills Road to Barnett Park is provided.

The Northeast Quadrant. The NE quadrant has two stories.

- The first is the new Evans High School which is a transformative event in the Pine Hills community. The new school will emphasize a new future for Pine Hills and its residents. Vehicles and pedestrians need to be provided a systemic way for safe and convenient access to and from the school without disrupting the entire area. A recommended system of access-ways, signals and crosswalks is proposed later in this chapter.
- The second story is the eight acre parcel at the intersection between Pine Hills Road and immediately adjacent to the new Evans High School campus. This corner hosts several small businesses, historic pollution problems, a cell tower and a large billboard. The County is working to address the pollution situation and exploring options related to future land assembly.

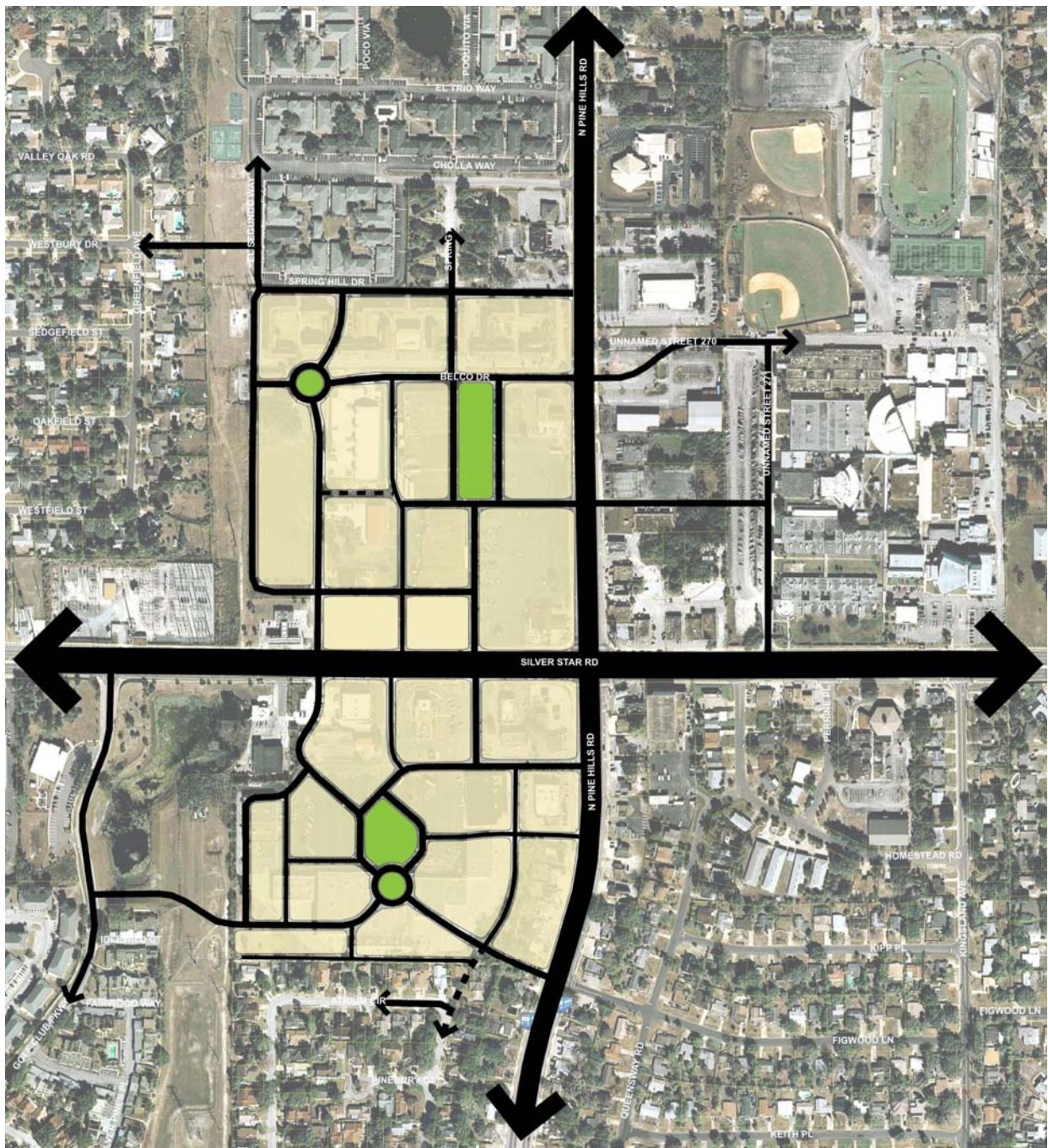
The Northwest Quadrant. The NW quadrant is home to a shopping center anchored by a Winn-Dixie grocery store, a gas station and two prominently visible tire stores with outdoor storage. Conversations with the owner of the shopping center reveal that occupancy is good and the center is performing well. The presence of a grocery store in the community is an asset. The outdoor storage of tires by the two tire stores is viewed as a community aesthetic liability and detriment to market enhancement.

The residential developments in this quadrant are also the subject of a recent arrangement whereby the Orlando Neighborhood Improvement Corporation (ONIC) will redevelop these dwellings units. The arrangement is in process as this study is being concluded. An enhanced residential area will improve the commercial viability of the Town Center.

The Southwest Quadrant. The SW quadrant is also occupied by a shopping center, but, in this case, the center is struggling. Vacancies are high. Access is restricted given the recent road improvements with medians and intersection locations. Conversations with the owner indicate that a new concept for this quadrant would be of interest to ownership.

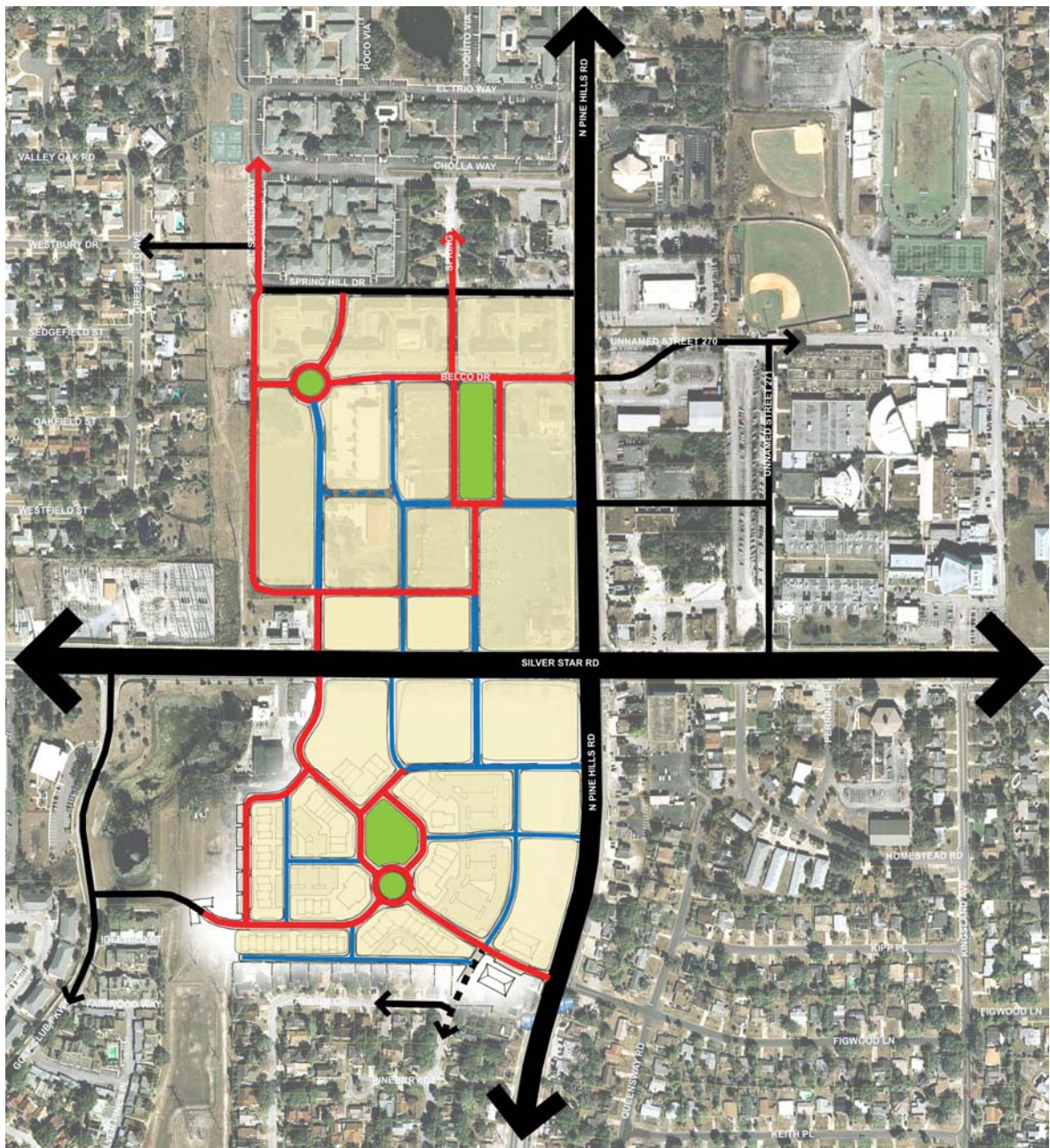
Prototype Sketches. Sketches of prototype plans for new development on the NW and SW quadrants have been prepared for study. These follow with an evaluation of each. At the end of the day, the owner of the property will need to initiate plans for the redevelopment of the properties, whichever one, or both, with the support of the County. The County can offer assistance with infrastructure and/or entitlements that would support redevelopment. A rejuvenated shopping area would be an enhancement to the area; a mixed-use town center development would be a greater achievement.

Exhibit 5.4: Prototype Development A – Conceptual Development without ownership constraints, integrated and enhanced access, internal core commercial/office, a residential component, connections and civic spaces.



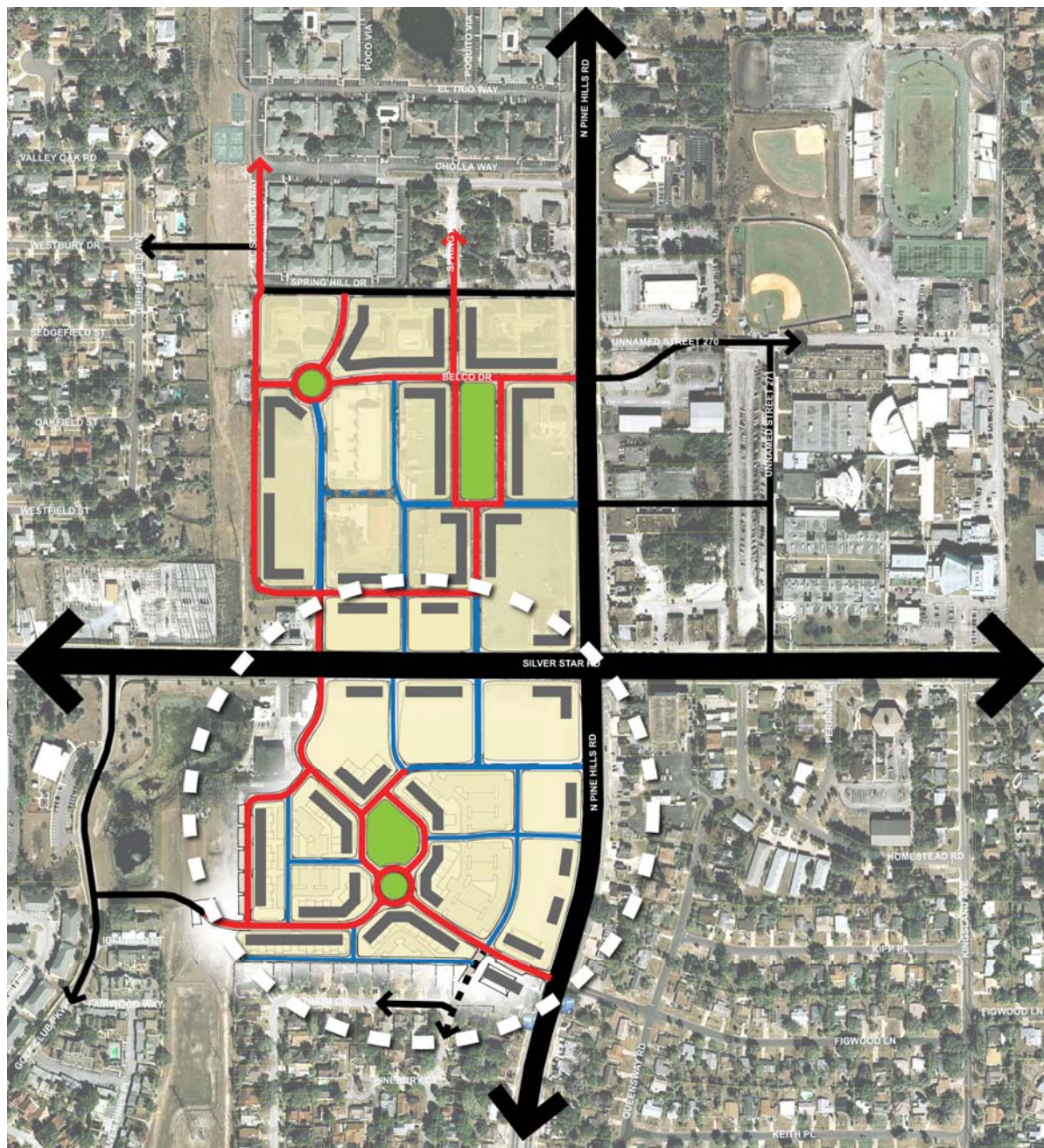
Source: RERC and AECOM

Exhibit 5.5: Prototype Development A – Conceptual Development without ownership constraints showing the hierarchy of streets. The “A” Streets (Red) are primary routes with building fronts. The “B” Streets (Blue) are support streets at the rear of buildings with parking.



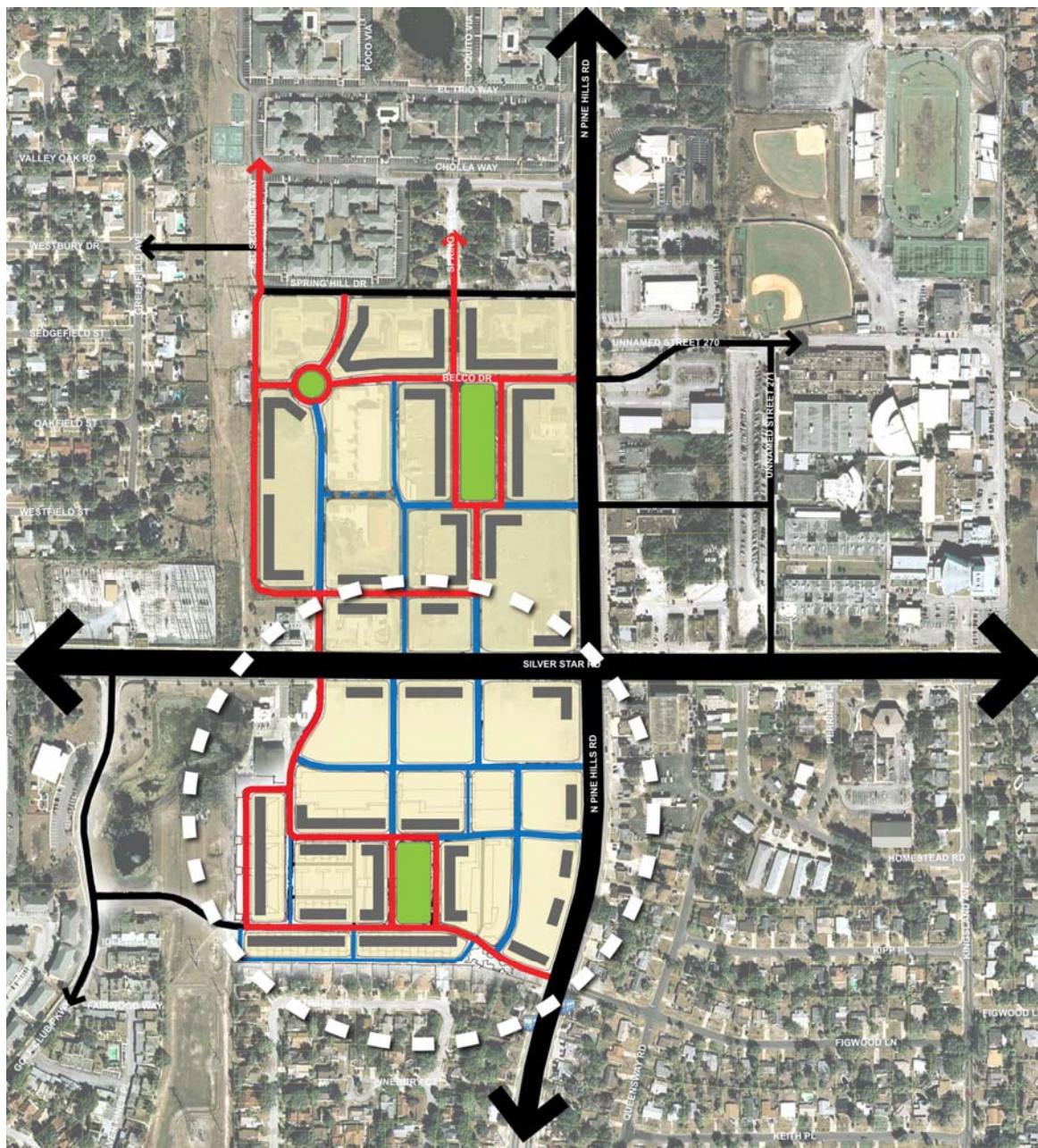
Source: RERC and AECOM

Exhibit 5.6: Prototype Development A – Conceptual Development without ownership constraints illustrating the SW quadrant as the potential Phase 1. The advantages of this quadrant are: there is a primary single owner with a desire to change and this quadrant is adjacent to the proposed phase 1 of the Pine Hills Trail.



Source: RERC and AECOM

Exhibit 5.7: Prototype Development B – This is a Concept Alternative with a more regimented block network, integrated and enhanced access, internal core commercial/office uses, a residential component, external connections and civic spaces. The preferred Phase 1 area is highlighted.



Source: RERC and AECOM

Focus on the Southwest Quadrant (Phase I) – Prototype Development A. Based on the analysis, Phase 1 in the SW quadrant has been the focus of more detailed consideration. Prototypes A and B have been sketched in greater detail. **Exhibit 5.8** reflects the primary and support streets system (top sketch) with hypothetical buildings (in black) around the civic space (bottom sketch).

A more detailed sketch with buildings by type of use follows as **Exhibit 5.9**. This sketch anticipates a mix of commercial, residential and office activity on the site with connections to similar uses in the immediate vicinity.

Exhibit 5.8: Detailed Sketches of Prototype Development A

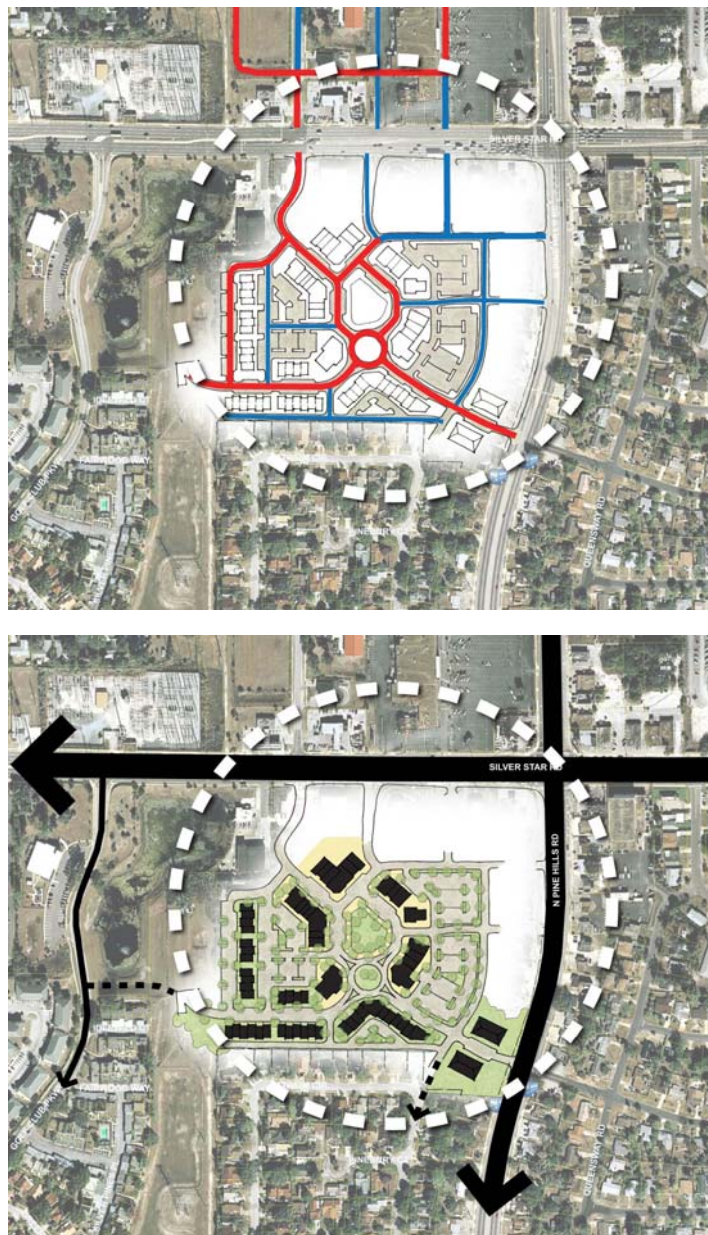
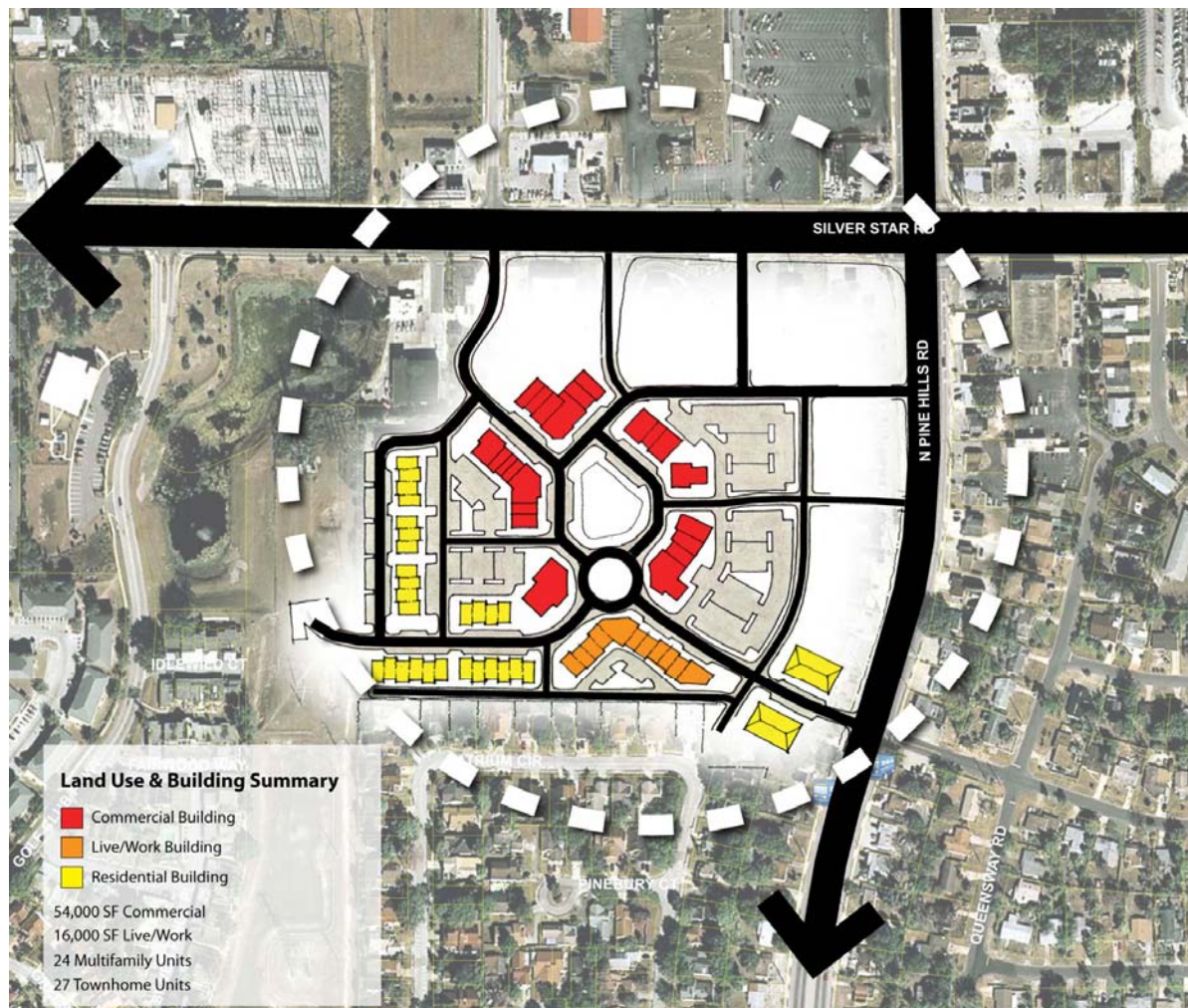


Exhibit 5.9: Prototype Development A – The SW Quadrant – Detailed Concept Alternative



- 54,000 SF non-residential floorplate (single-story). Additional square footage could be accommodated by coordinating redevelopment with existing outparcels, the creation of structured parking, or a reduction in parking ratio requirement.
- 16,000 SF of Live/Work building floorplate (two-story)
- 24 Multi-family units (two-story)
- 27 Single-family townhome units (two-three story)
- Retains existing commercial/retail outparcels (white areas along the frontage)
- New and improved access points are proposed on Pine Hills Road, Silver Star Road and to the west to Golf Club Parkway and the proposed Pine Hills Trail.

Focus on the Southwest Quadrant (Phase I) – Prototype Development B. The more detailed consideration of Development Prototypes B is reflected in **Exhibit 5.10** and **Exhibit 5.11**.

Exhibit 5.10: Detailed Sketches of Development Prototype B

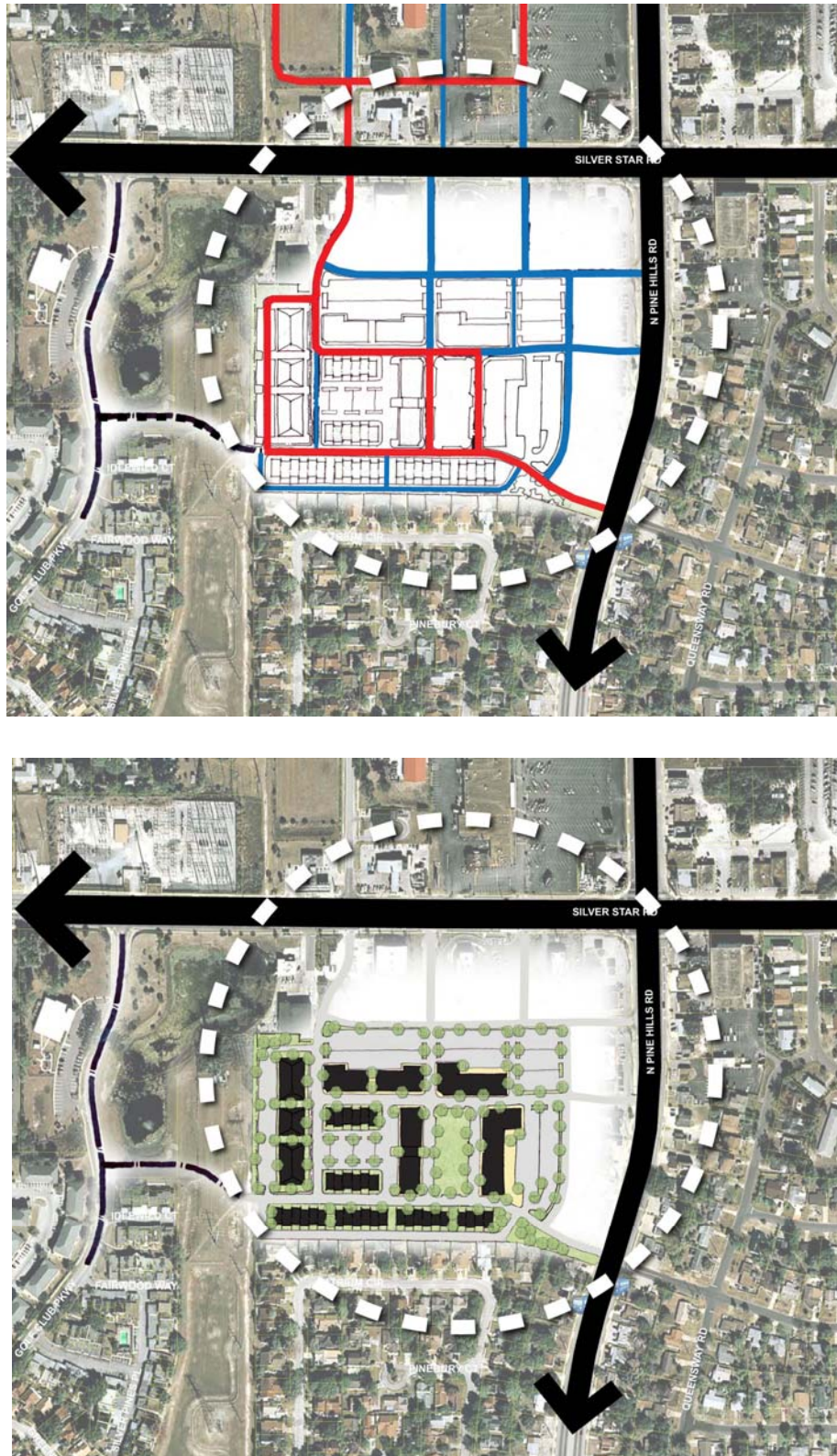
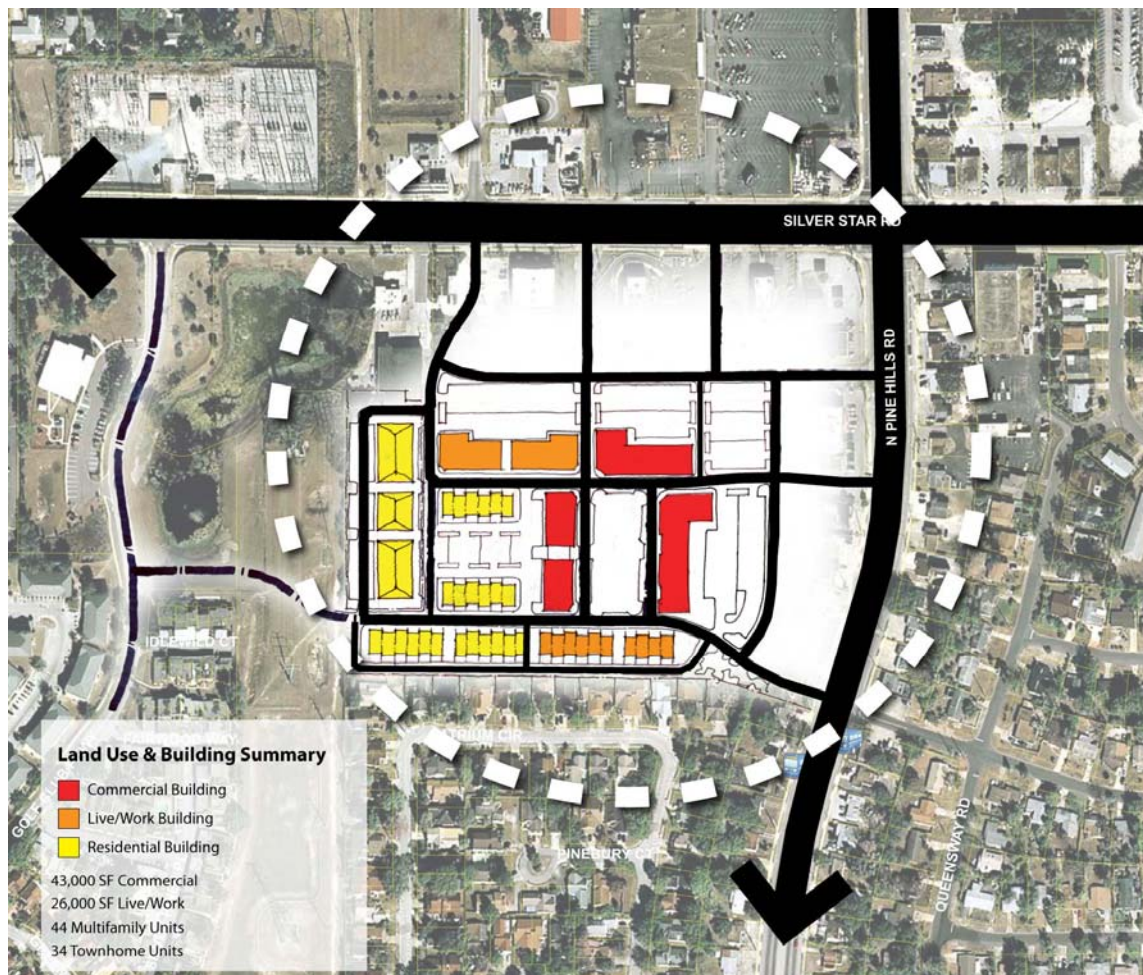


Exhibit 5.11: Prototype Development B – SW Quadrant- Concept Alternative illustrating the Conceptual Land Use & Building Summary



- 43,000 SF non-residential floorplate (single story). 10,000 SF is illustrated as a multi-unit live/work building that enables flexibility in layout and space needs with office/retail use on the ground floor. Additional square footage could be accommodated by coordinating redevelopment with existing outparcels, the creation of structured parking, or a reduction in parking ratio requirement.
- 26,000 SF Live/Work
- 44 Multi-family units (two story)
- 34 Single-family townhome units (two-three story). Ten townhome units are illustrated as live/work units depending on market demand.
- Retains commercial/retail outparcels [white areas along the frontage]
- New and improved access points are proposed on Pine Hills Road, Silver Star Road and to the west to Golf Club Parkway and the proposed Pine Hills Trail.

Actions

- 1. Recognize the importance of the investment in the new Evans High School campus and support the redevelopment of the northeast corner of Pine Hills/Silver Star Road intersection into complementary educational facilities.** This is the number one priority as identified by the Pine Hills Business Redevelopment Task Force. Funding needs to be acquired to purchase the properties, and potential modifications to the underlying future land use and zoning may be necessary to facilitate redevelopment as educational related facilities. Partnerships with local institutions, such as local hospitals or colleges, may provide additional future educational opportunities for Evans High School students and adults seeking further education.
- 2. Reinforce the community desire to make the intersection the “Town Center” for Pine Hills and advocate for resources to stimulate reinvestment.** The limited availability of funding sources requires a focused economic development directive. The intersection of Pine Hills Road and Silver Star Road provides the setting for a “signature” investment that will create a center for the community.
- 3. Engage property owner in southwest quadrant with incentives for the redevelopment of site to mixed use, including land assembly to improve access and circulation.**
- 4. Protect the residential neighborhood character in the southeast quadrant.**
- 5. Prepare and adopt urban design guidelines for all four quadrants of intersections along Silver Star Road at Pine Hills, Powers Drive and Hiawassee Road.** Design guidelines should set the form or manner of development that occurs at the major intersections in accordance to a community vision. The intent of the design guidelines should focus on providing uniform standards to establish high-quality development and orderly growth, promote positive visual aesthetics, maximize vehicular circulation with an emphasis on the pedestrian, maintain a strong community image through sense of place, and provide guidance for economic development through public and private development.

At a minimum, the design guidelines should describe the process for review and approval of development site plans, set compliance and violation standards, and establish standards for; landscape design, signage and wayfinding, building design, parking, lighting, stormwater retention, outdoor displays, and bicycle and transit access.

- 6. Provide incentives to enclose/relocate outside storage “eyesores” in northwest quadrant.**

6. CORRIDOR DEVELOPMENT

Purpose

Corridors are the pathways to our communities and should serve to accommodate travelers of all types to connected activity centers. The corridors lined with non-residential uses are important elements of the connectivity system in any community.

The Idea of Regional Corridors and Community Streets

Every corridor and street, in every community, serves three competing purposes:

1. to move regional traffic through the area,
2. to provide access to the uses and activities fronting the roadway, and
3. to serve the adjacent neighborhoods that necessitate pedestrian and bicycle crossings of the road.

The question to resolve is the weight given to each purpose. Regional corridors are weighted heavily to through trips for regional traffic while community roads are more specifically designed to serve neighborhood needs.

For roads that are clearly regional, such as West Colonial Drive, the bias favors the vehicles traversing the area; higher speeds and minimal disturbances to the flow of traffic are the primary considerations. The many traffic signals are a compromise of the regional purpose to the needs of the adjacent properties and neighborhoods. In neighborhoods this conflicting mission is resolved in favor of the homes on the street and neighborhood entrances with speeds that are slower, driveways that are frequent and sensitivity to the safety and convenience of pedestrians and bicyclists.

The “in-betweeners” are the streets and roadways, such as Pine Hills Road, where the conflict is not so clearly resolved. The conflicts collide with higher speed through traffic, slower speed property access traffic and even slower speed neighborhood accommodations. A roadway, such as Pine Hills Road, is trying to serve all three purposes; and in the case of Pine Hills Road, the current bias is clearly for high speed through traffic at the expense of property access and neighborhood needs.

Silver Star Road is also subject to this same conflict, but to a lesser degree. The resolution of the conflicted purposes of these two roads is the subject of the following analysis. West Colonial Drive is a more straight-forward situation also analyzed below.

Evaluation of Regional Corridors and Community Streets in Pine Hills Selected Regional Corridors

Figure 6.1 illustrates the three major corridors were examined in this study; Pine Hills Road, Silver Star Road and West Colonial Drive (SR 50). Each of these regional corridors is designed for regional traffic with a bias to moving vehicles through the community rather than serving the uses and activities along the roadways, and the adjacent neighborhoods. The objective is rectify the co-existence of the “through” purpose of this roadway with an approach that enhances both the economic value of the adjacent commercial properties for business purposes and increases the sensitivity to the needs of the adjacent neighborhoods.

As the Pine Hills community becomes a more cohesive, connected and comprehensive, it may be desirable that the Pine Hills Road regional corridor shifts the bias towards slower speeds and a better accommodation for walkers and bicyclists while accommodating the current volume of traffic. Of the three corridors in the study area, Pine Hills Road has drawn the most attention. It is a big, wide, fast road with few traffic signals and other disruptions to the vehicles traveling through the community.

In addition to the regional corridors, there are streets that traverse the community. These are important links for residents and local businesses.

The objective is to examine this corridor relative to the community-building objectives of the businesses and residents in Pine Hills. This analysis starts with an examination of the current zoning along the roadways and the planned future land uses.

Future Land Use Designations and Existing Zoning

The uses and activities on the three development corridors is an important indicator of the community's purpose of the featured roadway. As **Figure 6.2** and **Figure 6.3** illustrate, the future land use and existing land use designations for the three corridors are not single family residential. The existing and planned future land uses are multi-family housing, commercial, professional office and institutional. The objective becomes how to honor the function of the road and create successful places for these non-residential uses and activities located adjacent to these roads.

Figure 6.1: Pine Hills Regional Corridors

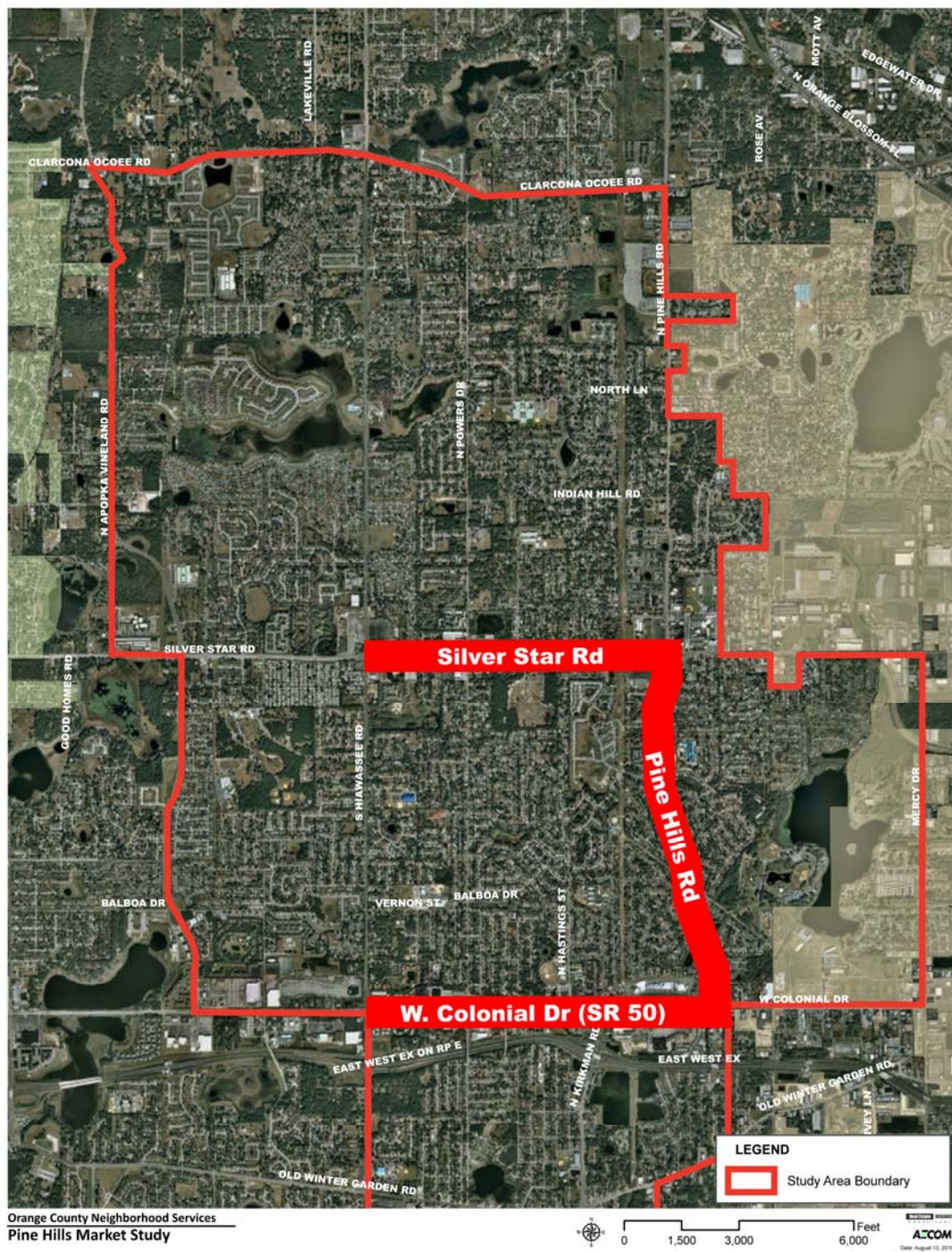
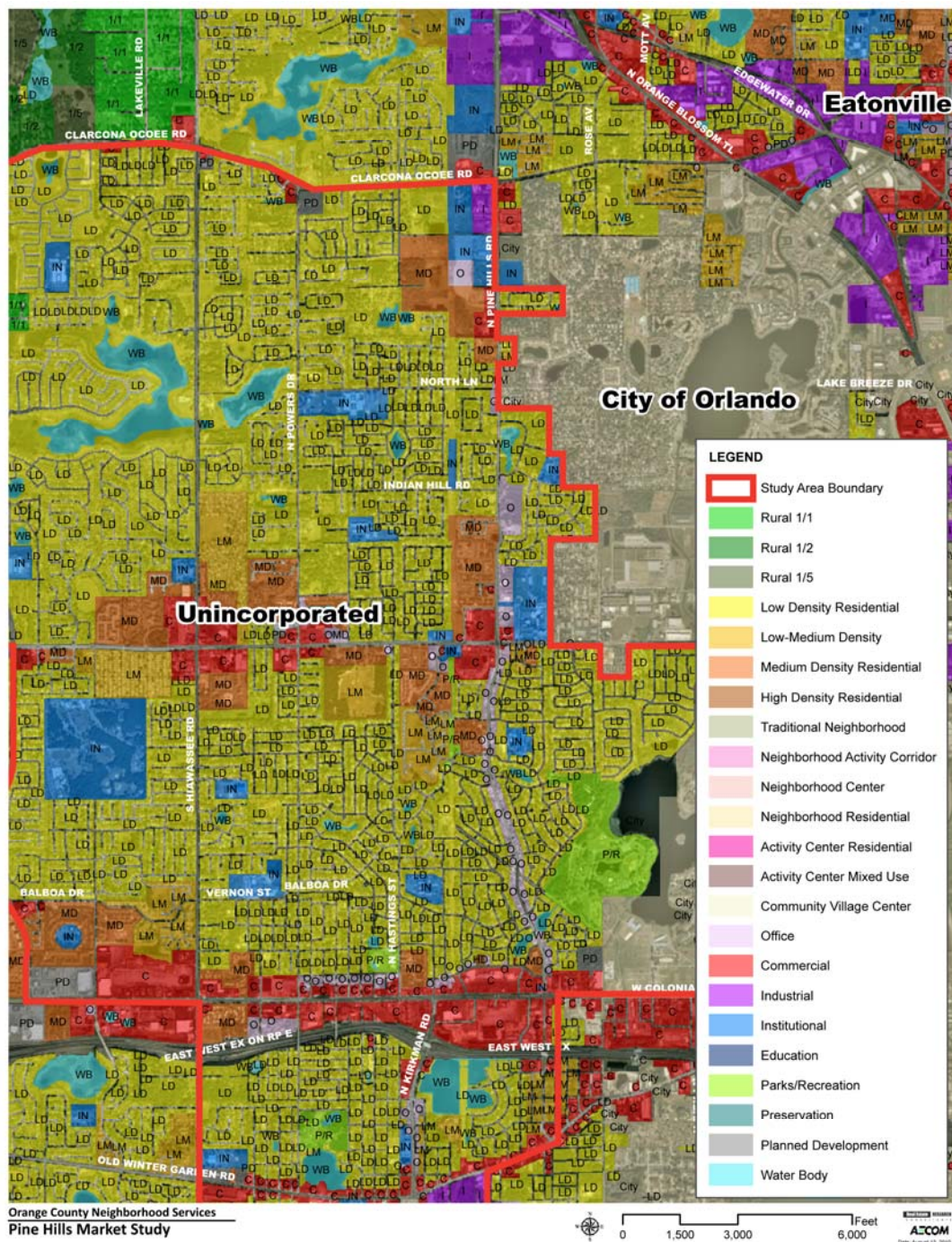
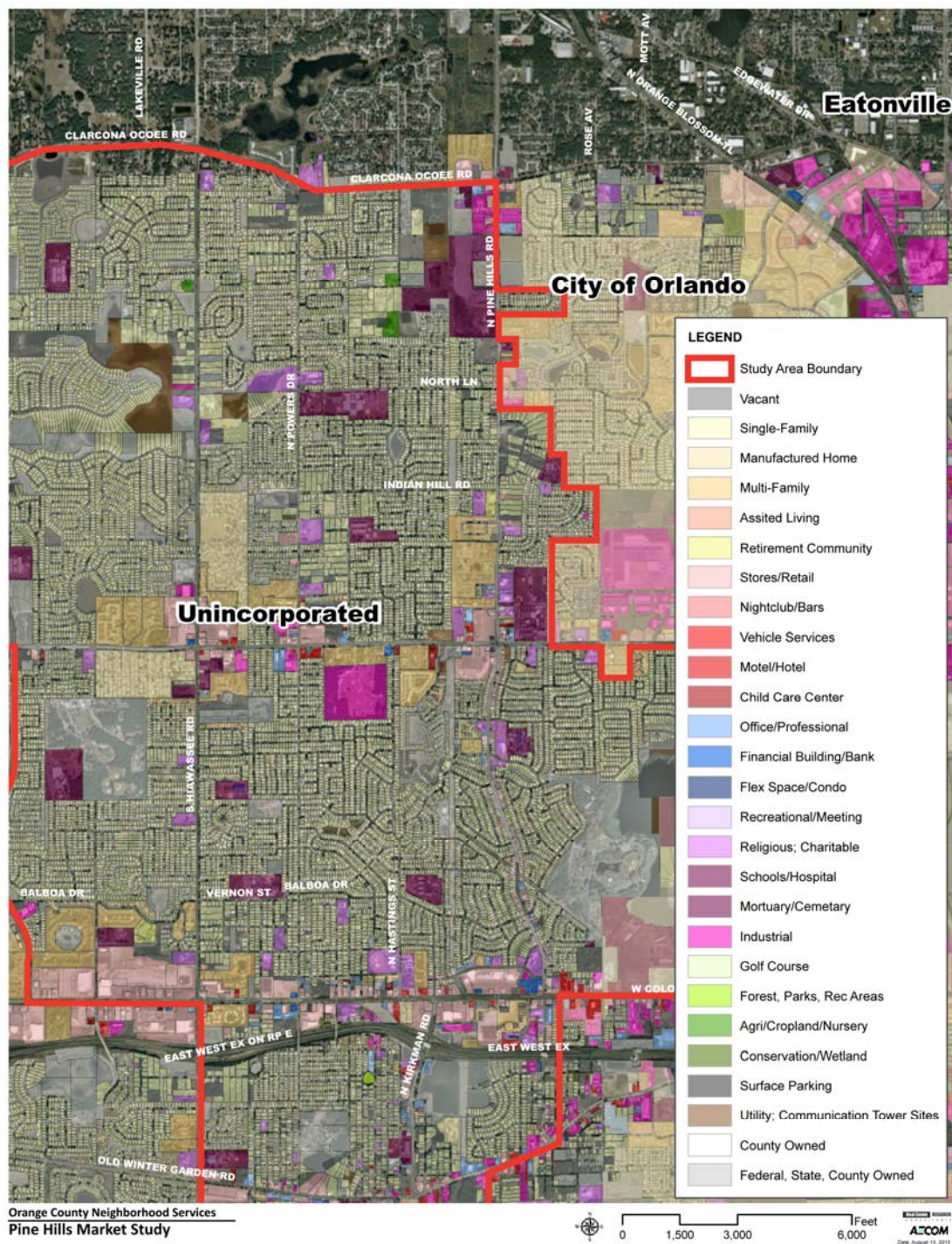


Figure 6.2: Future Land Use



Source: Orange County Planning Department

Figure 6.3: Existing Land Use



Source: Orange County Planning Department

Pine Hills Road

The portion of Pine Hills Road subject to this analysis extends from just north of its intersection with Silver Star Road southward to West Colonial Drive and onto SR 408; a length of approximately 2 miles. The roadway has 4 lanes with a painted median for this entire length with only two signalized intersections: one at Balboa Drive and the other at Hernandez Drive near the Disney Boys & Girls Club and Mollie Ray Elementary School. The road also has numerous driveways, minimal sidewalks, parking between the buildings and the street (to the right on the photo) and individual residences with cars in the driveway (on the left of the photo).

Exhibit 6.1: Pine Hills Road, Typical View



The exhibits that follow present two kinds of approaches. The first approach reflects improvements that can be made to Pine Hills Road within the current curb line (**Exhibit 6.2** through **Exhibit 6.5**). The importance of this approach is that the cost of changing the curbing and drainage system of the existing road is significant, whereas improvements within the existing curb line are relatively inexpensive. These improvements can materially change the character of Pine Hills Road without substantially reducing its functional capacities.

The second approach, reflected in **Exhibit 6.6** through **Exhibit 6.9**, indicates how development can take place on properties adjacent to Pine Hills Road. These sketches reflect the current property depths, parking and drainage requirements and sensitivity to adjacent residences to the rear of these professional office buildings.

Exhibit 6.2: Sketch of the Existing Situation on Pine Hills Road



Exhibit 6.2 shows the existing section on Pine Hills Road as shown in the photo in **Exhibit 6.1**. The measurements indicate:

- 15 foot continuous turn lane
- 11-13 foot through lanes
- 93 foot +/- total section of right-of-way.
- Posted speed of 40 miles per hour.

As discussed above, this condition promotes high travel speeds which make access to adjacent buildings/uses inconvenient and unsafe. The high speeds also create a difficult and dangerous situation for pedestrian and bicycle crossings. Pedestrian issues include inadequate sidewalk widths, lack of shade, benches and utility poles on the sidewalk, and no pedestrian refuge in the median to cross the road. As a neighborhood-oriented roadway, Pine Hills Road is not very accommodating.

Exhibit 6.3: Pine Hills Road Sidewalk and LYNX Stop Conditions



In order to improve the property access and neighborhood sensitivity of Pine Hills Road, several changes can be made within the current configuration. Without changing the existing curb line and drainage system, the improvements shown in **Exhibit 6.4**, Alternative #1, include:

- Center and through lanes narrowed
- Colored/textured paving
- 7 foot wide parking lanes added
- Short medians with shade trees
- Mid-block “bulb-outs” to accommodate street trees

In addition, Alternative #2, **Exhibit 6.5** below, reflects underground utilities.

Exhibit 6.4: Sketch of the Proposed Situation on Pine Hills Road – Alternative #1



Exhibit 6.5: Sketch of Proposed Situation on Pine Hills Road – Alternative #2



Improvements to consider beyond those shown in the two alternatives above include:

- Sidewalk materials, or special pavers, across driveways,
- Limited driveway widths,
- Elimination of “front of building” parking with an enforce “build-to-line” 20 feet from the right-of-way as shown in the following Prototype Development sketches, and
- Reduced variety of land uses with preference for Professional Office and Institutional Uses

The sketches that follow present approaches for developing properties that front Pine Hills Road. The uses shown are “professional office” since that is the predominant existing and planned type of use along the roadway. Institutional uses such as churches are also located on Pine Hills Road, but have not been illustrated.

Exhibit 6.6: Prototype Development – Office/Neighborhood Commercial



This prototype is designed on two lots (60' + 70') with a 3,000 SF building and five parking spaces per 1,000 SF of office space, or 15 spaces. It is assumed that stormwater retention is provided in the green spaces on-site or through under-drains in the parking area.

Exhibit 6.7: Prototypical Development – Professional Office: Option #1



Both Professional Office prototypes have two lots (60' + 70'), a 3,000 SF building and 15 parking spaces (5/1,000 SF building). Stormwater is provided in the green spaces on-site or with under-drains in the parking area. In **Exhibit 6.8**, the front yard setback has been reduced to permit double-loaded parking in the rear and a stub-out to the north.

Exhibit 6.8: Prototype Development – Professional Office: Option #2



Exhibit 6.9: Prototype Development – Residential Quadplex: View #1



This prototype, shown in different views with **Exhibit 6.9** and **Exhibit 6.10**, is also on two lots (60' + 70' lots) with the residential units sized from 1,000 to 1,600 SF per unit with two parking spaces per unit. Residential development mixed with professional office buildings on development corridors such as Pine Hills Road is compatible with appropriate buffers.

Exhibit 6.10: Prototype Development – Residential Quadplex: View #2



Silver Star Road

Silver Star has developed in an entirely different pattern than Pine Hills Road. The roadway has recently been improved as a six-lane road with access controlling medians and sidewalks. The intersection of Silver Star Road and Pine Hills Road has eight lanes for pedestrians to cross, as does the intersection with Hiawassee Road. The intersection with Powers Drive has seven lanes.

Pine Hills Road was a residential street which has been continually widened to the detriment of the homes facing the street, whereas Silver Star Road has no single family houses fronting it. The conversion problem existing on Pine Hills Road does not exist on Silver Star Road. The development along Silver Star Road is either larger tracts with apartments, shopping centers or institutional uses, or it has single family neighborhoods backing up to the road with walls and buffers between the individual homes and the roadway.

The issues on Silver Star Road are more specific and easier to address than those on Pine Hills Road. Signs, landscaping and pedestrian crossings deserve attention. The main areas of concentration should be at the commercialized intersections Silver Star Road with Pine Hills Road, Powers Drive and Hiawassee Road.

West Colonial Drive

West Colonial Drive, SR 50, is a regional road with regional commercial development along its entire length from the downtown Orlando to Winter Garden. This highway is currently under construction with major improvements underway. Upon completion, Colonial Drive will be a six-lane highway with a planted median; an extension of the current configuration east of Pine Hills Road.

As a result of the current project, the roadway will have lanes, speeds, median breaks, access ways and sidewalks fixed for the foreseeable future. The questions related to this roadway are related to aesthetics. The design standards currently applicable to Colonial Drive [SR 50] west of Pine Hills should be extended and applied to the section of the highway between Hiawassee Road and Pine Hills Road, and eastward to the City of Orlando limits. These standards have been in force for some time to the west and they could easily be applied to this section of the highway with little revision, if any.

Colonial Drive's retail and commercial activity is of great importance to Pine Hills as an employment center, as a shopping district and as an entryway. Signs along Colonial Drive that announcing the entrance to Pine Hills should be provided.

Other Community Streets

In addition to the three corridors that are the subject of this study, there are important community streets requiring attention and protection as the Pine Hills Community continues to progress. Pedestrian and bicycle travel should be accommodated on these streets, especially at street crossings.

Hiawassee Road. Hiawassee Road is a significant regional road with a full service interchange at the SR 408. Even though it is "only" four lanes with a painted median, it warrants protection as a community street since it provides access to many neighborhoods. It has important commercial centers at Silver Star and Colonial. Uses along the road are generally accessible from side streets although there are several individual homes with driveways onto Hiawassee Road. In general, this roadway appears to be settled in terms of

development issues although details may arise from time to time. This corridor was not subject to the examination of this study, but as an important road in the community and the regional road system, further study seems warranted to ensure that preventable and fixable issues are addressed.

Powers Drive. Powers Drive connects Silver Star Road and points north with Colonial Drive and points south. It is exclusively a residential road with the commercial shopping areas at the intersections of Silver Star and Colonial. This is an important community street and should be protected as such.

Balboa Street/Vernon Street. Balboa Street, with a jog to Vernon Street, provides one of the few east-west streets that connect Pine Hills Road with Hiawasse Road. Through trips by non-neighborhood traffic should be monitored to ensure that “traffic calming” devices are used when necessary. These through streets and N. Hastings Street are terrific local roads for residents, especially bicyclists and walkers, but non-neighborhood through traffic needs to be limited.

N. Hastings Street. This street goes from Silver Star Road southward to Colonial Drive. Many homes front directly onto Hastings Street with their driveways. As one of the few streets that makes such a community-wide connection, through trips that disturb the neighborhood should be prevented. N. Hastings is a good candidate for “traffic calming” to reduce non-neighborhood traffic from traversing the area.

Actions

1. “Tame” Pine Hills Road by:

- a. improving pedestrian and bicyclist facilities,
- b. potentially reducing posted speed limits,
- c. potentially limiting land uses along the road to professional office and institutional uses,
- d. create a median system to provide enhanced pedestrian safety and landscaping
- e. considering the addition of on-street parking at selected locations to support redeveloped professional office sites,
- f. controlling signage,
- g. re-examining locations of bus stops and enhance stops to provide shelter (structured or tree shade),
- h. adding street trees and
- i. increasing the number of safe pedestrian crossings.

2. Review the County’s land development code to identify changes necessary to allow and encourage re-development along Pine Hills Road as anticipated in the prototype sketches. Setbacks, parking and stormwater requirements permitting re-development on the previously residential lots will enable re-development and re-construction for professional office and institutional uses.

3. Continue to scrutinize development along Silver Star Road to control access and improve the aesthetic quality of the roadway and the development sites.

- 4. Extend the West Colonial Drive Standards applied west of Hiawassee Road to the link from Hiawassee Road eastward to the Orlando City limits.** Design standards for all corridors should include and encourage a consistent “form based” set of lot development guidelines, shared-parking areas, signage, and pedestrian access. The use of form-based codes is becoming more and more prevalent as jurisdictions recognize the power of allowing flexibility in the types of uses that are permitted within a specific zoning or land use district as long as the design is effectively regulated so that the character of the community is preserved and enhanced. Form-based code, in a nut shell, focuses less on land use and more on guiding physical form to create a predictable public realm.
- 5. Improve pedestrian and bike facilities on each regional corridor and community streets in the Pine Hills Community.**
- 6. Enhance and provide incentives for the redevelopment of aging residential to professional office along the Pine Hills Road corridor.**
- 7. Seek funding sources for the installation of improvements, specifically streetscape enhancements and underground utilities.**

7. COMMUNITY CONNECTIONS

Purpose

The purpose of this chapter is to present the idea and importance of community connections; and then to identify and assess the ways by which the residents, businesses and institutions in Pine Hills are connected to each other and the Region. Internal connections are evaluated as are regional connections, those that connect Pine Hills with the area outside the Pine Hills community. Once existing and missing connections are identified and examined, actions are recommended to improve the current situation.

The Idea of Access and Connectedness

Connections to and through to the community, internal and external, enable people to participate in economic and social activities that improve their lives...the more connected a place is, the better and stronger it is. As Pine Hills continues to become a more cohesive, connected, comprehensive community, it enhances access to places within the community and to places outside Pine Hills.

Remembering that connections are generally two-way pathways, the objective is for Pine Hills residents to have access to places and activities within their community, and to activities and places within the region. It also means that residents of the Orlando Region will have improved access to businesses, activities and amenities in Pine Hills.

Community safety concerns offer the one exception to unfettered increases in connectivity and access. Protecting neighborhoods, protecting schools and students, protecting people in their homes, on the street and in shopping areas is critical for a community to be a success. So when discussing connections, access and ease of movement, one must always temper the discussion with community security.

Four types of connections are important to strengthen the Pine Hills Community:

- internal connections between residents and Pine Hills businesses, schools, parks and community places,
- external connections that enable Pine Hills residents to have safe and convenient access to employment centers, schools, colleges and universities, medical centers, regional transportation systems and regional amenities,
- external connections that enable residents from throughout the region to have access to businesses and community activities in Pine Hills,
- technological connections and other forms of virtual access that enable residents to access local and global education and training programs, cultural amenities, entertainment and shopping activities using the internet.

The ideal system of community connections enables people to have safe and convenient access to serve their home life, employment, educational, recreational, cultural, health and spiritual needs at no or low cost.

Evaluation of Pine Hills Internal and External Connections

The following section presents existing and potential connections that enable Pine Hills residents, businesses and institutions to have access to community and Regional destinations using the full range of travel modes.

Destinations within Pine Hills. The residents of Pine Hills, like residents in most communities, have a fairly well-defined pattern of the places they frequent (see **Figure 7.1**). These places include regular trips from their homes to:

- work,
- school,
- grocery and related daily need shopping areas,
- personal service businesses like daycare, doctors offices, beauty shops and dry cleaners,
- parks and recreation places like Barnett Park,
- community activity facilities like the Pine Hills Community Center, the Library, the YMCA and the Disney Boys & Girls Club,
- spiritual places like churches, mosques and synagogues
- entertainment places like the movies and restaurants.

Modes of Travel. People travel to these places by car, by bicycle, by foot and by bus (see **Figure 7.2**). In order to make these trips safe and convenient, a system of travel-ways needs to be developed and maintained.

- Streets need to accommodate safe travel while preserving the integrity of the neighborhoods and respecting other modes of travel;
- Sidewalks, other walkways and bikeways need to accommodate pedestrians and bikers, especially as they cross busy streets;
- Multi-use trails can serve as safe ways for pedestrians and bikers to travel through the community with minimal conflict with automobiles; and
- Buses need to provide frequent service to places where people want to go with weather-protected shelters at bus stops with sidewalks to nearby destinations.

Figure 7.1: Pine Hills (Study Area) Community Places

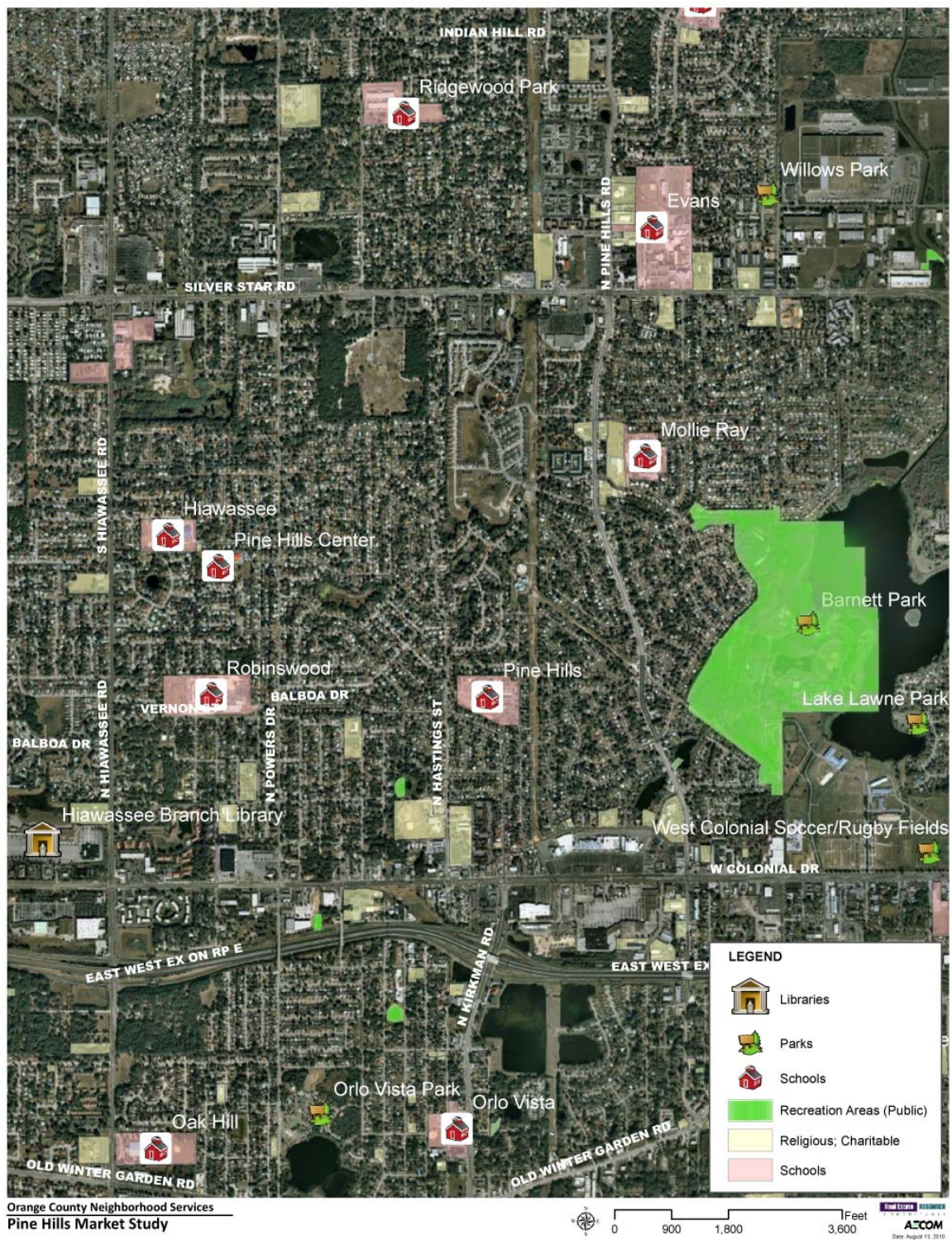
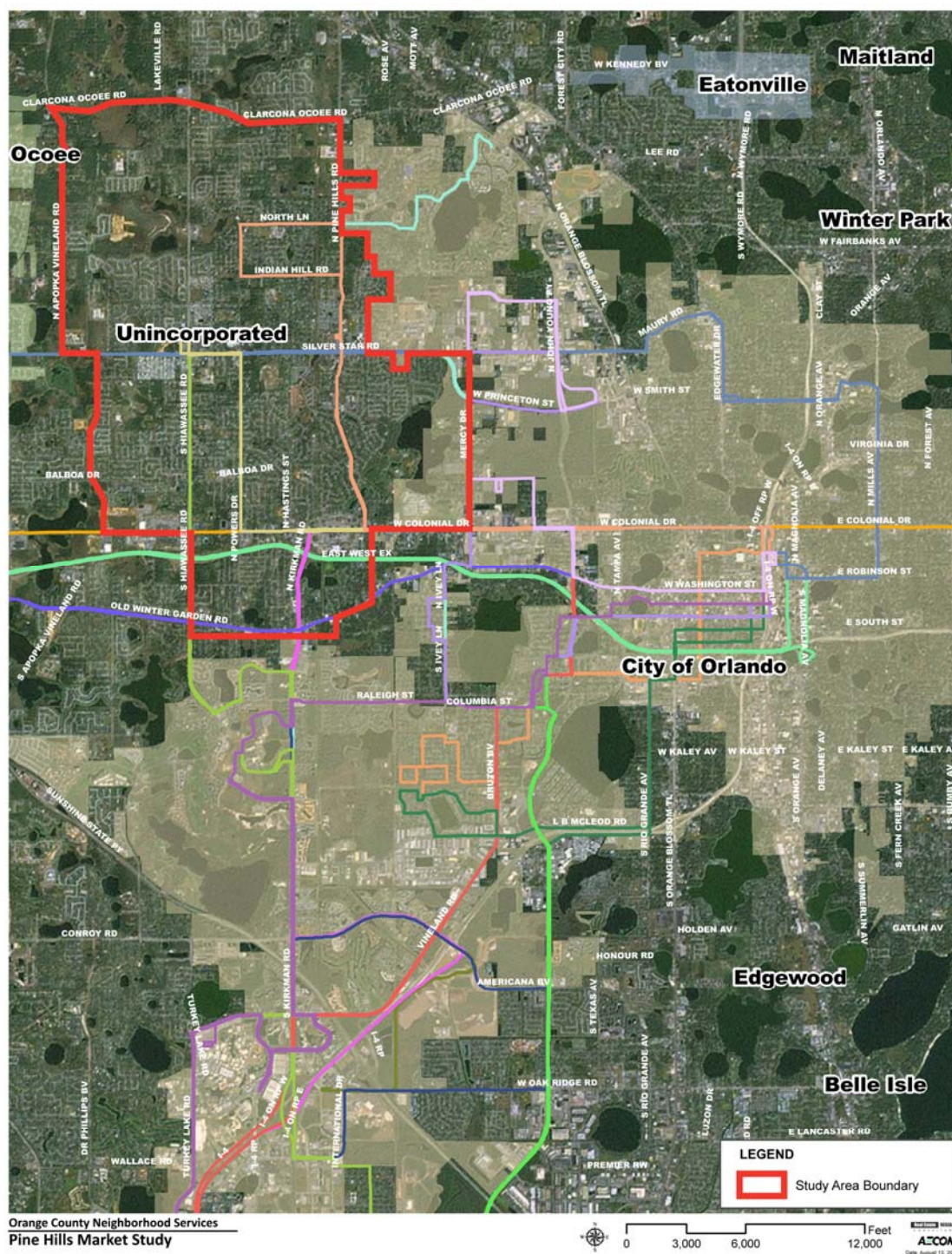


Figure 7.2: Existing LYNX Routes Serving Pine Hills



Connections within Pine Hills. To maintain and improve the internal travelways within Pine Hills, the many destinations need to be connected to the neighborhoods. The system of

connections includes travelways for each mode of travel – cars, trucks, bikes, walking and buses. The following activities need to either be continued or initiated:

1. **The Pine Hills Pedestrian System.** The complete sidewalk, crosswalk, trail and bikeway system should be examined for “gaps”. The completed comprehensive system will provide safe and convenient pedestrian and bicycle paths that connects residents with all Pine Hills’ schools, the YMCA, the Boys & Girls Club, the Pine Hills Community Center, the Orange County Public Library, neighborhood shopping centers and the proposed Pine Hills Town Center. A complete system would consist of:
 - a. **A completed sidewalk system** on every street throughout the Pine Hills community,
 - b. **A bikeway system** along the streets and roads with signs and lanes,
 - c. **Safe pedestrian and bicycle crossings** on Pine Hills Road, Silver Star Road, Powers Drive and Hiawassee Road along with other smaller streets in the community,
 - d. **The Pine Hills Trail,**
 - e. **An enhanced sidewalk system along Balboa Drive, Delores Drive and Hernandes Drive** that connect the Pine Hills Trail with Barnett Park, and
 - f. **The “Main” Connect,** as shown on **Figure 7.3** that provides a pedestrian/bike link between Evans High School, the proposed Pine Hills Town Center, the Pine Hills Trail, the Disney Boys & Girls Club, Mollie Ray Elementary School. and Barnett Park.
2. **Start the Pine Hills Trail and Supporting Pedestrian System.** The pedestrian/bike trail planned along the power line from Silver Star Road to Colonial Drive can be developed in phases:
 - a. **Phase 1** of the Pine Hills Trail System will include:
 - b. The Trail along the power line easement from Silver Star Road south to Hernandes Drive.
 - c. The Supporting Street System will then be enhanced to enable walkers and bikers to travel eastward along Delores Drive, across Pine Hills Road, to the Boys & Girls Club, Mollie Ray Elementary School and Barnett Park.
 - d. Safe Crossings will be provided at Pine Hills Road and Hernandes Drive.
 - e. **Phase 2** of the Pine Hills Trail will continue southward to its terminus at Colonial Drive. Phase 2 of the Trail will also include the pedestrian over-pass at Silver Star Road to connect Phase 3 of the Trail. The funding for this over-pass is being determined.
 - f. **Phase 3** of the System should be the extension of the sidewalk enhancements along Balboa Drive from the Pine Hills Trail to Hiawassee which will provide a connection to Pine Hills Elementary Schools and the Robinswood Middle School.
3. **Balboa Drive** from Pine Hills Road to Hiawassee Road is the only east-west street between Silver Star Road and Colonial Drive. This street can be used as an internal connector of vehicular, pedestrian and bicycle travel as long as the neighborhood and the homes on Balboa are protected from the ill effects of through traffic.

4. **Continue to Strengthen Regular LYNX Bus Service** that continues to serve the community and continues to be improved to serve the changing needs of the community over time (see **Figure 7.2**). A system of Bus Shelters needs to be commenced to provide a long term program for having convenient and safe bus stops along the main streets of Pine Hills Road, Silver Star Road, Powers Drive and Hiawassee Road. Regular bus service, supplemented by the pedestrian and bikeway system, is also the best way for residents to have access to the jobs on Silver Star Road east of Pine Hills Road.
5. **“Tame” Pine Hills Road** to bring the speeds and volumes of traffic along this thoroughfare more in tune with the residential character of the community. Pine Hills Road provides too much connectivity for people living outside Pine Hills. The main roads in the Pine Hills community should be designed, or re-designed, primarily to be community streets for residents and local businesses; these roads should not be designed to promote high-speed travel for people driving through the community. The program for Pine Hills Road and the other through streets is the subject of Chapter 6, Corridor Development, Community Streets and Shopping Centers.
6. **Build a Network of Multi-Modal Streets connected to the Pine Hills Town Center** to improve overall access from the residential areas to this commercial, educational and cultural center. The proposed system is presented in Chapter 5, The Proposed Pine Hills Town Center. The businesses in the Town Center need good access to thrive. Evans High School will need a good access system to get students, teachers and staff in and out of the campus. For the Town Center to be successful it needs to accommodate large numbers of people to come to the Center and enjoy the businesses and entertainment offered. On-site residences may also be a part of the Center’s atmosphere. A network of streets, sidewalks, signals, pedestrian and bike crossings and transit stops can, and should, be designed into the development of the Town Center.

The “Ring of Value”

The four quadrants of the intersection of Pine Hills Road and Silver Star Road should function together to create a “Ring of Value” that expands access and exposure to the interior of potential Town Center re-development properties and connects to Evans High School and the residential neighborhoods (see **Figure 7.4**). Additional signalized intersections adjacent to the main intersection will enhance internal access and pedestrian connections allowing users to travel to each quadrant without entering the main intersection. The additional signalized intersections could reduce traffic impacts on the main intersection, but may require special approval due to signal spacing requirements.

Figure 7.3: The Main Connect

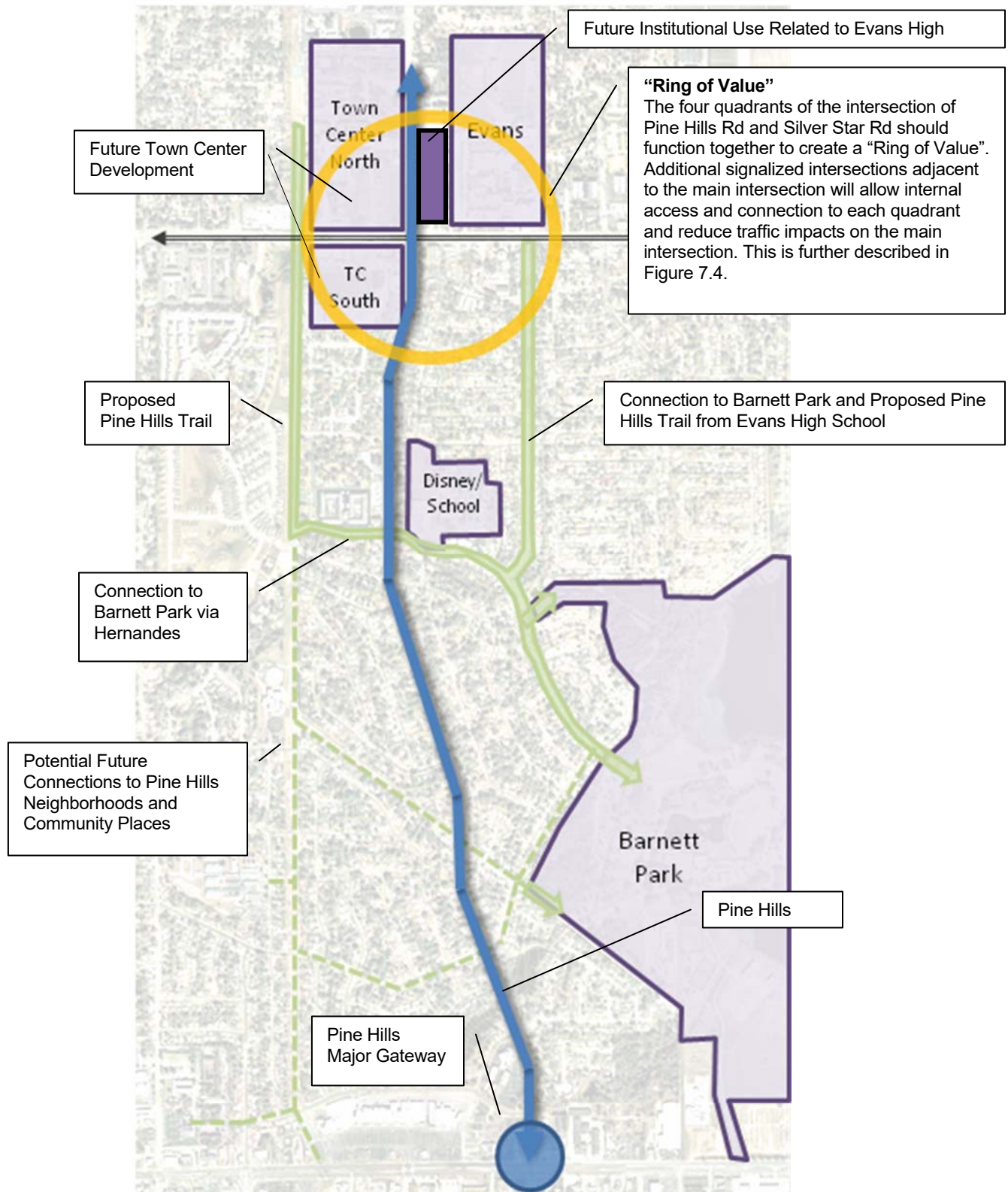
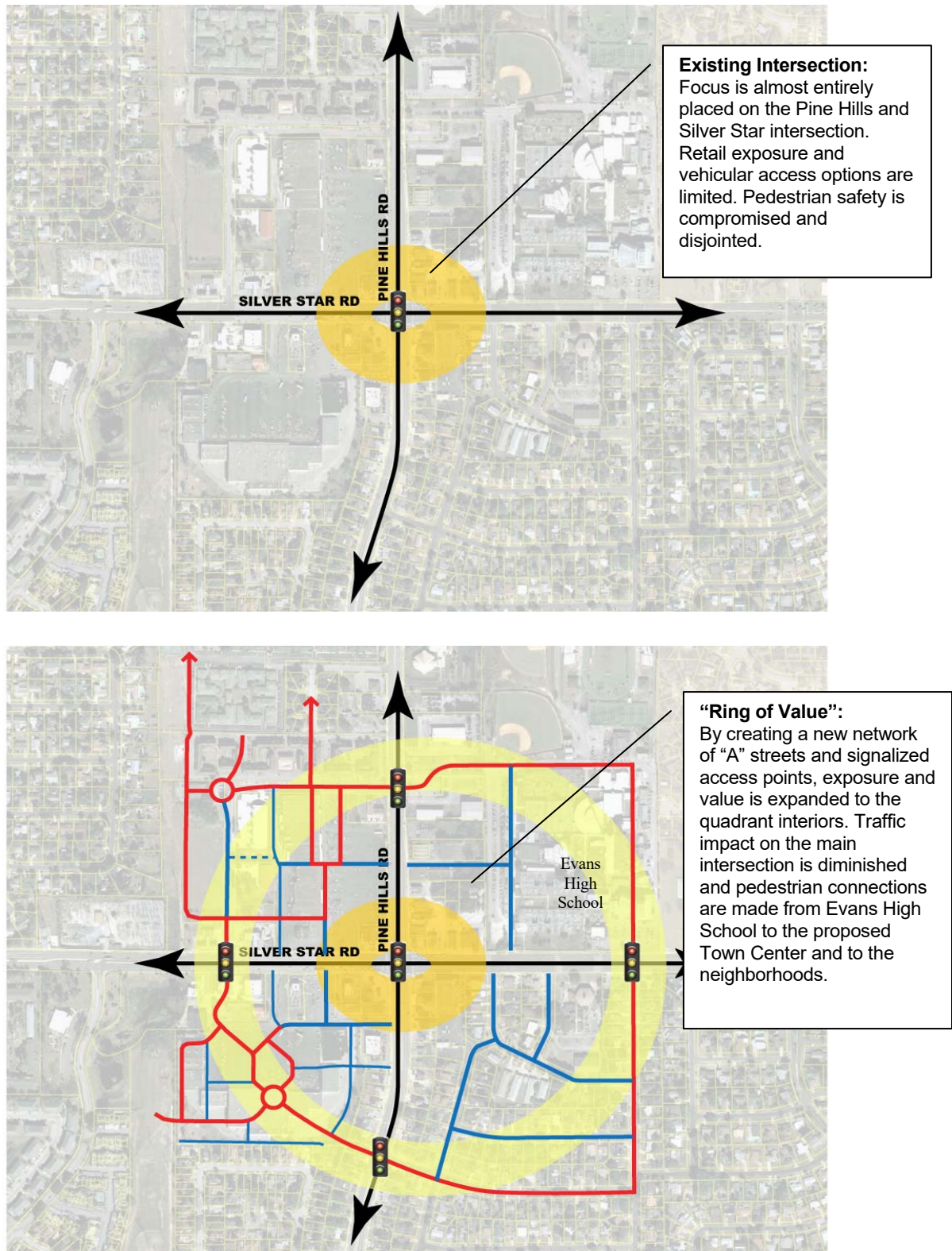


Figure 7.4: The “Ring of Value”



External Access for Pine Hills Residents to get to Regional Centers

The residents of Pine Hills have places they want to go and need to go outside Pine Hills. The street system is well designed to enable people with cars to connect to other areas of the Orlando Region. The transit system provides connections but does not necessarily provide convenient access from Pine Hills to employment centers, educational venues and health care facilities outside Pine Hills. **Figure 7.5** shows routes from Pine Hills to two key regional places:

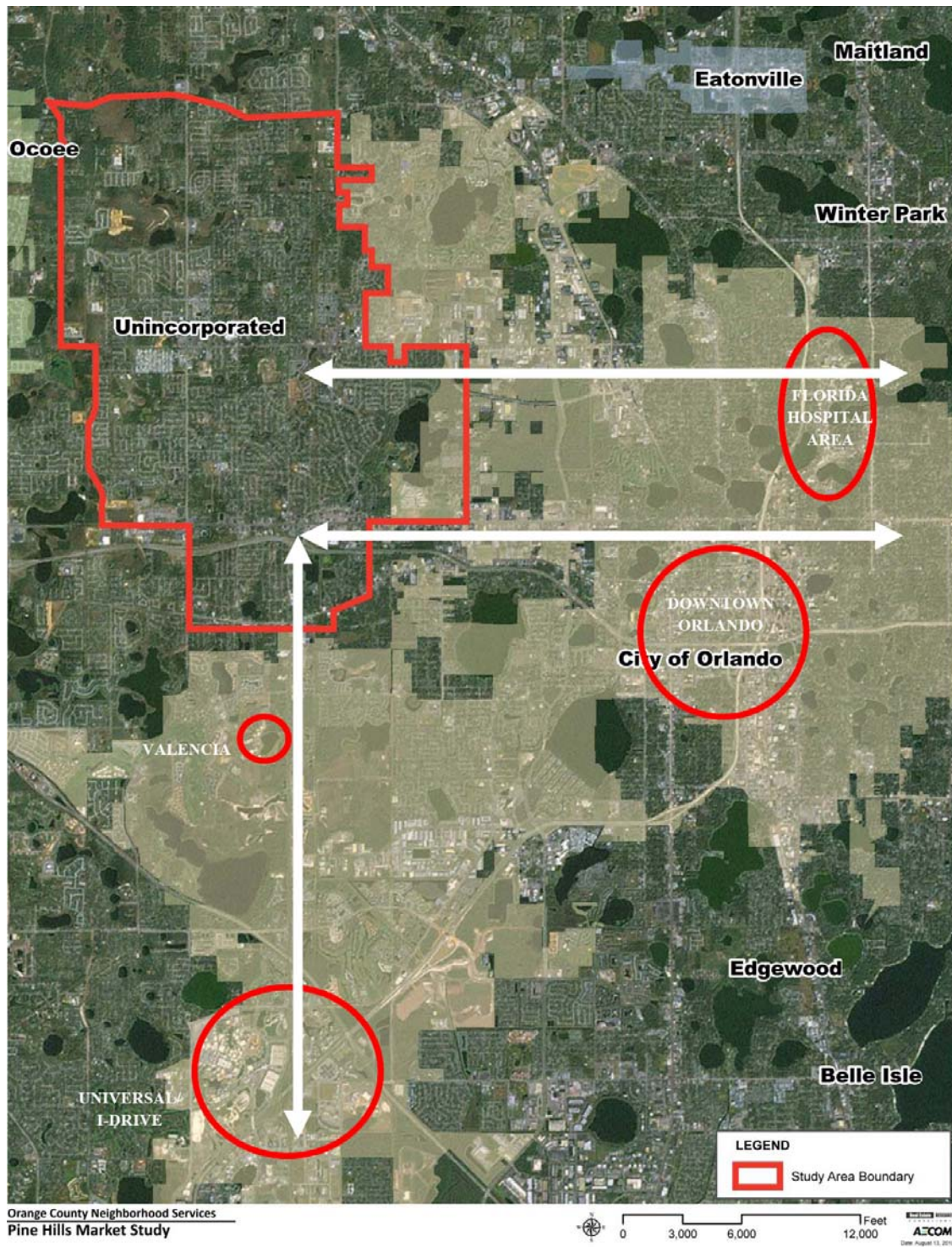
- a. **Employment Centers at Interstate 4 and Princeton** including Florida Hospital and the proposed Commuter Rail Station. Downtown Orlando, Orlando Health and Lake Mary employment centers will be accessible using the SunRail commuter rail system.
- b. **Employment Centers on International Drive** at the southern extent of Kirkman Road. This employment center includes large employers like Universal Studios, SeaWorld, the Orange County Convention Center, Lockheed Martin with connections to Orlando International Airport and many other operations. **The Educational Center at the Valencia (UCF) West Campus** is on Kirkman Road along this route.

Transit is the system that enables large numbers of people to travel around the Orlando region without a car. The more reliable, efficient and convenient this system becomes, the easier it will be for people to have access to regional destinations. The transit system, as currently constituted, does not make it easy for Pine Hills residents to travel to the major job, education and health centers of the Orlando Region.

A system to serve Pine Hills residents in the future could include premium transit service from Pine Hills to these two regional centers; Florida Hospital and the Orange County Convention Center. Embryonic discussions have taken place. Consider the possibilities:

- a. **The Silver Streak** could be express bus service that carries people from the Pine Hills Town Center at Silver Star Road and Pine Hills Road directly along Silver Star Road and then Princeton Avenue to the Commuter Rail [SunRail] Station at Florida Hospital South.
 - **At the Pine Hills Town Center terminus**, the system could consist of local buses that transport people from neighborhood bus stops to the Town Center for Express Service access to Florida Hospital South. The Express Service could initiate at the intersection of Silver Star and Hiawasse Road. The details need to be established; but the goal is express service from Pine Hills to Florida Hospital South and the commuter rail station.
 - **At the Florida Hospital South terminus** there are jobs at this medical center, and access to Downtown, Orlando Health's Downtown Campus and other job centers to the north at Lake Mary and to the south to the industrial area.
- b. **The International Line** could be express bus service from the Pine Hills Town Center to the job and education centers on Kirkman Road. The southern terminus could be the High Speed Rail Station at the Orange County Convention Center on International Drive. Like the Silver Streak, if this service can be safe, convenient, reliable and cheap, the residents of Pine Hills would have superior access to regional employment, education and health centers.
- c. **Community Access to Town Center Transit Station(s)** then becomes the design problem...how to design the street systems, the bike/ped system, the kiss-and-ride lots, the park-and-ride lots and the local bus service to make it easy for residents in the 1,000 acre Pine Hills community to get to the regional transit stations.

Figure 7.5: Connecting Pine Hills to Regional Centers



External Access for Regional Residents to visit Pine Hills Businesses, Activities and Amenities

Pine Hills is the home of many businesses, activities and community amenities that attract non-residents to the community. Community attracters such as restaurants and athletic facilities are being strengthened. The same systems that enable residents to travel the Orlando region also enable regional residents to travel to Pine Hills.

The big difference, once the destinations become more attractive, is related to marketing. First, regional residents must know there are interesting places in Pine Hills that they may find attractive. This marketing approach has several aspects:

- a. **Individual Business Advertising** that depends on the initiative of the individual enterprises, plus a positive regional community perception of Pine Hills. General efforts to change the regional community's perception of Pine Hills have been discussed and continue to be a task.
- b. **Community Amenities** consist of Barnett Park and soon, the new Evans High School. There are other smaller and lesser known amenities that may deserve promotion. The leverage to be had from Barnett Park and Evans High School is that people from around the Orlando region will attend events at these two venues. When they do, that is the opportunity to show a positive face, to impress those with old ideas that Pine Hills is "on the rise." These events cannot be wasted. Usually, people are open to new ideas for only a short period. As they say..."You only get one chance to make a first impression."



- c. **Community Identification Signs** are another factor discussed in the Task Force meetings. Most communities around the Region, incorporated or not, have identification signs that let you know when you are in, for example, Orla Vista or Pine Castle. Pine Hills needs to have identification signs at key locations on the major roads, especially Colonial Drive. As Colonial Drive construction is completed and signs are restored, new signs identifying Pine Hills should be in the FDOT's construction program.

Internet Access

Community connections to information systems can be enhanced with digital systems that are available to the general public. The popularity of computer use at the Orange County Library is an indicator of community interest. Easy community access would also support the educational and health mission of the Pine Hills community, especially for children.

- a. Internet connections and other forms of virtual access enable residents to access education and training programs, cultural amenities, entertainment and shopping activities using the internet. Internet access for the general public can be provided:
 - At the Orange County Library at Colonial and Hiawassee, as is currently done,
 - At a wifi "hot spot" in the proposed Pine Hills Town Center,
 - At each of the Orange County Public Schools in Pine Hills in established "public areas" that do not interfere with school operations and students.
 - At the several community centers including the YMCA, the Boys & Girls Club and the Pine Hills Community Center.
- b. An internet partner needs to be found to support Pine Hills in offering internet service to the general public.

Actions

1. **Complete the Sidewalk System** - Survey all sidewalks in the community to identify gaps; repair or add sidewalks to complete the system; examine the walking and biking access to each school to identify needed improvements. An annual program of sidewalk improvements should be designed to remedy all the gaps over a 3 to 5 year period with priorities set to resolve the most dangerous situations.
2. **Design and redesign the main roads in Pine Hills to be compatible with the residential character of the Pine Hills community.** This is further discussed in Chapter 6. Development corridors in Pine Hills include:
 - a. Pine Hills Road
 - b. Powers Drive
 - c. Hiawassee Road
 - d. Silver Star Road
 - e. Colonial Drive, SR 50.
3. **Plan for two Premium Transit Service Routes:** one from a multi-modal transit station at the Pine Hills Town Center to Florida Hospital South and the second from the Town Center Station to the High Speed Rail station at the Orange County Convention Center; Develop a strong working relationship with LYNX for the local system that supports the express service.
4. **Get Community Identification Signs for Pine Hills at strategic locations on Colonial Drive and along other major roadways;** specifically work with FDOT and Orange County to locate these signs at strategic locations on Colonial Drive as the construction project is completed. Signs should also be placed on Silver Star Road.
5. **Develop the first phase of the Pine Hills Trail with Enhanced Sidewalks** from the proposed Pine Hills Town Center to the Boys & Girls Club, Mollie Ray Elementary School and Barnett Park; Work with Orange County to secure funding for the Phase 1 of the Pine Hills Trail with enhanced sidewalks to cross Pine Hills Road and access Barnett Park.
6. **Make Barnett Park a Pine Hills community amenity;** Improve access and signage from Pine Hills Road to provide access and directions to Barnett Park.
7. **Find a technology partner, perhaps associated with Evans High School, to provide internet access for the general public in Pine Hills; find a corporate sponsor.**

8. STRONG NEIGHBORHOODS

The strength of any community is in large part measured by the health of its residential neighborhoods. The residential strength of the Pine Hills neighborhoods has been under appreciated. In the recent past a broad brushed characterization by the media has exaggerated public safety issues in the area. The result has been a perceived identity that belies much of Pine Hills true character.

Approximately 65% of the Pine Hills residences are owner-occupied, some of the highest in the metro region. This compares extremely favorably with the City of Orlando where less than 50% of the residences are owner-occupied. In addition, there is strong community participation in neighborhood programs and other community based activity. Thus, there is a solid underpinning of community pride.

Though the scope of the Task Force's effort did not deal directly with preparing a neighborhood plan, this brief chapter highlights the importance of strong neighborhoods. As discussed in their meetings the Task Force acknowledged the following as characteristics that identify strong neighborhoods:

- Engaged homeowner associations and community based organizations
- Well defined physical edges
- Safe and secure areas with effective neighborhood watch/safe neighborhood programs
- Effective code enforcement
- Well maintained public areas
- Healthy balance of homeowners to renter ratio
- Quality public schools at all grade levels
- Good access to open space, parks, and community facilities
- Diversity of neighborhood population
- Effective communication with public sector government and law enforcement

Action

The next step recommends that a neighborhood plan be developed either in-house by the county staff or by contract, to address the various elements identified above and incorporate into a specific action program.

9. PRIORITIZATION OF ACTION STEPS

Each of the prior chapters highlighted specific elements of a successful economic development community platform. With each element there were recommended action steps toward an effective implementation strategy. Below is the summary of these action steps categorized by element and broken down into near term (1 to 3 years) and long term (4 to 10 years) timeframes.

Recommended Actions	Near Term ¹	Long Term ²
To Establish an Effective Implementing Organization:		
<ul style="list-style-type: none"> Have the County Commission recognize that a permanent entity should be established to be accountable for the implementation of redevelopment activities and programs in Pine Hills. 	√	
<ul style="list-style-type: none"> It is recommended that a combination of the “department” and the NID be used to establish the entity to implement the Task Force recommendations. 	√	
To Develop a Vibrant Mixed Use Town Center:		
<ul style="list-style-type: none"> Recognize the importance of the investment in the new Evans High School campus and support the redevelopment of the northeast corner of Pine Hills/Silver Star Road intersection into complementary educational facilities. 		√
<ul style="list-style-type: none"> Reinforce the community desire to make the intersection the “Town Center” for Pine Hills and advocate for resources to stimulate reinvestment. 	√	
<ul style="list-style-type: none"> Provide resources to allow for land assembly and environmental mitigation in the Town Center area. 	√	
<ul style="list-style-type: none"> Provide incentives to enclose/relocate outside storage “eyesores” in northwest quadrant. 	√	
<ul style="list-style-type: none"> Engage property owner in southwest quadrant with incentives for the redevelopment of site to mixed use, including land assembly to improve access and circulation. 	√	
<ul style="list-style-type: none"> Protect the residential neighborhood character in the southeast quadrant. 		√
<ul style="list-style-type: none"> Prepare and adopt urban design guidelines for all four quadrants of intersections along Silver Star Road at Pine Hills, Powers Drive and Hiawasse Road. 	√	
To Develop Attractive and Functional Community Corridors:		
<ul style="list-style-type: none"> “Tame” Pine Hills road through reconfigured roadway, adding pedestrian amenities, slowing traffic, increasing number of safe pedestrian crossings. 		√
<ul style="list-style-type: none"> Review County’s land development code to identify changes necessary to encourage quality redevelopment along Pine Hills road as exemplified in prototype sketches. 	√	
<ul style="list-style-type: none"> Explore additional uses compatible with current zoning along Pine Hills Road that can be accommodated within the existing buildings (i.e. artists, incubator businesses, etc.) 	√	
<ul style="list-style-type: none"> Continue to monitor Silver Star Road to control access and improve aesthetic quality. 	√	

▪ Extend West Colonial Drive urban design standards to incorporate the link between Hiawasse Road east to the Orlando city limit.	√	
▪ Improve pedestrian and bike facilities on the main corridors and connecting community streets.		√
To Establish Effective Multi-modal Connections:		
▪ Complete sidewalk system, especially along corridors.		√
▪ Redesign main roads to be more compatible with residential character of community.		√
▪ Plan for two express transit service routes: Down Silver Star to SunRail Station at Florida Hospital and down Pine Hills/Kirkman Road to High Speed Rail Station at convention center; improve frequency of transit circulation within Pine Hills.		√
▪ Develop initial phase of Pine Hills Trail.	√	
▪ Improve access and signage to Barnett Park from the Pine Hills Road and the neighborhoods.	√	
▪ Provide internet access for the general public in the area.		√
To Create and Sustain Strong Neighborhoods:		
▪ Recommend that a Neighborhood Plan be developed either in-house by County staff or contracted for services.	√	

¹ Near Term = 1-3 Years

² Long Term = 4-10 Years

PART THREE:

COMMUNITY PARTICIPATION

10. "PINE HILLS ON THE RISE" INITIATIVE

For years, the Pine Hills community, located in the heart of Orange County, has suffered from poor public perception. The neighborhood has been portrayed in local media as a low-income, crime-ridden community with a myriad of social problems. While it is true certain areas in the neighborhood have experienced crime increases and physical decline over the years, overall this community remains a strong, viable place to call home!

To tackle the poor public perception and other persistent issues facing Pine Hills, the Board of County Commissioners in September 2009 established the Business Redevelopment Task Force. This 13-member group of residents and business owners works diligently with private consultants and Orange County Neighborhood Services staff to identify opportunities for redevelopment and neighborhood improvement in Pine Hills. The Task Force worked with private consultant Real Estate Research Consultants to complete a Neighborhood Economic Development Study and Marketing Analysis.

Mission Statement:

The Pine Hills Business Redevelopment Task Force will identify a vision for revitalization of area commercial properties and specific strategies for implementation.

The marketing analysis will provided the basis of redevelopment efforts, along with a previously completed report entitled "*Pine Hills Land Analysis & Strategic Plan.*" This report examined existing land use patterns in the area and identified areas suitable for pedestrian-friendly commercial redevelopment.

Consistent with the land analysis findings, the Task Force has focused its efforts on redevelopment within several commercial corridors of Pine Hills. They are:

- West Colonial Drive (between Pine Hills and Hiawassee)
- Pine Hills Road (between Silver Star and W. Colonial)
- Silver Star Road (between Pine Hills and Hiawassee)

The initiative was dubbed "**Pine Hills on the Rise,**" and has been well-received by the public due to a comprehensive community outreach strategy that included community meetings, focus groups and survey collection. The Task Force approved a colorful, upbeat logo that was placed on banners, promotional merchandise and Task Force correspondence. The logo helped generate community interest and support for the initiative.

11. PINE HILLS BUSINESS REDEVELOPMENT TASK FORCE

This volunteer Task Force of residents, community leaders and business people met once or twice per month depending on project needs. The meetings were publicly advertised and members of the public often attended to listen and provide input. The Task Force meetings served as the main avenue for conducting the work of the Task Force. In addition, several subcommittees were formed to address land use, education, communications and marketing. During these meetings and subcommittee meetings, the Task Force members worked with county staff and consultants to identify neighborhood challenges, prioritize needs and discuss possible solutions.

Chairman:

JaJa Wade

ACE Construction Management

Members:

Barbara Anderson

Orlo Vista United Safe Neighborhood

Michael Arrington

ACY Contractors

Allie Braswell

Central Florida Urban League

Ken Dwyer

Pine Hills Community Council

Susan Fortini

FASTSIGNS

Pinkie Freeman

Pine Hills Resident

Tim Haberkamp

Hardees

Anderson Hill

HZ Construction, Inc.

Capt. Dave Ogden

Orange County Sheriff's Office

Gwen Parrish

Pine Hills Safe Neighborhood Partnership

Rev. Frank Thompson

Worship Center Orlando

Julie Salvo

Orange County Public Schools



Task force members:

Standing, left to right: Anderson Hill, Michael Arrington, JaJa Wade, Tim Haberkamp, Ken Dwyer, Allie Braswell.

Seated, left to right: Pinkie Freeman, Susan Fortini, Gwen Parrish, Barbara Anderson, Julie Salvo.

Not pictured: Capt. Dave Ogden and Rev. Frank Thompson.

12. COMMUNITY OUTREACH

In order for the Task Force to successfully meet its mission and carry out its goals Task Force members, county staff and the consultant team reached out to the community at every opportunity to share information about its purpose, activities, progress and decisions. This continual communications allowed the Task Force to:

- Keep the public informed of important activities such as meetings, key milestones and recommendations
- Build rapport with the general public and key stakeholders
- Educate the public about issues, challenges and obstacles facing Pine Hills
- Solicit support and buy-in for Task Force goals and actions
- Engage the community in redevelopment solutions
- Find new allies in the effort to redevelop Pine Hills

All outreach efforts sought to reinforce several key messages regarding the Pine Hills area and the Task Force activities. Those messages are that:

- Pine Hills Redevelopment is important to residents
- Pine Hills Redevelopment is important to Orange County
- Pine Hills is a prime location for businesses to operate
- The Pine Hills Task Force is committed to improving Pine Hills business conditions through its actions and decisions
- The Task Force welcomes input from the community

The key strategy for community outreach involved hosting several community meetings, conducting focus groups with key populations and conducting surveys from businesses and consumers. In addition, the Task Force distributed an informational newsletter highlighting the positive improvements in Pine Hills (See Appendix for sample)

Community Meetings

The Task Force hosted three community meetings (See Appendix for agendas) and attended a half-day workshop to solicit public input for the redevelopment initiative. The meetings were well attended. The attendees helped the Task Force identify and prioritize needs, and they reinforced that community desires identified in the 2004 Land Analysis Plan were still valid.

“Top Wishes” Community Meeting (July 22, 2010). The first community meeting was held July 22 and drew more than 100 attendees. During the 90-minute meeting, attendees met Task Force members and the project team, and learned about efforts to reinvigorate several commercial corridors in Pine Hills.

Attendees also participated in a visioning exercise to identify and reach consensus on the top issues that need to be addressed in order for Pine Hills to thrive. The Pine Hills Business Redevelopment Task Force reviewed the top wishes and later added a 5th wish regarding education improvements.

- 1. More jobs and businesses locating to the area**
- 2. More crime prevention and safety initiatives**
- 3. More beautification and code enforcement**

- 4. The need for a redevelopment organization to initiate and drive redevelopment initiatives**
- 5. Improvements to education institutions/infrastructure**

“A Community Conversation” Community Meeting (August 18, 2010). This was the second community meeting. It attracted more than 60 attendees and revolved around a community conversation about transportation issues, redevelopment of the intersection of Pine Hills and Silver Star Roads, and recreational needs.

Issues identified at this event were:

Transportation:

- Difficult to get into some shopping centers due to traffic signal deficiencies
- Inadequate lighting and overhanging trees make it hard to see street signs
- Too much speeding on Silver Star where traffic is slowing to turn into shopping areas
- Community signage is scarce. Would like more signage with a unified design
- Pedestrian safety is a concern. They cross the street mid-block, as there are not enough proper crosswalks, especially near bus stops. Would like raised crosswalks and more pedestrian safety education.
- The residents are automobile dependent
- Lynx Bus service is inconvenient due to long travel times, long transfer times, lack of bus shelters
- Would like to see Lynx bus with more internal bus stops and routes (i.e. connections to shopping centers)
- Need more information available about bus schedules

Redevelopment at Pine Hills & Silver Star Roads:

- Favors town center development at this intersection
- Any plans should develop with Evans High School as a landmark
- Needs banks, movie theaters, restaurants
- The northwest corner needs to be demolished
- All four corners need to be redeveloped
- Include adequate parking
- Examine intersection of Hiawasse and Silver Star as alternate location for a town center

Recreation:

- Barnett Park is a wonderful community resource but is not easy to access from the community. Those access points have been closed off for safety reasons.
- Create a Barnett Park access from within the neighborhood. Only access point is from Colonial Dr.
- Make Barnett Park signage more visible to community
- Add more tennis courts to Barnett Park
- Add a swimming pool to Barnett Park
- Light up the park for safety reasons
- Look for more opportunities to add green space to Pine Hills
- Explore the feasibility of having a golf course in the community again

2010 Redevelopment Workshop (October 2, 2010). More than two dozen citizens joined Orange County staff, elected leaders and Task Force members to explore future redevelopment opportunities for Pine Hills, with specific attention on the intersection of Pine Hills Road and Silver Star Road.



Concerned residents of Pine Hills shared their hopes and ideas for neighborhood redevelopment.

Sponsored by the Orange County Planning Division, this event was not an official activity within the scope of services for the Neighborhood Economic Development Study and Marketing Analysis. Nonetheless it offered a valuable opportunity to hear from Pine Hills residents. Task Force members attended this half-day workshop along with more than 25 Pine Hills citizens.

During the event, local private developers, market research experts and transportation planners discussed the positive attributes in Pine Hills that would aid redevelopment, and how best to leverage those attributes. Private developer Mary Hurley told the audience that “Pine Hills has great bones.” The proximity to

downtown, connected street grids, solid housing stock and available sites for redevelopment make it attractive for developers.

Residents also participated in a visual preference survey conducted by the Orange County Planning Division. The goal of this segment was to discover the community’s design preferences as they apply to the physical landscape.

They viewed a visual presentation presenting them with choices of various designs and architectural styles for housing, commercial buildings, signage, parking areas, and green space. Using electronic keypads, the audience was able to vote on their choices and immediately see the results. The identified preferences were then used to create computer simulated design scenarios for a town center at the intersection of Pine Hills Road and Silver Star Road. This simulation was unveiled at the final community meeting.

The community showed a strong preference for commercial and residential buildings that followed traditional architectural lines, featuring characteristics such as awnings, balconies and porches/porticos. They liked old-fashioned street-lighting, uniform signage and parking lots where the asphalt was accentuated with landscaping and greenery. They were receptive to new concepts such as live-work housing units and on-street parking in designated geographical locations as well.

“The Future Defined” Community Meeting (October 28, 2010). This was the third community meeting, the focus of which was to share with the community all that has been learned from the research and community outreach efforts of the past year, and to get their final buy-in on the results and recommendations of the final report.

The consultant reviewed their final report and recommendations for a redevelopment strategy and Orange County Planning Division, using community planning software known as *CommunityViz*, demonstrated a computer simulation of a town center development at the corner of Pine Hills Road and Silver Star Road. The simulated community contained a mix of

residential and commercial buildings inspired by input from the visual preference survey conducted at the Redevelopment Workshop earlier in October.



Computer simulated Town Center scenario for the intersection of Pine Hills and Silver Star Roads.
SOURCE: Orange County Planning Division

Focus Groups

Immigrants Focus Group (August 10, 2010). A focus group was held for immigrants, but yielded poor participation. The staff decided to try different outreach efforts that did not involve face-to-face dialogue. These strategies included attendance the Caribbean Health Fair and working with immigrant churches to get input on their consumer habits and redevelopment concerns. Their concerns largely mirrored concerns expressed by the community as a whole, focusing on the desire for more jobs, safer walking environments and a better retail mix.

Seniors Focus Group (August 19, 2010). This focus group was well-attended and vocal. The seniors felt it was important to participate because they feel they rarely have an opportunity to voice their concerns and ideas.

Transportation Concerns:

- The main concerns are the poor connections for Lynx service on interior streets. Bus stops are mostly located along major, heavily trafficked roads. To get to these bus stops, seniors must walk along roads without sidewalks. Many are afraid to do so.
- The Lynx ride share program was discontinued, making it harder to get around. Seniors have to rely on rides from friends or family to get to medical appointments, grocery store, etc.
- Seniors would like sidewalks that connect to shopping; and safer, easier ways to cross at major intersections.

Commercial Area Concerns:

- No restaurants or entertainment centers exist in the heart of the community. Seniors must travel to the outer edges or to surrounding communities to enjoy these neighborhood amenities.
- Many of them fulfill their shopping needs outside of Pine Hills in order to have access to variety and more upscale selections. The Pine Hills stores do not recognize the buying needs of seniors and do not stock the types of merchandise they want to buy.
- They like shopping at some of the ethnic shopping centers like Chinatown because they like to explore other cultures. They don't want to see the ethnic diversity disappear.
- They feel it is important to keep major tenants like Publix, Public Library, K-mart, and the U.S. Post Office in the community.

- Finally, they want to see the shopping areas become more aesthetically pleasing to attract non-Pine Hills residents to the area.

Employment Issues:

- Seniors would like to work in the area. They need the kinds of jobs that seniors can do, such as light assembly.
- If transportation were available, they would also be willing to work outside of Pine Hills area.
- Positive attributes
- Diversity of population
- Affordable homes with large yards
- Convenience to downtown

Youth Focus Groups (September 7 & 13th, 2010). Staff met with three separate groups of students at Evans High School to learn how they would like to see the neighborhood around their school develop. The focus groups were held on with more than 50 students in the SAFE program and International Baccalaureate (IB) program.



Students from Evans High School participated in focus groups and research efforts to help Orange County learn about redevelopment needs in Pine Hills.

We asked what they would like to see in the vicinity of their new school, especially at the intersection of Pine Hills and Silver Star. We asked them to draw on a map (See Appendix for map example) the places where they would like to have afterschool jobs or hangout with friends. We also asked them to draw on the map and then cross-out any existing places they wished would go away.

They wanted a shopping mall with stores like Foot Locker, Cici's Pizza, and Golden Corral.

They also wanted a movie theater, "sportsplex" (with swimming pool); small amusement park; and jobs that lead to a good future. One student specifically drew a space shuttle and said he wanted jobs in aerospace to come back.

They did not, however, want more pawn shops or "dirty" grocery stores with poor customer service.

Faith-Based Focus Group (August 20, 2010). This group of pastors, congregation members and church administrators met with Orange County staff to discuss ways the Faith-Based community could assist with redevelopment efforts in Pine Hills. This group believes that, by first engaging pastors of the largest churches in Pine Hills in redevelopment efforts, the Task Force can then get the smaller churches involved.

This group suggested that Task Force members attend church services to inform congregations about the "Pine Hills on the Rise" initiative.

Pine Hills has many churches, but they are not centrally organized. The area needs a faith-based organization made up of all the pastors or their representatives. The community could

get more things done this way. They would like to create a database of all churches and see the county staff establish relationships with all church secretaries to keep abreast of happenings in the faith-based community.

They would also like to see a community wide, faith-based “celebration” event to get community excited about “Pine Hills on the Rise.”

Some of the churches worked with the District 2 County Commissioner to develop a database of vacant warehouse space in the area. They would like to see the Task Force use this data in any future redevelopment plans.

Community Surveys

Business Survey. During the months of July to September, a business survey (See Appendix for sample survey) was mailed to approximately 700 businesses in the 32818 and 32808 zip codes that fell into the Pine Hills study area. The purpose of the survey was to measure attitudes and perceptions about the business climate in Pine Hills. The most revealing information from the survey showed that most business owners do not live in Pine Hills. They conduct businesses in the neighborhood and then commute to another neighborhood after work. By increasing opportunities for business owners to live and work in Pine Hills, the neighborhood will benefit from the keeping money and resources in the neighborhood.

The survey also showed that:

- 63 percent of the survey respondents own businesses in Pine Hills and 28 percent manage a business.
- 25 percent of the responding businesses are located near the intersection of Pine Hills Road and Silver Star Road. Another 15 percent were located at the corner of Silver Star Road and Powers Drive. The remaining businesses were spread out among other key intersections in the area, including Pine Hills Road at Balboa Drive and Silver Star Road at Hiawasse Road.
- 68 percent of the businesses have been operating in Pine Hills for more than 10 years while 20 percent have been operating for 6 to 10 years.
- 40 percent of responding businesses were professional services while 25 percent were retail establishments. Another 27 percent fell into the “other” category, and included daycares and churches.
- 75 percent of respondents operate businesses in Pine Hills but do not live in the community.
- When asked which factors hurt their businesses the most, 73 percent felt it was the poor perception of Pine Hills. Other factors cited to a lesser degree were shoplifting/crime, traffic and road construction, poor target market, poor location and lack of access to business funding.
- 43 percent of the respondents believed improving the perception of Pine Hills would help businesses the most, while 38 percent believed creating a safe environment would help.
- 50 percent of owners/operators said they do not have plans to close or expand their businesses at this time; another 33 percent said they were not sure. Only 17 percent said they planned to expand in the next year.

- 63 percent of businesses said they had no plans to downsize or sell their businesses in the coming year.
- Respondents were asked to list any factors they thought would make it easier to operate a successful business in Pine Hills. The most frequently cited categories were cleanliness of public and private spaces, increased safety initiatives and stronger code enforcement. One respondent summarized his or her sentiment by writing that *“The area as a whole needs a facelift.”*



Consumer Survey. Consumer surveys (See Appendix for sample survey) were collected during the July-September time frame as well. However, the collection method differed from the business survey collection method. These surveys were collected at various community events, churches and shopping centers. A postcard advertising an online version of the survey was sent to a database of Pine Hills addresses in the 32808 and 32818 zip codes. Overall nearly 500 surveys were returned.

The survey showed that:

- 10 years was the average length of time that respondents have lived in Pine Hills; however, it was not uncommon that residents have lived there for 25 years or more. One respondent shared that he has lived in the neighborhood for 56 years.
- Sixty Three percent of respondents were homeowners and 27 percent were renters
- 66 percent of respondents live in Pine Hills; 27 percent do not
- 67 percent were women; 32 percent were men
- The ethnic breakdown of respondents:
 - African-American – 56 Percent
 - Caucasian – 23 Percent
 - Hispanic – 9 percent
 - Asian/Pacific Islander – 1 percent
 - American Indian/Alaskan Native/Native Hawaiian – 1 percent
 - Other – 6 percent
- Employment status of respondents:
 - Employed – 54 percent
 - Unemployed – 24 percent
 - Retired – 23 percent
 - About 32 percent of those employed work outside of Pine Hills. Just over 14 percent of those employed work in Pine Hills.
 - 67 percent think there are not enough jobs in Pine Hills
 - 43 percent earn household incomes under \$30,000
 - 10 percent earn household incomes between \$30,000 and \$35,000
- 13 percent earn household incomes above \$57,000
- 66 percent come from households with three or fewer members; 34 percent have households with four or more members.

The survey examined consumer habits in Pine Hills. By far, the most frequently used businesses are grocery stores and large discount chain stores. Respondents highly desire

more “upscale” stores and “fine dining” as opposed to some of the small, independently-owned business establishments. Residents reiterated the desire to see the intersection of Pine Hills Road and Silver Star Road redeveloped into a town center or upscale shopping area.

They expressed strong beliefs that the area is saturated with daycares, pawn shops, used tire stores and liquor stores. They felt the area lacked family entertainment opportunities, and frequently cited the desire to have a movie theater or entertainment complex nearby.

When these residents shop outside of Pine Hills, they are largely spending their money at restaurants, shopping malls and discount chain stores.

Some other consumer habits revealed by the survey include:

- Shopping frequency in Pine Hills:
 - 28 percent shop 3-5 times per week
 - 27 percent shop 1-2 times per week
 - 27 percent shop daily
 - 11 percent shop less than once per month
 - 2 percent never shop in Pine Hills
- Spending habits at Pine Hills businesses:
 - 39 percent spend \$10-\$50 per week
 - 25 percent spend \$51-\$100 per week
 - 19 percent spend \$100 or more per week
 - 8 percent spend less than \$10 per week
- Money Transactions:
 - 82 percent handle money transactions at a bank or credit union
 - 7 percent handle transactions at a check cashing business
 - 9 percent use other methods such as carrying cash only

The time spent gathering community input for this process was crucial to the development of a redevelopment strategy that addresses the needs and wants of the community as a whole, and not just the needs of a few vocal participants, as is sometimes the case in community revitalization. It also allowed opportunities for the Task Force and Orange County to reinforce the message that Pine Hills is changing for the better. The results of the “Pine Hills on the Rise” initiative will henceforth serve as a roadmap for future development and redevelopment that the community will support.

APPENDIX

Demographic and Socioeconomic Profile Report Tables

I POPULATION PROFILE (2010 DATA UPDATE)

	<u>2000</u>	<u>2010</u>	<u>2015</u>
<u>Total</u>			
Population	67,218	70,527	74,768
<u>By Sex</u>			
Male Population	32,251	34,108	36,221
Female Population	34,967	36,419	38,547
<u>By Marital Status</u>			
Pop. 15+ Never Married	15,736	18,622	19,781
Pop. 15+ Married, Spouse Present	21,569	20,789	21,910
Pop. 15+ Married, Spouse Absent	3,916	4,311	4,557
Pop. 15+ Divorced	5,469	6,458	6,874
Pop. 15+ Widowed	2,571	2,591	2,761
<u>By Educational Attainment</u>			
Pop 25+, Less than 9th Grade	2,948	3,248	3,519
Pop 25+, Some High School, No Diploma	7,946	5,410	5,815
Pop 25+, High School Grad (inc Equivalency)	12,511	15,192	16,296
Pop 25+, Some College, No Degree	8,427	8,426	9,041
Pop 25+, Associate Degree	2,676	3,758	4,047
Pop 25+, Bachelor's Degree	3,398	4,325	4,684
Pop 25+, Master's Degree	805	1,220	1,329
Pop 25+, Professional School Degree	351	395	431
Pop 25+, Doctorate Degree	155	218	237
<u>By Employment Status</u>			
Pop 16+, Civilian Labor Force, Employed	30,130	32,497	34,523
Pop 16+, Civilian Labor Force, Unemployed	2,459	3,831	4,011
Pop 16+, Armed Forces	38	24	25
Pop 16+, Not in Labor Force	15,390	15,148	16,118
<u>By Age & Sex</u>			
Pop, Male: Age 0 - 4	2,793	3,378	3,605
Pop, Male: Age 5 - 9	3,099	2,900	3,170
Pop, Male: Age 10 - 14	3,189	2,768	2,928
Pop, Male: Age 15 - 17	1,823	1,845	1,744
Pop, Male: Age 18 - 20	1,495	1,581	1,524
Pop, Male: Age 21 - 24	1,754	1,974	1,972
Pop, Male: Age 25 - 34	4,716	4,590	4,806
Pop, Male: Age 35 - 44	5,170	4,750	4,718
Pop, Male: Age 45 - 54	3,738	4,411	4,691
Pop, Male: Age 55 - 64	2,164	3,183	3,730
Pop, Male: Age 65 - 74	1,435	1,749	2,177
Pop, Male: Age 75 - 84	715	740	893
Pop, Male: Age 85+	160	239	263
Pop, Male: Age 16+	22,535	24,419	25,914
Pop, Male: Age 18+	21,348	23,217	24,774
Pop, Male: Age 21+	19,853	21,636	23,250
Pop, Male: Age 25+	18,099	19,662	21,278
Pop, Male: Age 65+	2,311	2,728	3,333
Median Age, Male	29.18	30.68	31.59
Pop, Female: Age 0 - 4	2,725	3,132	3,243
Pop, Female: Age 5 - 9	3,055	2,799	3,059
Pop, Female: Age 10 - 14	3,053	2,780	2,880
Pop, Female: Age 15 - 17	1,704	1,776	1,705
Pop, Female: Age 18 - 20	1,559	1,571	1,567
Pop, Female: Age 21 - 24	1,939	1,831	1,974
Pop, Female: Age 25 - 34	5,273	5,128	4,917
Pop, Female: Age 35 - 44	5,630	5,128	5,298
Pop, Female: Age 45 - 54	4,145	4,924	5,000
Pop, Female: Age 55 - 64	2,545	5,128	4,353
Pop, Female: Age 65 - 74	1,850	2,103	2,708
Pop, Female: Age 75 - 84	1,067	1,050	1,247
Pop, Female: Age 85+	422	498	596
Pop, Female: Age 16+	25,527	27,079	28,763
Pop, Female: Age 18+	24,430	25,932	27,660
Pop, Female: Age 21+	22,871	24,362	26,093
Pop, Female: Age 25+	20,932	22,531	24,119
Pop, Female: Age 65+	3,339	3,651	4,551
Median Age, Female	31.54	33.42	34.85

Source: Nielsen Claritas

II HOUSEHOLD PROFILE (2010 DATA UPDATE)

	<u>2000</u>	<u>2010</u>	<u>2015</u>
<u>Total</u>			
Households	21,943	22,600	23,745
<u>Family Households</u>			
Families	16,309	16,674	17,533
<u>Household Size</u>			
Average Household Size	3.03	3.08	3.11
Average Family Household Size	3.11	3.59	3.64
1-Person HH	4,204	4,213	4,378
2-Person HH	6,013	6,094	6,345
3-Person HH	4,107	4,266	4,494
4-Person HH	3,604	3,695	3,866
5-Person HH	2,199	2,304	2,440
6-Person HH	986	1,094	1,189
7+ Person HH	830	935	1,033
<u>Family HH by Presence of Own Children</u>			
HHs, 2+ People, Married Couple, Own Kids	5,081	4,528	4,726
HHs, Other Fam HH, Male Hhldr, Own Kids	760	789	829
HHs, Other Fam HH, Fem. Hhldr, Own Kids	3,155	3,519	3,725
HHs, 2+ People, Married Couple, No Own Kids	4,951	5,148	5,407
HHs, Other Fam HH, Male Hhldr, No Own Kids	669	819	868
HHs, Other Fam HH, Fem. Hhldr, No Own Kids	1,693	1,871	1,978
Total Married Couple Family HH	10,032	9,676	10,133
<u>Households by Race/Ethnicity</u>			
HHs, Hisp/Lat	2,508	3,155	3,644
HHs, Not Hisp/Lat	19,435	19,445	20,101
HHs, White	9,439	7,291	6,525
HHs, Black/Af Amer	9,879	11,929	13,289
HHs, Am Ind/AK Native	82	83	89
HHs, Asian	585	724	835
HHs, Native HI/PI	16	17	18
HHs, Some Other Race	984	1,318	1,552
HHs, 2+ Races	958	1,237	1,437
HHs, Hisp/Lat, White	1,217	1,436	1,626
HHs, Hisp/Lat, Black/Af Amer	191	224	247
HHs, Hisp/Lat, Am Ind/AK Native	14	13	15
HHs, Hisp/Lat, Asian	5	5	8
HHs, Hisp/Lat, Native HI/PI	2	0	0
HHs, Hisp/Lat, Some Other Race	885	1,229	1,461
HHs, Hisp/Lat, 2+ Races	194	248	287
HHs, Not Hisp/Lat, White	8,223	5,855	4,899
HHs, Not Hisp/Lat, Black/Af Amer	9,688	11,706	13,042
HHs, Not Hisp/Lat, Am Ind/AK Native	67	70	74
HHs, Not Hisp/Lat, Asian	580	719	827
HHs, Not Hisp/Lat, Native HI/PI	14	17	18
HHs, Not Hisp/Lat, Some Other Race	99	89	90
HHs, Not Hisp/Lat, 2+ Races	763	990	1,150
<u>Households by Vehicles Available</u>			
Occ HUs, No Vehicles	2,094	1,707	1,827
Occ HUs, 1 Vehicle	8,550	9,057	9,522
Occ HUs, 2 Vehicles	8,105	8,220	8,605
Occ HUs, 3 Vehicles	2,276	2,630	2,760
Occ HUs, 4 Vehicles	585	718	753
Occ HUs, 5+ Vehicle	346	268	277
<u>Households by Year Householder Moved In</u>			
Hhldr Moved In 1969 or Earlier	965	621	554
Hhldr Moved In 1970 to 1979	1,462	979	888
Hhldr Moved In 1980 to 1989	3,211	2,236	1,990
Hhldr Moved In 1990 to 1999	16,317	5,399	4,531
Hhldr Moved In 2000 or later	0	13,365	15,781
Median Length of Residence (Years)	n/a	8.45	11.28

Source: Nielsen Claritas

III HOUSING UNIT PROFILE (2010 DATA UPDATE)

	<u>2000</u>	<u>2010</u>	<u>2015</u>
<u>Owner-Occupied/Renter-Occupied</u>			
Owner-Occupied HUs	14,361	14,778	15,486
Renter-Occupied HUs	7,582	7,822	8,258
<u>Housing Units by Units In Structure</u>			
1 Unit Detached	16,163	17,016	17,769
1 Unit Attached	704	862	920
2 Units	286	246	263
3 to 19 Units	3,908	4,453	4,740
20 to 49 Units	455	700	753
50+ Units	770	456	499
Mobile Home	960	645	647
HUs, Other	0	0	1
<u>Housing Units by Year Structure Built</u>			
HUs, Built 1939 or Earlier	141	141	136
HUs, Built 1940 to 1949	292	285	275
HUs, Built 1950 to 1959	2,849	2,837	2,728
HUs, Built 1960 to 1969	4,259	4,099	4,084
HUs, Built 1970 to 1979	6,284	6,038	5,936
HUs, Built 1980 to 1989	5,598	5,550	5,530
HUs, Built 1990 to 1999	3,824	3,483	3,338
HUs, Built 2000 or Later	0	1,943	3,566
Median Year HU Structure Built	1977	1978	1979
<u>Owner-Occupied Units by Value</u>			
Own Occ HUs, Value < \$20,000	581	395	366
Own Occ HUs, Value \$20,000 - \$39,999	437	302	296
Own Occ HUs, Value \$40,000 - \$59,999	1,466	250	247
Own Occ HUs, Value \$60,000 - \$79,999	4,291	402	271
Own Occ HUs, Value \$80,000 - \$99,999	4,821	925	558
Own Occ HUs, Value \$100,000 - \$149,999	2,348	6,175	4,356
Own Occ HUs, Value \$150,000 - \$199,999	326	4,390	6,159
Own Occ HUs, Value \$200,000 - \$299,999	70	1,661	2,562
Own Occ HUs, Value \$300,000 - \$399,999	20	183	468
Own Occ HUs, Value \$400,000 - \$499,999	23	32	111
Own Occ HUs, Value \$500,000 - \$749,999	1	33	48
Own Occ HUs, Value \$750,000 - \$999,999	0	27	36
Own Occ HUs, Value \$1,000,000+	0	2	9
Own Occ HUs Median Value	\$81,732	\$141,410	\$163,393
Own Occ HUs Average Value	n/a	\$96,960	\$110,720

Source: Nielsen Claritas

IV EMPLOYMENT PROFILE (2010 DATA UPDATE)

	<u>2000</u>	<u>2010</u>	<u>2015</u>
<u>Employment Status of Population</u>			
Pop 16+, Civilian Labor Force, Employed	30,130	32,497	34,523
Pop 16+, Civilian Labor Force, Unemployed	2,459	3,831	4,011
Pop 16+, Armed Forces	38	24	25
Pop 16+, Not in Labor Force	15,390	15,148	16,118
<u>Females by Employment Status</u>			
Pop 16+, Female: Civilian, Employed	14,700	16,027	17,026
Pop 16+, Female: Civilian, Unemployed	1,404	1,829	1,918
Pop 16+, Female: Armed Forces	0	0	1
Pop 16+, Female: Not in labor force	9,579	9,223	9,818
% of Civ Labor Force Unemployed, Female	8.7%	10.2%	10.1%
<u>Employed Population by Industry</u>			
Emp Civ Pop 16+: Accommdtn/Food Svcs	3,716	4,067	4,311
Emp Civ Pop 16+: Admin/Spprt/Waste Mgmt	1,499	2,110	2,221
Emp Civ Pop 16+: Agr/Frst/Fish/Hunt/Mine	155	147	156
Emp Civ Pop 16+: Entertainment/Rec Svcs	1,974	1,715	1,794
Emp Civ Pop 16+: Construction	2,977	3,668	3,896
Emp Civ Pop 16+: Educational Svcs	1,722	1,880	2,012
Emp Civ Pop 16+: Fin/Insur/RE/Rent/Lse	1,848	2,068	2,218
Emp Civ Pop 16+: Health Care/Soc Asst	2,974	3,748	4,014
Emp Civ Pop 16+: Information	970	773	824
Emp Civ Pop 16+: Mgmt of Companies	26	93	100
Emp Civ Pop 16+: Total Manufacturing	1,956	1,643	1,757
Emp Civ Pop 16+: Oth Svcs, Not Pub Admin	1,571	1,603	1,712
Emp Civ Pop 16+: Prof/Sci/Tech/Admin	1,080	1,232	1,322
Emp Civ Pop 16+: Public Administration	992	971	1,033
Emp Civ Pop 16+: Retail Trade	3,668	4,176	4,430
Emp Civ Pop 16+: Transport/Warehse/Utils	1,711	1,578	1,668
Emp Civ Pop 16+: Wholesale Trade	1,291	978	1,039
<u>Employed Population by Occupation</u>			
Emp Civ Pop 16+: Architect/Engineer	325	297	315
Emp Civ Pop 16+: Arts/Entertain/Sports	518	463	500
Emp Civ Pop 16+: Building Grounds Maint	2,102	2,853	3,030
Emp Civ Pop 16+: Business Op. & Fin. Spec.	838	949	1,022
Emp Civ Pop 16+: Community/Soc Svcs	240	289	313
Emp Civ Pop 16+: Computer/Mathematical	256	289	313
Emp Civ Pop 16+: Construction/Extraction	2,554	3,197	3,386
Emp Civ Pop 16+: Edu/Training/Library	1,078	1,255	1,343
Emp Civ Pop 16+: Farm/Fish/Forestry	114	84	86
Emp Civ Pop 16+: Food Prep/Serving	2,228	2,479	2,644
Emp Civ Pop 16+: Health Practitioner/Tec	987	1,208	1,300
Emp Civ Pop 16+: Healthcare Support	840	1,167	1,241
Emp Civ Pop 16+: Maintenance Repair	1,229	1,192	1,267
Emp Civ Pop 16+: Legal	160	210	225
Emp Civ Pop 16+: Life/Phys/Soc Science	112	110	120
Emp Civ Pop 16+: Mgmt Except Farmer	1,749	1,892	2,004
Emp Civ Pop 16+: Office/Admin Support	5,118	4,771	5,062
Emp Civ Pop 16+: Production	2,065	1,601	1,705
Emp Civ Pop 16+: Protective Svcs	699	798	844
Emp Civ Pop 16+: Sales/Related	3,264	3,679	3,896
Emp Civ Pop 16+: Personal Care/Svc	1,084	1,154	1,212
Emp Civ Pop 16+: Transportation/Moving	2,570	2,513	2,679
Emp Civ Pop 16+: White Collar	14,644	15,411	16,414
Emp Civ Pop 16+: Blue Collar	8,418	8,503	9,036
Emp Civ Pop 16+: Service & Farm	7,067	8,535	9,057

IV EMPLOYMENT PROFILE (2010 DATA UPDATE - cont.)

	<u>2000</u>	<u>2010</u>	<u>2015</u>
<u>Workers By Travel Time to Work</u>			
Workers, Travel Time: < 15 Minutes	4,005	4,424	4,714
Workers, Travel Time: 15 - 29 Minutes	11,038	11,809	12,601
Workers, Travel Time: 30 - 44 Minutes	9,146	9,806	10,423
Workers, Travel Time: 45 - 59 Minutes	2,899	2,979	3,116
Workers, Travel Time: 60+ Minutes	2,009	2,316	2,467
<u>Workers By Means of Transport to Work</u>			
Workers, Transportation: Worked at Home	350	646	691
Workers, Transportation: Walked	212	209	226
Workers, Transportation: Bicycle	119	124	133
Workers, Transportation: Carpooled	4,820	4,273	4,525
Workers, Transportation: Drove Alone	22,488	24,466	25,979
Workers, Transportation: Public Transport	1,042	1,388	1,524
Workers, Transportation: Other	418	616	658

Source: Nielsen Claritas

V INCOME PROFILE (2010 DATA UPDATE)

	<u>2000</u>	<u>2010</u>	<u>2015</u>
<u>Households by Income</u>			
HHs with Inc < \$15,000	3,798	3,445	3,458
HHs with Inc \$15,000 - \$24,999	3,672	3,255	3,226
HHs with Inc \$25,000 - \$34,999	3,376	3,166	3,230
HHs with Inc \$35,000 - \$49,999	4,452	4,267	4,311
HHs with Inc \$50,000 - \$74,999	4,250	4,794	5,140
HHs with Inc \$75,000 - \$99,999	1,428	1,998	2,287
HHs with Inc \$100,000 - \$149,999	837	1,406	1,706
HHs with Inc \$150,000 - \$499,999	208	257	369
HHs with Inc \$500,000+	5	13	17
Median HH Inc	\$35,564	\$40,043	\$41,813
Avg HH Inc	\$42,089	\$47,429	\$49,821
Per Capita Inc	\$13,740	\$15,198	\$15,822
Aggregate HH Inc	\$923,567,801	\$1,071,881,250	\$1,182,990,858
<u>Income Density</u>			
Income Per Acre (Land Area 9,664 Acres)	\$95,567.86	\$110,914.86	\$122,412.13
<u>Median Household Income by Age</u>			
Hhldr 15 - 24, Median HH Inc	\$23,625	\$27,269	\$28,506
Hhldr 25 - 34, Median HH Inc	\$32,738	\$38,499	\$40,335
Hhldr 35 - 44, Median HH Inc	\$42,142	\$47,275	\$50,039
Hhldr 45 - 54, Median HH Inc	\$41,365	\$44,667	\$47,277
Hhldr 55 - 64, Median HH Inc	\$36,921	\$42,407	\$43,881
Hhldr 65 - 74, Median HH Inc	\$29,101	\$31,211	\$32,225
Hhldr 75 - 84, Median HH Inc	\$19,279	\$21,894	\$23,430
Hhldr 85+, Median HH Inc	\$14,713	\$18,215	\$21,119
<u>Family Households and Poverty Level</u>			
Families At or Above Poverty	14,195	14,007	14,714
Families At or Above Poverty with Children	8,531	7,919	8,311
Families Below Poverty	2,365	2,667	2,819
Families Below Poverty with Children	2,061	2,179	2,303

Source: Nielsen Claritas

VI ETHNICITY & LANGUAGE (2009 DATASETS)

	<u>2009</u>
<u>Languages Spoken At Home (2009 Data Only)</u>	
Pop Age 5+: Speak Only English at Home	48,377
Pop Age 5+: Speak Asian/PI Lang at Home	1,653
Pop Age 5+: Speak IndoEuropean @ Home	6,017
Pop Age 5+: Speak Spanish at Home	7,591
Pop Age 5+: Speak Other Lang at Home	205

Source: Nielsen Claritas

VII HOUSEHOLDS & NET WORTH (2009 DATASETS)

	<u>2009</u>	<u>2014</u>
<u>Households by Net Worth (2009-14 Data Only)</u>		
Households with Net Worth < \$25,000	10,649	10,796
Households with Net Worth \$25K - \$49,999	1,552	1,559
Households with Net Worth \$50K - \$74,999	1,211	1,222
Households with Net Worth \$75K - \$99,999	989	1,005
Households with Net Worth \$100K - \$149,999	1,556	1,587
Households with Net Worth \$150K - \$249,999	1,980	2,069
Households with Net Worth \$250K - \$499,999	2,284	2,484
Households with Net Worth \$500K - \$749,999	885	1,003
Households with Net Worth \$750K - \$999,999	538	617
Households with Net Worth \$1MM+	949	1,167
Average Household Net Worth	\$197,474	\$223,803
Median Household Net Worth	\$35,431	\$40,369

Source: Nielsen Claritas

VIII RENTER-OCCUPIED UNITS WITH CONTRACT RENT (2009 DATASETS)

	<u>2000</u>
<u>Renter-Occupied Units (2000 Data Only)</u>	
w/ Contract Rent	7,554
w/Cash Rent Contract Rent	7,385
w/Cash Rent<\$100 Contract Rent	104
w/Cash Rent \$100-\$149 Contract Rent	140
w/Cash Rent \$150-\$199 Contract Rent	45
w/Cash Rent \$200-\$249 Contract Rent	179
w/Cash Rent \$250-\$299 Contract Rent	151
w/Cash Rent \$300-\$349 Contract Rent	202
w/Cash Rent \$350-\$399 Contract Rent	444
w/Cash Rent \$400-\$449 Contract Rent	352
w/Cash Rent \$450-\$499 Contract Rent	606
w/Cash Rent \$500-\$549 Contract Rent	1,362
w/Cash Rent \$550-\$599 Contract Rent	923
w/Cash Rent \$600-\$649 Contract Rent	1,176
w/Cash Rent \$650-\$699 Contract Rent	641
w/Cash Rent \$700-\$749 Contract Rent	389
w/Cash Rent \$750-\$799 Contract Rent	200
w/Cash Rent \$800-\$899 Contract Rent	300
w/Cash Rent \$900-\$999 Contract Rent	106
w/Cash Rent \$1K-\$1,249 Contract Rent	54
w/Cash Rent \$1,250-\$1,499 Contract Rent	0
w/Cash Rent \$1,500-\$1,999 Contract Rent	12
w/Cash Rent \$2K+ Contract Rent	0
No Cash Rent Contract Rent	169

Source: Nielsen Claritas

IX CHECK CASHERS/CURRENCY EXCHANGES

<u>Institution Name</u>	<u>Employees</u>	<u>Year Opened</u>
Ace Cash Express	2	1993
Ace Cash Express	13	1995
Advance America	3	1997
Advance America	3	1998
Rapid Cash Advance	2	1999
Ace Cash Express	2	1999
Ace Cash Express	2	2004
Orlando Financial Svc	6	2005
All Checks Cashing	2	2007

Source: InfoUSA

X MAJOR EMPLOYERS (100 or More Emp.)

<u>Institution Name</u>	<u>Employees</u>	<u>Year Opened</u>	<u>Industry</u>
Bridges Of America	301	2007	Drug Abuse Treatment
Orange County Parks & Rec Dept	267	1989	Parks
Sam's Club	250	1999	Warehouses-Commodity/Mdse.
Maynard Evans High School	235	1984	Schools
Home Depot	206	1990	Home Improvements
Super Target	175	1991	Department Stores
Magnolia School Exceptional	160	1988	Schools
Robinswood Middle School	150	1988	Schools
Olive Garden Italian Rstrnt	130	1990	Foods-Carry Out
Meadowbrook Middle School	130	1988	Schools
Pine Hills Elementary School	130	1988	Schools
Estes Express Lines	125	1991	Trucking-Motor Freight
Winn-Dixie	120	1995	Grocers-Retail
Hiawassee Elementary School	115	1988	Schools
US Post Office	105	1989	Post Offices
Lake Gem Elementary School	105	1998	Schools
Rolling Hills Elementary Schl	101	1988	Schools
First National Bank-Central FI	100	1987	Banks
Environmental Protection Div	100	2002	County Govt-Environ. Programs
Schools Public Orange County	100	2003	County Govt-General Offices
Orlando Rehab & Health Ctr	100	2006	Health Resorts
Logan's Roadhouse	100	1998	Restaurants
Red Lobster	100	1984	Restaurants
Chili's Grill & Bar	100	1992	Restaurants
West Oaks Elementary School	100	2004	Schools

Source: InfoUSA

XI BUSINESSES & ATTENDANT EMPLOYMENT (2009 DATASETS)

<u>Industry (2009 Data Only)</u>	<u>Businesses</u>	<u>Employees</u>
ALL MANUFACTURING	38	181
ALL RETAIL	355	2,841
ALL INDUSTRIES	1,706	12,179
AGRICULTURAL PROD-CROPS	0	0
AG PROD-LIVESTOCK & ANIMAL	0	0
AGRICULTURAL SERVICES	45	198
VETERINARY SERVICES	5	54
ANIMAL SERVICES, except VET	5	9
DOG GROOMING SERVICES	2	4
APPAREL & ACCESSORY STORES	42	114
MEN'S & BOYS' CLOTHING STORES	11	22
WOMEN'S CLOTHING STORES	9	39
WOMEN'S ACCESS & SPEC STORES	0	0
CHILDREN'S & INFANTS' WEAR	0	0
FAMILY CLOTHING STORES	6	9
AUTO DEALERS & SERVICE STATIONS	41	352
AUTO REPAIR, SERV, & PARK	68	191
BOOK STORES	0	0
STATIONERY STORES	2	4
BUILDING MTRL & GARDEN SUP	17	99
MOBILE HOME DEALERS	0	0
ENGINEERING & MGMT SERV	32	125
BUSINESS SERVICES	110	495
CHEMICALS & ALLIED PRODUCTS	2	7
COMMUNICATION	15	115
GENERAL BUILDING CONTRACT	39	145
SPECIAL TRADE CONTRACTORS	113	679
EDUCATIONAL SERVICES	43	2,092
INDUSTRIAL MACHINERY & EQUIP	4	26
FARM & LABOR (B076)	0	0
DEPOSITORY INSTITUTIONS	25	186
CENTRAL RESERVE DEPOSITORIES	0	0
COMMERCIAL BANKS	9	98
CREDIT UNIONS	3	38
NONDEPOSITORY INSTITUTIONS	17	68
FEDERAL & FED-SPONSORED CREDIT	0	0
PERSONAL CREDIT INSTITUTIONS	7	33
BUSINESS CREDIT INSTITUTIONS	0	0
FOOD & KINDRED PRODUCTS	1	27
FOOD STORES	54	521
GENERAL MERCHANDISE STORES	19	291
HEALTH SERVICES	127	834
HOME FURNITURE/FURN & EQP	31	159
INSURANCE CARRIERS	0	0
LEATHER & LEATHER PRODUCTS	0	0
LUMBER & WOOD PRODUCTS	2	16
PRINTING & PUBLISHING	9	26
MEMBERSHIP ORGANIZATIONS	81	333
MISCELLANEOUS RETAIL	71	320
MISCELLANEOUS SERVICES	7	10
MUSEUMS, BOTANICAL, ZOO	0	0
NONCLASSIFIABLE ESTAB	53	147
NONSTORE RETAILERS	7	32
PERSONAL SERVICES	134	447
PRIVATE HHLDS	0	0
PUBLIC ADMINISTRATION	31	701
REAL ESTATE	86	355

XI BUSINESSES & ATTENDANT EMPLOYMENT (2009 DATASETS-cont.)

	<u>Businesses</u>	<u>Employees</u>
FOOD & KINDRED PRODUCTS	1	27
HOTELS & OTHER LODGING	2	44
SPORTING GDS/BICYCLE SHP	2	6
HOBBY, TOY & GAME SHOPS	3	7
MISCELLANEOUS REPAIR SERVICES	22	78
EATING & DRINKING PLACES	80	985
RETAIL STORES, NEC	21	64
SOCIAL SERVICES	79	793
STONE, CLAY, & GLASS PROD	2	17
TEXTILE MILL PRODUCTS	0	0
RAILROAD TRANSPORTATION	0	0
LOC & INTERURB MASS TRANSIT	17	37
TAXICABS	6	11
BUS CHARTER SERVICE	1	1
TRUCKING & WAREHOUSING	22	216
TRUCKING & COURIER SERVICES	12	192
U.S. POSTAL SERVICE	3	112
WATER TRANSPORTATION	2	3
TRANSPORTATION BY AIR	0	0
AIR COURIER SERVICES	0	0
TRANSPORTATION SERVICES	5	10
USED MERCHANDISE STORES	8	19
ANTIQUE STORES	0	0
ELEC, GAS, & SANITARY SERVICES	4	18
PUBLIC WAREHOUSING & STORAGE	10	24
WHOLESALE TRADE-DURABLE GOODS	39	180
WHOLESALE TRADE-NONDUR GOODS	7	15

Source: Nielsen Claritas

XII RESIDENTIAL NEW CONSTRUCTION

	<u>Single Family</u>	<u>Multifamily</u>
<u>Residential Units by Year of Construction</u>		
Year Built - 2000	126	494
Year Built - 2001	168	0
Year Built - 2002	141	88
Year Built - 2003	191	0
Year Built - 2004	228	272
Year Built - 2005	255	0
Year Built - 2006	140	240
Year Built - 2007	92	0
Year Built - 2008	33	0
Year Built - 2009	42	0
Total Units 2000-09	1,416	1,094

Source: Orange County Property Appraiser Database

XIII RESIDENTIAL HOME SALES

	<u>Units</u>	<u>Average Price</u>
<u>Residential Units by Year of Sale</u>		
2000	685	\$88,555
2001	750	\$95,016
2002	702	\$102,870
2003	849	\$114,453
2004	1,199	\$130,333
2005	1,536	\$167,129
2006	1,307	\$198,489
2007	643	\$195,244
2008	227	\$156,623
2009	351	\$84,802
2010 (through June)	236	\$65,154

Source: Orange County Property Appraiser Database

XIV HOME FORECLOSURE DATA

Foreclosures as of 6/3/2010, Zip Codes	<u>Bed</u>	<u>Bath</u>
<u>32808 and 32818, by Address</u>		
4711 DUTTON DR	3	1.5
4605 FERN PINE DR	3	2
5345 COYOTE TRL	3	1.5
2016 CRICKET DR	3	2
4722 NORTH LN	3	2
4111 ROBBINS AVE	3	2
2701 CASTLE OAK AVE	3	2
1243 EMERALDA RD	3	1
4305 ROBBINS AVE	3	2
5222 MONTAGUE PL	3	1
2472 ATRIUM CIR	2	2
2128 PICKETT AVE	3	2
6221 FOREST GROVE BLVD	3	1.5
1026 KIRK ST	3	2
1301 QUEENSWAY RD	3	1
4793 N PINE HILLS RD	2	2
4793 N PINE HILLS RD	3	2
4793 N PINE HILLS RD	2	2
4793 N PINE HILLS RD	3	2
4793 N PINE HILLS RD	2	2
4793 N PINE HILLS RD	3	2
4793 N PINE HILLS RD	2	2
4793 N PINE HILLS RD	3	2
4793 N PINE HILLS RD	2	2
4793 N PINE HILLS RD	3	2
4793 N PINE HILLS RD	2	2
4793 N PINE HILLS RD	3	2
4793 N PINE HILLS RD	2	2
4793 N PINE HILLS RD	3	2
4793 N PINE HILLS RD	0	2
4793 N PINE HILLS RD	3	2
4793 N PINE HILLS RD	2	2
4793 N PINE HILLS RD	3	2
4793 N PINE HILLS RD	2	2
4793 N PINE HILLS RD	3	2
4793 N PINE HILLS RD	0	0

XIV HOME FORECLOSURE DATA (cont.)

Foreclosures as of 6/3/2010, Zip Codes

32808 and 32818, by Address

	<u>Bed</u>	<u>Bath</u>
4793 N PINE HILLS RD	2	2
4793 N PINE HILLS RD	3	2
4793 N PINE HILLS RD	2	2
4793 N PINE HILLS RD	2	2
4793 N PINE HILLS RD	2	2
4793 N PINE HILLS RD	3	2
4793 N PINE HILLS RD	2	2
4793 N PINE HILLS RD	3	2
4793 N PINE HILLS RD	2	2
4719 SOUTHDOLD ST	3	2
3888 WATCH HILL RD	3	2
4709 BAY WILLOW CT	4	2
5159 CASSATT AVE	3	2
5613 TAMMANY CT	3	2
5201 W GOLF CLUB PKWY	3	2
4864 RED WILLOW AVE	3	2
2217 FONTAINEBLEAU DR	3	1
2511 N HASTINGS ST	3	2
4400 N PINE HILLS RD	2	1.5
5200 BONNIE BRAE CIR	3	2
1220 ST JAMES RD	3	2
5614 CHAM CT	3	2
1905 CRICKET DR	3	2
4320 S LAKE ORLANDO PKWY	3	2.5
3231 TWISTED OAK CT	5	2
2223 DUNSFORD DR	3	2
1553 N HUDSON ST	3	2
4211 LAKE LAWNE AVE	3	1.5
4719 ELDERWOOD CT	4	2
4713 ALMOND WILLOW DR	2	2
5262 MERIMONT CT	4	2
5201 MONTAGUE PL	3	2
1004 SANTA ANITA ST	2	1
918 BORDEAUX PL	3	2
5208 ASHWOOD PL	3	1
5275 SHAKAR CIR	3	2
4216 CAROUSEL RD	3	2
1182 LAKE BLANCHE DR	3	2
6224 RHYTHM BLVD	3	2
5816 HUTTON DR	3	2
4518 ROBBINS AVE	3	1.5
5823 FLORI LN	3	2
4308 DREXEL AVE	3	2
4524 NORTH LN	4	2
4545 WILD ROSE CT	4	2
4508 S LAKE ORLANDO PKWY	3	2
3530 AMIGOS AVE	3	2
902 FERNDILL RD	2	1
4550 FRISCO CIR	4	2
4821 INDIALANTIC DR	4	2.5
5820 LACONIA RD	3	2
2808 WAXY WILLOW LN	2	2
5979 KENLYN CT	3	2
6026 CHRISTIAN WAY	4	2
4059 SHANNON BROWN DR	2	2.5
869 PINEDALE AVE	3	1
4908 INDIALANTIC DR	3	1.5
5317 CAMROSE CT	3	1

XIV HOME FORECLOSURE DATA (cont.)

Foreclosures as of 6/3/2010, Zip Codes 32808 and 32818, by Address	<u>Bed</u>	<u>Bath</u>
3814 WESTGATE RD	3	2
5605 LEJEUNE DR	3	2
5025 FOXCROFT CT	3	2
901 SUNNILAND DR	3	1.5
4732 NANTUCKET LN	3	2
4781 LANTERN CT	3	2
4465 OAK ARBOR CIR	2	2.5
1100 FERNDILL RD	2	1
4525 BALBOA DR	3	2
2091 DUNSFORD DR	3	2
2400 QUEENSWAY RD	3	1.5
5856 ELON DR	3	2
4422 NORTH LN	2	2
5309 FERNHILL CT	3	2
4845 INDIALANTIC DR	3	2
4809 JUDY ANN CT	3	2
1049 SANTA ANITA ST	2	1
5715 ELON DR	3	1.5
4726 ROBBINS AVE	3	2
1211 ROGER BABSON RD	4	1.5
4820 SANDBAR WILLOW CT	4	2
2303 ATRIUM CIR	3	2
1811 GLENDALE RD	3	2
2522 KINGSLAND AVE	3	1
4902 TAM DR	3	1.5
4782 CORPUS CHRISTY CT	4	2
1620 HASTINGS CT	3	2
4513 FLINTLOCK DR	3	2
4117 ROBBINS AVE	3	2
4740 NORWALK PL	3	2
3927 TIMBER TRL	3	2
3501 KIPLING DR	3	1
6003 MERRIEWOOD DR	5	2
5537 BRITAN DR	3	3.5
4208 SEYBOLD AVE	3	1
5678 ALTEC CT	3	1.5
4617 FRISCO CIR	3	2
3720 PINE RIDGE RD	3	1.5
5249 SHAKAR CIR	3	2
5601 CHAM CT	4	2
5174 SIGNAL HILL RD	4	2
4504 OAK ARBOR CIR	2	2.5
6228 BEAUMONT AVE	3	2
4521 LAWNE CT	3	2
5614 RIVIERA DR	3	2
4859 NORWALK PL	3	2
1248 EMERALDA RD	3	1
1208 N PINE HILLS RD	3	2
3893 N LAKE ORLANDO PKWY	3	2
4503 OAK ARBOR CIR	2	2.5
4518 SAN SEBASTIAN CIR	3	2
814 TERRY LYNN DR	3	2
2459 ATRIUM CIR	2	2
3418 PIPES O THE GLEN WAY	3	1.5
4131 LAKE LAWNE AVE	3	2
5116 LIMING AVE	4	2.5
5824 HARRINGTON DR	3	2

XIV HOME FORECLOSURE DATA (cont.)

Foreclosures as of 6/3/2010, Zip Codes
32808 and 32818, by Address

	<u>Bed</u>	<u>Bath</u>
4400 BRITTANY RD	3	1.5
4400 BRITTANY RD	3	1.5
5229 GOLD TREE CT	3	2
6028 MEDFORD DR	3	2
4852 PAT ANN TER	3	2
5931 PARADISE LN	3	2
4912 BLARNEY DR	3	2
5363 CAMROSE CT	3	1.5
4800 MONTAUK ST	3	2
3521 N PINE HILLS RD	2	2
5515 OAKFIELD ST	3	2
3714 PINE RIDGE RD	3	1.5
4805 BEACON ST	3	2
1307 ROGER BABSON RD	4	1.5
6121 N HUDSON ST	3	2
4576 NORTH LN	3	2
4907 BLARNEY DR	3	2
5117 CLARION OAKS DR	3	2
5112 FIGWOOD LN	3	1
4866 NORTH LN	3	2
4784 SANOMA VLG	3	2
6104 LOST TREE CT	3	2
5636 INDIALANTIC DR	3	2
1614 RIDGE POINTE DR	4	2
5612 BALBOA DR	2	1
5915 BEECHMONT BLVD	3	1.5
6119 RHYTHM BLVD	3	2
1210 N PINE HILLS RD	3	1
1251 N PINE HILLS RD	2	1
4418 COLONY WAY	3	2
5306 BONNIE BRAE CIR	3	1.5
4774 MUIR VLG	3	2
6202 BALBOA DR	3	2
5824 JUDY DEE DR	3	2
6235 HIALEAH ST	5	2
1014 EMERALDA RD	4	1
4700 CARTEGENA CT	2	1.5
3023 BESS LN	3	2
5818 HOLMES DR	3	2
2095 ASHLAND BLVD	3	1.5
3503 RIDGEMONT RD	3	2
928 HACIENDA CT	3	1
1921 ROCKWELL RD	4	2
5752 GOLF CLUB PKWY	3	2
2102 ASHLAND BLVD	3	1.5
2127 ASHLAND BLVD	3	2
7408 NAVEL TREE CT	4	2
7214 PLEASANT DR	5	2
7732 RENWOOD CT	4	2.5
8070 VILLAGE GREEN RD	3	2.5
1129 WOODMAN WAY	2	2
4400 BRITTANY RD	3	1.5
5229 GOLD TREE CT	3	2
6028 MEDFORD DR	3	2
4852 PAT ANN TER	3	2
5931 PARADISE LN	3	2
4912 BLARNEY DR	3	2

XIV HOME FORECLOSURE DATA (cont.)

Foreclosures as of 6/3/2010, Zip Codes

32808 and 32818, by Address

	<u>Bed</u>	<u>Bath</u>
5363 CAMROSE CT	3	1.5
4800 MONTAUK ST	3	2
3521 N PINE HILLS RD	2	2
5515 OAKFIELD ST	3	2
3714 PINE RIDGE RD	3	1.5
4805 BEACON ST	3	2
1307 ROGER BABSON RD	4	1.5
6121 N HUDSON ST	3	2
4576 NORTH LN	3	2
4907 BLARNEY DR	3	2
5117 CLARION OAKS DR	3	2
5112 FIGWOOD LN	3	1
4866 NORTH LN	3	2
4784 SANOMA VLG	3	2
6104 LOST TREE CT	3	2
5636 INDIALANTIC DR	3	2
1614 RIDGE POINTE DR	4	2
5612 BALBOA DR	2	1
5915 BEECHMONT BLVD	3	1.5
6119 RHYTHM BLVD	3	2
1210 N PINE HILLS RD	3	1
1251 N PINE HILLS RD	2	1
4418 COLONY WAY	3	2
5306 BONNIE BRAE CIR	3	1.5
4774 MUIR VLG	3	2
6202 BALBOA DR	3	2
5824 JUDY DEE DR	3	2
6235 HIALEAH ST	5	2
1014 EMERALDA RD	4	1
4700 CARTEGENA CT	2	1.5
3023 BESS LN	3	2
5818 HOLMES DR	3	2
2095 ASHLAND BLVD	3	1.5
3503 RIDGEMONT RD	3	2
928 HACIENDA CT	3	1
1921 ROCKWELL RD	4	2
5752 GOLF CLUB PKWY	3	2
2102 ASHLAND BLVD	3	1.5
2127 ASHLAND BLVD	3	2
7408 NAVAL TREE CT	4	2
7214 PLEASANT DR	5	2
7732 RENWOOD CT	4	2.5
8070 VILLAGE GREEN RD	3	2.5
1129 WOODMAN WAY	2	2
2209 BRIDGEWOOD TRL	4	2
2504 HEALY DR	3	2
7809 REX HILL TRL	4	2.5
7550 COUNTRY RUN PKWY	3	2
2703 BON AIR DR	3	1.5
8642 VALLEY RIDGE CT	3	2
5342 FALLING WATER DR	3	2
4653 SETTLEMENT CIR	3	2.5
4660 MIRANDA CIR	3	2
3675 WESTLAND CT	2	2
7526 REX HILL TRL	4	2
7474 PENRILL CT	3	2
7230 COUNTRY RUN PKWY	4	2.5
3635 MANDALAY CT	2	1.5

XIV HOME FORECLOSURE DATA (cont.)

Foreclosures as of 6/3/2010, Zip Codes 32808 and 32818, by Address	<u>Bed</u>	<u>Bath</u>
1812 GREYSTONE TRL	3	2
4515 OAKTON DR	3	2
3312 PARIS PL	3	2
7456 CROOKED LAKE CIR	3	2
3442 LAKE TINY CIR	3	2
4157 SADDLEWOOD DR	3	2
4732 JONATHAN CHARLES DR	3	2
924 RED DANDY DR	3	2
8072 CLOVERGLEN CIR	3	2
1115 N POWERS DR	4	2
8088 VILLAGE GREEN RD	4	2
1635 NATCHEZ TRACE BLVD	4	2
1604 HINCKLEY RD	3	2
7176 IRONWOOD DR	4	2
2112 N POWERS DR	3	2
7921 REX HILL TRL	4	2.5
7110 GRAY SHADOW ST	4	2
6509 LUNDEEN WAY	3	1.5
2825 BON AIR DR	3	2
6549 REDWOOD OAKS DR	4	2
4814 HURDLE CT	4	2
7832 FALABELLA CT	3	2.5
7632 GRAMERCY DR	3	2
2429 HEALY DR	3	2
9200 NEW ORLEANS DR	4	2
9100 MONTEVELLO DR	4	3
6513 VERNON ST	3	2
6807 WESTBOROUGH LN	4	2.5
2903 BON AIR DR	4	2
5614 HUBER DR	3	1
5309 RENOIR DR	3	2
6612 SWYEAR CT	5	3
1444 WESTON WOODS BLVD	4	2
3418 DRAGOON PL	4	2
1541 NATCHEZ TRACE BLVD	3	2
4169 SADDLEWOOD DR	3	2
9276 BATON ROUGE DR	4	2
3335 PELL MELL DR	3	2
1711 ADDIE AVE	3	2.5
8543 HONOLULU DR	4	3
1845 COLUMBINE DR	3	2
4718 ROLLING OAK DR	4	3
8208 STEEPLECHASE BLVD	3	2
6314 LAKE HORSESHOE DR	3	2
4521 CAMBIUM CT	4	2.5
3640 TERRINA CT	3	1.5
3145 GOLDEN ROCK DR	4	3
1162 BYERLY WAY	3	2.5
947 SUNNY DELL DR	3	2
2430 HEALY DR	3	2
7622 COVEDALE DR	3	2
2389 LOCKE AVE	4	2
6306 LAURELWOOD CT	4	3.5
2113 ONETA CT	5	3
1614 LAMPLIGHTER WAY	3	2
2030 TORREY DR	3	2
3433 WESTLAND DR	3	2

XIV HOME FORECLOSURE DATA (cont.)

Foreclosures as of 6/3/2010, Zip Codes 32808 and 32818, by Address	<u>Bed</u>	<u>Bath</u>
7608 WARDEN DR	3	2
1508 HIGH GROVE WAY	4	3
8113 OLD GROVE DR	3	2
4827 HURDLE CT	4	3
7249 HIAWASSEE OAK DR	3	2.5
8343 ROSE GROVES RD	3	2
7019 VALIANT CT	3	2
5390 FALLING WATER DR	3	2
6932 THOUSAND OAKS RD	4	2.5
1034 YELLOW ROSE DR	4	3
1407 SERISSA CT	3	2
2818 HICKORY COVE CT	3	2
6510 LUNDEEN WAY	3	1.5
7408 PENRILL CT	4	2.5
5219 GANHILL CT	4	2.5
8242 CATHY ANN ST	3	1.5
7863 REX HILL TRL	4	2
3157 GOLDEN ROCK DR	4	3
7401 REX HILL TRL	4	2
4450 OAKHAM CT	3	2
6744 MERITMOOR CIR	3	2
3642 CHALET CT	3	1.5
7212 JUNE BUG LN	6	4
6952 HYLAND OAKS DR	4	3
7743 REX HILL TRL	3	2
1527 HIGH GROVE WAY	4	2
8633 SNOWFIRE DR	3	2
1904 GREYSTONE TRL	3	2
5131 N APOKA VINELAND RD	3	2
7751 TANBIER DR	3	2
7319 BRIARLYN CT	4	2
2609 STALEY CT	3	2
6522 MERITMOOR CIR	3	2
3308 DRAGOON PL	3	1.5
7714 RIFFLE LN	3	2
4429 BEAGLE ST	3	2
8451 LAINIE LN	4	2.5
6310 VERNON ST	3	2
9178 PRISTINE CIR	3	2
8824 SCENIC VISTA CT	5	3
7133 HIAWASSEE OAK DR	5	3
5073 SHALE RIDGE TRL	4	2.5
5168 SHALE RIDGE TRL	4	2.5
6306 NIGHTWIND CIR	4	2.5
5543 BRECKENRIDGE CIR	3	3
7370 PENFIELD CT	3	2
7018 OCHOPEE CT	4	2
8104 SULLY DR	3	2.5
6315 JENNINGS RD	3	2
1563 NATCHEZ TRACE BLVD	4	2
2114 ALLEGHENY CT	3	2
6627 WHIRLAWAY CIR	3	2
6518 SPRING LAND CT	2	2
8729 ISLA BELLA DR	4	2.5
8218 VILLAGE GREEN RD	3	2
3302 PARIS PL	3	2
6441 JACKWOOD CT	4	2

XIV HOME FORECLOSURE DATA (cont.)

Foreclosures as of 6/3/2010, Zip Codes

32808 and 32818, by Address

	<u>Bed</u>	<u>Bath</u>
1825 INKWOOD CT	4	2
1013 LAKE SHERWOOD DR	3	2
7235 PINION DR	3	1.5
1200 N HART BLVD	3	2
1827 PEARWOOD CT	4	2
911 PAHOA ST	3	2
1604 ST LAWRENCE ST	3	2
7475 PENRILL CT	4	2.5
2084 GREYSTONE TRL	3	2
7757 NEWLAN DR	4	2.5
8412 WHITE RD	3	2
1242 LAMPLIGHTER WAY	3	2
3009 GOLDEN ROCK DR	3	2
7236 KENSINGTON HIGH BLVD	3	2
1718 NEEDLEWOOD LN	5	2
1848 MATTERHORN DR	3	1.5
5330 RABBIT RIDGE TRL	4	2.5
7625 REX HILL TRL	4	2.5
7462 PENRILL CT	4	2.5
5508 BRECKENRIDGE CIR	4	2
3322 BON AIR DR	3	1
7238 HICKORY BRANCH CIR	3	2
1315 N HART BLVD	5	2
6314 UNDINE WAY	3	2
6856 GALLE CT	3	2
5206 GANHILL CT	4	2.5
6346 FOX BRIAR TRL	3	2
3338 KNIGHTSBRIDGE RD	3	2
4447 BEAGLE ST	3	2
7430 REX HILL TRL	4	2
1826 MULBERRYWOOD CT	4	2
3336 CHICO AVE	4	2
8058 VILLAGE GREEN RD	4	2
7963 HAWK CREST LN	4	2
6628 LAKEVILLE RD	3	2
1828 TILLSTREAM DR	3	2
8115 LAKE PARK ESTATES BLVD	3	2
3421 DRAGOON PL	3	1.5
7403 PENRILL CT	4	2
6816 COLONY OAKS LN	3	2
3001 REDLIVE OAKS LN	4	2
419 Foreclosures, Average BR/BA Size:	3.2	2.0

Source: Orange County

XV HOME LOAN ACTIVITY

Census Tracts 120.00,121.00,122.01,122.02,
123.03,123.04,123.05,123.06,123.07,124.01,
124.03,147.01,147.02,149.03,149.04

<u>Year</u>	FHA/FSA/RHS/VA Loans		Conventional Loans		Home Improvement Loans	
	<u>Number</u>	<u>\$000s</u>	<u>Number</u>	<u>\$000s</u>	<u>Number</u>	<u>\$000s</u>
2004	305	\$30,288	741	\$77,360	13	\$1,377
2005	166	\$16,465	1,089	\$127,756	33	\$3,965
2006	102	\$13,029	1,405	\$187,548	66	\$7,122
2007	83	\$11,118	614	\$91,567	41	\$4,826
2008	135	\$17,735	116	\$15,669	18	\$2,300

Source: FFIEC Home Mortgage Disclosure Act Reports



A G E N D A

**Community Kick Off Meeting
July 22, 2010
7 p.m. Pine Hills Community Center**

7:00 – 7:15

Welcome & Introductions – Lavon Williams, Manager, Orange County Neighborhood Services Division

7:15-7:30

History of Pine Hills redevelopment efforts – Lavon Williams

7:30-7:40

Opening Remarks – JaJa Wade, Chairman, Pine Hills Business Redevelopment Task Force

7:40-8:00

Overview of the Neighborhood Economic Development and Marketing Analysis – Tom Kohler, Real Estate Research Consultants

8:00-8:30

Community Visioning Exercise – Michelle Owens, Neighborhood Services Division and Sara Brady, Sara Brady Public Relations

8:30-8:40

Upcoming Events/Opportunities to Participate – Michelle Owens

8:40-9:00

Questions & Answers



BUSINESS SURVEY

Sponsored by the Pine Hills Business Redevelopment Task Force & Orange County Government

To determine the economic development needs of Pine Hills, The Pine Hills Business Redevelopment Task Force has developed this short survey to learn more about the attitudes and perceptions of business owners and operators in this community.

Please complete the survey and FAX to Neighborhood Services Division, 407-836-0920 by September 15, 2010.

1. Are you responding to this survey primarily as:

- ☐ Business owner ☐ Business Manager/Employee
☐ Other (specify) _____

2. Are you located in a shopping center? Yes ☐ No ☐ If so, which one _____

3. Which is the closest major intersection to your business establishment (please check one)?

- | | |
|--|--|
| <input type="checkbox"/> Pine Hills Road and Silver Star Road | <input type="checkbox"/> Silver Star Road and Hastings Street |
| <input type="checkbox"/> Pine Hills Road and West Colonial Drive | <input type="checkbox"/> West Colonial Drive and Powers Drive |
| <input type="checkbox"/> Pine Hills Road and Balboa Drive | <input type="checkbox"/> West Colonial Drive and Hastings Street |
| <input type="checkbox"/> Silver Star Road and Hiawassee Road | <input type="checkbox"/> West Colonial Drive and Hiawassee Road |
| <input type="checkbox"/> Silver Star Road and Powers Drive | <input type="checkbox"/> West Colonial Drive and Kirkman Road |

4. How long has your business been operating in the Pine Hills area?

- ☐ Less than 12 months ☐ 1-2 years ☐ 3-5 years ☐ 6-10 years ☐ More than 10 years

5. What type of business do you operate in Pine Hills?

- ☐ Retail ☐ Restaurant ☐ Entertainment ☐ Professional Services ☐ Wholesale ☐ Other _____

6. Do you also live in the Pine Hills area? Yes ☐ No ☐

7. Which of the following challenges do you feel hurts your business the most? (Check all that apply)

- | | |
|--|---|
| <input type="checkbox"/> Not enough customers | <input type="checkbox"/> Poor public perception of Pine Hills |
| <input type="checkbox"/> Lack of access to money, loans and technical assistance | <input type="checkbox"/> Poor business location |
| <input type="checkbox"/> Shoplifting/Crime | <input type="checkbox"/> Other (please specify) _____ |

8. Which of the following factors do you feel helps your business the most? (Check all that apply)

- | | |
|---|---|
| <input type="checkbox"/> Large target market | <input type="checkbox"/> An improving public perception of Pine Hills |
| <input type="checkbox"/> Easy access to business loans and technical assistance | <input type="checkbox"/> Good business location |
| <input type="checkbox"/> Safe Environment for customers and employees | <input type="checkbox"/> Other _____ |

9. If you have plans to expand your business, please tell us when:

- ___ 3 months ___ 6 months ___ 12 months or more ___ Not sure ___ I don't have plans to expand

10. If you have plans to expand your business or payroll, please tell us how much you plan to spend on the expansion:

- ___ Under \$5,000 ___ \$5,000-\$15,000 ___ \$15,001-\$25,000 ___ \$25,001-\$50,000 ___ \$ More than \$50,000

11. If you have plans to downsize your business or payroll, please tell us when:

- ___ 3 months ___ 6 months ___ 12 months or more ___ Not sure ___ I don't have plans to downsize

12. If you have plans to sell or close your business, please tell us when:

- ___ 3 months ___ 6 months ___ 12 months or more ___ Not sure ___ I don't have plans to sell or close

13. Please list any factors that you think would make it easier to operate a profitable business in the Pine Hills area?



Pine Hills on the Rise!

A Community Conversation
August 26, 2010
7 p.m. Pine Hills Community Center

7:00-7:15

Welcome & Introductions – Lavon Williams

7:15-7:30

Opening Remarks – JaJa Wade, Chair, Pine Hills Business
Redevelopment Task Force

7:30-7:40

Recap of July 22 kick-off meeting – Lavon Williams

7:40-8:40

Community Conversation – Lavon Williams & Michelle Owens

8:40-9:00

Questions & Answers

CONSUMER SURVEY

Sponsored by the Pine Hills Business Redevelopment Task Force & Orange County Government

To determine the economic development needs of Pine Hills, The Pine Hills Business Redevelopment Task Force has developed this short survey to learn more about the attitudes and perceptions of those who live and shop in this community. Please complete and return to a survey box or survey taker; or by FAX to 407-836-0920. *Thank you for caring about your community!*

1. Are you responding to this survey primarily as:

☐ Renter ☐ Homeowner ☐ Landlord ☐ Other (specify) _____

2. Do you live in Pine Hills? Yes ☐ No ☐; If so for how long? _____ years _____ months

3. Please check the boxes that apply to you:

a. ☐ Male ☐ Female

b. ☐ African-American (not of Hispanic Origin)

☐ Caucasian (not of Hispanic Origin)

☐ American Indian, Alaskan Native, Native Hawaiian

☐ Asian or Pacific Islander

☐ Hispanic

☐ Other (specify) _____

4. Are you employed? Yes ☐ No ☐ **If yes, is your job in the Pine Hills area?** Yes ☐ No ☐ **I'm retired** ☐

5. Do you feel that there are enough employment opportunities in the Pine Hills area? Yes ☐ No ☐

6. Which of the following income levels, best represents how much you make in a year?

☐ Under \$30,650 ☐ \$39,401 to \$43,750 ☐ \$50,751 to \$54,250

☐ \$30,651 to \$35,000 ☐ \$43,751 to \$47,250 ☐ \$54,251 to \$57,750

☐ \$35,001 to \$39,400 ☐ \$47,251 to \$50,750 ☐ \$57,751 and above

7. How many people are in your household?

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10 ☐ Other

8. How often do you spend money in a Pine Hills business?

☐ Never ☐ Less than once a month ☐ 1-2 times/week ☐ 3-5 times/week ☐ Daily

9. How much do you spend on average each week at Pine Hills businesses?

☐ Nothing ☐ Less than \$10 ☐ \$10-\$50 ☐ \$51-\$100 ☐ More than \$100

10. How do you handle your money transactions? ☐ Bank /Credit Union ☐ Check Cashing Business ☐ Other (please explain) _____

11. Which business places do you go to the most in Pine Hills?

12. Which business places do you go to the most outside of Pine Hills?

13. Which other businesses and services would you like to see available in Pine Hills?

14. Which businesses and services would you like to see removed from Pine Hills?

THE FUTURE PINE HILLS

Evans High School



Silver Star Road

N. Pine Hills Road





Pine Hills on the Rise!

"The Future Defined!"

October 28, 2010

7 p.m. Pine Hills Community Center

7:00-7:30

Community Open House

7:30-7:35

Opening Remarks – JaJa Wade, Chair, Pine Hills Business
Redevelopment Task Force

7:35-7:45

Recap of "Pine Hills on the Rise" Initiative – Lavon Williams

7:45-8:45

Project Update

Study Results & Recommendations – Tom Kohler, Real Estate
Research Consultants

Town Center Redevelopment Scenario – Jenni Bryla, Orange County
Planning Division and Michelle Owens, Neighborhood Services Division

Next Steps – Michelle Owens, Neighborhood Services Division

8:45-9:00

Questions & Answers



What's New in Pine Hills?

Pine Hills is on the Rise! Crime is down, homes are selling, schools are improving and businesses and residents are joining to help keep Pine Hills a great place to live.



*Task Force Members and citizens work together.
Photo courtesy of The Pine Hills Press*

To help these efforts, Orange County Government recently established the **Pine Hills Business Redevelopment Task Force** to work with staff and private consultants to create a vision and action plan to revitalize key commercial areas in Pine Hills. The 13-member task force is made up of residents and business people of Pine Hills.

This task force recently selected the private consulting firm **Real Estate Research Consultants, Inc.** to do a market analysis of Pine Hills.

The research will build on an earlier report entitled "2004 Pine Hills Land Analysis & Strategic Plan" that looked at existing land use patterns and identified areas suitable for redevelopment.

Consistent with the 2004 land analysis findings, the task force will focus its efforts on redevelopment in several commercial corridors of Pine Hills.

The research will focus on three commercial corridors:

- West Colonial Drive (between Pine Hills and Hiawassee)
- Pine Hills Road (between Silver Star and W. Colonial)
- Silver Star Road (between Pine Hills and Hiawassee)

Task Force Members

Chairman:

JaJa Wade, ACE Construction Management

Members:

Barbara Anderson, Orlo Vista United

Michael Arrington, ACY Contractors

Allie Braswell, Central Florida Urban League

Ken Dwyer, Pine Hills Community Council

Susan Fortini, FASTSIGNS

Pinkie Freeman, Pine Hills Resident

Tim Haberkamp, Hardees

Anderson Hill, HZ Construction, Inc.

Capt. Dave Ogden, Orange County Sheriff's Office

Gwen Parrish, Pine Hills Safe Neighborhood Partnership

Pastor Frank Thompson, Worship Center Orlando

Julie Salvo, Orange County Public Schools



Good News for Pine Hills!

Pine Hills has always been a strong community, with lots of housing options, active resident groups and a convenient location near Downtown Orlando. We're building on those strengths and many other positive changes to make Pine Hills the best it's ever been!

Crime is down

The Orange County Sheriff's office has reported a 19 percent drop in overall crime and a 31 percent drop in violent crime since last year. OCSO has opened a new command post in Pine Hills and assigned 20 new deputies to the community.

Homes are selling

Homes, especially foreclosed homes are selling again. A report from the Orlando Regional Realtor Association shows that in the 1st Qtr of 2010, 257 homes sold in the two zip codes that make up Pine Hills. Of those, 208 were bank-owned properties and 51 were short sales. Those figures are better than 1st Quarter sales in zip codes of similar-sized areas. Waterford Lakes had 212 sales and Hunters Creek had 225.

Schools are improving



When this school reopens, it will be a centerpiece of the community.

Orange County Public Schools has budgeted almost \$75 million dollars for the reconstruction of Evans High School. When this school

Businesses and residents have joined together

With the newly formed Pine Hills Business Redevelopment Task Force, a group of business people and residents are working with Orange County Government and private consultants to create a vision and action plan for our future.

Don't get left out

We can't do it without input from each and every member of the Pine Hills community. We need you to participate in our community events, to share your ideas with us, and to attend public meetings and show elected officials how much we care about this community.

Join Us Today!

To find out how you can be involved in these good times, call **Orange County Neighborhood Services** at 407-836-5621.

Project Team

Orange County Neighborhood Services Division
www.orangecountyfl.net/neighborhoods

Orange County Planning Division
www.orangecountyfl.net/planning

Real Estate Research Consultants
www.ercinc.com

AECOM
www.aecom.com

Planning Design Group
www.pdgfla.com

Sara Brady Public Relations
www.sarabradypur.com

