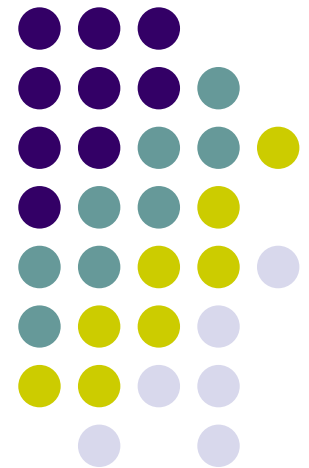




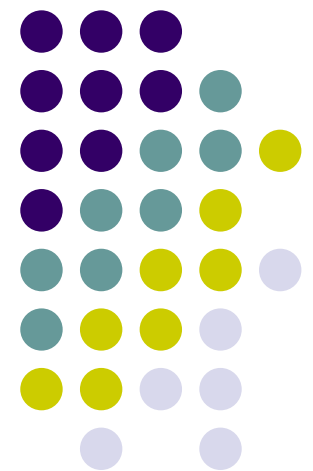
Osceola County, Florida Vision and Growth Strategy

**Advisory Services Panel
January 22-27, 2006**

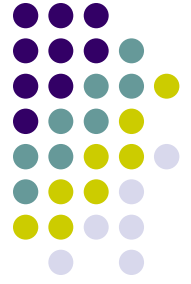


Introduction

Roger Galatas







About ULI

- Independent Nonprofit Education and Research Organization
- Mission: To Provide Responsible Leadership in the Use of the Land in Order to Enhance the Total Environment
- Established in 1936
- Almost 30,000 Full and Associate Members Worldwide
- Representing the Entire Spectrum of Land Use and Real Estate Development Disciplines

Advisory Services Program



- To Bring the Finest Expertise to Bear on Complex Land Use Planning and Development Projects, Programs, and Policies
- Over 400 Panels Nationally and Internationally

The Panel



Chair

Roger L. Galatas

Roger Galatas Interests LLC
The Woodlands, TX

Panelists

Andrew Borsanyi

The Concord Group
San Francisco, CA

Pat Hawley

R. A. Smith & Associates
Brookfield, WI

David Godschalk

University of North Carolina
Chapel Hill, NC

Ann Saegert

Haynes & Boone, LLP
Dallas, TX

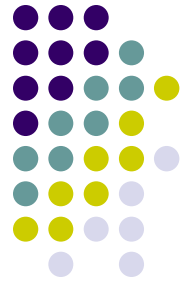
Gerard P. Tully

Psomas
Salt Lake City, UT

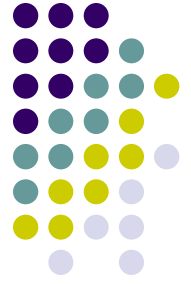
Douglas M. Wrenn

Rodgers Consulting, Inc.
Germantown, MD

The Process



- Overview by County and Council Staff
- Sponsor Briefing and Tour
- Interviews of 56 Individuals
- Completed Outline of Information
- Presentation of Recommendations
- Final Report to be Published

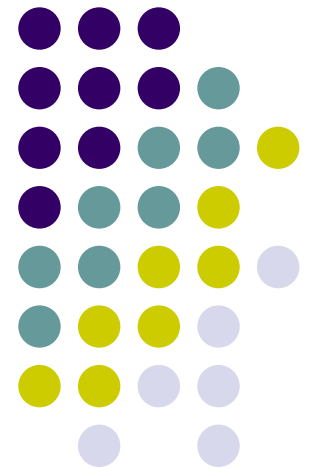


Presentation Covers

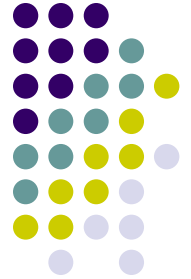
- Response to Questions Posed
- Market Assessment
- Planning and Design
- Development Strategies and Implementation
- Conclusions and Recommendations
- Lessons Learned – Example Community

Market Potential

Andrew Borsanyi
Gerard Tully

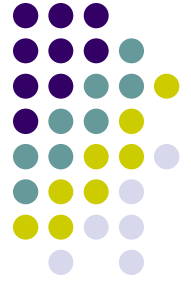


Market Potential

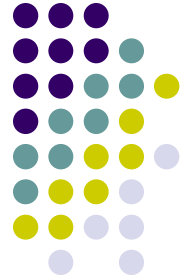


- Central Florida Overview
- Residential Market
- Commercial Market

Orlando MSA



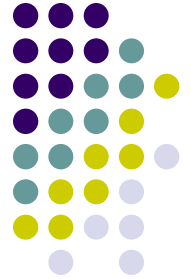
- 3rd Fastest Growing Region in US
- Projected 2.5% Annual Growth (vs. 1% National)
- Long Term Drivers
 - Unique Tourism Assets
 - Regional Transportation
 - Diversifying Economy
 - Strong Business Climate
 - Relative Affordability
 - Land Availability
- 100% Population Growth by Mid-Century



Residential Market

- 30,000 New Homes Sold Last Year
- Residential Market Drivers
 - Household Growth
 - Current Population Turnover
 - Second Home
 - “Horizontal Hotel” Investment
 - Retiree
- 35,000+ Homes Per Year Demand

Projected Supply



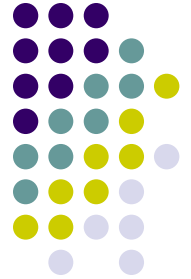
- Less than 130K Units in Approved DRI's
- 3-4 Years Supply
- 55K Units in Proposed DRI's
- Supply Challenged to Meet Demand

Where Will Growth Go?



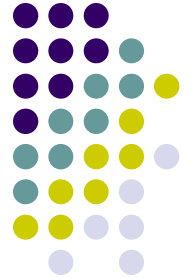
- I-4 Corridor Becoming Built Out
- The Turnpike
- Osceola and Lake Counties

Osceola County



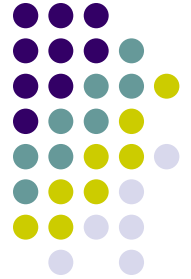
- Current Population = 11% of MSA
- 7,000 New Home Sales Last Year
- 23% of MSA Total
- County Capturing Double Its Historical Share

Osceola Future



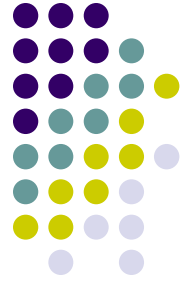
- 30% of Approved Units in DRI's
- 50%+ of Proposed Units in DRI's
- The Linchpin of MSA Growth

MSA Office Market



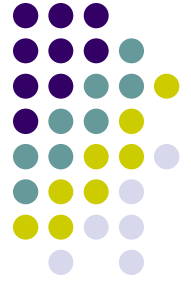
- Strong Market: 10% Vacancy
- 50 Million Square Feet Total
- 2 million Per Year Net Absorption
- 60 million Square Feet in Approved DRI's
- 30 Years of Supply
- High Competition

MSA Industrial Market



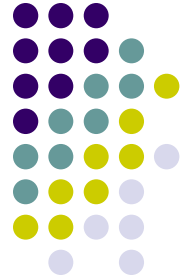
- Strong Market: 6% Vacancy
- 120 Million Square Feet Total
- 2.5 Million Per Year Net Absorption
- 60 million Square Feet in Approved DRI's
- 20+ Years of Supply
- High Competition

Retail

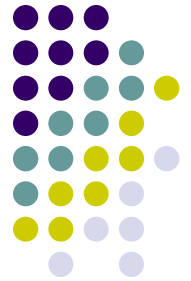


- High Competition
- 30 Million Square Feet Approved
- Community Retail Per 15,000 Residents
- Regional Mall Per 400,000 Residents
- East Toho Need – 6 Integrated Town Centers
- Mall Only in 10+ Year Term

Conclusion

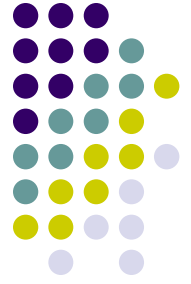


- Residential for Orlando MSA
- Integrated Community Retail
- Selective Office and Industrial



Planning For Success

- The Choice To Remain 'Rural' Is Not An Option
- By Focusing On Where You Will Urbanize
 - You Will Also -
Determine What Will Remain 'Rural'
- As A Community You Can Create The Vision

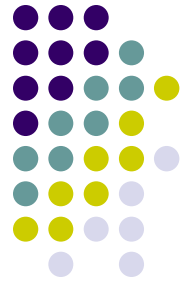


Minimize The Frustration

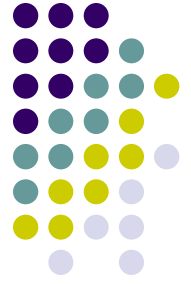
- Periods of Dynamic Growth Are Frustrating
 - Crowded Roads
 - Crowded Schools
 - Diminished Levels of Service
- Good Planning Minimizes The Problems
- Knowledge Of The End Product Helps

The Single Greatest Obstacle

- TRANSPORTATION -



- The Quality of Commerce and Lifestyle Both Depend On Adequate Transportation Systems
 - Upgrade of Existing Roads Needed
 - Planning For Future Roadways
 - Integration Of Transit
 - Include Future Transit Patterns
 - Pathways, Bikeways, and Trails
 - Pedestrian Mobility

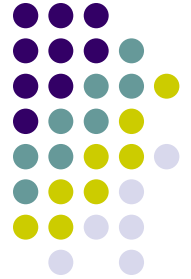


Additional Infrastructure

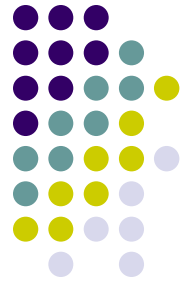
- Utility Extensions
- Municipal Services
- Education
- Housing Affordability
- Parks and Recreation
- Programs and Incentives

“Even If you are on the right track you’ll get run over if you just sit there”

Historic Patterns - Future Needs



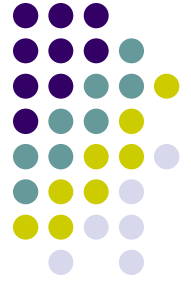
- Ranches To Ranchettes
- Early Planned Communities
- Future Models
 - Higher Densities - Growing Beyond 3/Acre
 - Diversity Of Housing Choices
 - Integration of Mixed Uses
 - Schools, Parks and Open Space



Think Strategically

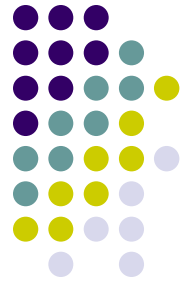
- The 'Private Sector' Mindset
 - Regulatory Practices That Move You Forward
 - Responding To Trends
 - Defined Goals - Flexible Options
 - Meeting Market Demands
- Stability Of Leadership
- Partnering In Good Times and Bad

The Region, The World and a Crystal Ball?



- Think Regionally -
Act Locally
- Identify Your Role In The Scheme Of Things
 - Population Creates Opportunity
 - Lifestyle Matters
- Create A 'Sense of Place' In A Tourism Driven Economy
- 'Open For Business' Attitude

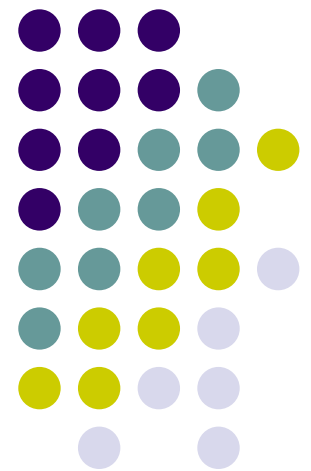
Planning - Preparation and Patience



- Have A Vision and Stick To It !
- Plan To Make It Happen
- Develop In A Proactive Manner
- Stay The Course (with Flexibility)
 - There Are No Overnight Success Stories
 - Make 'Yes' Easy For The Right Proposal
 - Be Willing To Say "No" (Especially In Tough Times)
- Election Cycles Can Be Trying Times

Planning and Design

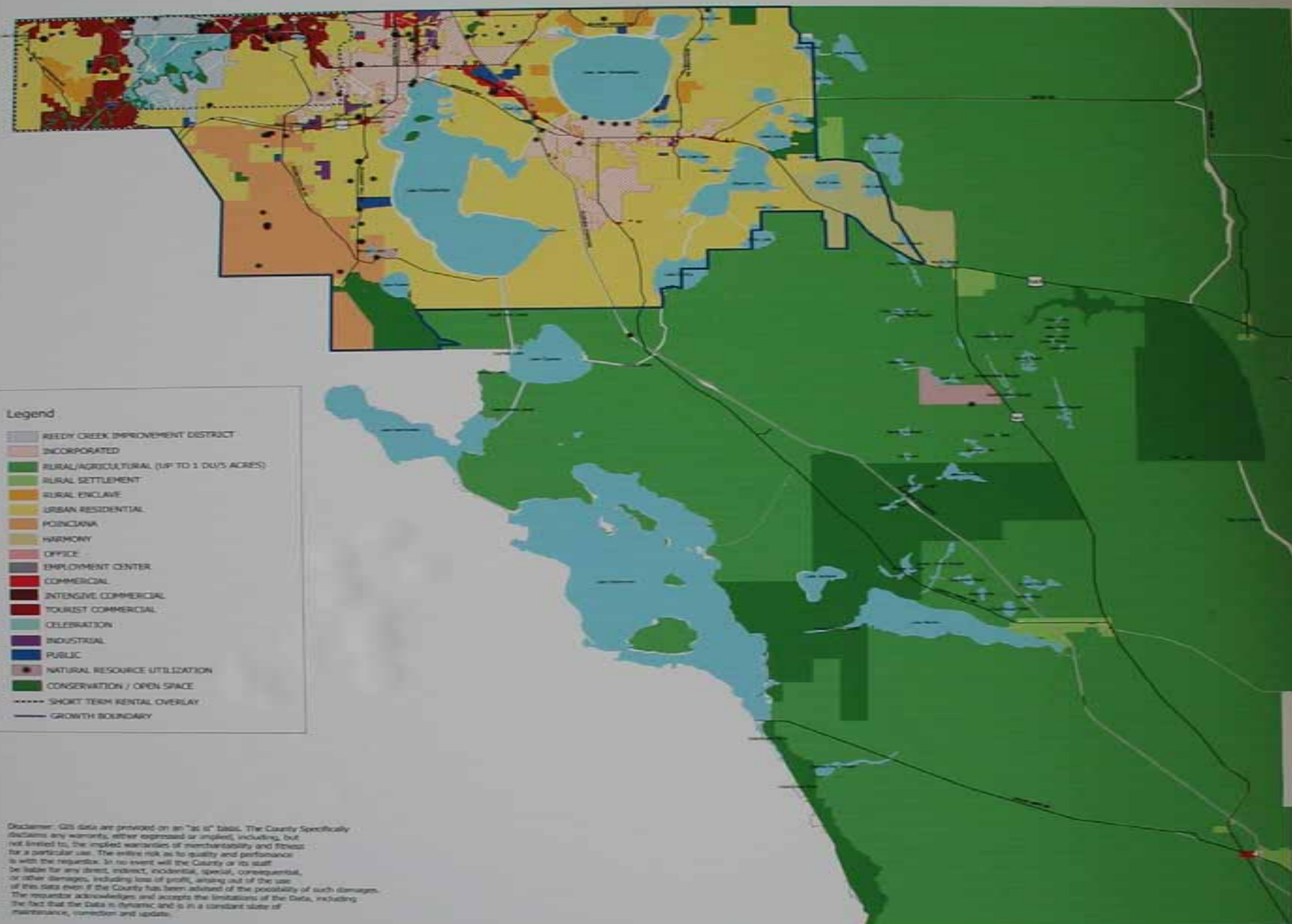
Pat Hawley
Douglas Wrenn

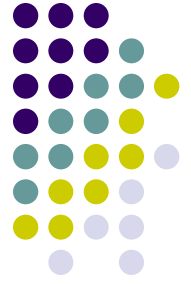


Community Building Potential



- Economic Development
- Public Enjoyment
- Civic Identity

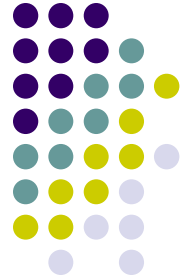


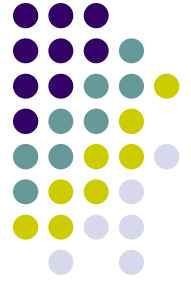


Not The Same As Regulating
the Planning and Design of
Multiple DRIs

Start With A Vision

- Natural, Cultural and Economic Assets
- Citizen Hopes and Aspirations

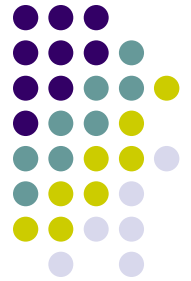




A Set of Guiding Principles

- Celebrate the Environment
- Encourage Economic Development
- Promote Opportunities for Public Interaction
- Allow Flexibility for the Long Term
- Risk Greatness

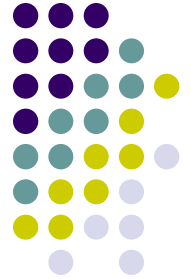
Create a Unified Vision for Lake Toho and Its Surroundings



- 5 DRIs
- Bella Lago
- Kissimmee Lakefront
- St. Cloud
- Remainder of Lakefront Property



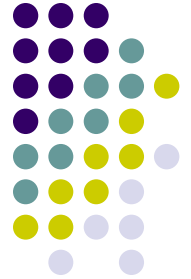
Hierarchy of Commercial Components



- Town Center
- Villages (DRIs)
- Neighborhoods



Set of Performance Standards



- Public Access to the Lake
- Cluster Development
- Connectivity
- Environmental Protection and Enhancement
- Density and Scale
- Mix of Uses
- Landscaping / Lighting / Signage
- Design Consistency for Public Improvements
- Quality of Public Building and Facilities



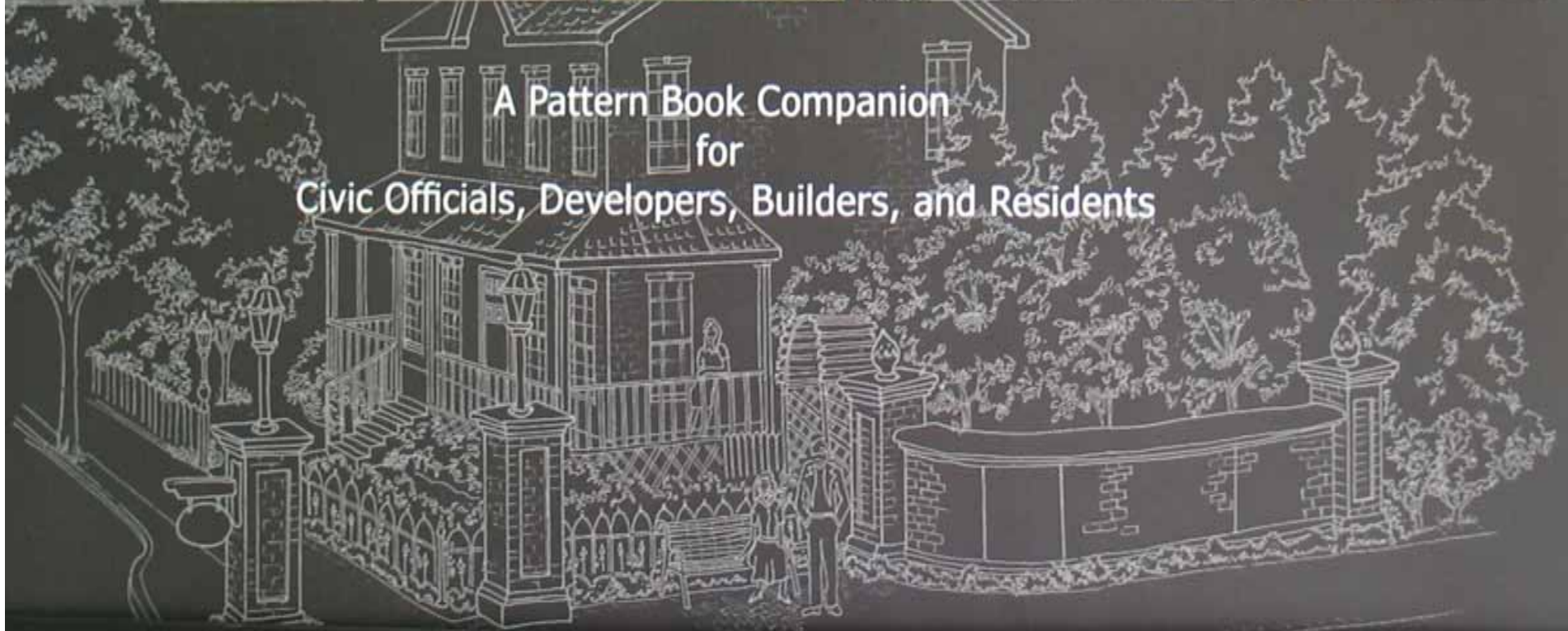
Community Designs Guidelines for Each Village (DRI)

Cannery Village

Milton, Delaware



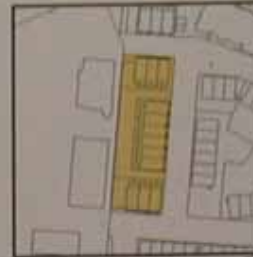
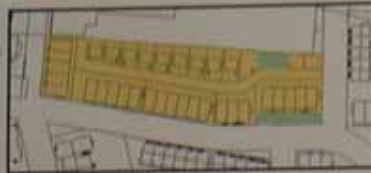
A Pattern Book Companion
for
Civic Officials, Developers, Builders, and Residents





NET AREA = 2.2 AC
TOTAL UNITS = 29
OF TOWN HOUSES, SINGLE
FAMILY COTTAGE, AND
SINGLE FAMILY
10.4 UNITS/A.C.

NET AREA = 2.1 AC
TOTAL UNITS = 40
OF TOWN HOUSES, SINGLE
FAMILY COTTAGE, AND
SINGLE FAMILY
19.1 UNITS/A.C.



NET AREA = 2.1 AC
TOTAL UNITS = 40
OF TOWN HOUSES, SINGLE
FAMILY COTTAGE, AND
SINGLE FAMILY
19.1 UNITS/A.C.

NET AREA = 4.2 AC
TOTAL UNITS = 46
OF TOWN HOUSES, SINGLE
FAMILY COTTAGE, AND
SINGLE FAMILY
10.7 UNITS/A.C.



NET AREA = 1.8 AC
TOTAL UNITS = 18
OF TOWN HOUSES, SINGLE
FAMILY COTTAGE, AND
SINGLE FAMILY
11.3 UNITS/A.C.

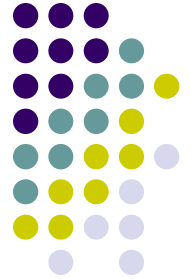


NET AREA = 1.7 AC
TOTAL UNITS = 21
OF TOWN HOUSES, SINGLE
FAMILY COTTAGE, AND
SINGLE FAMILY
12.4 UNITS/A.C.

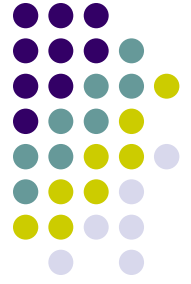


NET AREA = 2.2 AC
TOTAL UNITS = 46
OF TOWN HOUSES, SINGLE
FAMILY COTTAGE, AND
SINGLE FAMILY
10.7 UNITS/A.C.

Lake Toho Management Plan

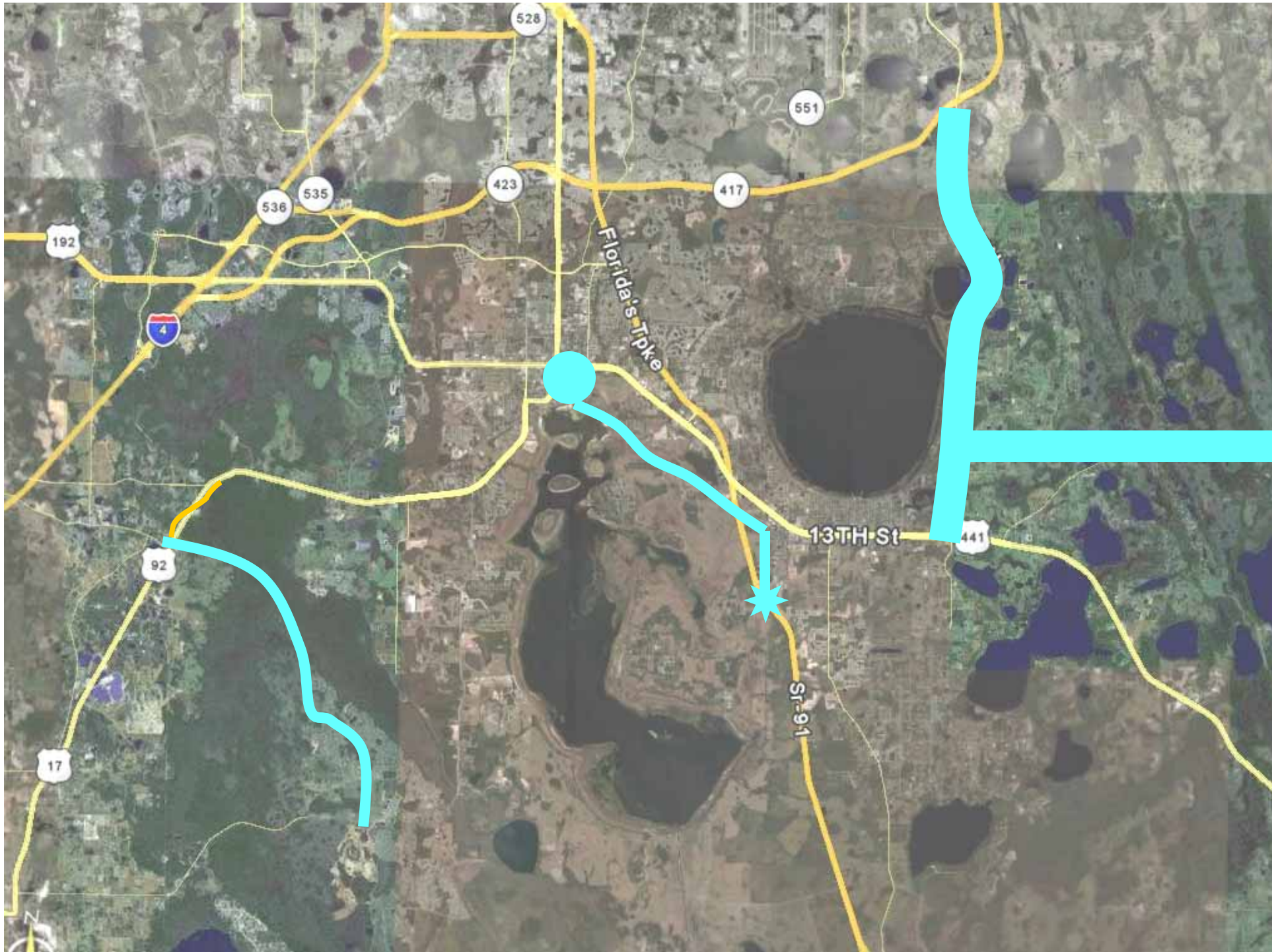


- Active Recreation
- Environmental Protection
- Passive Recreation



Transportation

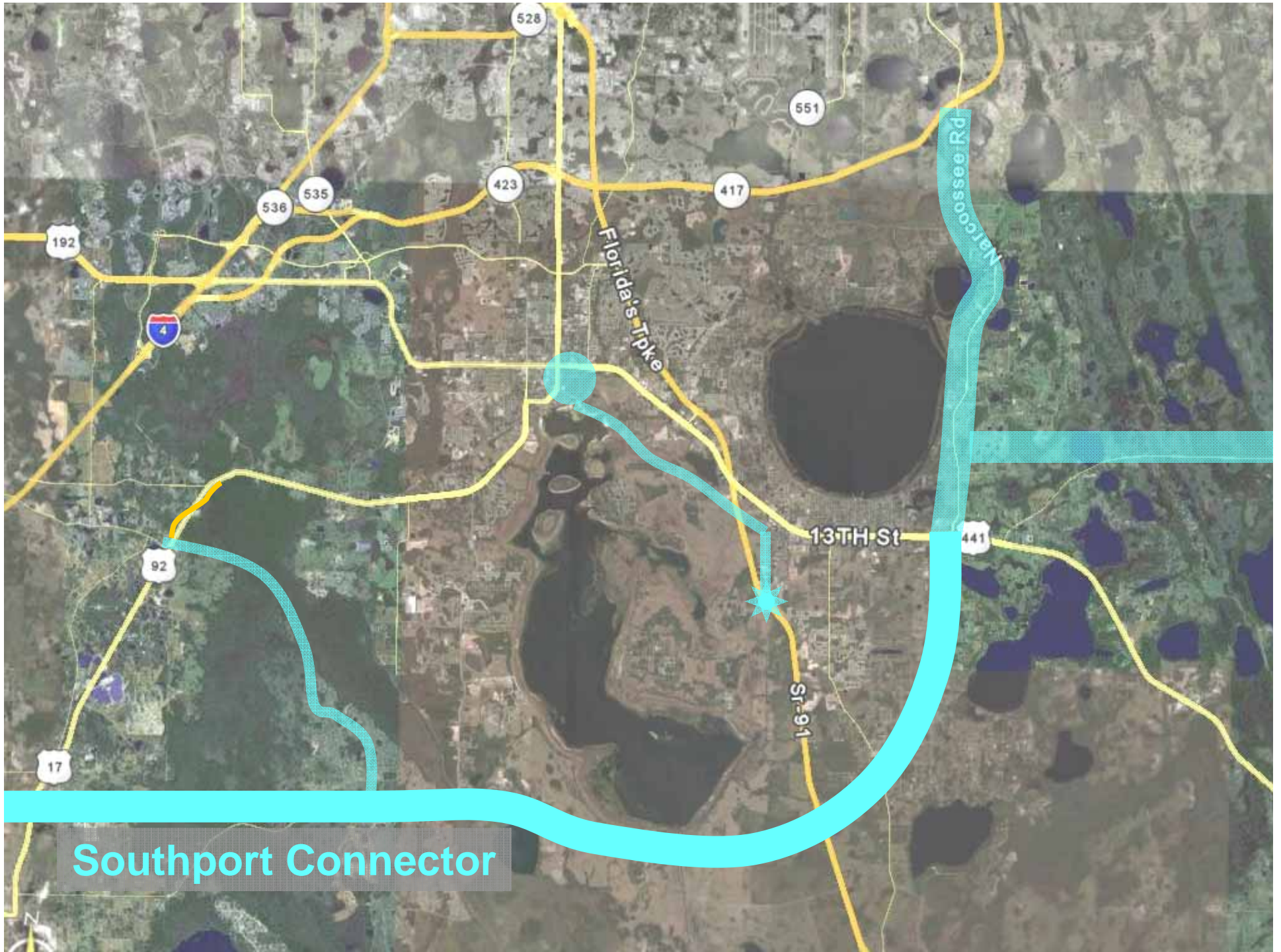
- Existing Regional System
 - Roads
 - Operating At or Above Capacity
 - Lack of Roads on south end of Study Area
 - Transit
 - Primary Link Between Kissimmee and Orlando
 - Secondary Links Within Kissimmee and St. Cloud
 - Pedestrians/Bicycles
 - Limited Amenities
 - Bill Johnson Memorial Pathway



Transportation

- Study Area DRI's
 - Mixed Use
 - Estimated 250,000 to 400,000 Daily Trips
 - Inter-DRI Coordination
 - Limited Connectivity Between DRI's

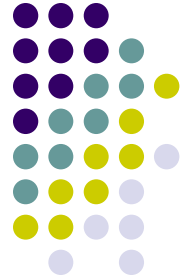




Transportation

- Internal Recommendations
 - External Connections
 - North-South 4-Lane Roadway (Convertible to 6)
 - Transit
 - Lakefront Corridor
 - Greenway
 - Bike/Ped Paths



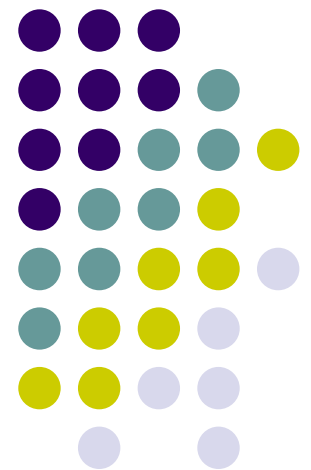


Transportation

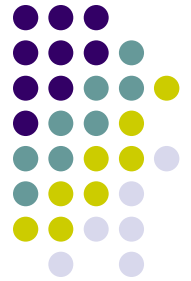
- Implementation
 - Pursue Fast Track Construction of County Planned Improvements
 - Evaluate Alternative Methods of Constructing Development Related Improvements
 - Toll Facilities
 - Community Development District
 - County Transportation Authority

Development and Implementation Strategies

David Godschalk
Ann Saegert

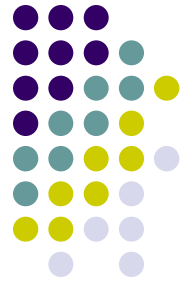


Rural to Suburban/Urban Transition Issues

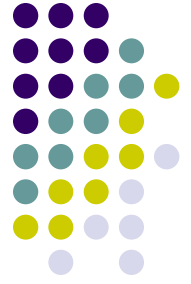


- Land Use Changes
 - Larger Scale
 - Faster Pace
 - Corporate vs Individual Decisions
- Lifestyle Changes
 - Informal to Formal Procedures (e.g., Interlocal Agreements)
 - Unwritten to Written Rules
 - Professional Staff for Technical Analyses and Consensus Building

Responding to Suburban/Urban Transition

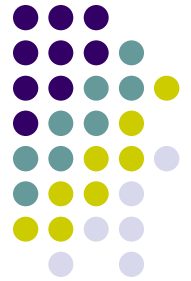


- Imagine Living and Working in Osceola County in 2025
- Translate Sustainable Development and Smart Growth Goals into Potential Scenarios
- Understand Options and Agree on Specific Vision of Desired Future



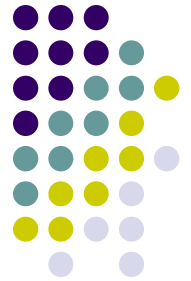
Critical Vision Principles

- Sustain Environmental Resources
- Provide Affordable Workforce Housing
- Partner with Regional Transportation and Economic Development Initiatives



Delineating Urban/Rural Line

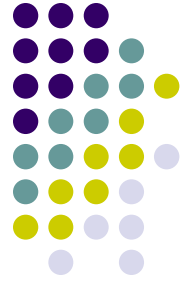
- Regulatory Strategy—Urban Growth Boundary (UGB)
 - Pro's
 - Predictable Location and Staging of Urban Growth
 - Reduced Costs of Urban Services and Facilities
 - Protection of Critical Environmental and Rural Areas
 - Con's
 - Reduced Returns to Rural Property Owners
 - Cost of Funding Projected Growth Needs
 - Lack of Success in Protecting Large Amounts of Rural Land



Delineating Urban/Rural Line

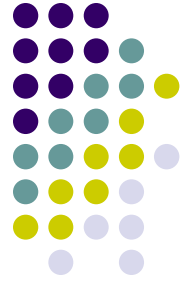
- Market-Based Strategy—Transfer of Development Rights (TDR)
 - Pro's
 - Return to Rural Property Owners from Sale of Rights
 - Continuation of Ranching and Other Rural Uses
 - Clustering Development in Designated Receiving Areas
 - Con's
 - Difficult to Make a Market for Rights
 - Opposition to Increased Density in Receiving Areas

Lake Tohopekaliga's Water Quality



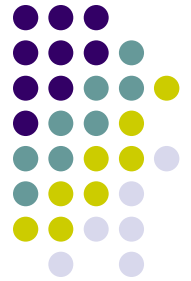
- Development Considerations:
 - Critical to Water Quality and Quantity, Storm Water Runoff and Flood Protection; At Risk From Poor Solid and Hazardous Waste Management Practices
 - More Critical with Anticipated Growth
 - Requires Regional Approach with Input From All Applicable Governmental Agencies

Lake Tohopekaliga's Water Quality



- Implementation:
 - Specific Locations and Standards for New Facilities, Detention Ponds, Waterways, Buffer Areas, and Vegetation and Wildlife Management in Development Plans and Codes
 - Land Dedication Requirements
 - Impact Fees and Community Development Districts
 - Equalize Economic Impacts
 - Conduct Recreation Carrying Capacity Study and Implementation Recommendations

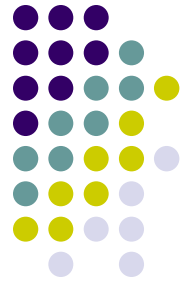
Strategies for Equitably Allocating the Costs of Quality Recreational and Conservation Areas



Development Strategy:

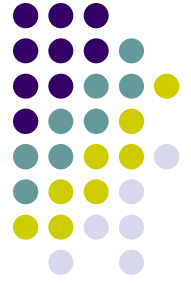
- Specific Locations and Standards for New Recreational Facilities and Conservation Areas in Development Plans and Codes

Strategies for Equitably Allocating the Costs of Quality Recreational and Conservation Areas



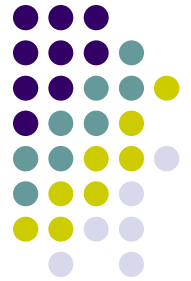
- Implementation:
 - Land Dedication Requirements
 - Consider Recreation Impact Fees for New Residential Construction
 - Service Charges and User Fees
 - Community Development Districts

Financing Schools to Accommodate Future Development



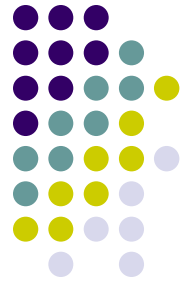
- Work Closely With the School District to Identify the Number, Size and Location of Schools to Accommodate Growth, and Include These Requirements in the Development Plans and Codes
- Student Headcount Projections
- Require Payment of Education Impact Fees Early in the Approval/Permitting Process

Financing Schools to Accommodate Future Development



- Developer Land Dedications
- Community Development Districts and Education Facility Districts
- Reconsider Current Education Impact Fee Exemptions for Resort, Timeshare and Other Limited Occupancy Residential Products

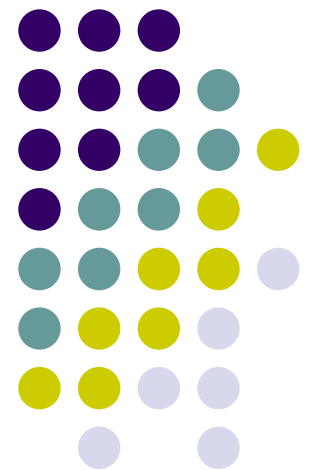
Financing Schools to Accommodate Future Development

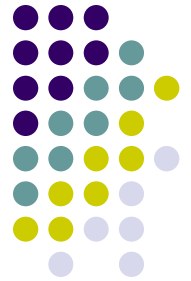


- Encourage the School District to Build Schools Near Where People Live
- Encourage Co-Location of New Schools and Other Community Facilities and Services
 - Libraries, Parks and Other Community Facilities
 - Off-Core Hours Programs for Younger Children and Teens; Parenting and English as a Second Language Program; Personal Enrichment Programs and Other Activities
- County Funding of Infrastructure Costs for new Schools Not Paid From Other Sources

Conclusions and Recommendations

Roger Galatas

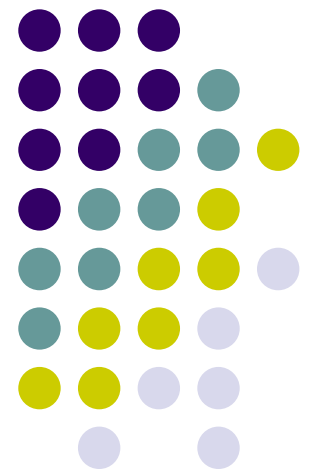




- Osceola in the Path of Growth
- Regional Relationships are Important
- Form Your Vision for the Future – Be Patient
- Focus on Building Community Rather than Land Development
- Address Quality of Life Issues
- Important Community Building Blocks
 - Transportation
 - Education
 - Environment/Open Space
 - Public Safety



Osceola County, Florida Vision and Growth Strategy



**Advisory Services Panel
January 22-27, 2006**