Assessing the Property Impacts of SunRail Stations

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Final Report

Executive Summary

There are many benefits to fixed route transit, although some of these may not be immediately realized or quantified. One potential long-term benefit of these investments is the development and real estate impacts induced by the transit system. Community support for public transit could come more easily if transit systems could demonstrate positive fiscal impacts beyond those achieved through fare box returns. Other than direct operating revenues generated largely from fares, transit systems have the potential to generate additional public revenues through catalyzing development around transit stations and along transit routes, yielding increased property values and property taxes. The quantification of these development-related revenue streams can be a useful input into fiscal analyses of transit investments, and may demonstrate that these systems offer a greater return on investment than traditional cost recovery measures might suggest.

This report provides an assessment of the property value changes and development impacts that have occurred around SunRail stations since the system's opening. Using property appraiser data, the study team estimates tax revenue impacts that resulted from property value changes around the stations. As detailed in this report, the evidence shows that development around stations has been highly variable across the system, with some stations having experienced modest to substantial new development and other no new development of note. However, the evidence does indicate that SunRail stations have generally outperformed control areas that were identified as part of this study. The evidence illustrates that SunRail has yielded some substantial positive property value impacts - and by extension increased property taxes – to the affected jurisdictions. SunRail investments have catalyzed new development around some stations and yielded measurable (re)development benefits in the form of property tax increases from new transit-oriented developments.

While some stations have experienced new development, a number of other stations have not. Case studies of a subset of stations point to the mix of factors that have contributed to the relative success of redevelopment efforts around some SunRail stations. As expected, the location of the station within the larger system plays a factor, with those stations at the ends of the system showing very little development to date, whereas more centrally located stations have experienced more growth. In addition, the neighborhood setting, land use mix, and other local factors have played a role in station redevelopment. Lastly, the evidence points to the important role of focused, strategic land use planning around stations and complementary infrastructure investments in promoting successful (re)development initiatives around SunRail stations.

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Chapter 1: Introduction

1.1 Study Overview

Transit systems in the US generally require public subsidies in order to sustain services. According to the 2012 National Transit Database, aggregate operating revenues in the US only covered a third of operating costs and almost none of the capital costs. The total amount of annual public transit subsidies in the US has reached more than 40 billion dollars. While many would argue that these subsidies are justified by the public benefits of transit provision (e.g., providing mobility to disadvantaged groups and reducing the negative impacts of driving), the non-monetary nature of the benefits makes such justifications difficult. Robust support of transit investments among policy makers and the general public would come more easily if transit systems could demonstrate positive fiscal impacts beyond those achieved through fare box returns.

Other than direct operating revenues generated largely from fares, transit systems may also generate additional public revenues through development impacts around transit stations and along transit routes. This revenue can take the form of increased property taxes, sales taxes, and impact fee revenues associated with new development attracted to station areas. The advantage of capturing these increased values is that they can be captured and used to support the transit services long-term. The quantification of these indirect, development-related revenue streams can be a useful input into fiscal analyses of transit investments, and may help demonstrate that these systems offer a greater return on investment than traditional cost recovery measures might suggest. In addition to the revenue streams, the rail system also helps to revitalized lack luster neighborhoods creating vibrant, active, thriving communities.

Focusing on these issues in a Florida context, this study seeks to benchmark and quantify the property value changes and estimate the development-related tax revenues associated with the new SunRail commuter rail system in the Orlando Metropolitan Area. The recent construction of the SunRail system allows for an assessment of the development and property value impacts of this investment in the project's early years.

This project's final report provides an assessment of the property value changes and development impacts that have occurred around SunRail stations since the system's opening. It further estimates the additional tax revenues associated with the new development and increases in property values. As detailed in this report, the evidence shows that development around stations has been highly variable across the system, with

some stations having experienced modest to substantial new development and others experiencing no development of note. However, the evidence does indicate that SunRail stations have generally outperformed control areas that were identified as part of this study. This evidence illustrates that SunRail has brought substantial positive property value impacts - and by extension increased property taxes – to the affected jurisdictions. SunRail investments have catalyzed new development around some stations and yielded measurable economic benefits in the form of property tax increases from new transit oriented development.

While some stations have experienced new development, a number of other stations have not. Case studies of a subset of stations point to the mix of factors that have contributed to the relative success of redevelopment efforts around SunRail stations. As expected, the location of the station within the larger system plays a factor, with those stations at the ends of the system showing very little development to date, whereas more centrally located stations have experienced more development. In addition, the neighborhood setting, land use mix, and other local factors have played a role in station redevelopment. Lastly, the evidence points to the important role of focused, strategic land use planning around stations as well as complementary infrastructure investments in promoting successful (re)development initiatives around SunRail stations.

1.2 Organization of the Report

The report is organized into ten chapters, including this introductory chapter. Chapter 2 presents a summary of the academic and professional literature on the development impacts around rail transit stations. This literature yields a few conclusions relevant to the SunRail system, including the unevenness of development around station areas, the importance of station locations, and the role of local actors in promoting and inhibiting station area (re)development.

Chapter 3 presents a summary of a set of property value and tax revenue analyses. The research design employed a paired case study approach. Under this approach the research team analyzed property value changes and estimated tax revenues for 1) areas around SunRail stations (the experimental group) and 2) control areas with similar characteristics, but no rail station investments (the control group). The results indicate that SunRail stations generally outperformed the control areas, with greater growth in property values and the associated property taxes. However, these results varied station by station, with a small set of stations lagging behind their control areas or performing at roughly the same level.

Chapters 4-11 present a set of detailed case studies for seven selected SunRail stations. The case study stations were chosen to capture the two ends of the spectrum, capturing the development impacts in SunRail station areas that 1) experienced much greater levels of development than other stations and 2) experienced little redevelopment. The case studies allowed the research team to examine more closely those factors that contributed to (or limited) redevelopment efforts around the SunRail stations.

Chapter 12, the concluding chapter, summarizes the findings from these analyses. The chapter also suggests ways that FDOT and its partners can play to better understand the property value impacts of SunRail and to promote redevelopment around stations.

Chapter 2: Literature Review

2.1 Introduction

As part of this project the research team reviewed relevant academic and industry research on the property and development impacts of rail transit investments on areas around rail stations. This chapter summarizes the evidence on the linkage between investments in rail transit and new development around rail stations.

2.2 Rail Systems and Urban Development

The costs of investing in rail can be quite overwhelming. According to a recent report by *Reconnecting America*, the capital costs of investing in commuter rail alone can range from $3 million to $25 million per mile, which requires large public subsidies to build, expand, and operate these systems.[1] In the United States, transit agencies' operating revenues typically cover only a third of the operating costs and almost none of the capital costs[2]. Today, the total amount of annual public transit subsidies in the US has reached more than $40 billion dollars.[2] While many would argue that these subsidies are justified by the public benefits they provide (e.g., providing mobility to disadvantaged groups and reducing the negative impacts of driving), the non-monetary nature of such benefits makes justification difficult.

Numerous studies have analyzed the impacts of public investments in fixed rail transit outside the realm of the fare box and found that the economic benefits of transit do not stop at the turnstile.[3, 4, 5, 6, 7] In fact, fixed rail transit systems can generate significant public revenue through property taxes, sales taxes, and impact fee revenues associated with new development attracted to station areas.[7, 8, 9] The purpose of this literature review is to assess the evidence on the development impacts of fixed rail transit investments and provide guidelines for future project work assessing the development impacts of SunRail in metropolitan Orlando.

2.3 The Benefits of Investing in Rail

Investing in rail transit can result in a variety of benefits to jurisdictions, including improved social, economic, and environmental conditions, as summarized in Table 2-1 below.[7, 8, 10] First and foremost, transit ensures all residents can meet their travel needs, especially those who are unable to drive. Transit also promotes healthy and sustainable communities through higher levels of walking and biking associated with transit use, and

by helping to reduce automobile dependency and the negative externalities associated with driving. Automobiles place considerable pressures on transportation networks, requiring continual roadway and highway expansion that can result in many negative impacts to the environment including carbon emissions, harm to wetlands, farmlands, wildlife habitats, and water resources.[11] Investing in rail can lessen these negative effects by increasing a transportation network's capacity with less environmental and land use impacts.[8, 10] Rail can also help to alleviate congestion, promote local and regional economic growth, and influence urban development by directing growth into certain nodes or corridors.[12]

Table 2-1: The Benefits of Transit[7, 8, 10]

Environmental Benefits	Social Benefits
▪ Reduced traffic congestion	▪ Improved social cohesion through positive interactions among people in a community
▪ Reduced fuel consumption	▪ Improved fitness and health as a result of increased walking and biking
▪ Better air quality	▪ Reduced traffic accidents
▪ Reduced sprawl	▪ Improved transportation options, particularly for non-drivers
▪ Conservation of open space	▪ Reduced consumer transportation costs
Fiscal Benefits	▪ Expanded labor market shed for employers
▪ Reduced road and parking facility costs	▪ Improved access to job opportunities for workers (and increased labor market shed for employers)
▪ Economic development benefits through agglomeration efficiencies and increased productivity	▪ Neighborhood revitalization
▪ Increased property values	
▪ Increased property tax revenues	

One of the challenges to assessing many of these benefits is they can be difficult to measure and monetize, consequently the benefits of rail systems are often undervalued in cost/benefit analyses.[9] Without clear monetary benefits, justifying rail investments to policymakers and gaining public support of rail systems can be difficult. However, research has shown that one of the most significant and easily measurable benefits of rail systems is its impact on property values and development patterns.[7, 10] Since these impacts can be translated into property tax revenue, quantifying the impact of rail systems on property values and property taxes is a vital part of developing robust support for transit investments.[7] Before considering prior work analyzing existing evidence on the impacts of public investments on property values, it is necessary to present an overview of how investments in rail systems impact property values.

2.4 How and Why Rail Systems Impact Property Values and Development Patterns

In addition to a property's physical characteristics (lot size, topography, condition, etc.), a property's accessibility to jobs, shopping opportunities, amenities, and other destinations is typically considered among the most important determinants of land value.[12, 13, 14] Since rail investments can significantly improve the accessibility of properties in close proximity to transit stations, developing a rail system can create property value premiums for properties within a certain distance of a rail station.[3, 7, 17] Furthermore, households that locate near public transit also have the option to spend less on transportation and thus can afford to spend more on housing.[3, 14]

The accessibility advantages provided by rail systems can also attract new commercial and residential development that would have occurred elsewhere in a region.[9] The presence of transit and transit-oriented development can even encourage population growth within a jurisdiction by attracting new residents. According to a survey conducted by the Urban Land Institute, when asked about the importance of specific community features Millennials ranked the following characteristics highly: "a short distance to work and school (ranked highly by 82 percent), walkability (76 percent), proximity to shopping and entertainment (71 percent), and convenience of public transportation (57 percent).[18]" Many communities have realized generational changes in lifestyle preferences regarding housing, transportation, and community, and are investing in these areas to attract new residents. The presence of rail in particular is an attractive community feature as it provides a competitive option to driving and a superior service quality (e.g., speed, comfort, convenience, and reliability) compared to traditional bus transit service.[19]

Some studies have found that transit lines and transit stations do not always have positive impacts for communities, in large part related to perceived nuisance effects such as noise, pollution, increased local vehicle traffic from transit passengers, and crime.[5, 9, 21, 22] These nuisance effects can reduce property values very close to stations or lines.[9] For instance, Bollinger et al. (1998) found a reduction in office rent values within a quarter of a mile of Atlanta's MARTA stations due to the perceived risk of safety near stations.[22] However, literature on the property value impacts far more often finds net positive impacts due the improved accessibility offered by transit.

2.5 Estimating the Impacts of Rail Systems on Property Values

Numerous studies have estimated the impact of rail systems on surrounding property values, with CTOD (2008) offering a detailed assessment of all studies conducted prior to 2008[7] and Litman's (2015) recent update to earlier work offering detailed summaries of these studies.[9] While results have found wide variation in the magnitude of the property value premium, the literature suggests that investments in fixed rail transit systems do have a positive effect on property values surrounding transit stations. This section summarizes this body of literature and identifies factors that contribute to the direction and magnitude of impacts.

When estimating the development impacts of a rail system it is important to consider a wide range of contextual factors that may impact a community's land values. These factors are presented in Table 2-2.

Parsing out and controlling for these factors has proved a challenge for researchers investigating the property impacts of transit investments. As a consequence, researchers generally utilize one of two methodologies to factor in context-specific attributes. The most common method is a cross-sectional (i.e., a single point in time) hedonic price model, which uses a regression model "to separate out the effects of housing characteristics from the impact of location.[3]" In other words, the price of a property near a station is compared to the price of properties not near a station after statistically controlling for other relevant factors. A smaller set of researchers have utilized a pre/post methodology, "which allows researchers to investigate changes in nearby housing costs after public transit service was added or expanded.[3]" The price changes are then compared to control areas except without access to a transit station. This type of longitudinal assessment provides more direct causal inferences.[24] However, while these methodologies can be effective at determining the average property value premiums within a study area, they often struggle to parse out how these premiums vary within a given context. In fact, property value premiums can vary from region to region, station to station, or even parcel to parcel depending on the context, and the parcel's development potential.[25]

Table 2-2: Factors Influencing the Development Impacts of Transit[3, 7, 9, 23]

Transit System Factors	Neighborhood Conditions
• Type of Transit Investment (e.g. light rail vs. heavy rail) • Accessibility Benefits Provided by the System • Transit System Life Maturity	• Neighborhood Profile (e.g. Population, Income, Race/Ethnicity) • Mix of Uses and Densities in the Station Area • Housing Types and Mixes in the Station Area • Amount of Vacant Land in Station Area • The Friction of Distance
Macro-Economic Factors	**Planning and Land Use Factors**
• Health of the National/Regional Economy • Health of the Regional Housing Market	• Zoning and Other Land Development Regulations within the Station Area • Vision for Station Areas in Local Plans • Commitment to a (Re)Development Agenda

Consequently, it is not surprising that studies examining the impact of rail stations on property values have produced wide ranging results. Studies have found that rail stations can increase the value of residential land within a quarter mile of the station by anywhere from 3% to 45%.[6, 7, 10] It is important to note that despite the methodological difficulties and the diversity of results, the literature generally aligns with the conclusion that the presence of a transit station does increase the value of the surrounding properties to some extent. Due to variation in the contexts and methodologies utilized by past studies, the fact that "properties near stations sell at a small to modest premium," may be the only insight that "one might safely generalize from the body of literature,[25]" but it remains a clear indication that rail systems have a positive fiscal impact beyond fare box revenue.

Huang (1996) found that a major problem researchers face when estimating a rail system's impact on property values is that new development associated with a transit station may not occur immediately after a new transit line is announced or constructed,

as developers may wait until market and political conditions are favorable before building.[12] Further, upon development, increases in land values may take time to appreciate and fully appear in home prices and rents.[12] Consequently, the maturity of the rail system is a major potential determinant of the estimated property value premium. The literature generally agrees that the older a transit system is, the more likely its benefits are to be captured in property values.[26]

Bay Area Rapid Transit (BART) in the San Francisco Bay Area provides an excellent case study of this phenomenon. A few years following BART's opening in 1973, an impact study was commissioned to estimate its land use impacts. The initial study concluded that BART played a fairly modest, though not inconsequential, role in shaping metropolitan growth and land-use patterns.[27] They also found that BART's cumulative impact had continued to grow over time. Among the station areas studied in the update, Cervero & Landis (1997) found that over time BART sparked a significant amount of non-residential (commercial, office, industrial) development.[27] Between 1965 and 1995, non-residential development within a half mile BART Stations increase from around 45 million to nearly 100 million square feet. While residential development experienced significantly less growth than non-residential development, multi-family housing within the station areas grew steadily. In the end, vacant land within half-mile buffers of BART stations fell sharply from approximately 27% of total area in 1965 to just 4% of area in 1990, suggesting that areas within close proximity to station areas were especially attractive for new development. This study highlights the important factors of time and distance in understanding the impacts of rail investments on development patterns and property values.

Some studies have found property value impacts at all stages of a rail system's life cycle, beginning with the announcement of a rail line and its stations. For example,

Immergluck (2009) found that the announcement of a new transit line can increase property values and induce speculation and gentrification.[28] Using data on vacant land sales in Washington County (Oregon), Knaap, Ding, & Hopkins (2001) showed that plans for light rail investment have a positive influence on land values, even before the infrastructure is in place.[17] Within one year after the announcement of station areas, land values within a half-mile of station areas were approximately 70 percent higher. However, the values of parcels sold two years after the announcement were only 20 percent higher than parcels sold before the announcement.[17] The authors were uncertain whether this was attributable to a "speculative bubble" or if these price effects would be sustained over time.

Figure 1, excerpted from the CTOD (2008) report, summarizes the theoretical property value impacts associated with new transit systems.[7] There is evidence that the announcement of new station locations generates an initial round of land speculation and investment, and in subsequent years property values increase until the system opens. After opening, property value increases may continue for stations where development opportunity and market demand is robust.

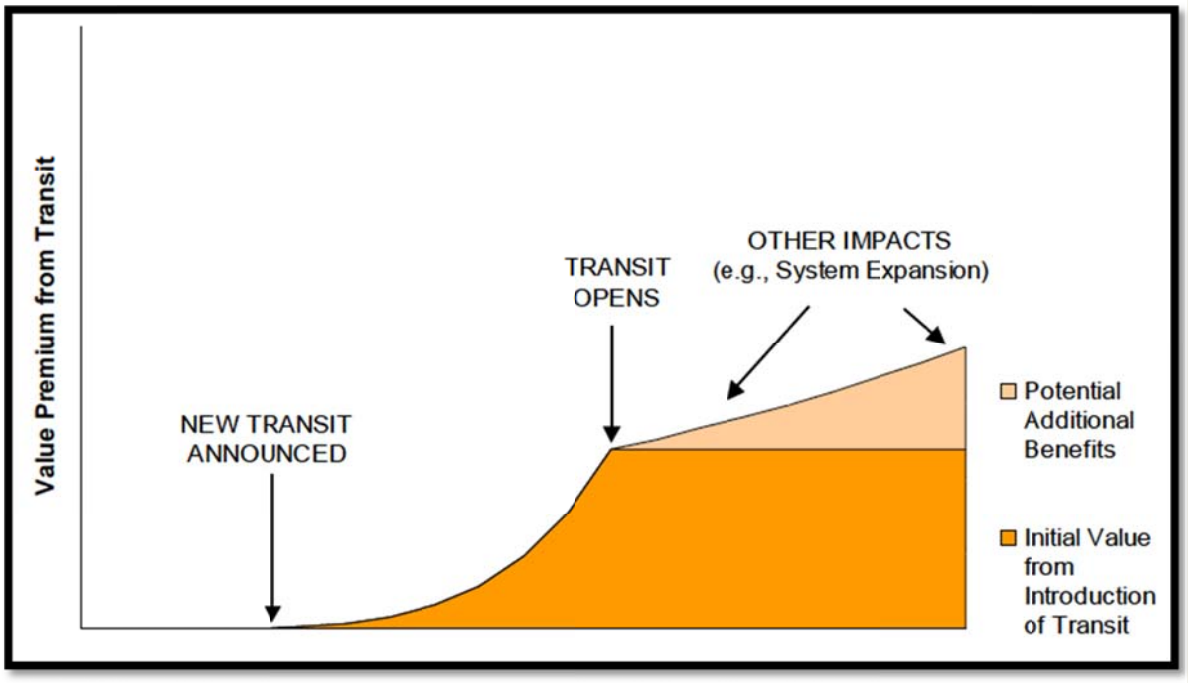

Figure 2-1: The Time Dimension of System Impacts (aka "The Value Curve in Theory")[7]

Another factor that determines the level of impact rail stations have on surrounding property values and development patterns is proximity to a station. Many studies have found that proximity to transit leads to higher home values and rents, although the magnitude of this effect is debated[3, 7, 17, 27] and this effect has not been a universal finding.[29] In the past, studies have focused on the economic impacts of investing in rail using quarter-mile and half-mile buffers. In most cases, researchers have found a positive association with increased development activity within a quarter-mile to half-mile of rail station areas, with the most pronounced effects occurring within the quarter-mile distance.[30] A study of transit-oriented development sponsored by the Federal Transit Administration found: "average housing value premiums associated with being near a station (usually expressed as being within ¼ to ½ mile of a station) are 6.4% in Philadelphia, 6.7% in Boston, 10.6% in Portland, 17% in San Diego, 20% in Chicago, 24% in Dallas, and 45% in Santa Clara County.[10]" Further, proximity to a station can have varying effects on different types of properties. A study by Mohammed et al. (2013) found that commercial properties appear to experience a greater increase in their values when compared to residential properties.[23]

There is some evidence that rail's negative externalities, such as noise pollution, and perceived and actual increases in crime, can have a negative effect on properties in extremely close proximity to rail stations.[14] However, Kilpatrick et al. (2007) reason that accessibility is what creates value and that accessibility is gained by proximity to stations, stops, and on ramps, but not to the line or the highway in general.[14] In an attempt to isolate potential negative externalities, Kilpatrick et al. (2007) investigated these disbenefits using two different empirical models, one that included both access benefits and negative externalities, and another without the access benefits.[14] They determined that proximity to the transit corridor alone without direct access to the system conveyed a negative impact on nearby housing values. This suggests that negative externalities have the potential to diminish property values in close proximity to a rail corridor.

Two other factors that have been shown to affect the magnitude of rail station's impact on surrounding property values are the type of rail system that is developed and the socio-economic conditions of the context neighborhood.[23, 31] The literature indicates that heavy and commuter rail systems tend to enhance land and property values to a greater extent than light rail.[23] Higher capacities and greater accessibility impacts appear to produce greater property value effects. In terms of neighborhood context, Gatzlaff & Smith (1993) analyzed the impacts of the Miami Metrorail system on the sales prices of single-family homes before and after the announcement of the construction of the system in 1980.[31] They found that stations within higher income neighborhoods experienced property values premiums, while stations in lower income areas experienced no impact at all. Their

findings demonstrate how the impact of transit stations on the station area can vary from station to station based on neighborhood contextual factors.

In their 2008 report *Capturing the Value of Transit*, the Center for Transit-Oriented Development undertook a comprehensive review of studies of the property value impacts of rail systems. They offer the best summary assessment of the property impacts of these transportation investments, shown in Table 2-3 below. The major takeaway from their analysis is that rail systems do positively impact values in areas around transit stations across a broad range of land uses.

Table 2-3: Summary of Estimated Property Value Premiums by Land Use[7]

Land Use	Range of Property Value Premium
Single Family Residential	+2% w/in 200 ft of station (San Diego Trolley, 1992) to +32% w/in 100 ft of station (St. Louis MetroLink Light Rail, 2004)
Condominium	+2% to 18% w/in 2,640 ft of station (San Diego Trolley, 2001)
Apartment	+0% to 4% w/in 2,640 ft of station (San Diego Trolley, 2001) to +45% w/in 1,320 ft of station (VTA Light Rail, 2004)
Office	+9% w/in 300 ft of station (Washington Metrorail, 1981) to +120% w/in 1,320 ft of station (VTA Light Rail, 2004)
Retail	+1% w/in 500 ft of station (BART, 1978) to +167% w/in 200 ft of station (San Diego Trolley, 2004)

2.6 Property Value Impact Cases

This section provides details on development and property value impacts for the Dallas Area Rapid Transit system and the METRO Blue Line in Minneapolis. These cases are presented because of the detail and care with which these studies were undertaken, and because these studies will be used to help shape the research design for this SunRail project.

Dallas Area Rapid Transit Light Rail System

The Dallas Area Rapid Transit (DART) rail system is comprised of 90 miles between its four lines, making it the longest light rail system in the United States. Between 1996 and

2013 the DART rail system expanded to 60 stations, broadening its service from the City of Dallas to surrounding suburbs. A recent report prepared by the Center for Economic Development and Research at the University of North Texas found the DART light rail system to have a considerable impact on patterns of development within a quarter mile of DART station areas.[32]

That research team analyzed property values for industrial, multi-family, office, retail and single-family properties within a quarter-mile of stations, and compared the station areas to control areas. Control areas were defined along the major roadways closest to the rail line at the next major intersection without a DART station. For the impacts of existing development, the analysis was performed in ArcGIS using parcel data from appraisal districts for the three counties with light rail stations. For the impacts of future development, researchers used secondary sources such as newspapers and online journals to examine the value of projects announced, planned, and under construction. In addition, the research team contacted community members with special knowledge of local real estate development and performed field observations along the entire DART rail line to examine on-going development and identify sites of proposed projects.

According to the study, new development within quarter-mile buffered areas increased from just before the opening of the starter system in 1996, through early 2013. In the 17 year period of study new development in the station areas totaled more than $1.5 billion in valuation compared to roughly $600 million in the control areas. The researchers found notable differences in property value impacts for differing land uses. Among the most notable findings were that multifamily and office properties were especially drawn to the station areas, retail development was attracted to station areas, although to a lesser extent, and high-end single-family residential development was also attracted to select station areas often associated with a park and ride.[32] Overall, researchers estimated that over $36 million in tax revenue was collected within DART study area, compared to $14 million in control areas.

Similar to previous studies, property and rental premiums decreased with greater distance from the station. Reflecting the expected distance-decay function, Nelson et al. (2015) found that premiums existed as far away as 1.85 miles from certain stations, but there was a decline the further one moves away from stations.[33] The analysis found that premiums decreased roughly 25% after 0.25 miles, 50% at about 0.56 miles, and 75% by 0.93 miles.[33]

The METRO Blue Line, Minneapolis

The METRO Blue Line (formerly the Hiawatha Line) is a 12-mile light rail line in Minnesota that connects downtown Minneapolis to its southern suburbs. It opened in 2004, just west of an existing highway and industrial corridor, and has been deemed a success since its opening. Less than two years after service began, the METRO Blue Line had already exceeded its 2020 weekday ridership goal of 24,800.[34] According to ridership report archives of the American Public Transportation Association, the METRO Blue line accounts for approximately 13% of Metro Transit's total ridership. Today, the METRO Blue line serves 19 stations, with 10 future stations proposed.

To examine the impacts of the METRO Blue line on commercial and industrial properties, Ko and Cao (2010) of the University of Minnesota used a hedonic price model to capture the effect of access to the Hiawatha LRT, controlling for other factors.[35] Using this methodology, the researchers were able to estimate the Blue Line's impact by breaking down the characteristics associated with the property's value, such as location and structural attributes, and obtaining each attribute's contributory value. Further, the researchers compared the study area as defined by one-mile buffer areas to a sub-region in order to gain a better understanding of price fluctuations in the real estate market.

Ko and Cao (2010) found that during the initial construction phases of the METRO Blue Line, per square foot building values decreased within a quarter-mile buffer of the station areas due to perceived nuisance effects associated with construction and pre-existing land uses of the corridor.[35] Nuisance effects associated with pre-existing land uses of the corridor persisted after construction, but overall a net increase in the value of single-family and multifamily homes west of the line was attributed to a result of improved accessibility. Single-family homes within one-half mile of a station sold for $5,229 more after 2004, compared to similar homes in southeast Minneapolis that were located farther from the station area. Multi-family properties also benefited, with premiums estimated at $15,755 after the line opened. By 2007, after the line had been in place for three years, per square foot building values within a quarter-mile buffer had increased over 38 percent.

Similar to the findings of the DART impact studies, Ko and Cao (2010) found that benefits of the METRO Blue Line exceeded the expected quarter-mile and half-mile radii.[35] Notably, they found an overall increase in demand for commercial and industrial properties within a radius of one-mile along the light rail corridor. However, the study was unable to ascertain whether the increase in demand generated new economic benefits, or if the increases were simply redistributed at the expense of other areas in the region.

The Austin MetroRail Commuter Line

In November 2004, residents in the Austin metropolitan region voted to develop a commuter rail line along an old freight rail corridor, running from downtown Austin to the northern suburb of Leander. The MetroRail line project, which opened in 2010, is part of a suite of projects included in the region's long-range transit plan (Capital Metro's "All Systems Go" transit plan). The plan offers a vision for the Austin region that includes a range of rail and bus investments to promote mobility and combat congestion.[36] Two years after opening, the MetroRail commuter line was attracting 1,800 riders on the average weekday.[37]

Although no formal, academic study has been completed to date, the *Austin American-Statesmen* undertook a detailed review of the development impacts around the MetroRail stations at the two-year anniversary of the system's opening in March, 2012.[37, 38] In its analysis of development permits and construction activity, the newspaper concluded that only three of the nine stations had produced any development that could be linked to the MetroRail system. The total development impacts included several hundred new housing units and modest commercial development only in a few locations.[37]

A station-by-station review determined that there were plans for transit-oriented development around certain stations, but that these efforts were hampered by a still recovering regional and national economy.[38] There were three stations with some notable development activity, though; 1) the Crestview station, with new development in the form of a 316 unit apartment complex, 30,000 sf each of retail and office space; 2) the MLK Jr. station, with a reported $47 million of new construction; and 3) Plaza Saltillo, with several small residential developments and plans for more extensive redevelopment at the time the report was filed. The review suggested that station areas that experienced development success were those with strong existing market demand, existing and available quality sites for development, site preparation work in early stages of MetroRail's implementation, and financial and development partnerships between the public and private sectors. Each of these three stations is located close to, but outside of the downtown, with very little development at suburban stations.

2.7 Rail Investments and Sales Tax Revenues

While there has been substantial research on the link between rail systems and property value impacts, little to no work has investigated the role rail systems play in the amounts and locations of sales tax revenue generation. There has been some research on the use of sales taxes as a funding stream for transit investments,[39] but this work has only investigated sales taxes as a means of supporting rail and not the impact of rail investments on the location and/or generation of sales taxes.

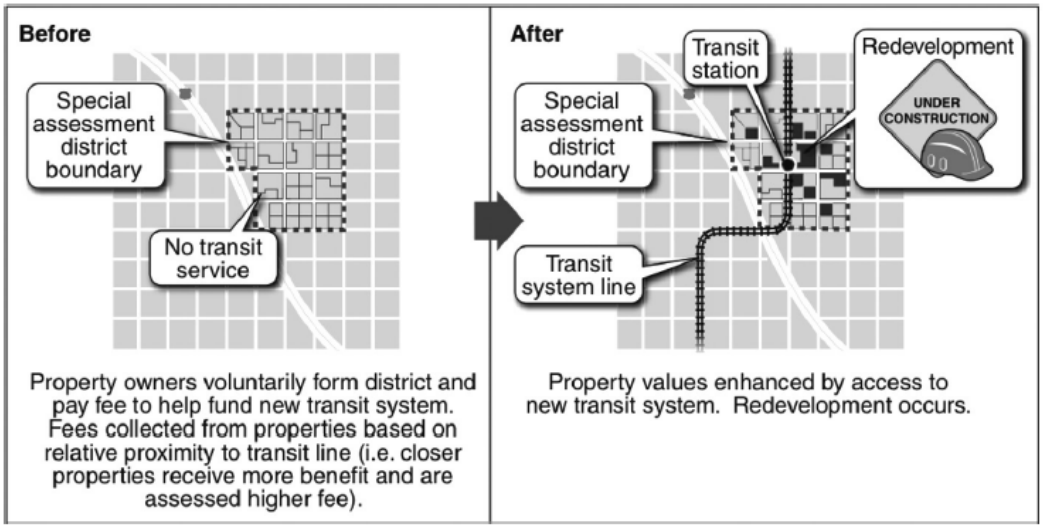

Figure 2-2: The Special Assessment District Approach to Transit System Finance[42]

There has also been substantial work on the use of special assessment districts (SADs) and value capture mechanisms to finance public infrastructure.[40, 41, 42] However, these special assessments are made based upon the property's value and location (Figure 2-2) and not any changes in sales (and sales tax revenues) associated with the transit investment.[40] A review of the literature finds no example of a SAD that included special assessments on sales tax revenues for business owners within the special district, although district-level sales taxes and bed taxes have been used to help defray the costs of other public infrastructure investments like sports facilities and convention centers.[43, 44]

2.8 Conclusions and Key Takeaways

Our review of the literature investigating the property value impacts associated with rail investments yields several key takeaways that will shape the FSU Project Team's research on the SunRail commuter rail line. The most pertinent findings of this literature are:

- *Rail systems have almost always been found to positively impact property values around stations. Investments in these systems are almost certain to yield development and property value impacts over time.*

- *Distance is an important factor, with most studies finding larger impacts within a ¼ mile of stations, lesser impacts within the ¼ to ½ mile ring, and lesser, but still significant impacts in the ½ mile to 1 mile ring.*
- *Property value impacts can take many years to materialize, related in part upon the success of the transit system, macroeconomic and local economic conditions, and market demand.*
- *Property value impacts typically vary widely by station area. Among the key factors that influence the amount of development by station area include the neighborhood context, station area planning, and development opportunity in the form of vacant and underutilized land.*
- *Property value impacts can vary widely by land use type, with some cases seeing the emergence of new or expanded office and commercial markets, while other cases have seen substantial new residential property development, and still others experience no property impacts at all.*
- *Property value impacts can take two different forms, 1) property value increases through new construction and/or renovation and 2) market-based property value increases due to the enhanced attractiveness and accessibility offered by the new transit line.*
- *There have been no detailed studies of changes in sales and sales taxes related to new rail investments, although there is a growing literature on special assessment districts and joint development projects to support transit.*

Chapter 3: Property Value Analysis

3.1 Introduction

In order to estimate the development and property tax impacts of the SunRail system, the study team developed a paired case study methodology to analyze and attempt to isolate any SunRail-related impacts. Under this approach the research team analyzed property value changes and estimated tax revenues for 1) areas around SunRail stations (the experimental group) and 2) control areas with similar characteristics, but no rail station investments (the control group). Changes that have occurred in station areas were then directly compared to changes in the control areas to determine whether the station areas have seen increased (or decreased) property values and tax revenues *relative* to what has occurred in the control areas. To the degree that the control areas represent the pattern of property values changes that would have occurred without the introduction of SunRail, the differences between the station areas and control areas represent changes that are attributable to SunRail.

This chapter summarizes the approach the research team developed to complete the analysis. In this summary we detail the data employed, the data management operations required to facilitate accurate comparisons for all station areas, the approach for identifying the most appropriate control area for each SunRail station, and the methods used to compare and measure the differences between the station areas and their control areas. After detailing the methodology, the chapter presents a system-wide overview of the property value changes and estimated impacts on tax revenue caused by these property value changes. This is followed by a station-by-station property value and tax revenue analysis, which takes a more detailed look at the trends for each station and its control area.

3.2 Property Value and Tax Revenue Analysis Methodological Approach

To benchmark and quantify the property value changes and development-related tax revenue associated with the new SunRail commuter Rail system, the research team utilized a paired case study approach. Under this approach we analyzed the property value changes and tax revenues at the parcel level for 1) areas around SunRail stations (the experimental group) and 2) control areas with similar characteristics, but no rail station investment (the control group). This section outlines the steps the research team took to conduct this analysis.

Obtain and Clean Property Parcel Data

Parcel data for the three counties comprising the study area, Volusia, Seminole, and Orange, were obtained from the East Central Florida Regional Planning Council. Parcel datasets were collected for each year within the study period, 2007 – 2015. To display the general land use category of each parcel, the Department of Revenue codes attached to each parcel were sorted into 14 land use categories. These groupings were Single Family Residential, Multi-Family Residential, Commercial, Institutional/Infrastructure, Industrial/Manufacturing, Parking, Park, Lake, Travel/Movement, Agriculture, Vacant Residential, Vacant Institutional, Vacant Industrial, and Vacant Commercial.

Based on the literature, station areas were assumed to be the locations within a half-mile (0.5 mile radius) of a given SunRail stop. Geographic information systems (GIS) buffering operations were used to capture the subset of parcels within each county that fall within a half-mile radius of a given SunRail Station. These selected station area parcel data were then cleaned extensively. Several aspects of the data were specifically checked and edited for accuracy: (1) Extended lakefront parcels were trimmed to the natural shoreline; (2) Parking lots categorized as vacant land were re-categorized as "Parking;" (3) Freight and road right-of-way parcels categorized as Institutional/Infrastructure were re-categorized as "Travel/Movement;" (4) Ambiguous and uncertain parcels were "ground truthed" using Google Earth satellite imagery for landmark and parcel use identification.

2010 Census data by block group within the station areas were also selected for analysis and comparison. Since much of the demographic data of interest is not available at the Census block level, the block groups within the station areas were interpolated to approximate the demographic metrics. The proportion of block group area falling within the station area radius was calculated, and this proportion was used to weight the demographic metrics for that block group. All block group data intersecting the station area were interpolated using this method, and weighted values were combined for an interpolated estimate of the composite station area values. Data collected using this method includes total resident population, total number of households, commute mode, average household income, vehicle ownership, and median age of residents. Data for control areas were collected using an identical interpolation method.

Control Area Selection

Control areas were systematically selected for each SunRail station area in order to help discern whether changes to overall property values were related to SunRail's development or were influenced by unrelated market trends. Changes that occurred in control areas during the same period were considered to be unrelated to the rail system.

Changes that occurred in the station areas that went above and beyond what occurred in the control areas were considered to have been influenced by SunRail.

As illustrated in Figure 3-1, the selection of control areas was completed using a "minimum differences" analysis that compared candidate control area's land use and demographic metrics against the same metrics for the original 0.5-mile radius station area. This method of comparison identifies the area of greatest similarity to the station area from among 10-15 candidate areas. Candidate control areas were determined by creating 1 mile and 1.5-mile buffers around the station of interest. A "candidate point" was placed where a major arterial roadway or railroad right-of-way intersected these two buffers. New 0.5-mile radius buffers were drawn around each candidate point to establish areas of identical size for comparison against the original 0.5-mile radius station area.

Several land use and demographic measures were employed as factors for comparison between the candidate control areas and the original station area. These measures were chosen based on our literature review as representative of the factors most likely to influence station area redevelopment outcomes. These measures included total population, household income, household density, average parcel size, and acreage share of each land use category. The values of each variable within the station area and each candidate area were measured or interpolated from 2007 property tax roll parcel data and 2010 Census data. The values were then standardized so that one measure was not weighted more heavily than another in the candidate selection process.

The differences between the candidate area variable values and the original station area values were calculated. The two candidate control areas with the lowest combined difference between their standardized values and those of the original station area were identified as the two best fit candidate areas.

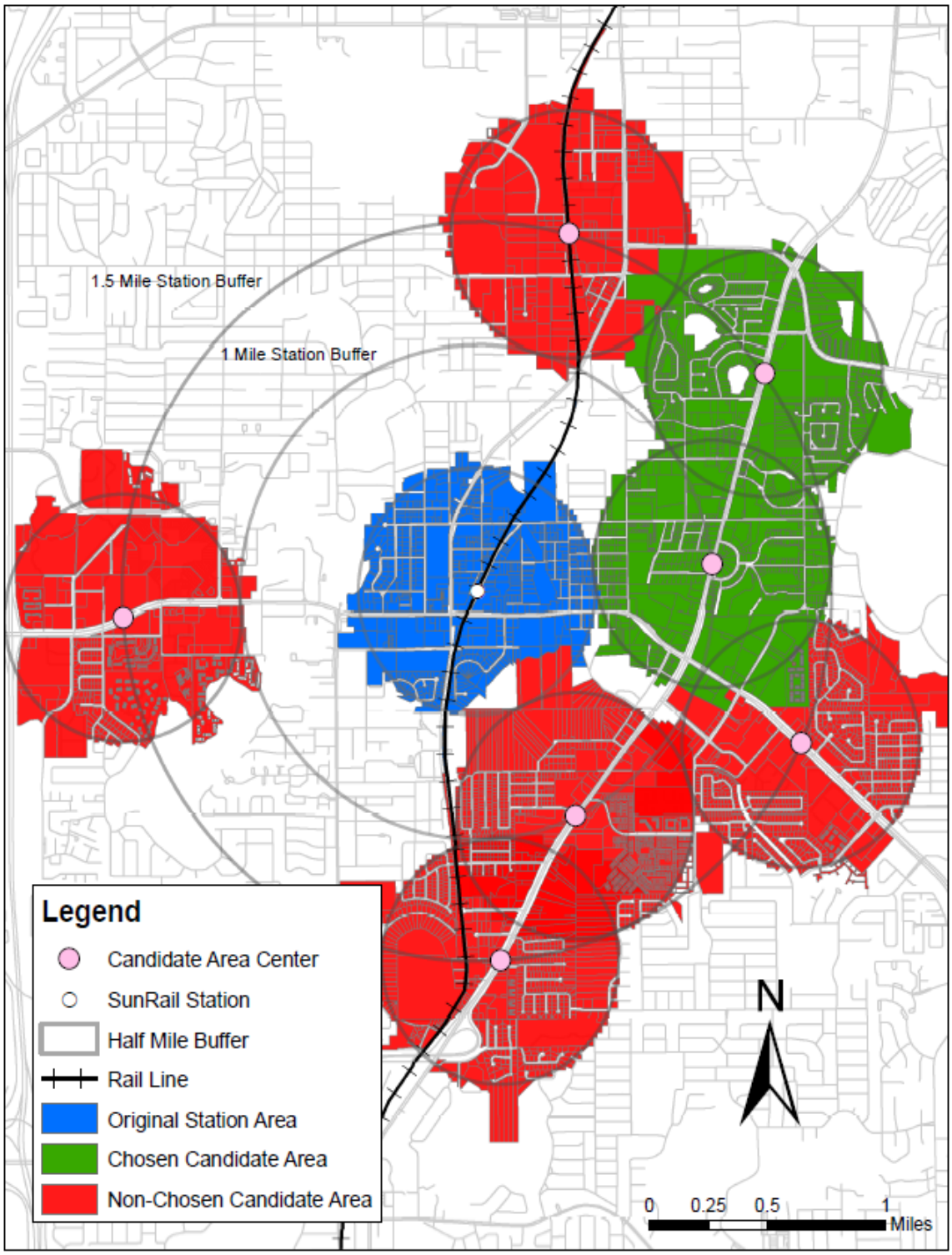

Figure 3-1: Control Area Candidate Selection Methodology Schematic

Table 3-1 summarizes the results of the control area candidate analysis, showing that while some of the lowest and second lowest minimum difference values were relatively similar, some revealed significantly more similar matches for the TOD areas. Maitland for example had the lowest minimum difference amongst all stations/candidates but had a substantially greater second lowest minimum difference, indicating strong validation for the first result and its selection as a control area. Longwood, Altamonte Springs, Sanford, and Sand Lake all showed promising calculations. Other stations, particularly DeBary, Winter Park, Florida Hospital, and Lake Mary showed relatively weaker results, though were still deemed to be acceptable.

Table 3-1: Summary of Control Area Candidate Analysis

Station Area	# of Potential Candidates	Lowest Minimum Difference	Second Lowest Minimum Difference
DeBary	12	0.85	1.11
Sanford	14	0.46	0.54
Lake Mary	14	0.84	0.97
Longwood	12	0.31	0.38
Altamonte Springs	13	0.40	0.63
Maitland	13	0.28	0.97
Winter Park	12	0.89	1.04
Florida Hospital	10	0.97	1.18
Orlando Health	10	0.83	0.89
Sand Lake	15	0.55	0.58

To verify our selection of control areas, additional feedback was sought from local planning contacts identified by SunRail staff as members of their Technical Advisory Committee. Maps of the SunRail and candidate control areas were compiled in ArcGIS and sent to planning professional contacts in each of the respective areas in order to identify any potential conflicts or highlight instances where there was a clear “winner” among candidates as understood by those with local knowledge of the area’s character.

The stations located in Downtown Orlando, LYNX Central Station and Church Street Station, were analyzed using a different methodology than the rest of the SunRail

stations. Since there is no comparable area in Orange County that has a similar urban form to Downtown Orlando proper, the candidate area process used for the other station areas was deemed inappropriate. Instead, quarter-mile buffers around each station were used to create the station areas, and all of the parcels within Downtown Orlando that lay outside of these station areas were taken for use as comparison against these two station areas, forming the control area.

Property Value and Tax Revenue Analysis

Using the parcel-level property tax roll data obtained from each of the three counties in the study area, the research team aggregated the assessed property values used for each station and control area. The research team used the parcel's assessed value as the primary unit of measure instead of the taxable value for the property value analysis in order to capture SunRail's full impact on the property values. Since the taxable value deducts exemptions from the assessed value based on characteristics of the property's owner or land use, using the taxable value could dampen SunRail's total impact on property values in station areas where exemptions are more prevalent. More importantly, the assessed value provided a truer comparison between the station area and the control area, by controlling for tax exemptions. Using the assessed value ensured the comparison between the station area and the control area was based on the desirability of the land and the value of improvements instead of on changes to a property's exemption status.

To calculate the estimated tax revenue for each station and control area, the taxable value of each parcel was multiplied by their respective millage rate. The estimated tax revenues for each parcel were then aggregated to the station/control area level. The research team used the taxable value to estimate SunRail's impact on tax revenues because the taxable value accounts for tax exemptions and consequently provides a more accurate estimation of the tax revenue collected by local governments. Unfortunately, taxable value data was not available for stations within Seminole and Volusia Counties (Debary, Sanford, Lake Mary, Longwood, and Altamonte Springs). For these stations the assessed value was used to calculate the tax revenue instead of the taxable value. Since the assessed value does not subtract out the exemptions, using the assessed value consistently overestimated the tax revenue generated by approximately 10-15%. However, these overestimations largely cancel out when comparing the station area to the control because each control are was located in the same county as its respective station area and therefore utilized the same type of property values.

To calculate how much the SunRail station areas outperformed their control areas, the research team estimated how the assessed property values in each station area would

have performed assuming it grew at the same rate as its control area between 2007 and 2015. To do this, the control area's annual growth rates for the estimated property value per acre were applied to the station area's estimated property values per acre in 2007. Multiplying this by the station area's acreage provided an estimate of the station area's property values for each year in the study period assuming it grew at the same rate as the control area. The difference between the station area's actual property values and the estimated property values without SunRail was then calculated to find the incremental property value changes relative to the control areas.

3.3 Results of the Property Value and Tax Revenue Change Analysis

This section presents the results of the SunRail station area and control area property value analyses, along with the estimated tax revenue changes over the study period. For these analyses the research team calculated changes in property values and tax revenues over three different time periods: 2007-2015, 2007-2011, and 2011-2015. These periods capture the entirety of the property value and tax revenue changes during SunRail's planning, development and phase I opening (2007-2015); a period of economic recession and widely documented property value losses (2007-2011); and a period of economic recovery and investment (2011-2015).

This section highlights several themes that emerged from the property value and tax revenue analysis for all twelve stations and their control areas. First, after a decline during the recession, property values recovered in both station and control areas. Second, stations in Orange County generally experienced more growth in property values than stations in both Seminole and Volusia counties. Third, while SunRail's impact on property values varied significantly from station to station, cumulatively SunRail had a marked positive impact on property values within the station areas.

In terms of tax revenue changes, many of the trends observed over the study period mirror those changes associated with the property values. That is, SunRail stations areas generally outperformed their control areas by more in the second half of the study period (2011-2015), than in the first half (2007-2011) due to the economic recovery and SunRail's growing impact on development patterns within the station areas. Second, Orange County stations generally performed better than Seminole and Volusia County stations. The downtown and hospital stations performed extremely well in terms of property value changes; however these changes did not always lead to significant tax revenue increases because many of these properties were tax exempt. It was also difficult to identify how much of the new development in these areas was a direct result of

SunRail because activity centers like downtown Orlando were likely to attract new development with or without SunRail.

Table 3-2: SunRail Station Area's and Control Area's Cumulative Property Value by Year, 2007-2015

	Station Areas			Control Areas		
Year	Assessed Value	Assessed Value per Acre	% Change	Assessed Value	Assessed Value per Acre	% Change
2007	$4,125,848,775	$576,189		$5,651,348,004	$672,614	
2008	$4,413,526,470	$616,365	7.0%	$6,139,500,441	$730,713	8.6%
2009	$4,151,805,514	$579,814	-5.9%	$5,788,425,922	$688,929	-5.7%
2010	$3,861,380,659	$539,255	-7.0%	$5,207,183,802	$619,750	-10.0%
2011	$3,861,380,659	$539,255	0.0%	$5,207,183,802	$619,750	0.0%
2012	$4,476,967,572	$625,224	15.9%	$5,905,114,774	$702,817	13.4%
2013	$4,477,308,841	$625,272	0.0%	$5,905,846,405	$702,904	0.0%
2014	$4,816,086,780	$672,584	7.6%	$6,236,834,256	$742,298	5.6%
2015	$5,533,144,339	$772,723	14.9%	$7,131,403,169	$848,768	14.3%

Changes in Cumulative Property Values

Table 3.2 summarizes the changes in property values across all station areas and their control areas for the entire study period 2007-2015. During this period, the SunRail station areas saw their cumulative property values increase by about 15%, outpacing the control area property value increase by about half of a percentage point. The table illustrates the impact of the national recession, registering declines in property values for two years and essentially no change in values in two other years during the period 2008-2013. Since 2013, property values have continued on an upward trajectory, reflecting the recovery of the national economy and the return of a robust real estate market in Florida. When comparing the overall station area property value increases against the increases for the control areas, Table 3.2 illustrates that station area property values grew at a faster rate during the entire period 2007-2015. These data indicate that SunRail station areas' real estate markets performed better than the control areas' real estate markets during this very volatile period in the state and national economy.

Changes in Station Area Property Values

Explorations of individual station area's changes reinforce these general themes. Tables 3.3-Table 3.5 illustrate the changes in property values per acre for each station area and control area for the three time periods of interest 2007-2011, 2011-2015, and 2007-

2015. For these tables the research team standardized the values by developable acre so as to provide for more accurate and direct comparisons between the station areas and their control areas. Note that in these tables those station areas labeled in green outperformed their control area, with greater property value per acre growth or lesser property value per acre decline. Stations in red performed worse than their corresponding control areas.

Table 3.3 illustrates that the national recession had a significant impact on property values within the SunRail station areas and control areas. Almost every station and control area experienced a reduction in property values between 2007 and 2011. While the magnitude of this initial drop in property values varied from station to station, the main determinant of the cumulative property value changes over the entire study period was how the station area recovered after 2010. Table 3.4 illustrates that as the national and state economy recovered, so did the property values by acre in the station areas and control areas. Between 2011 and 2015 almost every station area and control area saw increases in property value per acre.

Table 3-3: Total Property Value per Acre Change for All Station and Control Areas, 2007-2011

Assessed Value per Acre Change, 2007 - 2011				
	Station Area		Control Area	
Station*	Dollar Change	% Change	Dollar Change	% Change
DeBary	-$6,193	-41.7%	-$3,383	-26.0%
Sanford	-$33,773	-16.4%	-$64,818	-15.6%
Lake Mary	-$57,041	-20.5%	-$86,701	-22.3%
Longwood	-$95,088	-19.8%	-$64,872	-23.1%
Altamonte	-$62,450	-15.4%	-$62,361	-15.4%
Maitland	-$35,679	-8.3%	-$47,151	-9.5%
Winter Park	-$91,394	-6.2%	-$19,685	-2.8%
FL Hospital	$43,370	3.8%	-$117,228	-11.8%
LYNX*	-$807,101	-15.8%	-$126,874	-4.5%
Church*	$124,991	1.9%	-$126,874	-4.5%
Orlando Health	$50,764	3.4%	-$55,852	-14.6%
Sand Lake	-$52,721	-18.3%	-$21,893	-6.3%

*Stations in **Green** cells outperformed their control areas during the period of analysis.
Stations in **Red** cells performed less well than their control areas during the period of analysis.

Table 3-4: Total Property Value per Acre Change for All Station and Control Areas, 2011-2015

Market Value Dollar Amount Change per Acre, 2011 - 2015				
	Station Area		Control Area	
Station*	Dollar Change	% Change	Dollar Change	% Change
DeBary	$141	1.6%	$7	0.1%
Sanford	$23,226	13.5%	-$10,606	-3.0%
Lake Mary	$25,372	11.5%	$47,033	15.6%
Longwood	-$15,282	-4.0%	-$497	-0.2%
Altamonte	-$23,356	-6.8%	-$18,057	-5.3%
Maitland	$65,132	16.6%	$25,430	5.6%
Winter Park	$563,848	40.5%	$197,010	28.9%
FL Hospital	$1,021,882	86.3%	$205,018	23.4%
LYNX*	$1,581,018	36.8%	$1,407,760	52.6%
Church*	$5,963,578	90.4%	$1,407,760	52.6%
Orlando Health	$313,342	20.0%	$32,404	9.9%
Sand Lake	$23,587	10.0%	$46,737	14.3%

*Stations in **Green** cells outperformed their control areas during the period of analysis.
Stations in **Red** cells performed less well than their control areas during the period of analysis.

Table 3.5 illustrates the changes in property values by acre across the entire study period, 2007-2015. This table demonstrates the tremendous variability in these property values by station area, as well as variation in the performance of the station areas against their control areas. Two key trends are apparent from these tables. First, property value changes varied remarkably across the station areas, with some experiencing sometimes substantial growth during this period (most notably the in-town stations) and others experiencing net losses in property value (largely the outlying stations). Second, when compared to their control areas using these metrics, six stations outperformed their control areas (the stations labeled in green), and six lagged their control areas (labeled in red). One of the key findings of these analyses is that changes in property values and performance relative to their control areas varied widely from station to station.

Table 3-5: Total Property Value per Acre Change for All Station and Control Areas, 2007-2015

Assessed Value per Acre Change, 2007 - 2015				
	Station Area		Control Area	
Station*	Dollar Change	% Change	Dollar Change	% Change
DeBary	-$6,052	-40.7%	-$3,376	-25.9%
Sanford	-$10,547	-5.1%	-$75,424	-18.2%
Lake Mary	-$31,669	-11.4%	-$39,669	-10.2%
Longwood	-$110,371	-22.9%	-$65,369	-23.3%
Altamonte	-$85,805	-21.1%	-$80,418	-19.8%
Maitland	$29,453	6.9%	-$21,712	-4.4%
Winter Park	$472,453	31.8%	$177,324	25.3%
FL Hospital	$1,065,252	93.4%	$87,790	8.8%
LYNX*	$773,917	15.2%	$1,280,886	45.7%
Church*	$6,088,569	48.5%	$1,280,886	45.7%
Orlando Health	$364,106	24.1%	-$23,448	-6.1%
Sand Lake	-$29,134	-10.1%	$24,844	7.1%

*Stations in **Green** cells outperformed their control areas during the period of analysis.
Stations in **Red** cells performed less well than their control areas during the period of analysis.

County Variations in Station Area Performance

Table 3.6 presents all results in one meta-table for all station areas and control areas for the period 2007-2015. This table also identifies these station areas by their home county, which proves to be an important factor in understanding their relative growth and decline in property values over this time period. As seen in Table 3-6, the county each station is located in appears to have a significant impact on the performance of property values in both station and control areas.

Table 3.6 reveals that station areas in Seminole and Volusia counties experienced property value declines for every station and control area. Between 2007 and 2015, the five station areas located in these two counties lost a combined $129.6 million in assessed property values. Over the same time period, property values in the seven Orange County stations grew by over $1.5 billion. These differences are likely due to a few factors, including the possible over-valuation of properties in Seminole and Volusia counties prior to the recession, the much greater volatility in real estate in more suburban counties, and the resilience of urban land in Orange County, by far the most urbanized of the three counties. While it is unclear whether these differences are due to geographic factors, such as the rail line's endpoints, the county's economic health or the assessment practices of the respective property appraisers, the home county of the respective station

areas had a significant impact on the value performance of both station and control areas.

Having identified that trend, it is important to point out that the county a station is located in does not appear to impact whether the station area outperformed its control area. As identified in Table 3.5, Sanford and Longwood in Seminole County outperformed their control areas, while Orange County's Winter Park, Lynx and Sand Lake stations lagged behind their control areas.

SunRail's Property Value Increment

Table 3.7 shows a station-by-station comparison of the station area's property value increment relative to their control areas. In other words, Table 3.7 shows how much the station areas outperformed their control areas, providing an indication of how much SunRail and other factors affected property value outcomes. While many locations did experience negative outcomes at points in time on these metrics, overall many station areas saw increases in their property values and tax revenues associated with SunRail. Aggregated over the entire system, the analysis found that the station areas outperformed their control areas by $810.9 million in terms of property value changes over the cumulative study period, but more than 85% of that increase (approximately $675.9 million) was witnessed in the last four years of the study period (2011-2015). This would be consistent with the economic growth taking place during that time. Contributions to these estimates varied widely from station-to-station. Florida Hospital was the largest contributor of positive property value change ($414.2 million). Other stations, such as Sand Lake, a terminus, underperformed their control area in terms of property value ($25.8 million) indicating that those parcels associated with SunRail did not have a positive impact during the time period 2007-2015.

Table 3-6: Summary of Property Value Changes for all 12 SunRail Station Areas Between 2007-2015

Station	Station Area			Control Area		
	Total Change in Property Value	Total Change in Value per Acre	% Change in Value Per Acre	Total Change in Property Value	Total Change in Value per Acre	% Change in Value Per Acre
Debary	-$14,892,118	-$6,052	-40.7%	-$8,017,043	-$3,376	-25.9%
Sanford	-$7,097,240	-$10,547	-5.1%	-$40,261,953	-$75,424	-18.2%
Lake Mary	-$15,825,887	-$31,669	-11.4%	-$25,029,372	-$39,669	-10.2%
Longwood	-$51,264,774	-$110,371	-22.9%	-$36,691,601	-$65,369	-23.3%
Altamonte Springs	-$40,528,396	-$85,805	-21.1%	-$40,115,028	-$80,418	-19.8%
Maitland	$17,158,284	$29,453	6.9%	-$11,703,865	-$21,712	-4.4%
Winter Park	$202,565,200	$472,453	31.8%	$111,339,819	$177,324	25.3%
FL Hospital	$457,585,981	$1,065,252	93.4%	$38,797,822	$87,790	8.8%
LYNX	$85,967,395	$773,917	15.2%	$746,820,452	$1,280,886	45.7%
Church Street	$638,250,848	$6,088,569	48.5%	$746,820,452	$1,280,886	45.7%
Orlando Health	$150,534,548	$364,106	24.1%	-$13,315,548	-$23,448	-6.1%
Sand Lake	-$15,158,277	-$29,134	-10.1%	$11,411,030	$24,844	7.1%

*Dotted lines indicate County borders

Table 3-7: Total Assessed Property Value Increment Relative to Control Areas, 2007-2015

Station	Property Value Changes Around SunRail Stations		
	2007-2011	2011-2015	2007-2015
Debary	-$5,739,032	$326,984	-$5,412,048
Sanford	-$1,167,251	$19,156,679	$17,989,428
Lake Mary	$2,464,080	-$4,120,740	-$1,656,659
Longwood	$7,478,151	-$6,702,833	$775,318
Altamonte Springs	-$62,015	-$2,508,807	-$2,570,822
Maitland	2,835,998	$25,199,322	$28,035,320
Winter Park	-$21,322,062	$62,974,841	$41,652,779
FL Hospital	$76,512,450	$337,726,213	$414,238,662
Church Street	$43,833,193	$284,168,461	$328,001,654
LYNX	-$63,988,002	-$109,158,069	-$173,146,071
Orlando Health	$112,161,053	$76,650,292	$188,811,345
Sand Lake	-$18,041,835	-$7,771,087	-$25,812,921
Total	**$134,964,728**	**$675,941,256**	**$810,905,985**

*Dotted lines indicate County borders

Table 3-8 aggregates stations into one of three classes presenting the station area's and property value increments relative their control areas. Downtown Stations (Church Street, Lynx), Hospital Stations (Florida Hospital, Orlando-Health), and Suburban Stations (all remaining eight stations) groupings were produced to help evaluate trends between types of station areas. While Table 3-8 indicates that the majority of the property value increment was likely not directly attributable to SunRail, it also demonstrates that SunRail is gradually generating positive property value impacts.

Table 3-8: Comparing Property Value Changes in Downtown, Hospital Station, and Suburban Stations, 2007-2015

Stations	Property Value Changes Around SunRail Stations		
	2007-2011	2011-2015	2007-2015
Downtown Stations	-$20,154,809	$175,010,392	$154,855,583
Hospital Stations	$188,673,503	$414,376,504	$603,050,007
Suburban Stations	-$33,553,966	$86,554,359	$53,000,395
All Stations	**$134,964,728**	**$675,941,256**	**$810,905,985**

Over the cumulative study period 2007-2015, all three station classes experienced positive changes with regards to property values and tax revenue associated with SunRail. Despite numbering only two, the Hospital Stations saw about $603 million of the $811 million in total property value increment relative to their control areas. Close to three-fourths of the remaining $208 million, was captured by the two downtown stations. The remaining eight suburban stations only accounted for $53 million of the cumulative property value increment. In this way, Table 3-8 indicates that the majority of the $811 million of property value increment was likely due to the large amounts of investment and development in Downtown Orlando (such as the Amway Center) and around medical facilities. While SunRail may have contributed to the desirability of these areas, it is difficult to parse out how much of this increment was attributable to SunRail. In this way, the Suburban stations may provide a truer indication of SunRail's impact upon the stations area's property values. The fact that the property value increment in the suburban stations grew over time, from -$33,553,966 between 2007 and 2011 to $86,554,359 between 2011 and 2015 may indicate that SunRail has encouraged new development and generated increasing tax revenues within the station areas over time. As new developments come on-line and these developments begin to be reflected by increasing property values, the tax revenue attributable to SunRail is only expected to increase.

SunRail Station Area Tax Revenue Growth

Although it is difficult to estimate exactly how much of the recent development surrounding SunRail stations is directly attributable to SunRail, there is no question that

SunRail station areas have experienced significant tax revenue growth since SunRail was announced in 2007. Table 3-9 shows the estimated tax revenue of each station area for three years marking the beginning, midpoint, and end of the study period. This table indicates that tax revenues followed the same pattern seen in the property value analysis as the cumulative tax revenue of all twelve stations declined during the first half of the study from $56,161,931 in 2007 to $52,508,745 in 2015. Yet in last four years station area tax revenues have grown substantially as the cumulative station area tax revenue in 2015 was $18.8 million higher than their 2007 levels. Since property values in Seminole and Volusia counties have not fully recovered to their prerecession levels (as seen in Table 3-6), the tax revenue generated by stations located in these two counties in 2015 remain slightly lower than in 2007, although tax growth in the second half of the study indicates that they will surpass their 2007 tax revenue soon.

Table 3-9: Station Area Property Tax Revenues, 2007-2015

	Station Area	2007 Estimated Taxes	2011 Estimated Taxes	2015 Estimated Taxes
Seminole and Volusia County*	DeBary	$709,322	$413,768	$420,492
	Sanford	$2,501,403	$2,230,143	$2,603,612
	Altamonte Springs	$3,174,444	$2,865,156	$2,729,644
	Lake Mary	$2,272,124	$1,906,806	$2,103,086
	Longwood	$3,870,939	$3,243,376	$3,190,406
	Total	**$12,528,232**	**$10,659,249**	**$11,047,240**
Orange County**	Maitland	$3,485,546	$3,399,203	$3,956,938
	Winter Park	$7,285,275	$6,642,924	$10,319,083
	FL Hospital	$3,902,213	$3,567,250	$4,754,906
	Church	$8,929,478	$9,338,003	$15,109,580
	LYNX	$13,344,933	$12,829,500	$22,913,398
	Orlando Health	$4,364,413	$4,071,322	$4,857,488
	Sand Lake	$2,321,841	$2,001,294	$2,045,905
	Total	**$43,633,699**	**$41,849,496**	**$63,957,298**
Combined Total		**$56,161,931**	**$52,508,745**	**$75,004,538**

*Estimates calculated using assessed property values

**Estimates calculated using taxable property values

Table 3-10 aggregates the station area tax revenues into Downtown, Hospital, and Suburban stations. All three station classes saw tax revenues increases over the study period. The Downtown stations generated $15.7 million more in property tax revenue in 2015 than they did in 2007, accounting for 83.5% of the cumulative tax revenue growth generated by all 12 stations over that period. This is in line with Table 3-8's findings indicating that the majority of the property value and tax revenue growth is due to increasing investment and development in Downtown Orlando. While SunRail may be a contributing factor to this development, it is difficult to parse out SunRail's exact role in generating additional tax revenue. The Hospital Station's massive property value growth seen in Table 3-7 and 3-8 only translated to moderate property tax increases because much of the new development occurred on tax exempt properties. Consequently, the suburban stations may once again provide the best indication of SunRail's impact on property taxes. Between 2007 and 2015 the combined tax revenues of the eight suburban stations grew by $1.7 million. More importantly, all signs indicate that this growth will continue in the coming years as property tax revenues in suburban stations increased by 20.6% between 2011 and 2015.

Table 3-10: Comparing Tax Revenue Changes in Downtown and Hospital Stations to Other Stations, 2007-2015

Stations	Tax Revenue Changes Around SunRail Stations		
	2007 Estimated Taxes	2011 Estimated Taxes	2015 Estimated Taxes
Downtown Stations	$22,274,411	$22,167,503	$38,022,978
Hospital Stations	$8,266,626	$7,638,572	$9,612,394
Suburban Stations	$25,620,894	$22,702,670	$27,369,166
All Stations	$56,161,931	$52,508,745	$75,004,538

3.4 Station by Station Property Value and Tax Revenue Analysis

Debary Station

Overall, the Debary Station was among the most underperforming stations areas. This was not surprising since it is an almost-rural park-and-ride station on the northern terminus of the rail line. Thus, even though Debary has more ridership than almost any other station, it has yet to generate significant development activity leading to property value/tax increases. The recession hit Debary especially hard; particularly in 2010 when property values in the station area declined by 26.5% (Table 3-11). The decline in Debary's property values did not subside until 2013 and by then Debary's value per acre had already declined by 47.0%. Similarly, in 2012 Debary only generated about half of the tax revenue it had generated in 2007 (Table 3-12). Since 2012, the Debary station area has fared better with small

Table 3-11: Property Value Changes in Debary's Station and Control Areas, 2007-2015

Year	Station Area			Control Area		
	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre
2007	$36,572,771	$14,863		$30,928,620	$13,024	
2008	$33,646,361	$13,674	-8.0%	$30,599,457	$12,885	-1.1%
2009	$29,029,953	$11,798	-13.7%	$29,548,676	$12,443	-3.4%
2010	$21,333,957	$8,670	-26.5%	$22,894,907	$9,641	-22.5%
2011	$21,333,957	$8,670	0.0%	$22,894,907	$9,641	0.0%
2012	$19,465,993	$7,911	-8.8%	$21,865,546	$9,207	-4.5%
2013	$19,807,262	$8,050	1.8%	$22,597,177	$9,515	3.3%
2014	$20,238,408	$8,225	2.2%	$23,340,081	$9,828	3.3%
2015	$21,680,653	$8,811	7.1%	$22,911,577	$9,648	-1.8%
Total Change	-$14,892,118	-$6,052	-40.7%	-$8,017,043	-$3,376	-25.9%

to moderate property value increases. 2015 was particularly promising since the station area significantly outperformed its control area. However, even with a positive 2015 the Debary Station area was outperformed by its control area over the study period as property values in the control area only declined by 25.9%, compared to the station area's 40.7% decline. In this way, it would seem that the presence of SunRail has yet to mitigate the property value decline sparked by the recession. However, property tax revenues have steadily increased since 2012, growing by 7.1% in 2015.

Table 3-12: Debary Station Area's Tax Revenue Estimates, 2007-2015

Year	Estimated Tax Revenue	Tax Revenue Growth Rate
2007	$709,322	
2008	$652,564	-8.0%
2009	$563,030	-13.7%
2010	$413,768	-26.5%
2011	$413,768	0.0%
2012	$377,539	-8.8%
2013	$384,158	1.8%
2014	$392,520	2.2%
2015	$420,492	7.1%

Sanford Station

The Sanford Station area followed the general pattern of property value decline between 2007 and 2010 before experiencing modest growth between 2013 and 2015. Overall, the property values in the station area declined by 5.1% between 2007 and 2015 (Table 3-13). Yet, even though property values in the station area declined, it outperformed its control area's every year except for 2009 and 2015 (Table 3-13). For example, in 2014 the Station area's property value per acre grew by 12.8% while the control area declined by 0.8%. Consequently, SunRail likely aided the Sanford station area's recovery from the recession by preventing the station area's property values from declining as much as they otherwise would have. Even though the station area's assessed property values experienced a slight decline, the station's property taxes grew slightly over the study period (Table 3-14). While this is due in part to gradual increases in millage rates, a new 194 unit townhome community built adjacent to the station between 2008 and 2015 has also served to increase property taxes.

Table 3-13: Property Value Changes in Sanford's Station and Control Areas, 2007-2015

Year	Station Area			Control Area		
	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre
2007	$138,211,893	$205,395		$221,818,251	$415,539	
2008	$137,677,163	$204,600	-0.4%	$220,749,453	$413,536	-0.5%
2009	$122,199,553	$181,599	-11.2%	$206,034,319	$385,970	-6.7%
2010	$115,485,690	$171,621	-5.5%	$187,217,980	$350,721	-9.1%
2011	$115,485,690	$171,621	0.0%	$187,217,980	$350,721	0.0%
2012	$114,084,487	$169,539	-1.2%	$173,642,664	$325,290	-7.3%
2013	$114,084,487	$169,539	0.0%	$173,642,664	$325,290	0.0%
2014	$128,451,897	$190,890	12.6%	$172,333,715	$322,838	-0.8%
2015	$131,114,653	$194,847	2.1%	$181,556,298	$340,115	5.4%
Total Change	-$7,097,240	-$10,547	-5.1%	-$40,261,953	-$75,424	-18.2%

Table 3-14: Sanford Station Area's Tax Revenue Estimates, 2007-2015

Year	Estimated Tax Revenue	Tax Revenue Growth Rate
2007	$2,501,403	
2008	$2,536,142	1.4%
2009	$2,316,342	-8.7%
2010	$2,249,025	-2.9%
2011	$2,230,143	-0.8%
2012	$2,191,259	-1.7%
2013	$2,263,702	3.3%
2014	$2,499,527	10.4%
2015	$2,603,612	4.2%

Lake Mary Station

Lake Mary followed the same pattern as most of the Seminole County stations. After a sharp decline in property values between 2007 and 2010, the Lake Mary station area gradually recovered but never made it back to its prerecession property values (Table 3-15). However, the analysis showed little indication of SunRail-related property value growth. Until 2014, the station area had kept pace with its control area. In fact, between

2007 and 2013, the property value per acre in both the station area and the control area dropped by approximately the same percentage (21%). However, in 2014 the control area significantly outperformed the station area (despite property values in the station area growing by 8.6%). That was reversed in 2015 when the station area outperformed its control area (5.4% growth in the station area compared to 1.6% in the control area). The recent growth in property values and property taxes (see Table 3-16) is expected to continue in the coming years as there have been significant new housing and mixed-used developments built adjacent to the station in the last couple years that may not be fully represented in the tax rolls yet.

Table 3-15: Property Value Changes in Lake Mary's Station and Control Areas, 2007-2015

Year	Station Area			Control Area		
	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre
2007	$138,755,429	$277,665		$245,105,897	$388,466	
2008	$135,773,116	$271,697	-2.1%	$245,854,388	$389,652	0.3%
2009	$122,015,566	$244,167	-10.1%	$219,549,601	$347,962	-10.7%
2010	$110,250,828	$220,624	-9.6%	$190,400,964	$301,765	-13.3%
2011	$110,250,828	$220,624	0.0%	$190,400,964	$301,765	0.0%
2012	$107,334,849	$214,789	-2.6%	$193,436,839	$306,576	1.6%
2013	$107,334,849	$214,789	0.0%	$193,436,839	$306,576	0.0%
2014	$116,583,353	$233,296	8.6%	$216,614,822	$343,311	12.0%
2015	$122,929,542	$245,996	5.4%	$220,076,525	$348,797	1.6%
Total Change	-$15,825,887	-$31,669	-11.4%	-$25,029,372	-$39,669	-10.2%

Table 3-16: Lake Mary Station Area's Tax Revenue Estimates, 2007-2015

Year	Estimated Tax Revenue	Tax Revenue Growth Rate
2007	$2,272,124	
2008	$2,269,607	-0.1%
2009	$2,104,708	-7.3%
2010	$1,915,161	-9.0%
2011	$1,906,806	-0.4%
2012	$1,823,959	-4.3%
2013	$1,887,842	3.5%
2014	$1,997,005	5.8%
2015	$2,103,086	5.3%

Longwood Station

The Longwood station area's property value per acre declined by 22.9% during the study period (Table 3-17). However, the presence of SunRail may have mitigated the intensity of the property value decline during the recession because the Longwood station area slightly outperformed its control area throughout the study period. However, the control area began to outperform the station area in 2014 and 2015 so it is unclear whether Longwood's success will continue into the future. Similar to the station area's property values, Longwood's property tax revenue declined by 17.6% over the study period. However, Longwood has experienced notable new development in the last couple years that likely is not reflected in the property tax rolls yet.

Table 3-17: Property Value Changes in Longwood's Station and Control Areas, 2007-2015

Year	Station Area			Control Area		
	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre
2007	$223,473,413	$481,128		$157,563,081	$280,711	
2008	$216,598,618	$466,326	-3.1%	$154,952,780	$276,060	-1.7%
2009	$202,113,371	$435,140	-6.7%	$138,525,750	$246,794	-10.6%
2010	$179,306,969	$386,039	-11.3%	$121,150,331	$215,839	-12.5%
2011	$179,306,969	$386,039	0.0%	$121,150,331	$215,839	0.0%
2012	$170,535,302	$367,154	-4.9%	$111,697,449	$198,998	-7.8%
2013	$170,535,302	$367,154	0.0%	$111,697,449	$198,998	0.0%
2014	$170,372,429	$366,804	-0.1%	$117,590,287	$209,496	5.3%
2015	$172,208,639	$370,757	1.1%	$120,871,480	$215,342	2.8%
Total Change	-$51,264,774	-$110,371	-22.9%	-$36,691,601	-$65,369	-23.3%

Table 3-18: Longwood Station Area's Tax Revenue Estimates, 2007-2015

Year	Estimated Tax Revenue	Tax Revenue Growth Rate
2007	$3,870,939	
2008	$3,814,128	-1.5%
2009	$3,673,188	-3.7%
2010	$3,272,693	-10.9%
2011	$3,243,376	-0.9%
2012	$3,142,863	-3.1%
2013	$3,251,153	3.4%
2014	$3,158,449	-2.9%
2015	$3,190,406	1.0%

Altamonte Springs Station

The Altamonte Springs station area experienced property value declines that were similar to the Longwood Station (21.1% over the entire study period) (Table 3-19). However, unlike Longwood, Altamonte Springs was outperformed by its control area. Compared to its control area, Altamonte Springs had a particularly poor 2009, but it began to recover in the following years as it outperformed its control area in every year until 2014. The Station area's late decline in property value in 2015 is particularly concerning because that was a time when its control area and the majority of other station areas saw property value increases. This lag in property values led to further declines in property tax revenue as property taxes declined by 14.0% between 2007 and 2015 (Table 3-20).

Table 3-19: Property Value Changes in Altamonte Springs' Station and Control Areas, 2007-2015

Year	Station Area			Control Area		
	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre
2007	$191,731,561	$405,928		$202,629,307	$406,208	
2008	$194,880,138	$412,594	1.6%	$203,381,431	$407,716	0.4%
2009	$174,686,865	$369,842	-10.4%	$200,001,439	$400,940	-1.7%
2010	$162,234,720	$343,478	-7.1%	$171,521,448	$343,847	-14.2%
2011	$162,234,720	$343,478	0.0%	$171,521,448	$343,847	0.0%
2012	$155,025,437	$328,215	-4.4%	$159,770,699	$320,290	-6.9%
2013	$155,025,437	$328,215	0.0%	$159,770,699	$320,290	0.0%
2014	$156,779,520	$331,929	1.1%	$162,017,736	$324,795	1.4%
2015	$151,203,165	$320,123	-3.6%	$162,514,279	$325,790	0.3%
Total Change	-$40,528,396	-$85,805	-21.1%	-$40,115,028	-$80,418	-19.8%

Table 3-20: Altamonte Springs Station Area's Tax Revenue Estimates, 2007-2015

Year	Estimated Tax Revenue	Tax Revenue Growth Rate
2007	$3,174,444	
2008	$3,345,524	5.4%
2009	$3,110,278	-7.0%
2010	$2,928,673	-5.8%
2011	$2,865,156	-2.2%
2012	$2,748,019	-4.1%
2013	$2,846,460	3.6%
2014	$2,752,652	-3.3%
2015	$2,729,644	-0.8%

Maitland Station

The Maitland station area and its control area both followed the general pattern of declining property values during the recession followed by a gradual increase in property values throughout the remainder of the study period. However, unlike many of the Seminole County stations, Maitland fully recovered from the recession and gained over $17 million in assessed property values between 2007 and 2015 (Table 3-21). Even though the station area and the control area alternated years of relative success over the other, the station area significantly outperformed its control area, as property values in the station area grew by 6.9% between 2007 and 2015 compared to a 4.4% decline in the control area. In this way, SunRail appears to have provided a significant boost to property values in the station area. This impact on property values has also generated tax revenue as the Maitland station area's annual tax revenue returned to its prerecession levels as early as 2011 and increased by 13.5% over the entire study period (Table 3-22).

Table 3-21: Property Value Changes in Maitland's Station and Control Areas, 2007-2015

Year	Station Area			Control Area		
	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre
2007	$249,454,657	$428,194		$268,417,212	$497,755	
2008	$257,944,197	$442,766	3.4%	$258,802,458	$479,925	-3.6%
2009	$236,945,807	$406,722	-8.1%	$249,408,226	$462,505	-3.6%
2010	$228,668,996	$392,515	-3.5%	$242,999,928	$450,621	-2.6%
2011	$228,668,996	$392,515	0.0%	$242,999,928	$450,621	0.0%
2012	$237,137,652	$407,051	3.7%	$236,964,024	$439,428	-2.5%
2013	$237,137,652	$407,051	0.0%	$236,964,024	$439,428	0.0%
2014	$256,685,218	$440,605	8.2%	$241,303,438	$447,475	1.8%
2015	$266,612,941	$457,646	3.9%	$256,713,347	$476,051	6.4%
Total Change	**$17,158,284**	**$29,453**	**6.9%**	**-$11,703,865**	**-$21,704**	**-4.4%**

Table 3-22: Maitland Station Area's Tax Revenue Estimates, 2007-2015

Year	Estimated Tax Revenue	Tax Revenue Growth Rate
2007	$3,485,546	
2008	$3,608,747	3.5%
2009	$3,468,017	-3.9%
2010	$3,304,667	-4.7%
2011	$3,399,203	2.9%
2012	$3,524,288	3.7%
2013	$3,512,789	-0.3%
2014	$3,897,070	10.9%
2015	$3,956,938	1.5%

Winter Park Station

After experiencing notable property value declines in 2009 and 2010, property values in the Winter Park station area exploded in 2012 jumping up by 32.4%, 23.4% more than the control area's growth rate in the same year (Table 3-23). In one year, the station area's property values increased well above their prerecession levels. While the Winter Park station area continued to grow gradually through the end of the study period, it was outperformed over the remainder of the study period as the control area grew by 13.4% in

2015. Given the one-time nature of Winter Park's property value growth, it is unclear whether these tax revenue gains can be attributed to SunRail or whether they will continue in the future. Whatever the case, Winter Park's predisposition to TOD as an established activity center helped to create a successful SunRail station that further increased the area's accessibility and appeal. This success has also generated property taxes, as the station area's tax revenue was 41.6% higher in 2015 than it was in 2007 (Table 3-24).

Table 3-23: Property Value Changes in Winter Park's Station and Control Areas, 2007-2015

Year	Station Area			Control Area		
	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre
2007	$636,570,116	$1,484,705		$440,460,723	$701,496	
2008	$688,928,541	$1,606,824	8.2%	$458,740,387	$730,609	4.2%
2009	$624,483,592	$1,456,515	-9.4%	$451,197,509	$718,596	-1.6%
2010	$597,384,610	$1,393,311	-4.3%	$428,100,505	$681,810	-5.1%
2011	$597,384,610	$1,393,311	0.0%	$428,100,505	$681,810	0.0%
2012	$790,638,865	$1,844,048	32.4%	$466,521,881	$743,002	9.0%
2013	$790,638,865	$1,844,048	0.0%	$466,521,881	$743,002	0.0%
2014	$838,622,792	$1,955,963	6.1%	$486,760,315	$775,234	4.3%
2015	$839,135,316	$1,957,159	0.1%	$551,800,542	$878,820	13.4%
Total Change	**$202,565,200**	**$472,453**	**31.8%**	**$111,339,819**	**$177,324**	**25.3%**

Table 3-24: Winter Park Station Area's Tax Revenue Estimates, 2007-2015

Year	Estimated Tax Revenue	Tax Revenue Growth Rate
2007	$7,285,275	
2008	$7,673,601	5.3%
2009	$6,862,650	-10.6%
2010	$6,440,449	-6.2%
2011	$6,642,924	3.1%
2012	$9,658,181	45.4%
2013	$9,594,872	-0.7%
2014	$10,479,923	9.2%
2015	$10,319,083	-1.5%

Florida Hospital Station

The Florida Hospital station exhibited the second highest property growth rate of any SunRail station. Between 2007 and 2015, Florida Hospital's value per acre grew by 93.4%. During the same time period its control area only grew by 8.8% (Table 3-25). The Florida Hospital station area outperformed its control area every year except for 2010. The majority of Florida Hospital's rapid growth occurred in 2014 and 2015 when the station area's property values grew by 70.0% in a two year span. However, the majority of this growth was due to major investments in the hospital and surrounding medical facilities, most of which are tax exempt. Consequently, the massive increases in property values have only produced moderate tax revenue gains. In 2014, the station area's tax revenues were actually lower than they had been in 2007. However, the combination of the hospital improvements and the presence of SunRail generated significant development in taxable properties in 2015 as property tax revenue increased by 27.3%, rising well above the station area's tax revenue at the start of the study period (Table 3-26).

Table 3-25: Property Value Changes in Florida Hospital's Station and Control Areas, 2007-2015

Year	Station Area			Control Area		
	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre
2007	$489,822,964	$1,140,300		$438,413,833	$992,022	
2008	$549,929,106	$1,280,226	12.3%	$443,843,793	$1,004,309	1.2%
2009	$533,262,513	$1,241,426	-3.0%	$398,459,063	$901,615	-10.2%
2010	$508,452,818	$1,183,670	-4.7%	$386,606,277	$874,795	-3.0%
2011	$508,452,818	$1,183,670	0.0%	$386,606,277	$874,795	0.0%
2012	$557,348,538	$1,297,498	9.6%	$387,888,089	$877,695	0.3%
2013	$557,348,538	$1,297,498	0.0%	$387,888,089	$877,695	0.0%
2014	$717,249,802	$1,669,745	28.7%	$409,274,155	$926,086	5.5%
2015	$947,408,945	$2,205,552	32.1%	$477,211,655	$1,079,812	16.6%
Total Change	**$457,585,981**	**$1,065,252**	**93.4%**	**$38,797,822**	**$87,790**	**8.8%**

Table 3-26: Florida Hospital Station Area's Tax Revenue Estimates, 2007-2015

Year	Estimated Tax Revenue	Tax Revenue Growth Rate
2007	$3,902,213	
2008	$4,079,132	4.5%
2009	$3,656,545	-10.4%
2010	$3,462,736	-5.3%
2011	$3,567,250	3.0%
2012	$3,717,819	4.2%
2013	$3,694,859	-0.6%
2014	$3,734,849	1.1%
2015	$4,754,906	27.3%

LYNX Station

The LYNX station area experienced substantial property value growth over the study period. However, LYNX's property value growth was very slow compared to the rest of Downtown Orlando. During the recession the LYNX station's property values were hit harder than the rest of downtown, dropping by about $90 million between 2007 and 2010 (Table 3-27). After that, the station area's property values stagnated, maintaining a similar level until 2014. The station area's stagnation was in sharp contrast to the rest of Downtown Orlando where property values grew by 22.5% in 2012. However, in 2014 and 2015 the LYNX station area recovered. In two years, the station area's property values grew by 35.2%, significantly outperforming its control area and rising well above the station area's prerecession property values. However, LYNX's late surge was too late to catch up to the rest of Downtown Orlando. Over the entire study period, the LYNX station area's property value per acre grew by 15.2%, while the remainder of Downtown Orlando's grew by 45.7%. Yet, it is possible that the station area's rapid growth in the last two years may indicate that LYNX will continue to grow faster than its control area in the coming years.

Even though, the LYNX station area did not grow as fast as its control area, LYNX still experienced significant property tax growth over the study period. In fact, LYNX's property tax revenue grew by 71.7%, faster than any other station area (Table 3-28). Netting $22,913,398 in tax revenue in 2015 alone, the LYNX station area generates more tax revenue than any other station area.

Table 3-27: Property Value Changes in LYNX's Station and Control Areas, 2007-2015

Year	Station Area			Control Area		
	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre
2007	$566,921,280	$5,103,678		$1,633,988,434	$2,802,485	
2008	$598,321,253	$5,386,354	5.5%	$1,861,426,930	$3,192,569	13.9%
2009	$528,795,527	$4,760,453	-11.6%	$1,771,513,966	$3,038,357	-4.8%
2010	$477,267,711	$4,296,577	-9.7%	$1,560,014,778	$2,675,611	-11.9%
2011	$477,267,711	$4,296,577	0.0%	$1,560,014,778	$2,675,611	0.0%
2012	$482,750,179	$4,345,932	1.1%	$1,910,842,917	$3,277,323	22.5%
2013	$482,750,179	$4,345,932	0.0%	$1,910,842,917	$3,277,323	0.0%
2014	$524,565,657	$4,722,374	8.7%	$2,031,641,193	$3,484,507	6.3%
2015	$652,888,675	$5,877,595	24.5%	$2,380,808,886	$4,083,371	17.2%
Total Change	**$85,967,395**	**$773,917**	**15.2%**	**$746,820,452**	**$1,280,886**	**45.7%**

Table 3-28: LYNX Station Area's Tax Revenue Estimates, 2007-2015

Year	Estimated Tax Revenue	Tax Revenue Growth Rate
2007	$13,344,933	
2008	$15,528,434	16.4%
2009	$14,879,367	-4.2%
2010	$12,471,234	-16.2%
2011	$12,829,500	2.9%
2012	$15,144,492	18.0%
2013	$15,055,261	-0.6%
2014	$17,325,588	15.1%
2015	$22,913,398	32.3%

Church Street Station

The Church Street station area was the most successful station area in terms of property value growth. Property values in Downtown Orlando as a whole grew rapidly during the study period, with the value per acre growing by 45.7% between 2007 and 2015 (Table 3-29). Yet, the Church Street Station far exceeded the rest of Downtown by growing by 94.0% in the same time period. Church Street's exceptional growth included a 48.2%

increase in 2012, the fastest one-year growth rate of any station or control area. A large portion of this rapid growth is attributable to the construction of the Amway Center, which accounted for about $275 million of the station area's $333 million property value growth in 2012. However, property values within the station area continued to grow throughout the remainder of the study period, growing by 24.1% in 2015.

The tax revenue increases associated with this rapid property value growth was dampened by the fact that the Amway Center currently is property tax exempt. Yet, the tax revenue generated by the station area still increased by 69.2% over the study period. However, since Downtown Orlando is a major activity center that likely would have seen significant development and property value increases with or without SunRail (as indicated by the control area's 45.7% increase in property values), it is difficult to determine how much of the tax revenue growth is attributable to SunRail.

Table 3-29: Property Value Changes in Church Street's Station and Control Areas, 2007-2015

	Station Area			Control Area		
Year	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre
2007	$678,802,507	$6,475,410		$1,633,988,434	$2,802,485	
2008	$769,678,285	$7,342,316	13.4%	$1,861,426,930	$3,192,569	13.9%
2009	$775,106,637	$7,394,100	0.7%	$1,771,513,966	$3,038,357	-4.8%
2010	$691,905,064	$6,600,402	-10.7%	$1,560,014,778	$2,675,611	-11.9%
2011	$691,905,064	$6,600,402	0.0%	$1,560,014,778	$2,675,611	0.0%
2012	$1,025,177,160	$9,779,638	48.2%	$1,910,842,917	$3,277,323	22.5%
2013	$1,025,177,160	$9,779,638	0.0%	$1,910,842,917	$3,277,323	0.0%
2014	$1,061,233,328	$10,123,594	3.5%	$2,031,641,193	$3,484,507	6.3%
2015	$1,317,053,355	$12,563,980	24.1%	$2,380,808,886	$4,083,371	17.2%
Total Change	**$638,250,848**	**$6,088,569**	**94.0%**	**$746,820,452**	**$1,280,886**	**45.7%**

Table 3-30: Church Street Station Area's Tax Revenue Estimates, 2007-2015

Year	Estimated Tax Revenue	Tax Revenue Growth Rate
2007	$8,929,478	
2008	$10,648,702	19.3%
2009	$10,572,087	-0.7%
2010	$9,077,866	-14.1%
2011	$9,338,003	2.9%
2012	$11,287,169	20.9%
2013	$11,220,900	-0.6%
2014	$11,801,334	5.2%
2015	$15,109,580	28.0%

Orlando Health Station

The Orlando Health Station was among the more successful station areas in terms of property value growth. The Orlando Heath station area's property value per acre only declined by 4.6% between 2009 and 2010, the smallest decline of any station area during the recession (Table 3-31). This may have been in part because of the station area's momentum, prior to the recession as the station area had grown by 8.4% in 2008. The Orlando Health station area also outperformed its control area every year except for 2014. However, the majority of the station area's success occurred in 2007 and 2012. By 2015, Orlando Health's growth had slowed to mirror its control area. This may indicate that much of Orlando Health's success was due to development momentum prior to the opening of SunRail instead of SunRail itself. Altogether, property values in the station area grew by 24.1% during the study period compared to a 6.1% decline in its control area.

Like the Florida Hospital station area, the Orlando Health Station's tax revenues were dampened by the prominence of tax exempt hospital properties. Consequently, tax revenues in the Orlando Heath Station only increased by 11.3% between 2007 and 2015 with most of this growth coming in 2014 (Table 3-32).

Table 3-31: Property Value Changes in Orlando Health's Station and Control Areas, 2007-2015

Year	Station Area			Control Area		
	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre
2007	$625,838,623	$1,513,750		$217,713,732	$383,384	
2008	$678,295,671	$1,640,631	8.4%	$223,050,251	$392,781	2.5%
2009	$667,174,385	$1,613,731	-1.6%	$192,363,456	$338,743	-13.8%
2010	$646,826,443	$1,564,514	-3.0%	$185,996,826	$327,532	-3.3%
2011	$646,826,443	$1,564,514	0.0%	$185,996,826	$327,532	0.0%
2012	$703,724,824	$1,702,138	8.8%	$178,954,625	$315,131	-3.8%
2013	$703,724,824	$1,702,138	0.0%	$178,954,625	$315,131	0.0%
2014	$702,147,384	$1,698,322	-0.2%	$185,468,244	$326,601	3.6%
2015	$776,373,171	$1,877,856	10.6%	$204,398,184	$359,936	10.2%
Total Change	**$150,534,548**	**$364,106**	**24.1%**	**-$13,315,548**	**-$23,448**	**-6.1%**

Table 3-32: Orlando Health Station Area's Tax Revenue Estimates, 2007-2015

Year	Estimated Tax Revenue	Tax Revenue Growth Rate
2007	$4,364,413	
2008	$4,736,567	8.5%
2009	$4,480,198	-5.4%
2010	$3,952,744	-11.8%
2011	$4,071,322	3.0%
2012	$3,937,398	-3.3%
2013	$3,913,230	-0.6%
2014	$4,571,700	16.8%
2015	$4,857,488	6.3%

Sand Lake Road Station

The Sand Lake Road station was among the poorest performing stations. Not only was Sand Lake Road the only station in Orange County to end the study period with lower property values than it started with, but it also was significantly outperformed by its control area. Sand Lake Road's property value per acre dropped by over 10% in both 2008 and 2009 (Table 3-33). Even after a modest recovery in 2014 and 2015, the property values in the Sand Lake Road station area still declined by 10.1% over the entire study period. More importantly, the Sand Lake Road station area was outperformed by its control area every year except for 2014 and 2015, but the greatest disparities came in 2008 and 2012. Sand Lake's stagnating property values caused it to be the only station area in Orange County that generated less property tax revenue in 2015 than it did in 2007 (Table 3-34). Even a 10.4% increase in 2015 failed to recover the property tax declines from the previous years. However, Sand Lake's tax revenue increase in 2015 could be indicative a further growth in the coming years as SunRail matures and SunRail's long-term impacts on development patterns continue to take shape.

Table 3-33: Property Value Changes in Sand Lake Road's Station and Control Areas, 2007-2015

Year	Station Area			Control Area		
	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre	Total Assessed Property Value	Assessed Value per Acre	% Change in Value per Acre
2007	$149,693,561	$287,705		$160,320,480	$349,050	
2008	$151,854,021	$291,858	1.4%	$176,672,183	$384,651	10.2%
2009	$135,991,745	$261,371	-10.4%	$160,309,951	$349,027	-9.3%
2010	$122,262,853	$234,984	-10.1%	$150,265,080	$327,157	-6.3%
2011	$122,262,853	$234,984	0.0%	$150,265,080	$327,157	0.0%
2012	$113,744,286	$218,612	-7.0%	$152,687,124	$332,431	1.6%
2013	$113,744,286	$218,612	0.0%	$152,687,124	$332,431	0.0%
2014	$123,156,992	$236,703	8.3%	$158,849,077	$345,847	4.0%
2015	$134,535,284	$258,572	9.2%	$171,731,510	$373,894	8.1%
Total Change	-$15,158,277	-$29,134	-10.1%	$11,411,030	$24,844	7.1%

Table 3-34: Sand Lake Road Station Area's Tax Revenue Estimates, 2007-2015

Year	Estimated Tax Revenue	Tax Revenue Growth Rate
2007	$2,321,841	
2008	$2,357,835	1.6%
2009	$2,159,762	-8.4%
2010	$1,917,003	-11.2%
2011	$2,001,294	4.4%
2012	$1,849,069	-7.6%
2013	$1,841,747	-0.4%
2014	$1,853,472	0.6%
2015	$2,045,905	10.4%

Summary

This chapter has presented the results of the property value analysis. Results show that during the early part of the study period, the Great Recession of the 2007-2010 tended to have measurable negative effects over property values in both the station areas and their respective control areas. Looking at the latter half of the study period, in many station areas these trends reversed and growth in property values was observed. This was also the case in the respective control areas. The extent to which station areas performed relative to their control areas was highly variable, though trends in geography, location, and other factors suggest possible explanations. The next chapter presents summaries of case studies of selected stations which look to dive deeper into explaining some of these observed property valuation trends.

Chapter 4: Summary of Case Studies

4.1 Introduction

Flowing from the property value and tax revenue analysis, the research team began the process of conducting case studies of selected station areas to determine the impact of SunRail investments on property values surrounding the station, the form and function of the new development in the station area, and the character of the station area. The case studies are intended to reveal whether the modest property value gains demonstrated in the quantitative analysis are expected to continue to escalate in the future. These case studies are also designed to determine the specific role of SunRail investments in catalyzing new development in the station areas, as well as influencing the form of new development around stations.

Eight SunRail stations were chosen to be examined in detailed case studies: Sanford, Lake Mary, Longwood, Altamonte Springs, Maitland, LYNX, Church Street, and Sand Lake Road. By examining the existing conditions, community reactions, political support, and development interests within each station area, these case studies aim to provide inferences into the wide variation seen in the outcomes and level of success across the eight stations. The case studies ultimately aim to answer why some stations were more successful than others at changing development patterns, sparking new development, cultivating TOD, and increasing property values and tax revenues within the station areas.

4.2 Summary of the Case Study Selection Methodology

Case study station areas were selected based upon site visits, discussions with SunRail staff and local planning officials, and preliminary research into new and proposed development within a half-mile of stations areas. To better understand how and why SunRail's property value impacts have varied between station areas, the research team purposefully selected a set of station areas that had demonstrated positive property value changes and showed great promise of continued TOD, as well as a set of stations areas with minimal property value impacts and limited evidence of new SunRail-related development. This approach allows the research team to explore and understand the dynamics that influence the form, function, and character of development around station areas. After an evaluation of each station area, the research team identified a total of eight station areas for which case studies were constructed. Four of these station areas have experienced new development in the immediate vicinity of the SunRail station, much of which has taken the form of TOD-style housing and mixed use. In contrast, the team

identified four SunRail station areas where little new development has occurred. These stations are identified in Table 4-1.

Table 4-1: SunRail Station Area Selected for Case Studies

Case Studies of Station Areas with New Development	Case Studies of Station Area with Limited New Development
• Church Street Station • LYNX Central Station • Lake Mary Station • Longwood Station	• Altamonte Springs Station • Maitland Station • Sand Lake Station • Sanford Station

Due to the close proximity between the LYNX and Church Street stations and their similar influence on new development guided by the same policies and regulations, these two station areas were combined into a single downtown profile, utilizing quarter-mile buffers compared with the remaining area within the downtown boundary.

Once identified, the research team began a comprehensive examination of each case study area, gathering and synthesizing a wide range of relevant information concerning each station area. The major elements for the case study analyses include:

- Obtaining copies of existing land-development regulations (LDR), comprehensive plans, and other important planning documents,
- Contacting local planning staff to inquire about recent and ongoing changes to the comprehensive plan or LDRs that could have helped or hindered development around the station,
- Gathering information on notable development projects around each station area,
- Scheduling interviews with developers of notable development projects to discuss how SunRail impacted the location and design of their development plans.

Case Study Evaluation Criteria

To provide a systematic way of synthesizing, evaluating, and displaying all of the information collected on each case study, the research team developed a set of evaluation criteria to rate SunRail's impact on development patterns within the station area. The criteria were designed to rate how the station area performed over SunRail-related development outcomes as well as to evaluate the station area over a host of factors that may have shaped the character and scale of each outcome. In this way, the

criteria aided in telling each case study's story by providing insight into how and why SunRail did or did not spark TOD within the station area.

The research team identified three primary evaluation criteria to assess each case study station area: Predisposition to TOD, TOD Commitment, and SunRail-Related Development. For each primary criterion, the research team developed a set of sub-criteria made up of the underlying factors shaping and determining each major criterion. Tables 4-2 – 4-4 list each of the factors used to evaluate each primary criterion and provide a description of the questions each sub-criterion was trying to answer.

Predisposition to TOD attempts to capture the local context factors that determine how inclined the station area was to TOD before SunRail was announced. As seen in Table 4-2, this criterion included factors such as the station's location, demographics, existing built form, existing zoning, and development momentum prior to 2007. Evaluating each case study along these issues uncovered preexisting factors that may have hindered SunRail from having a noticeable impact on the station area's property values and development patterns. The station area's Predisposition to TOD will also help to identify the specific role of SunRail investments in catalyzing new development by uncovering whether new developments were likely to occur even without the SunRail.

Table 4-2: Station Areas' Predisposition to Transit-Oriented Development Evaluation Criteria

Predisposition to TOD Evaluation Criteria	Description
Location	Was the station's geographic location within the Orlando metro region conducive for TOD? Was the station location within the station area conducive for TOD?
Demographics (neighborhood profile)	Was the station area's neighborhood profile supportive of TOD?
Existing Built Form	Was the character of existing development conducive for TOD? Did the station area exhibit higher density, mixed-use development prior to SunRail? Was vacant land available for new development?
Development Momentum	Was the station area already growing before SunRail was announced?
TOD-Friendly Zoning (pre-existing)	Did the station area already have zoning codes that accommodated higher density, mixed-use development?

TOD Commitment attempts to uncover how supportive the local community, and particularly the local government, was of SunRail and TOD. More specifically, this criterion

evaluates whether the local government proactively supported SunRail-related TOD through planning documents, policy decisions, and infrastructure investments. In some cases, little to no new TOD occurred because the zoning codes did not permit development other than the single-family homes and big-box stores that historically comprised the station area. Without a local government that was committed to promoting TOD and that took steps to support and incentivize TOD, SunRail was unlikely to have a noticeable effect. Thus, evaluating whether the station areas incorporated SunRail into their land development regulations and comprehensive plan in a timely manner and identifying whether infrastructure investments such as adding sidewalks or improving stormwater systems were made to support TOD was a vital part of uncovering why certain stations were more successful than others.

Table 4-3: Station Areas' TOD Commitment Evaluation Criteria

TOD Commitment Evaluation Criteria	Description
Incorporation of SunRail/TOD into LDR's (zoning codes, etc.)	Has the local government amended their LDRs since the announcement of SunRail to allow for higher density, mixed-use development?
Incorporation of SunRail/TOD into Comprehensive Plan	Has the local government amended their Comprehensive Plan since the announcement of SunRail to incorporate TOD around the station?
Planned TOD Infrastructure Investment	Has the local government incorporated TOD-related infrastructure investments within the station area into their capital improvement plan?
Implemented TOD Infrastructure Investment	Has the local government constructed infrastructure improvements (such as sidewalks/bike lanes, streetscape improvements, and stormwater systems) within the station area since the announcement of SunRail?
Timeliness of Response	Did the local government begin incorporating SunRail into planning documents and infrastructure plans prior to the opening of SunRail?
Political Commitment/ Local Enthusiasm	Has the local community been supportive of or opposed to SunRail and TOD?

Finally, the SunRail-Related Development criterion was the outcome criterion, evaluating whether the presence of SunRail did in fact spark new development within the station area. This criterion looked first and foremost at the amount of new development (both planned and completed) that occurred between 2007 and 2015 that likely was associated with or motivated by SunRail. The research team tried to parse which new developments that were obviously not linked to SunRail, such as single-family homes built

half-a-mile from the station. However, the research team typically erred on the side of including any new developments in the evaluation. Almost as important as the amount of new development was the character of the new development. Specifically the research team was interested in whether or not the new development represented a significant deviation from station area's traditional development patterns in terms of density, mix of uses, housing mix, or pedestrian-friendly design. If the new development simply was a continuation of the area's traditional development patterns, it was less likely to have been affected by SunRail and was less likely to have an impact on current or future property values.

Table 4-4: Station Areas' SunRail-Related Development Evaluation Criteria

SunRail –Related Development Evaluation Criteria	Description
Amount of New Development	How much new development (planned and completed) occurred in the station area between 2007 and 2015?
- Completed New Development	How much new development was constructed between 2007 and 2015?
- Planned New Development	How much additional development has been planned or permitted but not constructed?
Character of New Development	Did the new development represent a significant deviation from the station area's traditional development patterns? Was the new development transit-oriented?
- Density/Intensity	Was the new development higher density/intensity than was typical for the station area?
- Mix of Uses	Did the new development include a mix of uses? Did it improve the station area's land use mix?
- Pedestrian-Friendly Design	Did the new development incorporate sidewalks and bike lanes? Did it promote accessibility to the station?
- Proximity to Station	Was the new development located close to station?

A major challenge the research team faced while evaluating each case study was that the huge variation in the local context of each case study made it impossible to use a rigid scale to rate each station over the evaluation criteria. For example, when measuring the amount of new development in a given station area, a single mixed-use apartment complex in a suburban station area such as Sanford could be considered a large amount of new development because it represents a significant deviation from the area's traditional low-density development patterns. However, only one new development in

Downtown Orlando in eight years would represent a drastic decline in development activity. Consequently, the research team determined that a 3-point ordinal scale ('Good,' 'Fair,' or 'Poor') would be a more suitable approach to provide a fair evaluation of each station area because it could be scaled to fit the local context.

4.3 Summary of Case Study Findings

In-depth examinations of each station area showed a wide array of existing local conditions, including built environment, political response, and interest from developers. The research team's qualitative evaluation of each case study based on the stations' pre-disposition to TOD, the local commitment to TOD, and the amount of new SunRail-related development is summarized in Table 4-5.

Predisposition to new development was suspected to be a major influence on the likelihood of new TOD occurring. Station areas containing suburban strips with auto-dependent development patterns such as in Altamonte Springs and Sand Lake Road have not experienced significant new TOD. Other station areas located within suburban town centers or dense urban areas, such as the Lake Mary, Longwood, Maitland, LYNX, and Church Street stations have all experienced new TOD. Likewise, areas including a significant amount of industrial uses were expected to have limited opportunities for new TOD, such as in the Sand Lake Road station area. However, this was not the case with the Sanford station area where a new townhome community was developed directly adjacent to the SunRail platform, and also has two mixed-use TODs planned for the future.

Support and early, proactive responses from local governments were also considered to have a possible influence on the creation of new TODs. However, support provided in the way of relevant changes to comprehensive plans, land use codes, ordinances, and even monetary investment into new infrastructure resulted in inconsistent amounts of new construction within station areas. While an area like Sanford did not establish a master plan for the station area and instead utilized a flexible Planned Development rezoning strategy for new projects, it has experienced a new development and increased tax revenues with continued interest from other developers. This result contrasts directly with Altamonte Springs, which has planned for development in the SunRail station area, has reclassified zoning for pedestrian focused TOD, and has invested and budgeted for a considerable amount of infrastructure improvements, but has yet to experience TOD since the introduction of SunRail. These results may signify a lack of realized potential in Altamonte Springs, as they are attempting to remove cost-prohibitive barriers to developing within the area, though also possible is that planning efforts meant to guide new growth have had inconsistent influence on actually stimulating new development.

Table 4-5: Summary of Case Study Evaluations

Evaluation Criteria	Sanford	Lake Mary	Long-wood	Alta-monte Springs	Mait-land	LYNX/ Church	Sand Lake Road
Predisposition to TOD	**Fair**	**Good**	**Good**	**Poor**	**Fair**	**Good**	**Poor**
Location	Poor	Fair	Good	Fair	Good	Good	Poor
Demographics (neighborhood profile)	Fair	Good	Good	Poor	Good	Fair	Poor
Existing Built Form (mix of uses, density, housing mix, amount of vacant land, accessibility)	Fair	Good	Good	Poor	Fair	Good	Poor
Development Momentum	Fair	Good	Fair	Poor	Fair	Good	Poor
TOD-Friendly Zoning (pre-existing)	Poor	Fair	Good	Poor	Fair	Good	Poor
TOD Commitment	**Poor**	**Good**	**Good**	**Fair**	**Fair**	**Good**	**Fair**
Incorporation of SunRail/TOD into LDR's (zoning codes, etc.)	Fair	Good	Good	Fair	Fair	Good	Poor
Incorporation of SunRail/TOD into Comprehensive Plan	Poor	Good	Good	Fair	Fair	Good	Fair
Planned TOD Infrastructure Investment	Poor	Fair	Fair	Good	Good	Good	Fair
Implemented TOD Infrastructure Investment	Poor	Fair	Fair	Fair	Fair	Good	Poor
Timeliness of Response	Poor	Good	Good	Fair	Good	Good	Good
Political Commitment/Local Enthusiasm	Fair	Good	Good	Fair	Fair	Good	Poor
SunRail Related Development	**Poor**	**Fair**	**Good**	**Poor**	**Fair**	**Good**	**Poor**
Amount of New Development	Poor	Fair	Good	Poor	Fair	Fair	Fair
- Completed New Development	Poor	Fair	Good	Poor	Poor	Fair	Fair
- Planned New Development	Fair	Poor	Fair	Poor	Fair	Fair	Fair
Character of New Development	Poor	Fair	Fair	Poor	Good	Good	Poor
- Density	Fair	Good	Good	Poor	Good	Good	Poor
- Mix of Uses	Poor	Fair	Fair	Poor	Fair	Good	Poor
- Pedestrian-Friendly Design	Poor	Good	Fair	Poor	Fair	Good	Poor

The wide variation in context and planning efforts has resulted in different TOD outcomes between station areas. Generally, the downtown LYNX and Church Street stations have experienced very large projects focused strongly around the SunRail station, and more than any other station areas were expected to benefit from their location within an expanding, dense urban center with increasing interest from developers and a high level of multi-modal connectivity. However, because the surrounding downtown area has also recently experienced rapid growth, it is difficult to infer how much influence the SunRail has had in the impetus of these particular developments compared with their location in the downtown area alone. The Maitland, Lake Mary, and Longwood station areas have perhaps experienced the most similar type of new development, which is primarily multi-family apartment complexes that are either directly adjacent to their respective SunRail stations or are within a very short walking distance.

In summary, while SunRail's impact on property values, tax revenue, and development patterns has varied significantly between each station area, the following case studies suggest that, in settings conducive for TOD, SunRail has already begun to be a catalyst for higher density, mixed-used development that could signify an ongoing transformation of several station areas into transit-oriented activity nodes. The remainder of the chapter provides a brief summary of each case study that will be expounded upon in the following chapters.

Sanford

The Sanford study area includes several previously established single-family residential communities on the north side of the rail lines, while the south side of the study area has been used for industrial purposes. Though there is currently a general lack of mixed-use development and pedestrian/bicyclist accessibility from most of the nearby neighborhoods to the station, the Sanford SunRail station area is considered to have considerable future potential due to the availability of large, vacant parcels. However, as seen in Table 4-5, Sanford's distance from population centers and the relative lack of planning efforts to promote TOD within the station area may have slowed new SunRail-related development. The only significant new development that occurred during the study period was the Riverview townhomes community. While Riverview's 194 townhomes are adjacent to the station and provides boardwalk access to the station platform, this gated community does not represent a significant deviation from Sanford's traditionally auto-oriented development patterns. However, Sanford's potential may be realized in the coming years as two significant planned developments have recently received property zoning changes to Planned Development. The proposed All Souls Transit Village is a roughly 22 acre proposed development from the Orlando Diocese that

is intended to consist of 840 apartments, 120 additional age-restricted units, 40,000 square feet of retail and office space, and a 600,000 square foot elementary school. The Transit Properties proposed development is to include a mix of transit oriented apartments and retail. In this way, while SunRail has yet to have a significant impact on the Sanford station area, developers are beginning to implement denser, mixed-use TODs that could transform the character of the station area in the near future.

Lake Mary

The City of Lake Mary has responded to the opportunities provided by the SunRail with a number of policy and comprehensive plan changes based around downtown revitalization and mixed-use TOD, including the creation of a Downtown Development District and Downtown Master Plan. The city has also utilized development incentives, in the form of a Transfer of Development Rights (TDR) program for flexible development regulations, and Public-Private-Partnerships to encourage and realize new development. The City's support and leadership appear to have been successful as the newly constructed $32 million Station House Apartments project has provided 200 multi-family residential units extremely close to the station that likely would not have been developed without the City's efforts. Another planned mixed-use development, Station Pointe, is intended to provide office and retail space that will be connected directly to the station's platform. These projects complement the existing mix of land uses in the station area, which includes residential, commercial, office, and public space around the city's downtown center. Though these efforts and new developments represent a new, more multi-modal and transit oriented direction for Lake Mary, tax revenue changes attributable to SunRail have thus far generally not been positive.

Longwood

The Longwood SunRail station area has benefited from proactive, development friendly leadership, and is described as having potential to transition into a new downtown style district. Planning and TOD in the station area has been guided by the 2012 Heritage Village Urban Code, showing a comparatively early response to guiding development around the SunRail station with considerable additions to the city's comprehensive plan and land development code. The city and county have also invested into new infrastructure including a sidewalk project, on-street parking, and storm water management in order to help promote new developments. In conjunction with the SunRail, these efforts have significantly increased interest in the area and have helped stimulate a number of new multi-family developments within the station's half-mile radius, including the $30 million, 208-unit apartment complex Weston Park, the $10.8 million, 123-unit age-restricted Heritage Village Commons, and Magnolia Place, a 10-unit

affordable townhome redevelopment by Habitat for Humanity of Seminole County. Several new local businesses in very close proximity to the station have recently opened, including a coffee house and a fast food sandwich restaurant.

Altamonte Springs

Though the city has actively attempted to promote and guide TOD around its SunRail station with the East Town Center Vision Plan for Urban Infill Redevelopment, the Economic Development Opportunity sub-district, and a number of infrastructure improvements, previously existing conditions in Altamonte Springs have presented some difficult barriers for new mixed-use development. The station study area consists primarily of residential units and requires millions of dollars in improvements to storm water management and infrastructure that are currently budgeted through 2018 in order to remove cost-prohibitive barriers for new developments. Very little new development of any kind has occurred near the station recently, though there is a possible future affordable multi-family housing development that will be constructed within the station's study area.

Maitland

Maitland is a relatively small city compared with other SunRail stations, but it claims a strong residential identity emphasizing the preservation of its neighborhoods. The station is located directly off of North Orlando Avenue, a significant corridor in the area with a limited amount of land for new developments or space for parking to support them. Strict land use guidelines were established by the city in 2008 with a TOD Overlay District delineating boundaries around the station between an economic development area and existing residential areas. Despite the challenges for new development in the Maitland SunRail station area, there have been two new significant developments, including Maitland Station Apartments, an approximately $47 million, 293-unit apartment complex that is currently under construction, and Uptown Maitland Senior Apartments, a $22 million, 93-unit, age restricted community. A $3.4 million, five-story parking garage is also expected to be added to the area if grant money can be acquired in order to help improve accessibility and stimulate additional ridership. Kittelson & Associates, Inc. created a Maitland station area bicycle and pedestrian connectivity study in 2014, though the city is expected to update its Area Transportation Study soon in order to improve multi-modal mobility and circulation with the creation of networks for bicyclists and pedestrians between the surrounding residential neighborhoods and the general commercial corridor. Most notable amongst these improvements is a nearly $300,000 boardwalk that connects the station platform with a nearby neighborhood that crosses a retention pond.

LYNX & Church Street

Orlando has recently experienced a resurgence of new development throughout its downtown area, including around its two SunRail stations. The LYNX and Church Street stations are linked through the remaining downtown area through a number of multi-modal transportation systems, including the commuter rail, the LYNX bus system, Lymmo, and the Juice bike share program. Due to the two station's close proximity and the need for a suitable control candidate area, each station's study area was defined by a quarter mile that were combined and compared with the remaining area within Orlando's downtown boundary. New construction around in the study areas includes the $39 million Crescent Central Station, a 279-unit mixed-use TOD condominium with ground floor retail, which is currently one of the most prominent developments specifically focused around the SunRail. The $63 million, 320-unit Skyhouse apartments also crosses the LYNX station's quarter-mile radius boundary very slightly, as does a small portion of the future Creative Village development boundary. The Church Street station is set for the $81 million Tremont Tower, a 28-story mixed-use development including parking, office space, hotel rooms, and an indoor SunRail platform inside the building. These particular TODs in part represent higher intensity growth in the downtown area and increasing integration of the SunRail in new developments.

Sand Lake Road

The Sand Lake Road station currently is the southern terminus of SunRail's phase 1, and while the station has experienced considerable ridership as a park-and-ride station, the surrounding area has experienced little new development. A large portion of the station's half-mile radius contains a historic neighborhood, while much of the area south of the station is devoted to industrial uses. The area west of the station includes a portion of a residential community built between 2000 and 2002, as well as a significant amount of wetlands, presenting inherent difficulties for new development that are exacerbated by the busy Sand Lake Road / McCoy Road corridor, particularly from the overpass crossing the rail line. New development that has occurred in the station's study area includes a Chevron gas station with a Food Mart convenience store, as well as several fast food restaurants, namely KFC, Wendy's, and Taco Bell. One parcel in the station's TOD is zoned for a planned development, though no plans for this project have been publicized. The ECFSCC has also established a TOD overlay district surround the Sand Lake Road station in order to provide some guidelines for new developments, and also has plans for a future sidewalk improvement project near the station. Overall, Sand Lake Road's difficulty to spur new development has been reflected in the station area's property values changes, as they have decreased significantly between 2007 and 2015.

Chapter 5: Sanford Station Area Profile

5.1 Introduction

As noted in 2014 by SunRail's TOD facilitator Blake Drury, much of the Sanford SunRail station TOD area has been historically perceived as an industrial part of the community despite the existing supply of long established and recently developed single-family residential communities north of the rail line[1]. Though large vacant parcels on the southern half of the study area provide opportunities for new and varied developments, perception of the area along with a general lack of mixed-use may have delayed interest from developers. Previously existing nodes of development surrounding the station's study area may have also attracted new development towards either the Central Florida Zoo & Botanical Gardens to the northwest, the Marketplace at Seminole Towne Center to the southwest, or the historic Sanford downtown area to the east.

Two new planned developments for mixed-use properties, the All Souls Transit Village and Transit Properties, have recently shown that there is promise in the Sanford SunRail station area for new TODs, particularly for large, advantageous projects. The Planning and Development Services Director of Sanford Russel Gibson commented that property owners of some of the large vacant parcels surrounding the SunRail station are still in the process of obtaining or securing additional TOD related land use entitlements for the properties (i.e., increased density, mixed uses, master plans, etc.) (R. Gibson, personal communication, April 25, 2016). However, as the Sanford station area is still within this early transitionary phase of new development, it is currently able to be compared with other SunRail stations as an area that has experienced a moderate amount of new developments influencing tax revenue since the introduction of SunRail.

5.2 Recent Pre-SunRail Station Area Development

Several residential communities of varying densities exist within the Sanford SunRail station's TOD area. A number of these homes and townhomes are located extremely close to the rail lines, which has caused some friction between residents and various state and local agencies[2]. FDOT has attempted several strategies to remedy these complaints[3, 4], such as providing improvements to private residences[5], though the station's proximity presents inherent issues with noise. This is evident in Figure 5-1, which shows a Riverview townhome from the Sanford SunRail station platform, as well as Figure 5-2, which displays satellite imagery of the SunRail station and the surrounding half-mile radius study area.

Riverview Townhomes is a gated residential community adjoined to the Sanford SunRail station area[6], as seen in Figure 5-2. The area is located within the Riverview Townhomes I & II subdivisions, and consists of approximately 194 units built between 2008 and 2015. The community was developed by M/I Homes and is currently organized by the Riverview Homeowners Association. A walkway and gate provide private and direct access between the station platform and Riverview.

Figure 5-1: Riverview Townhome Adjacent to SunRail Platform

The Preserve at Lake Monroe is a housing community directly adjacent to the Sanford SunRail station that was developed by Centex Corporation[7]. The area is located within the Preserve at Lake Monroe and Preserve at Lake Monroe Phase II subdivisions, and consists of 294 parcels with approximately 279 units built between 2003 and 2006 (one unit was built in 2009 and another in 2012).

Venetian Bay is a single family residential community subdivision that exists partially within the northeast of the Sanford SunRail station's TOD area. Venetian Bay is comprised of 98 homes that were built in 2005, approximately 74 of which are within the half-mile buffer of the station.

Wolfers Lake View Terrace is a smaller, lower density community adjacent to Venetian Bay, containing 39 homes, roughly 17 of which are also within the TOD area, however, only two homes have been built in this neighborhood in the last decade.

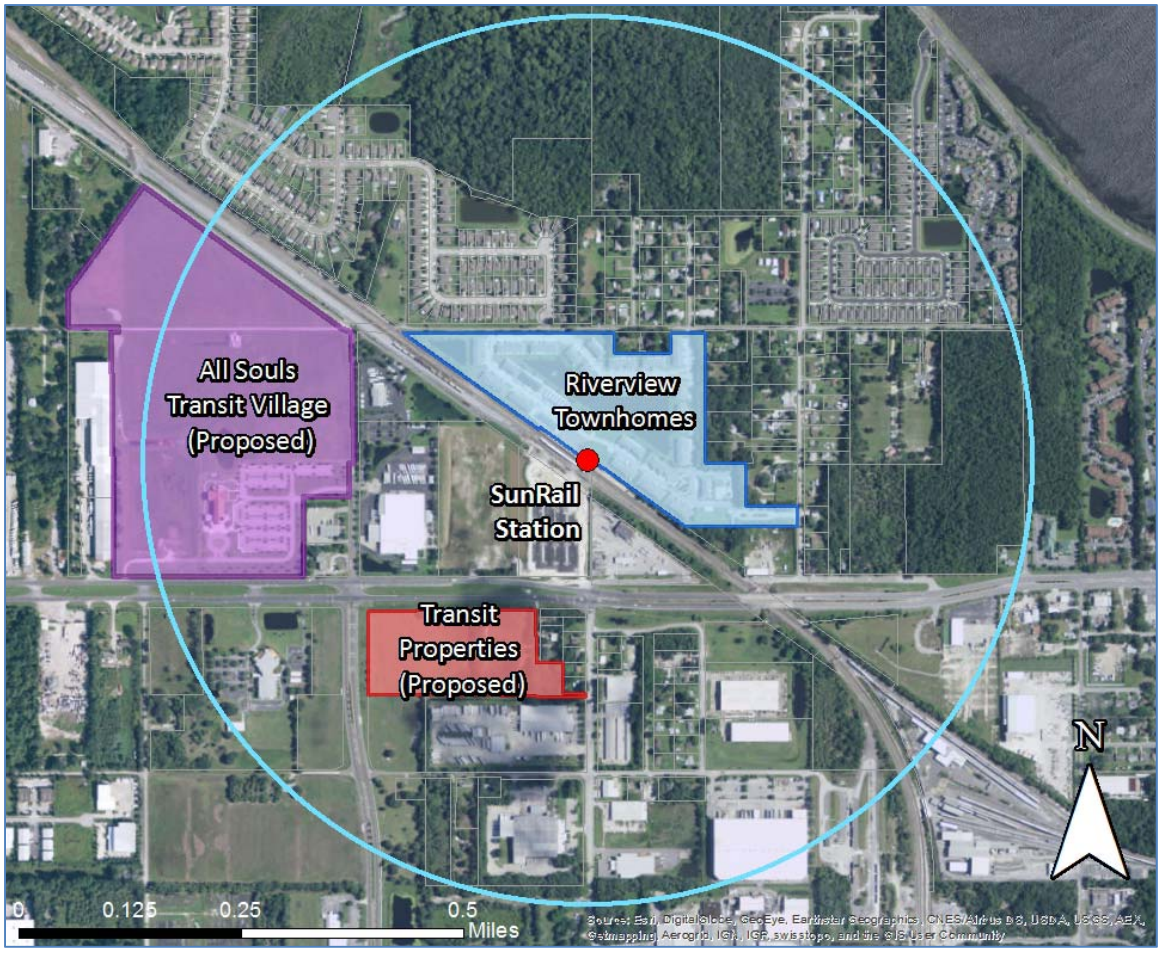

Figure 5-2: Sanford SunRail Station Half-Mile TOD Area with New and Proposed Developments

5.3 Post-SunRail Station and Future Area Development

Since the introduction of SunRail service to Sanford, two planned developments (seen in Figure 5-2) have been proposed within the station's TOD area. Representatives from each these properties have requested and received zoning reclassification from the city for planned development (PD) allowing for mixed-use TOD.

All Souls Transit Village (3280 W 1st St) is a proposed mixed-use-development on a 21.82 acre parcel currently occupied by the All Souls Catholic Church[8]. On May 17, 2016, the Orlando Diocese met with Sanford officials to discuss the proposed development 0.4 miles west of the Sanford SunRail station. Ray Bradick of PKA Orlando, Inc. is representing the diocese and has commented that preliminary plans (seen in Figure 5-3) include 840 apartments, 120 age-restricted units for senior living, 25,000 square feet of retail, 15,000 square feet of office space, and a 600,000 square foot elementary school[9].

[10]. The property is currently tax exempt, though the apartments, retail, and office space are currently intended to be sold to a private company to development, which "would return the property to the tax rolls.[9]" In 2015, the Seminole County Property appraiser assessed the property's value at $8,191,019[11].

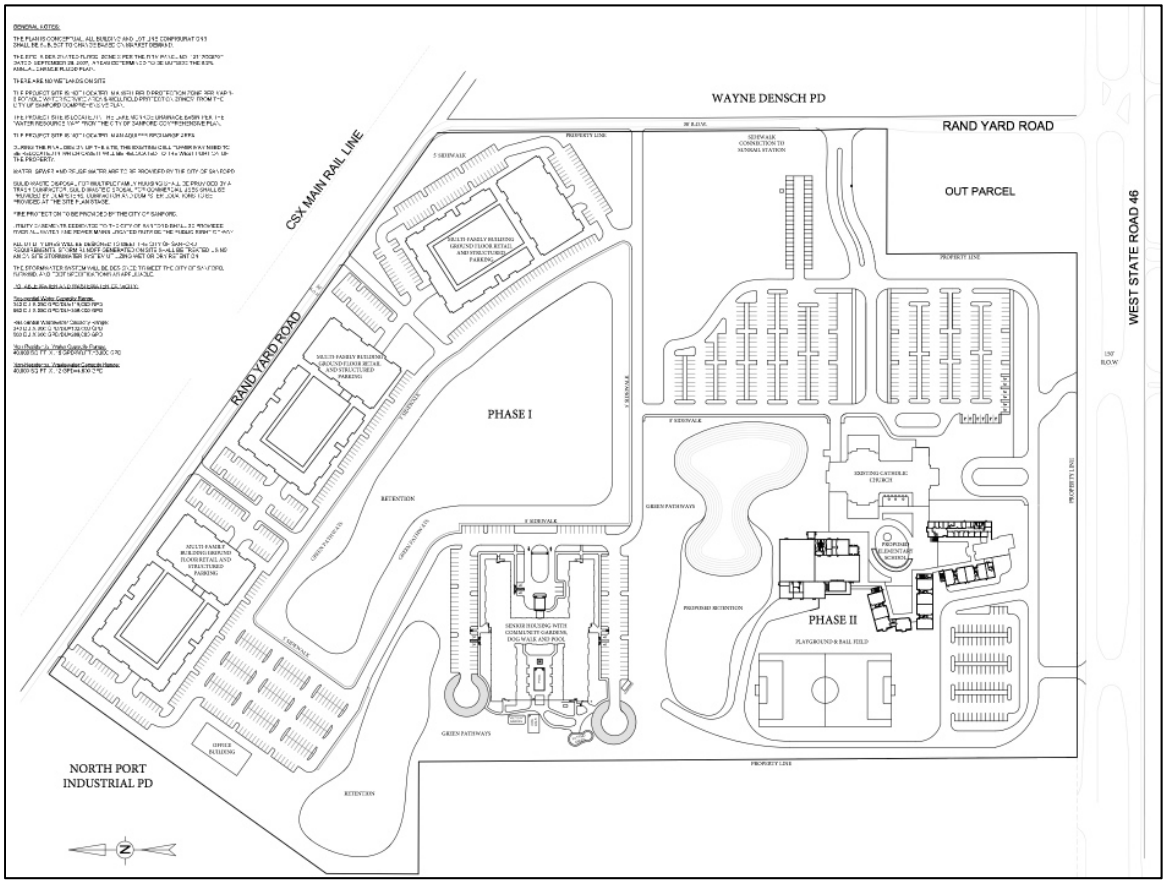

Figure 5-3: Plans for the Mixed-Use All Souls Transit Village TOD

Transit Properties: Five vacant parcels on approximately 12.4 acres located south of SR 45 at 2901 West 1st Street have been combined into a new planned TOD owned by the Transit Properties Group[12] that is specifically "designed to capitalize on its location near transit.[13, 14]"

Each of the five parcels were sold to Transit Properties LLC on April 1, 2014, and in 2015 were assessed a combined total just value of $2,149,601 [14]. The proposed master plan a mix of apartment buildings and retail (seen in Figure 5-4) was submitted to the city on July 9, 2015. On September 3, 2015 staff recommended to the Sanford Planning and Zoning Commission to approve the rezoning from RI-1 (Restricted Industrial) and SR-1A (Single Family Residential) to PD (Planned Development)[15], who then in turn recommended

approval to the City Commission on September 28, 2015[16]. Ordinance 4353 approved the rezoning on October 12, 2015, though it noted rezoning will expire after three years if all new improvements are not completed or an extension is granted[12].

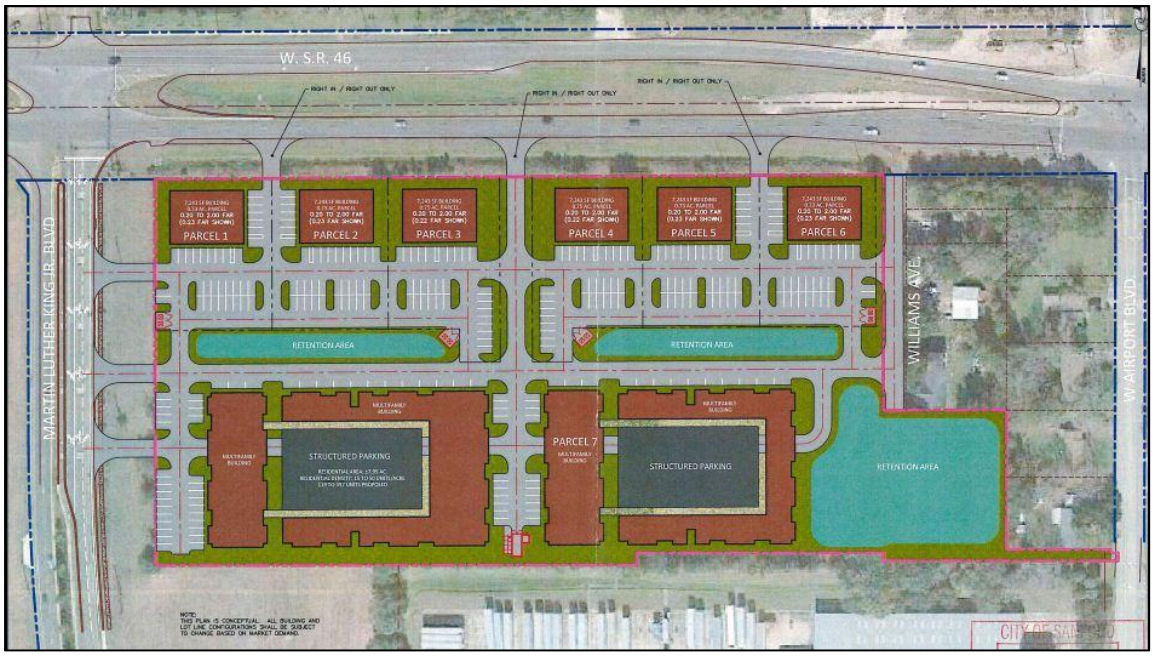

Figure 5-4: Proposed Transit Properties TOD[13]

Other Notable Developments: Several other developments are also currently underway very close to the Sanford SunRail station, though outside of the half-mile radius study area. Most notable are the 120,000 square foot North Park Commerce Center, and a 70 acre mixed-use development 1 mile west of the Sanford SunRail station named Thornbrooke, which has been approved for construction and is to include 189 single family homes, 112 townhomes, and 7 commercial lots.

5.4 Future Land Use and Zoning Classifications

Figure 5-5 shows the Future Land Use for the Sanford SunRail station is Higher Intensity Planned Development Target Industry (HIPTI). Other FLU designations within the TOD include Low Density Residential (LDR), Waterfront Downtown Business (WDBD), Westside Industry Commerce (WIC), Industrial (I / IND), Suburban Estates (SE), Resource Protection (RP), and Low Density Single Family Residential (LDRSF).

The Sanford SunRail station area is zoned as Industrial (M-1), as seen in Figure 5-6. Additional zoning designations within the surrounding TOD area include a significant amount of PD and Agriculture (AG / A-1 Ag.-1Ac). There is also to a lesser extent Single

Family Residential (R-1 & R-1A), Multi-Family Residential (R-2), General Commercial (GC2), and additional M-1.

Policy FLU 5.9 of Seminole County's Future Land Use Element explains the HIPTI FLU designation, noting permitted uses and locational standards are intended to "maintain adequate lands for target industry in close proximity to and high visibility from major interchanges.[17]" Policy FLU 5.6 also describes HIP designations as being designed for, amongst other goals, promoting "the development of target industries that will provide jobs in close proximity to the County's existing residential areas, support future mass transit systems and make the most efficient use of the County's substantial investment in infrastructure and services.[18]"

Development Incentives

Since the implementation of the Sanford SunRail station, the Sanford City Commission has approved of the use of a number of development incentives. This includes Resolution No. 2584, which establishes an Expedited Plan Review Process and fee. Additionally, Ordinance No. 4358 authorized a city-wide referendum to determine whether the city should enact an Economic/Community Development Property Tax Exemption. On March 15th, 2016, a majority of voters (68.05%) approved of this Ordinance to provide tax exemptions to new businesses that create jobs and fulfill other conditions[17], allowing Resolution 2590 to be passed, adopted, and made effective as of April 11th, 2016.

Figure 5-5: Sanford SunRail Station TOD Area Future Land Use

Overlays, Comprehensive Plan Policies and Objectives, and Land Development Regulations

Seminole County has established the Policy FLU 5.17 for an Energy Conservation Overlay (ECO) (Figure 5-7), which impacts unincorporated Dense Urban Land Areas, areas within a half-mile radius of major urban activity centers and SunRail stations, and a quarter-mile of the right-of-way of major urban transit corridors. This overlay is intended to encourage compact, multi-modal, energy conserving developments that balance jobs and housing, and includes a framework for performance evaluation[19].

Figure 5-6: Sanford SunRail Station TOD Area Zoning

Objective FLU 4 compliments this policy, stating "The County shall also encourage redevelopment of areas identified as contained within the Energy Conservation Overlay to achieve a more compact land use pattern that conserves energy and reduces greenhouse gasses.[18]"

Also related is Objective FLU 10, which "encourages a range of housing types and a range of household incomes with close proximity to SunRail commuter rail stations and within [the] Energy Conservation Overlay.[18]"

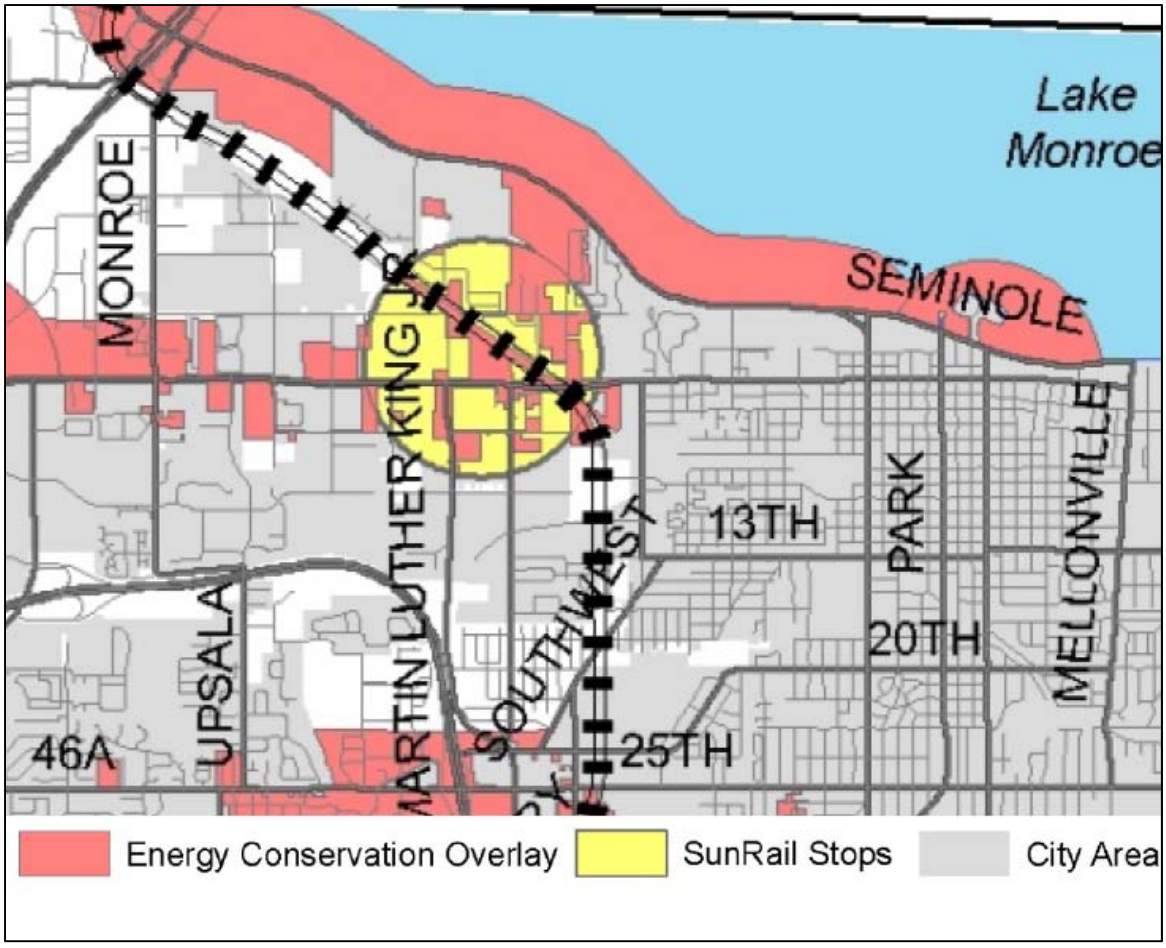

Figure 5-7: Seminole County Energy Conservation Overlay for the Sanford SunRail Station Area[20]

Objective CON 8.13 expands on the county's efforts towards energy conservation, stating "The County shall continue to support efforts put forth in the County Transit, Pedestrian and Bicycle Multi-Modal Mobility Strategy… and Energy Conservation Overlay… to increase mass transit ridership, use of SunRail commuter rail, bicycle and other alternative modes of travel as a means to minimize fuel consumption, and to encourage redevelopment in a more energy efficient land use pattern that will enable more use of alternative modes of travel.[18]"

5.5 Capital Improvements and Future Suggested Projects

Seminole County has listed Capital Improvement Project 01785244 as having completed Land and Development phases[21]. This project is aimed at improving the sidewalk on West Airport Blvd south of SR 46 W., as seen in Figure 5-6, which is partially within the Sanford

SunRail station's TOD area. The upgrade is intended to increase pedestrian safety and enhance multi-modal connections to neighborhoods, schools, mixed-used developments, and the SunRail station. A construction start date has not yet been established for this project.

The Florida Department of Transportation conducted a connectivity study in 2014 for proposed additional short term and long term projects intended to improve accessibility for pedestrians and bicyclists. Proposed projects with the greatest potential impact localized to the SunRail Station TOD area include added sidewalk access at or near the Airport Blvd intersection; railroad crossing options for pedestrians and bicyclists; an added 5' sidewalk on the west side of Persimmon Ave; and the purchase of right-of-way (ROW) adjacent to the station's ROW to install shared-use paths.

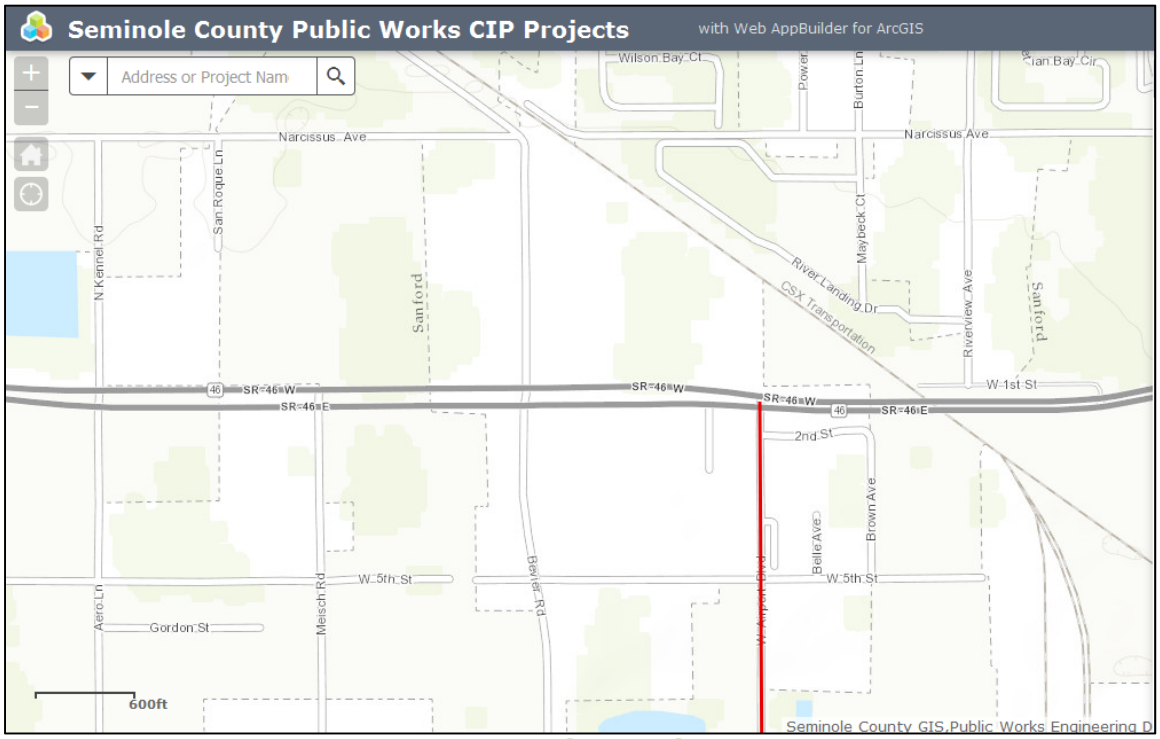

Figure 5-8: Seminole County CIP Map for Sanford SunRail Station TOD Area

5.6 Enhance Central Florida SunRail Station Area Study Plan for Sanford

In 2014, the East Central Florida Sustainable Communities Consortium produced detailed station area plans for six SunRail stations[22]. Sanford was included in the $2.4 million study, which includes an overview of the station area and its existing conditions, a public

outreach strategy, review of relevant city and county policies and regulations, housing needs and market assessments, and several development scenarios for guided growth.

The study notes the SunRail station "prioritizes vehicular movement over pedestrian and bicycle access in terms of site entry points, internal on-site circulation, and pedestrian-friendly amenities.[19]" Sanford is also compared directly with other SunRail stations as an area with "an opportunity to create a 'special employment mixed-use district station area typology'" and "presents the highest opportunity to introduce new transit-supportive uses with [the] least amount of disruptions to existing development.[19]"

Chapter 6: Lake Mary Station Area Profile

6.1 Introduction

The city of Lake Mary promotes its sense of community as an Orlando suburb, though it also prides itself as being a premiere location for business and development due to its proximity to Orlando and the increasing potential provided by the SunRail[1, 2]. The city has sought to capitalize on these advantages by channeling its efforts into a downtown master plan promoting mixed-use development, with the Lake Mary SunRail station at its center and encouraged by development incentives and a TDR program for policy flexibility. Notable developments include the 200 unit apartment complex Station House (Figure 6-1), and the proposed 32,000 square foot office and retail Station Pointe. Due to the construction of Station House in response to the city's support, the Lake Mary SunRail station can be used in a comparative study as an area that has experienced some new growth since the introduction of the SunRail.

Figure 6-1: New Development Seen from SunRail Station

6.2 Recent SunRail Station Area Developments

Since the introduction of SunRail to Lake Mary, a new multi-family apartment complex has been constructed as a TOD. Potential future mixed-use developments represent the potential for future growth and redevelopment and the possibility for a new downtown center that links neighborhoods throughout the area surrounding the Lake Mary SunRail station.

The Station House Luxury Apartments (188 E. Crystal Lake Ave.) is 200-unit, $32 million apartment community, seen in Figure 6-2 [3]. The development is the result of a public-private partnership between Epoch Properties and Lake Mary. A TDR program allowed the development to purchase additional density and to construct a parking garage that encroached into public right-of-way, enabling the project to move forward[4]. The development is also said to be marketed towards millennials commuting into Orlando using the SunRail[4], particularly due to the inclusion of only thirteen three bedroom units, prioritizing one and two bedroom units targeted at younger residents[4].

As evident in Figure 6-1, the development is located extremely close to the SunRail and is easily within walking distance. Nearby amenities include Central Park, a farmer's market, the Cross Seminole Trail, a community center, and a variety of nearby retail[4]. Whit Blanton, a commentator for Renaissance Planning commented that "the area surrounding Station House and the SunRail station is poised for additional development… signifying that initial success will be a catalyst to further development of the area.[4]"

Figure 6-2: Station House Apartments

Blanton also comments that "according to City staff, lenders are still balking at the zero on-site parking provisions, making office development unlikely in the TOD area" which will "likely remain primarily residential with small amounts of retail.[4]"

Station Pointe at Lake Mary was marketed by developers Chris and Dana Mahnken of Lake Mary as 32,000 square-feet of retail and office space with a connecting walkway to the SunRail station platform[5]. Development was expected to begin in 2015, though the proposed plan has thus far not materialized and the developers did not respond to inquiries regarding recent news.

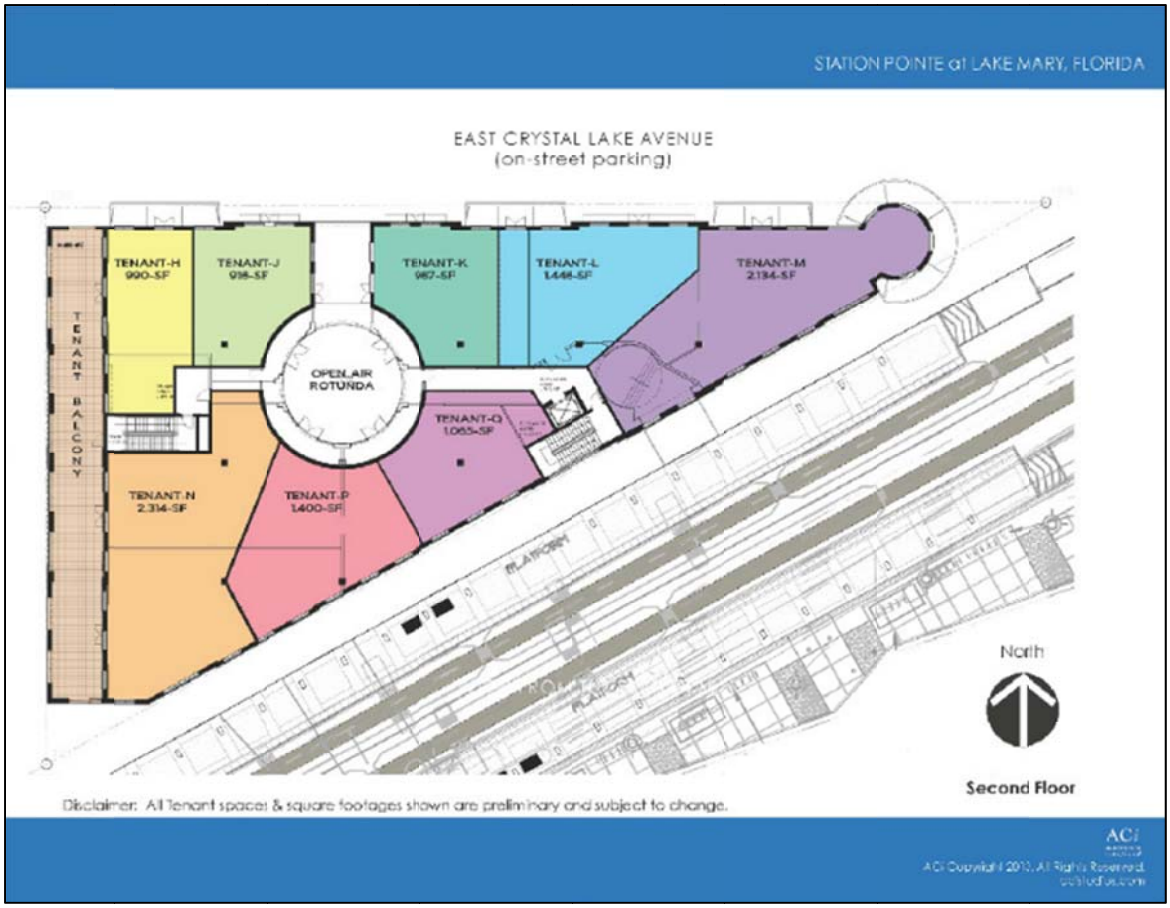

Figure 6-3: Planned Designs for Station Pointe at Lake Mary[6]

6.3 Future Land Use and Zoning Classifications

The Lake Mary Comprehensive Plan notes the city's goal for downtown revitalization, which is intended in part to "ensure proper and functional growth that will compliment and support SunRail.[7]" Specific strategies include "long-range community commercial development goals, design guidelines, infrastructure needs, neighborhood character, and [necessary] fiscal strategies.[7]" New policies will promote mixed-use development patterns and alternative mobility strategies, particularly in the DDD FLU area and the DC zoning district, which "allow for a mixture of uses not permitted in other City land use designations and/or other City zoning districts.[7]"

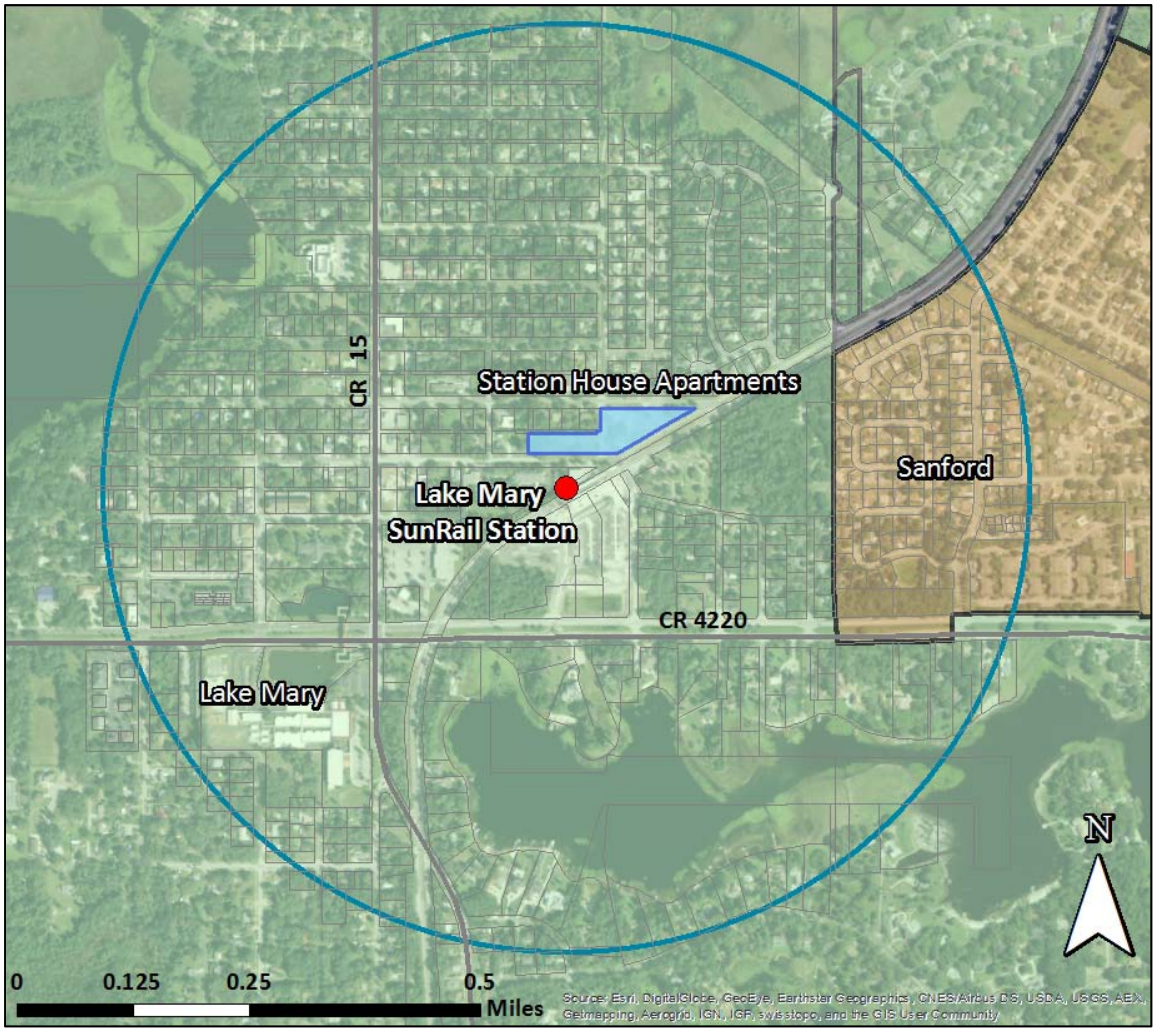

Figure 6-4: Lake Mary SunRail Station Area with Half-Mile Radius and City Boundaries

Future Land Uses surrounding the Lake Mary SunRail station are illustrated in Figure 6-5, which shows a small variety of designations. The immediate area including and surrounding the station is classified as Downtown Development District (DDD), while the majority of the remaining area is Low Density Residential (LDR) and Low/Medium Density Residential (LMDR). There is also a small amount of Restricted Commercial (RCOM), Public/Semi-Public (PUB), Office (Off), and two small commercial (COM) parcels.

The FLUE GOP Policy 1.4 explains these classifications in more detail. The DDD is intended to accommodate mixed-use development "including consumer oriented commercial uses, office, service uses, and residential. A diverse mix of uses, housing types, and densities shall be promoted in the [DDD] in order to create an attractive place to live, work, and play.[7]" The DDD is complimented by a City Commission approved

Downtown Master Plan, seen in Figure 6-6. FLU Policy 1.8 compliments these goals by establishing a Transportation Concurrency Exception Area (TCEA) to allow the city to "focus on future redevelopment opportunities including infill development, and further redevelopment within the [DDD] adjacent to the SunRail" station[7].

Zoning in the station's half-mile radius includes a number of classifications supporting single family residences, commercial, some agriculture, and the downtown center, as seen in Figure 6-7. The city's SunRail station is zoned as Downtown Center (DC), which is mixed with General Commercial (C-1). The surrounding area is primarily comprised of Single Family (R-1A, R-1AA, and R-1AAA), with a smaller amount of Agriculture (A-1), Government Use (GU), One and Two Family (R-2), and Professional Office (PO). The DC zoning district is explained in more detail by the city's Land Development code section 154.67, which states it is intended to assist development, listing many of the same goals as the DDD FLU[9]. Zoning in the Sanford portion of the study area includes Single-Family Residential (SR-1 and SR-1A), and Multiple-Family Residential (MR-2).

To compliment and encourage TOD in the downtown area, Lake Mary has utilized a Transfer of Development Rights (TDR) program that utilizes density banking. Whit Blanton explains that the Downtown Master Plan sets "a base density of 18 dwelling units per acre… so the City converted the development potential of all city-owned property in the downtown area into an aggregated pool of 'unused dwelling units'" resulting "in a TDR pool of some 400 dwelling units, available for purchase by developers to increase a project's density and yield"[4].

The Lake Mary SunRail station area also benefits from Seminole County's Policy FLU 5.17, which establishes the ECO. This overlay is intended to encourage compact, multi-modal, energy conserving developments that are supported by the county[10]. Seminole County FLU supports this policy in encouraging compact land development and reducing greenhouse gasses, and FLU encourages a mix of housing types in close proximity to the station[10]. Objective CON 8.13 also promotes energy conservation by showing County support for transit, pedestrians, bicyclists, and other alternative modes to reduce fuel consumption[10].

Figure 6-5: FLU for the Lake Mary SunRail Station Study Area within Lake Mary City Limits

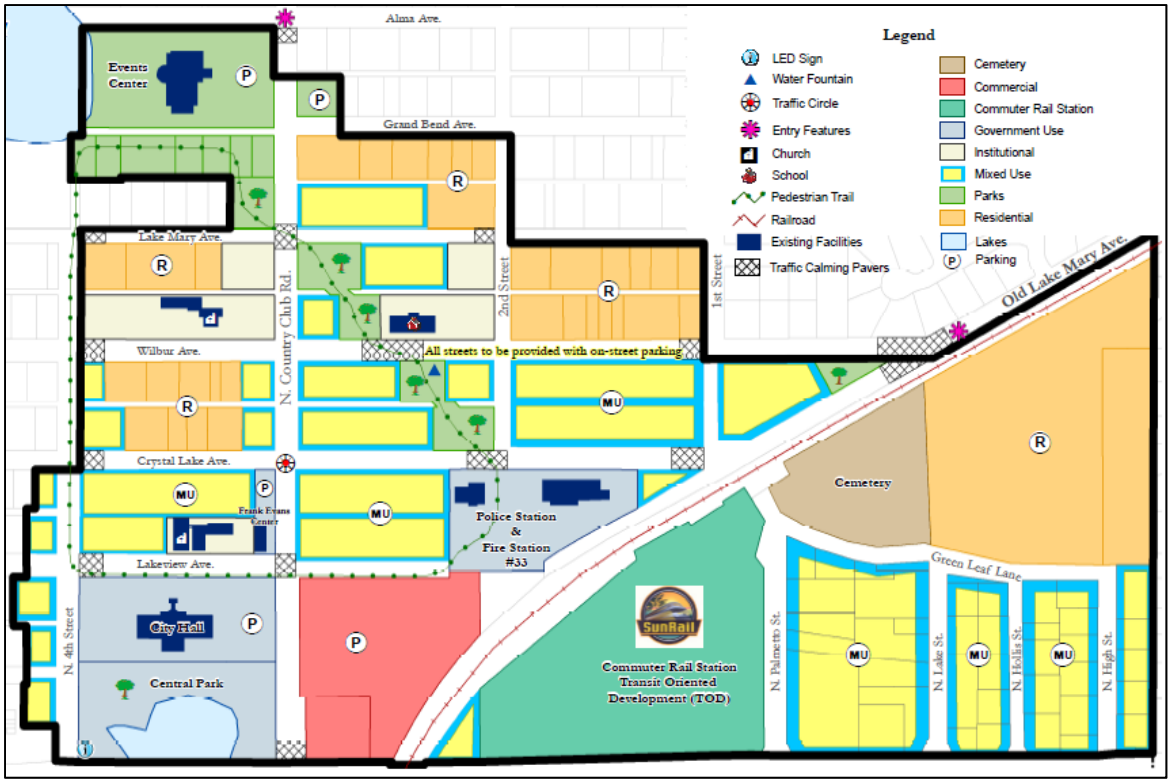

Figure 6-6: Lake Mary Downtown Master Plan[8]

Development Incentives

Lake Mary has utilized a wide-range of incentive based strategies in cooperation with Seminole County to promote desired growth and development in the SunRail station area. Strategies and programs used include sales and use tax exemptions for research and development costs; a qualified target industry tax refund for specific industries paying higher wages; expedited permitting for economic development projects creating a required number of jobs; a high impact business performance incentive grant for relocating businesses creating a minimum number of jobs; an Economic Development Transportation Fund to encourage eligible projects that facilitate economic development; and a Capital Investment Capital Tax Credit to attract and grow capital intensive industries [11-15].

Lake Mary's Community Development Department also provides a Neighborhood Beautification Grant (NBG) Package to "promote the undertaking of activities by City neighborhoods to beautify their developments, and to avoid blighted areas", providing $25,000 per fiscal year[16]. "Grants are available to homeowners' associations and organized neighborhood organizations; this includes condominium associations and

resident associations… Individual homeowners or unregistered organizations are not eligible.[16]"

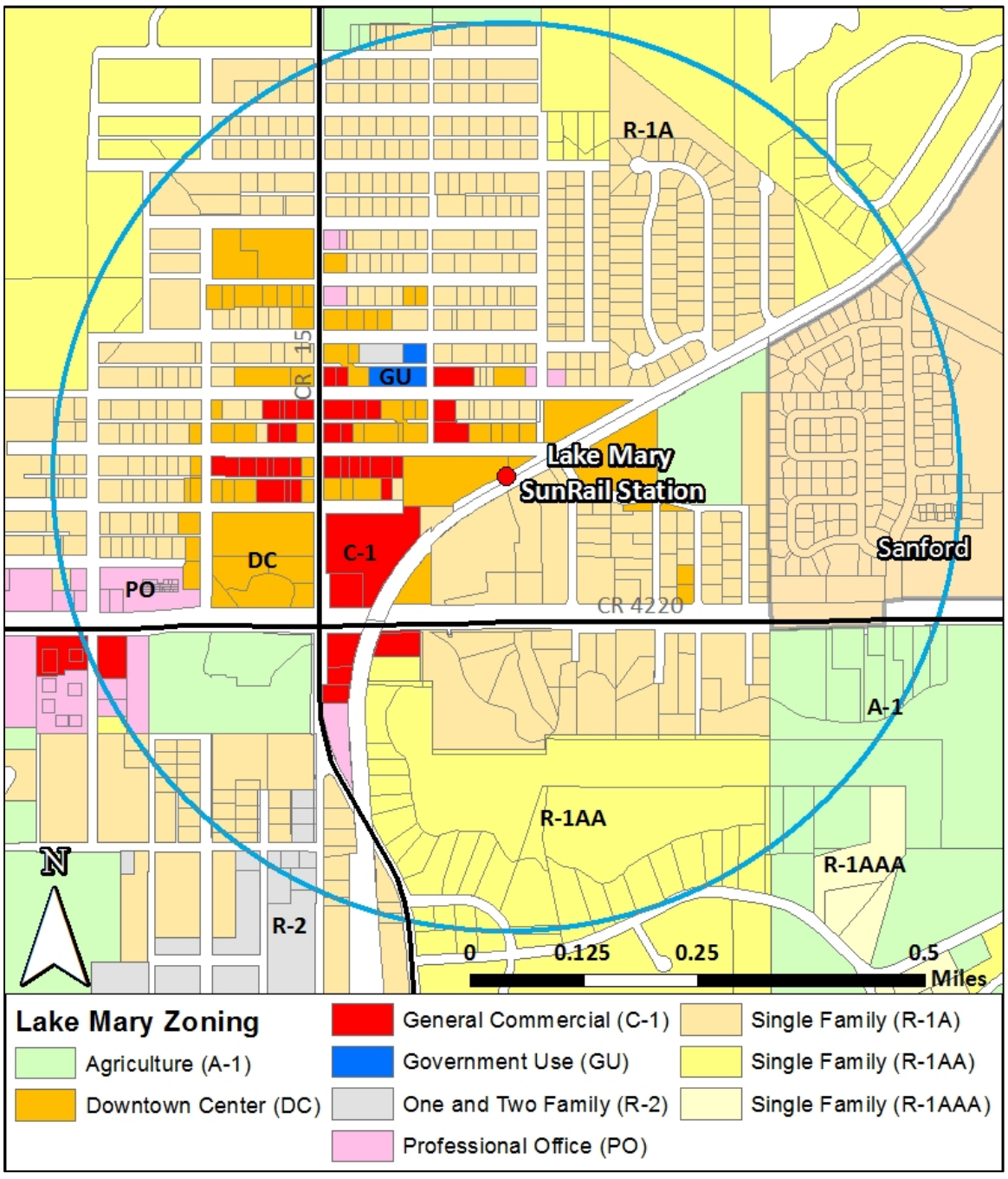

Figure 6-7: Zoning Districts within the Lake Mary SunRail Station TOD Area

Seminole County also provides its own incentives for new developments, which includes (but is not limited to) a Qualified Target Industry Tax Refund to encourage new job growth in high-value industries[12]. A Jobs Growth Incentive Fund established in 1995 is also used to award "funds for expenses such as impact and permit fees, relocation costs, equipment purchases, land acquisition, building construction, loan interest pay-down, lease-hold improvements or any other legitimate business expense as determined by the Board of County Commissioners. Special consideration will be given to projects seeking to locate in targeted redevelopment areas. Preference will be given to projects that will be constructing new buildings.[17]" Additionally, Lake Mary "has worked in partnership with Seminole County to provide incentives for projects on a case-by-case basis.[17]"

Lake Mary SunRail Station Area Bicycle & Pedestrian Connectivity Study

In May 2014, Kittelson & Associates, Inc. produced a Bicycle and Pedestrian Connectivity Study for the Lake Mary SunRail station area for FDOT and SunRail. The study identifies infrastructure needs in the area to help prioritize projects and set long term goals, and to assess pedestrian and cyclist needs and suggested solutions.

Particular issues identified include trip hazards on sidewalks, the need for detectable warning surfaces on pedestrian ramps near crosswalks, the need for marked crosswalks, areas for new sidewalks, a suggested roundabout, areas for decorative pavement features for traffic calming, a pedestrian track crossing, and intersection improvements[18]. The study lists eight projects that it suggests be immediately addressed, sixteen short term projects, and four long term projects.

6.4 Capital Improvements

Seminole County has listed several capital improvement projects that exist at least partially within the half-mile radius surrounding the Lake Mary SunRail station that can be seen in Figure 6-8.

Project 01785134 is an active roadway project titled Lake Mary Blvd Intersection Improvements-Study Phase, and is described as a study that will assist in determining what the best solution is for future improvements at a variety of intersections from Rinehart Road to North Country Club Road[19]. Design is scheduled from October, 2015 to September 2022. No construction date is set.

Project 00227066 is an active paving project titled W Lake Mary Blvd Resurfacing, and is described as asphalt overlay, full depth reclamation, and/or various rehabilitation methods from Country Club Road to USE 17-92 [20]. Design was scheduled from January

2016 to February 2016, and road construction was scheduled to begin in April 2016 with no completion date set.

Project 01785197 is a pending paving project for S Country Club Rd planned for fiscal year 2020/2021.

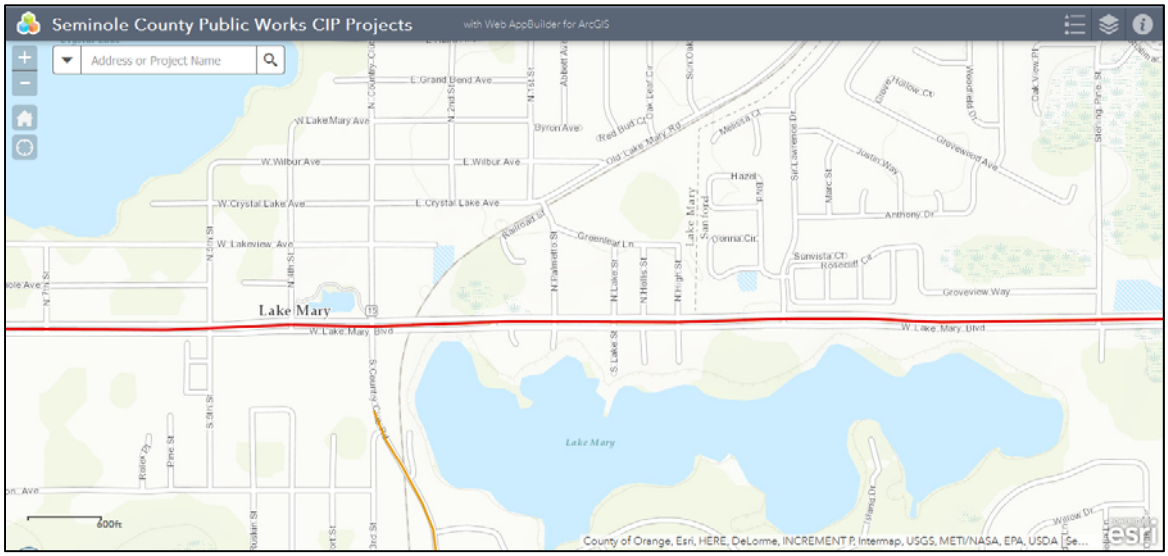

Figure 6-8: Seminole County Capital Improvements in the Lake Mary SunRail Station Area[21]

On July 18, Central Florida Roads posted details on project 412994-4 for track renewal and grade crossing upgrades along the SunRail corridor. “Improvements include rail replacements, ballast installation, track surfacing, and pedestrian and roadway grade crossing upgrades at various locations within the limits mentioned above. These improvements will enhance the safety and quality of the corridor for train, pedestrian and vehicular traffic.[22]” One upgrade is planned within the half-mile radius of the Lake Mary SunRail station at the rail crossing on South Country Club Road.

Chapter 7: Longwood Station Area Profile

7.1 Introduction

Longwood's leadership practices a proactive attitude towards economic development, and notes that a primary advantage of conducting business in Longwood is the ease of transportation access within the area[1]. A comprehensive retail study conducted in 2015 bolsters this claim by stating that there is such a "strong potential for transit-oriented development" in Longwood that the area around the SunRail station could potentially increase its residential base and retail amenities enough to "redefine the area as a downtown-type district.[2]"

Since the early planning phases of SunRail, Longwood has worked closely with FDOT to create a station area near the city's historic downtown that has been able to provide development opportunities and a livable community with a safe, balanced transportation system[3]. Longwood has shown its commitment to enhancing its TOD area with the creation of the 2012 Heritage Village Urban Code, which has provided strategies for improving station area mobility, accessibility, design, regulations, and infrastructure[4, 5].

SunRail has arguably brought the attention of some advantageous developments to the Longwood station area that perhaps would not have occurred without the commuter rail. New businesses are also opening in previously developed properties in close proximity to the SunRail station and residential TODs. Because of these new developments and the area's future potential within a pro-growth environment with available developable land, the Longwood SunRail station area compares favorably with other SunRail station areas as one that has experienced new growth and increased tax revenue since the introduction of the commuter rail.

7.2 Recent and Future SunRail Station Area Development

Several new TOD projects have recently occurred in the half-mile area surrounding the Longwood SunRail station. Slightly less new development occurred in the TOD area in the years before the rail's announcement than after. Seminole County's property appraiser's website lists 16 developments built between 2005 and 2009, on a combined 10.1 acres, with $3,016,312 in total just value[6]. These developments were primarily comprised of various residential units such as duplexes, single family, and multi-family homes. Also included were a bank and a church, which together comprised 7 acres of the total developed land and almost half of the total appraised value. As a comparison, from 2010

to 2015, the Longwood TOD area has seen 21 new developments on 18.0 acres of land amounting to $15,227,639, signifying larger and much more expensive developments[6].

While most of the new construction within the Longwood TOD area built between 2010 and 2015 was single family residential (comprising 15 of the area's 21 projects) there have also been some significant TOD projects that collectively represent a potential new landscape for the Longwood station area. Three developments in particular have added a total of 341 residential units to the TOD study area. Each of these new major projects prominently cites their close proximity to the SunRail in their advertising, suggesting further they were specifically built as TODs[7-9]. New businesses targeting SunRail commuters have also opened very close to the station, including a sandwich shop and coffee house. Other notable new developments include a Dollar General and a Wawa gas station with convenience store[6].

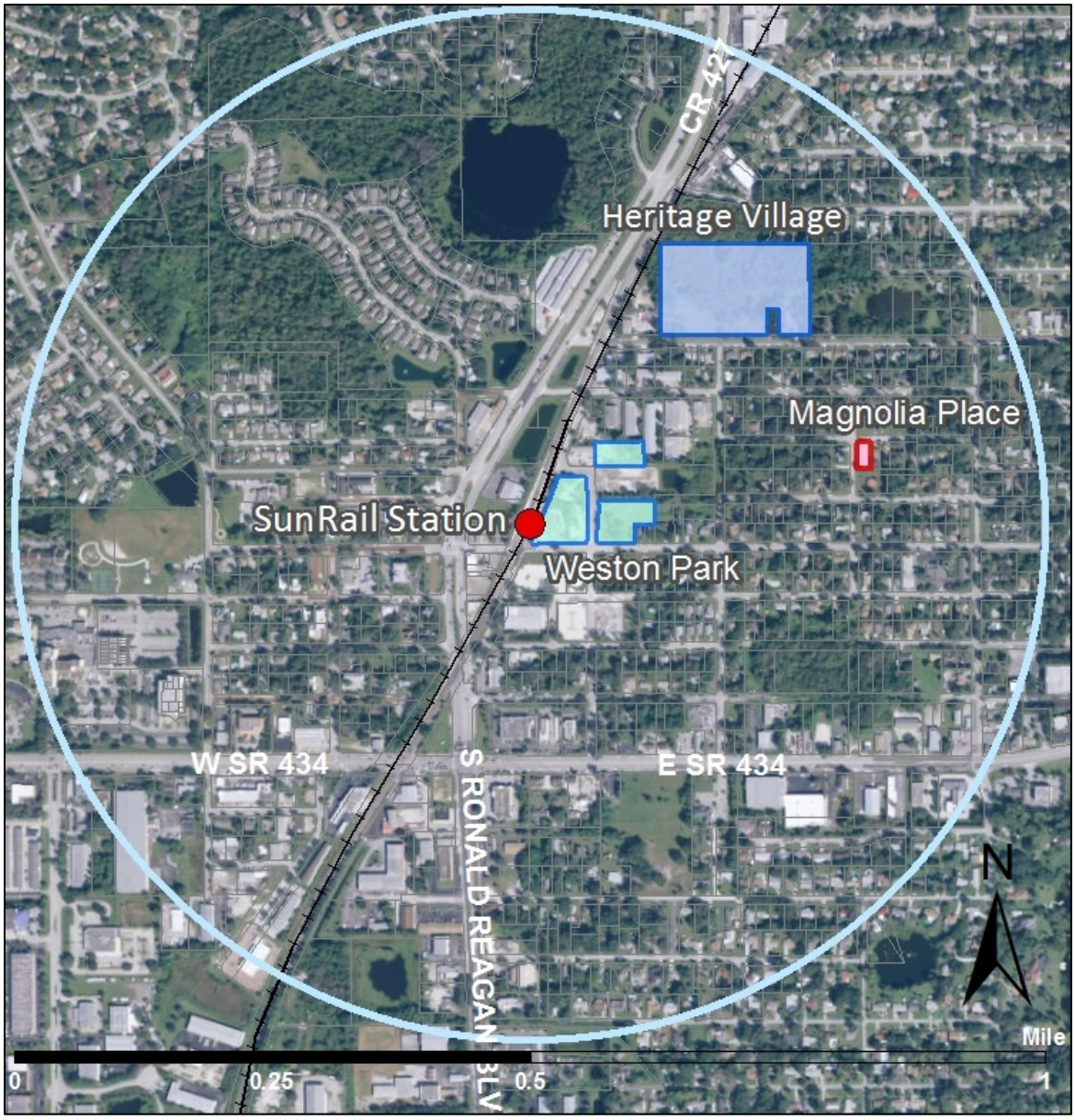

Figure 7-1: Longwood SunRail Station Half-Mile TOD Area Image with New TOD Projects

Weston Park at Longwood Station (100 Myrtle St.) is a 208-unit, 253,000-square-foot, four-story apartment complex adjacent to the Longwood SunRail station[10]. Construction of the $30 million Wendover Housing Partners project began in December 2014, and was financed in part by Toronto-based Timbercreek Asset Management and Mutual of Omaha[11]. At the time of its opening in early 2016, about one-fifth of its units had been leased[9], and the complex is currently 40% occupied (S. Bower, personal communication, April 25, 2016). The project includes structured parking, which was financed in part by Seminole County, and is open to both residents and SunRail riders, providing one space

per apartment unit[11]. Jonathan Wolfe, president and founder of Wendover, said, "As Central Florida continues to grow, access to public transportation will become invaluable to commuters wanting to avoid congested highways and interstates. Wendover recognized the lack of housing in close proximity to stops on the SunRail line, making the option to ride less convenient. Weston Park is a step in the right direction in creating a more transit-friendly city.[12]"

Figure 7-2: Weston Park Under Construction

Heritage Village Commons (357 Orange Ave.) is a $10.8 million affordable apartment complex located 0.4 miles northeast of the Longwood SunRail station. The multi-family property includes 123 one or two bedroom units for qualified tenants aged 55 and up, with rents ranging from $567 to $673 per month. Construction on the project began in December 2014 and opened to residents in early 2016. According to Johnathan Wolf, president of Wendover Housing Partners, the project's proximity to the SunRail station allowed developers to receive federal housing credits that were earmarked for affordable housing tied to the station[13].

Magnolia Place (361 N. Oak St.) is an affordable townhome redevelopment of a property that was abandoned in 2008 and has since "had a negative impact on the neighborhood, attracting crime and affecting home values" (L. Andrews, personal communication, June 27, 2016). The two-phase project is an effort by Habitat for Humanity of Seminole County & Greater Apopka and will contain 10 new 3 bed/2.5 bath townhomes "within walking distance" of the SunRail station[14]. Phase one is expected to be complete in July of 2016, while phase two have an expected completion date of February 2017.

New Businesses: Several new businesses have recently opened in the area surrounding the Longwood SunRail station. One parcel located approximately 300 feet west of the station contains several new locally owned businesses. Among these are Pete's Eats, a fast food sandwich shop that opened in September 2014. Also located on the same parcel is Nu Natural, a cosmetics & beauty supply store that opened in September 2015, and the Wild Hare Kitchen & Garden Emporium, a gourmet organic grocer / farmer's market that opened in December 2012. A nearby parcel just across Church Street also contains a mix of several new businesses, including the Zanzibar Coffee House, which opened in October 2015, the Back to Basics Barber Shop, and an Irish Pub.

7.3 Zoning and Future Land Use Classifications

The area immediately surrounding the Longwood SunRail station is zoned by the city as a mix of Downtown Neighborhood to the west, Transit Village Neighborhood to the east, Neighborhood Edge further to the east, and Neighborhood Edge Workshop Overlay to the northeast, as illustrated in Figures 2 and 3.

Additional, though less intensive zoning within the TOD area includes the 434 Corridor, West End, Artisan Village, Lyman, Low-Density Residential, Historic District, General Hutchinson, Infill and Mixed Use, Neighborhood Commercial Mixed Use, and Conservation.

Future Land Use categories in the station area are primarily Infill & Mixed Use (IMU) and Historic District, as seen in Figure 3. Other classifications in the TOD area include Conservation, Low Density Residential, Medium Density Residential, and small amounts of Industrial, Public/Institutional and Neighborhood Commercial Mixed Use.

Longwood's Future Land Use Element defines these categories, providing additional context to the development allowed within the TOD area[15]. Low Density Residential allows for 0 to 4 units per acre, while Medium allows up to 15 units per acre. Industrial areas are intended for light and clean industrial uses such as manufacturing, assembly, warehousing, storage, art studios, and cottage industries, with residential usage of industrial areas being limited to 40% and no single family residences allowed. Conservation allows up to 1 dwelling unit per acre, though no development may result in the elimination of the natural resources, or increase the potential for flood damage in areas designated as flood plains.

IMU is intended for major corridors and areas surrounding the SunRail station in order to promote vertical or horizontal mixed use development on single or aggregated parcels. The IMU policy directly refers to the purpose of promoting "the utilization of transit in the City through the provision of TOD in the Transit Village Overlay District surrounding the City's SunRail station and transit supportive development along... major transit corridors[15]." Specific uses within the IMU allowed include commercial, office, duplex and multi-family residential, institutional, civic, cultural, light industrial, and government.

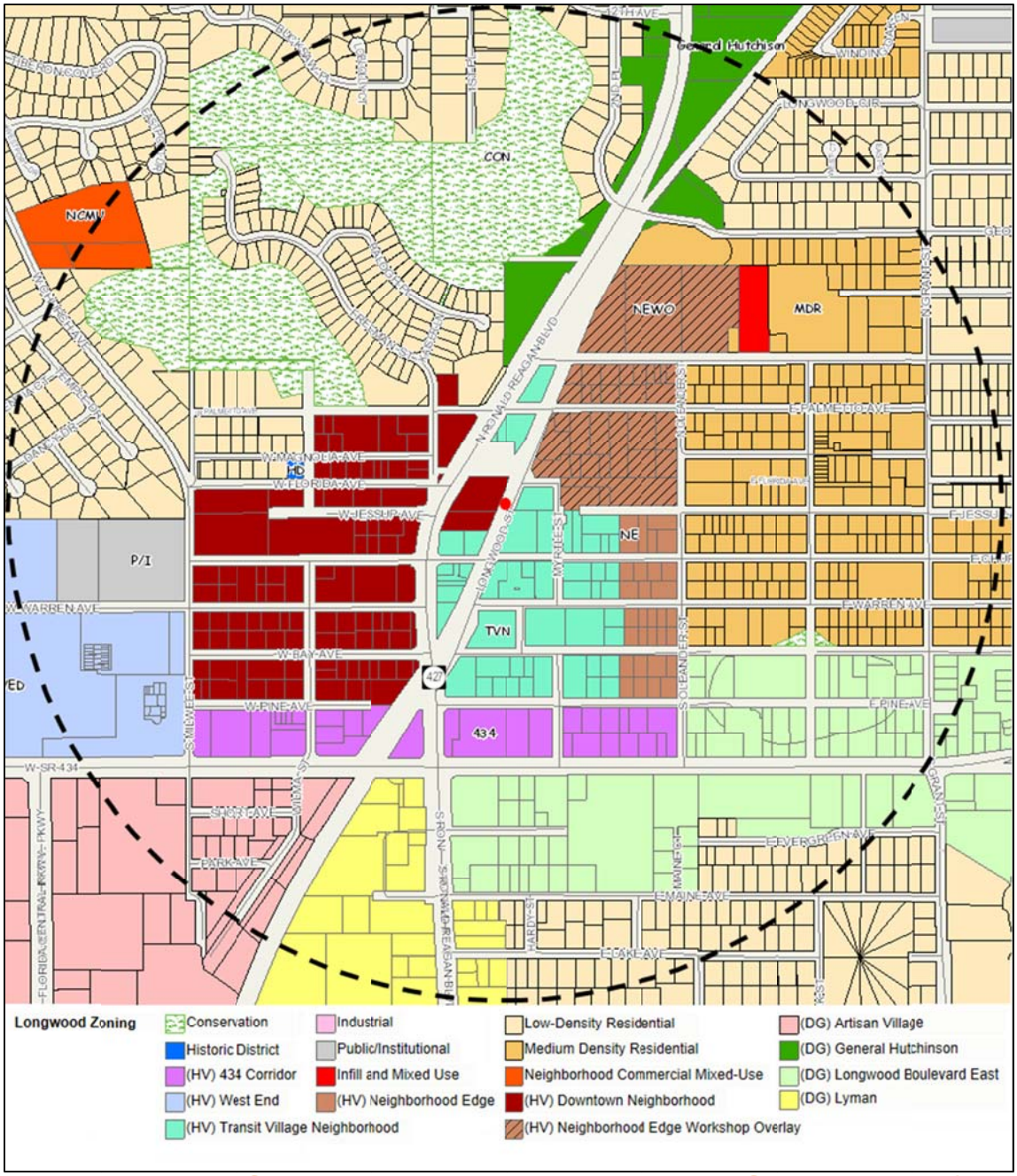

Figure 7-3: Zoning for the Longwood SunRail Station Half-Mile TOD Area[6]

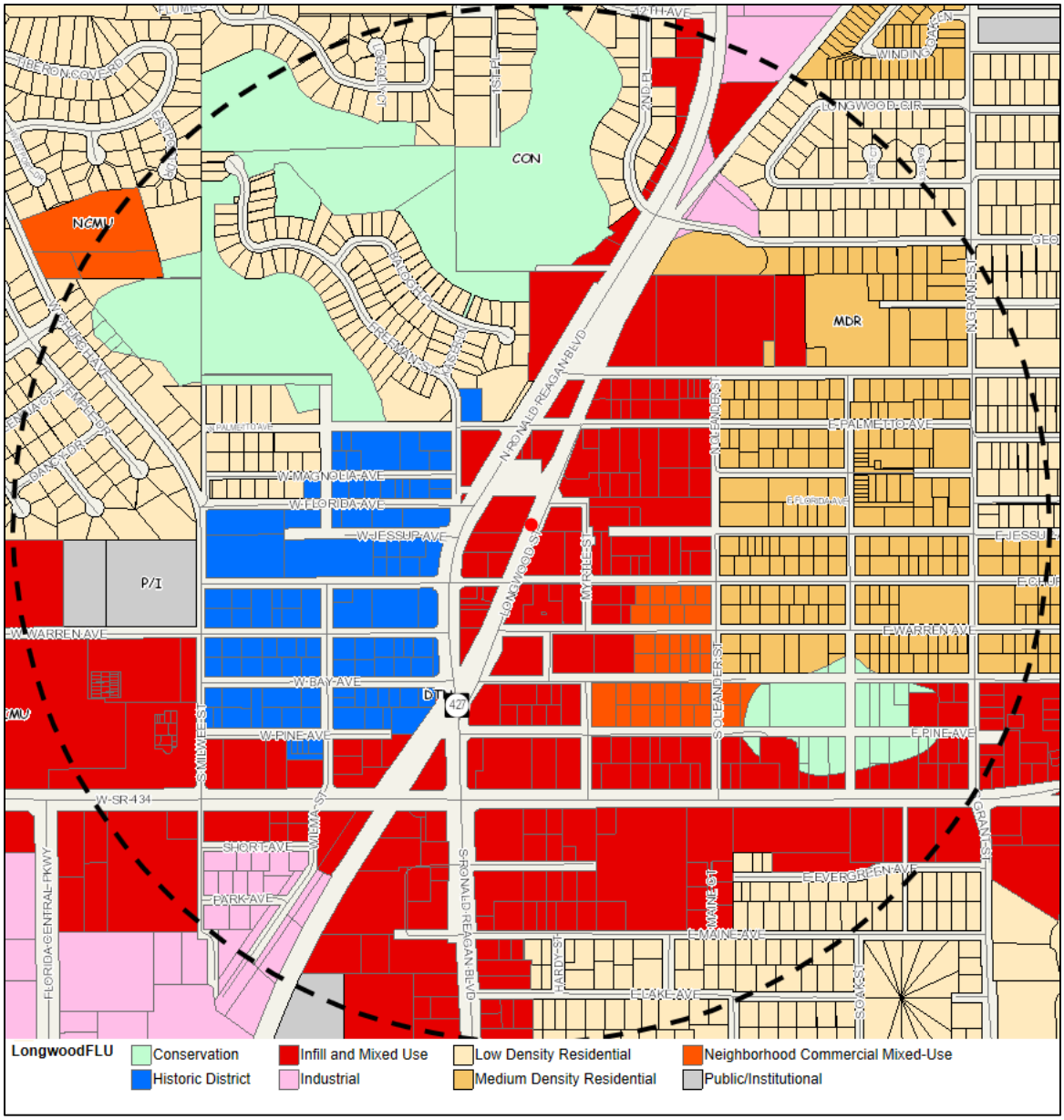

Figure 7-4: Future Land Use for the Longwood SunRail Station Half-Mile TOD Area[6]

Comprehensive Plan Policies & Objectives, Land Development Regulations, and Overlays

Longwood recognized that successful TOD around the SunRail station would require necessary "regulatory and infrastructure improvements to support development.[4]" In 2012, the Longwood City Commission adopted the Heritage Village Redevelopment Strategy (HVRS) and the Heritage Village Urban Code (HVUC) to provide local leadership and planners with organized tools to help guide growth[16].

The Heritage Village Special District is established by Section 2.4.3 under Article II of the Longwood Development Code, which states the HVUC "is adopted as Article XII of this Land Development Code and adopted by reference as a standalone document.[17]" This "form-based code creates a streamlined, efficient process for the review and permitting of development in the Heritage Village.[16]"

Included in the Code and Strategy are designated sub-districts for directed development with defined standards, as seen in Figure 4. These areas serve as Overlay Districts that are also represented in the city's Zoning Map and regulations. The SunRail station is a part of the area designated as the Transit Village Neighborhood (TVN), and is surrounded by Neighborhood Edge (NE), Downtown Neighborhood (DN), and SR-434 Corridor (434).

The Heritage Village Plan identifies that development in the TOD area is most generally guided by the city's Comprehensive Plan, Development Code, and Design Guidebook. The comprehensive plan includes specific goals, objectives, and policies (GOPs) that are intended to support the SunRail and the station area. Specific GOPs relate to adequate public facilities provisions, future land use, community design, recreation and open space, and mobility and transportation. The plan also recommends that "implementation strategies should focus on improving pedestrian conditions" including "new sidewalks... expanding sidewalk widths... retrofitting key streets within the TOD with street trees and on-street parking, and upgrading walks in the Historic Core[4]." Further, the station core area should have the highest intensity and density, a mix of uses, smaller pedestrian oriented blocks, and surface and garage parking.

In 2015, a Station Area Plan Summary and Narrative was prepared by Longwood along with the Enhance Central Florida Project, a community planning effort consisting of 26 organizations, including local governments, non-profits, higher education institutions, heath groups, private businesses, and transportation groups[18]. This project has produced detailed station area planning for 5 other SunRail station areas and has allowed local businesses and residents to help produce a vision for the area's future. This effort has resulted construction-ready drawings for pedestrian improvements suggested by the Heritage Village Redevelopment Strategy, which can help the city acquire project funding.

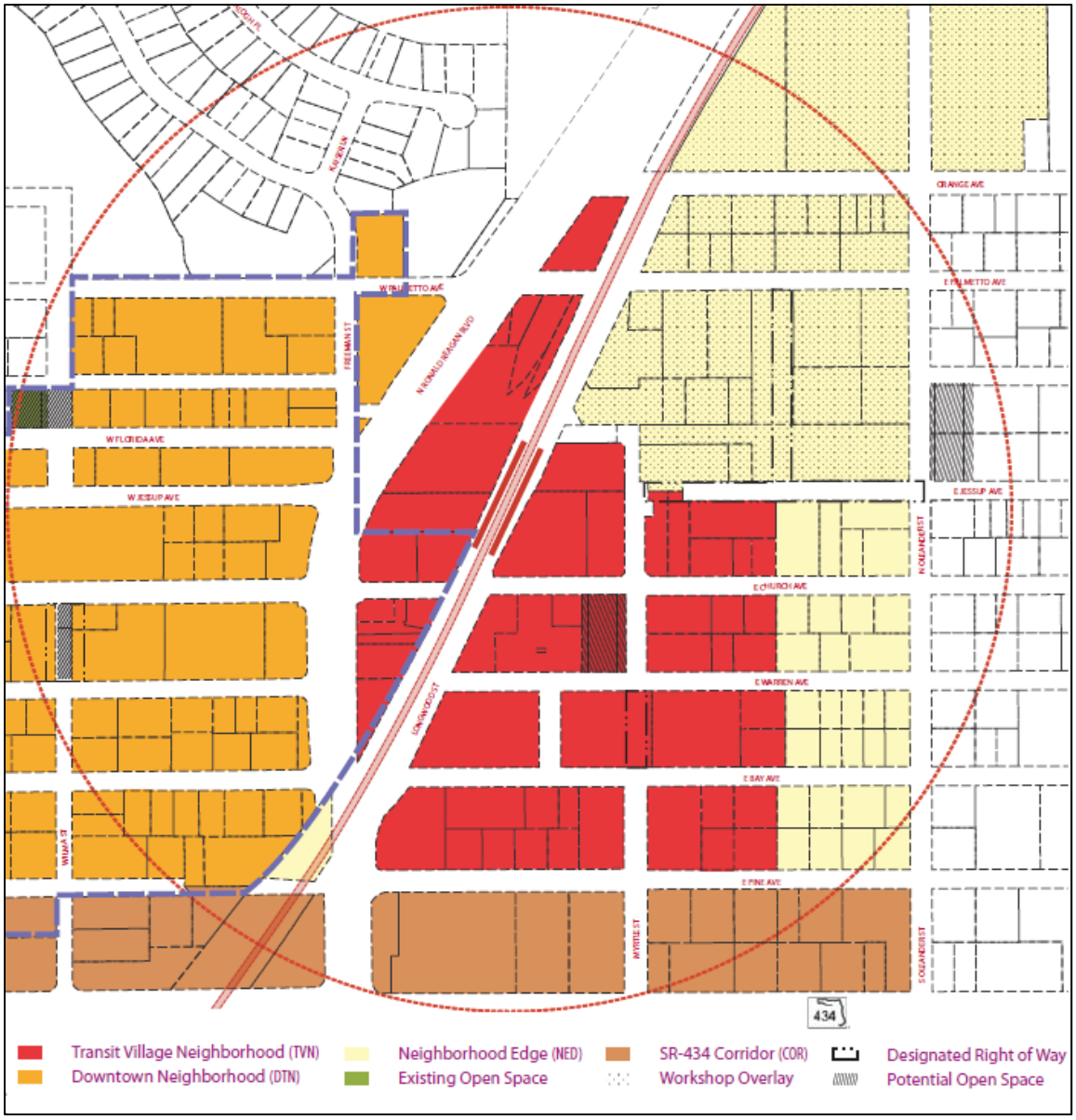

Figure 7-5: Heritage Village Code Zones in the SunRail Station TOD Area with ¼ Mile Radius[4]

It is also noteworthy that Seminole County has established the Policy FLU 5.17 Energy Conservation Overlay (ECO) around the Longwood SunRail station. This overlay impacts areas within a ½ mile radius of major urban activity centers and SunRail stations, and a ¼ mile of the right-of-way of major urban transit corridors (as well as unincorporated Dense Urban Land Areas)[3]. The ECO is intended to encourage compact, multi-modal, energy conserving developments that balance jobs and housing, and includes a framework for performance evaluation. Objective FLU 4 compliments this overlay, stating "The County shall also encourage redevelopment of areas identified as contained within

the [ECO] to achieve a more compact land use pattern that conserves energy and reduces greenhouse gasses[19]." Also related is Objective FLU 10, which "encourages a range of housing types and a range of household incomes with close proximity to SunRail commuter rail stations and within [the ECO].[19]

Objective CON 8.13 expands on the county's efforts towards energy conservation, stating "The County shall continue to support efforts put forth in the County Transit, Pedestrian and Bicycle Multi-Modal Mobility Strategy... and Energy Conservation Overlay... to increase mass transit ridership, use of SunRail commuter rail, bicycle and other alternative modes of travel as a means to minimize fuel consumption, and to encourage redevelopment in a more energy efficient land use pattern that will enable more use of alternative modes of travel[19]."

Development Incentives

Longwood provides a number of varying incentives to encourage and promote new development within the city[20]. This strategy has been evident in the public-private partnerships that have occurred between Wendover Housing Partners, Longwood, and Seminole County.

Specific incentive programs offered by Longwood include the Micro-enterprise Revolving Loan Fund which provides $5,000-$10,000 loans for small businesses; the Longwood Economic Development Tax Abatement for new and expanding businesses; the Longwood Economic Enhancement Program for the redevelopment of brownfields; the Longwood Green Building Program for environmentally sustainable development which fast-tracks permits and reduces site plan fees; the Seminole County Jobs Growth Incentive Trust Fund provides monetary assistance for qualified targeted (high paying) businesses, and helps with relocation, impact fees, and permit costs; the Downtown Historic District Matching Grant Program, which provides up to $5,000 for redevelopment within the Historic District; and the Rising Energy Efficiency Program to encourage the use of local contractors, suppliers, and other businesses for energy efficiency improvements to homes[20].

Additional incentives have been provided in the way of funding capital improvements to accommodate new developments in the Longwood TOD area, including a HUD sustainability grant; almost $2 million worth of storm water improvements for Weston Park provided by Longwood; affordable housing tax credits for Heritage Village Commons; and a shared-parking garage provided by Seminole County that provides parking spaces for residents and commuters[11-13, 21].

Seminole County also provides a number of incentives for attracting new and relocating businesses. Specific programs include a Qualified Target Industry Tax Refund to attract high-value industries[22]; a Jobs Growth Incentive Fund established in 1995 to award "funds for expenses such as impact and permit fees, relocation costs, equipment purchases, land acquisition, building construction, loan interest pay-down, lease-hold improvements or any other legitimate business expense as determined by the Board of County Commissioners" with special consideration "given to projects seeking to locate in targeted redevelopment areas" and preference "given to projects that will be constructing new buildings.[23]" The County also notes that Longwood has "worked in partnership with Seminole County to provide incentives for significant projects on a case-by-case basis", and that the city "offers a Residential Energy Efficiency Program (REEP) that allows for energy efficiency rebates" and "has designated and approved the Longwood Economic Enhancement Program (LEEP) that takes advantage of State brownfield rebates and incentives.[23]"

7.4 Capital Improvements

Longwood has recently put efforts into "sidewalk construction improvements around the station, while in tandem working with partners in Seminole County to make much-needed improvements, such as lane width reductions and adding bike lanes, to Ronald Reagan Parkway.[24]"

Seminole County has listed Capital Improvement Project 00205304 (Figure 5) as being active though it has completed design and road construction[25]. This project provides intersection improvements to the roadway at SR 434 and Central Florida Parkway, which is located within Longwood's SunRail TOD area southwest of the station.

Longwood's Heritage Village Plan makes key recommendations for the addition of approximately $25 million of infrastructure to be funded publically and privately. Eleven of these projects consist of primary pedestrian network streets, and another 9 secondary pedestrian network streets.

FDOT's Central Florida Roads website lists project 412994-4 for Track Renewal and Grade Crossing Upgrades throughout the SunRail corridor. "Improvements include rail replacement, ballast installation, track surfacing, and pedestrian and roadway grade crossing" and "will enhance the safety and quality of the corridor for train, pedestrian and vehicular traffic.[26]" Grade crossing improvements were scheduled in Longwood at East

Palmetto Avenue in July, 2016 approximately 500 feet north/north-east of the SunRail station platform.

Figure 7-6: Capital Improvement Project in Longwood SunRail Station TOD Area[27]

7.5 Longwood SunRail Station Area Bicycle & Pedestrian Connectivity Study

In May 2014, FDOT initiated a study with Kittelson & Associates, Inc. to describe existing conditions and opportunities for improvement for bicycle and pedestrian networks in the area surrounding the Longwood SunRail station. The study notes that the SunRail "is a significant local, state, and federal investment which can ultimately be successful only if riders can access the SunRail stations through multiple modes of travel," marking the importance of identifying infrastructure needs and "enhancing multi-modal connectivity.[28]"

Station metrics detail a comparatively high number of single-family homes and low employment within the half-mile radius surrounding the Longwood SunRail station, with a moderate total residential units and overall connectivity.

A field review identifies specific opportunities for improvement, including rebuilds for sidewalk ramps, sidewalk hazard repairs, detectable warning surfaces, crosswalk striping, new 5-foot wide sidewalks to connect the SunRail parking lot to Longwood Street, a 5-foot sidewalk on Church Avenue, sidewalk widening in select areas, new signals, and pedestrian gates at the Palmetto Street rail crossing. A number of areas are also identified for the installation of "pedestrian-scale lighting along primary walk routes within a quarter-mile of the station.[28]" A total of 14 projects are listed for immediate priority, another 24 for short-term, and five for long-term.

Chapter 8: Altamonte Springs Station Area Profile

8.1 Introduction

In recent years, Altamonte Springs has transitioned from a suburban community to more of an urban and economic center[1]. As a part of this growth, the city has attempted to improve infrastructure around its SunRail station area in order to make it a more affordable and desirable place to develop[2]. In 2014 the city also approved a strategic plan for future growth targeting 120 acres surrounding its SunRail station in order to establish a "dense, pedestrian-oriented urban area[3]", and guide future changes to the city's comprehensive plan. However, compared with other SunRail station areas, the Altamonte Springs SunRail station currently has relatively high unemployment, low income, unmet housing needs, and very little recent development, with new construction in the TOD area limited to 8 new single family homes since 2008 [4, 5].

The station area is still considered to have future potential for new development due to the city's investments in road improvement and storm water management, which are currently cost prohibitive barriers that developers will be unlikely to be willing to pay for[2]. However, due to the overall lack of new development within the area, the Altamonte Springs SunRail station (Figure 8-1) can currently be used in a comparative study with other stations as an area that has not experienced significant TOD since the introduction of SunRail.

Figure 8-1: Altamonte Springs SunRail Station

Compared with other cities with SunRail stations, Altamonte Springs is a medium to large city with an estimated 2014 population of 42,225 within 9.01 square miles[6]. Approximately one-quarter of the area within the Altamonte Springs SunRail station TOD area is outside of the city's boundary and is under the jurisdiction of Seminole County, as seen in Figure 8-2.

8.2 Post-SunRail Station and Future Area Development

Altamonte Springs has experienced very little new development within its SunRail station TOD area, though the city is still attempting to make the station area more viable for new TOD developments. In April 2014, Blake Drury, the SunRail TOD facilitator commented that "the city is investing into roadways, better connections and storm water management to make the area more developable and sustainable", and acknowledged that "there aren't too many developers that can shoulder the cost of infrastructure and then wait for the market to follow", though "down the line, this will be a really good development location"[2].

The Seminole County Property Appraiser's website lists 8 new single developments and 237 sales since 2008, signifying that while the Altamonte Springs TOD area has experienced comparatively little new development, the real estate market has not been completely inactive[5].

One of the properties included in this list of recent TOD area sales indicates a possible future apartment complex, though very little publicized information pertaining to this development was available. In 2014, Merritt Street Housing, LP purchased the property and applied for housing credit financing for affordable housing for a planned development referred to as City Park at Merritt Street[7]. The proposed project is located at 1130 Merritt Street, though the property appraiser's website lists the address as 541 Merritt Morning Way, another road on the same parcel. The property is comprised of 21.58 acres with a total just value of $5,706,067, and previously occupied by the Time of Refreshing Christian Worship Center[8]. A permit was issued in March 2016 for demolition, and other permits were issued in February 2016 for multiple apartment buildings[8]. This property is outside of the Altamonte Springs city limits (Figure 8-2) and is zoned as R-1 (single-family dwelling on a minimum lot size of 8,400 sq. ft.) and PD (Planned Development) by Seminole County, with a FLU of MDR (Medium Density Residential).

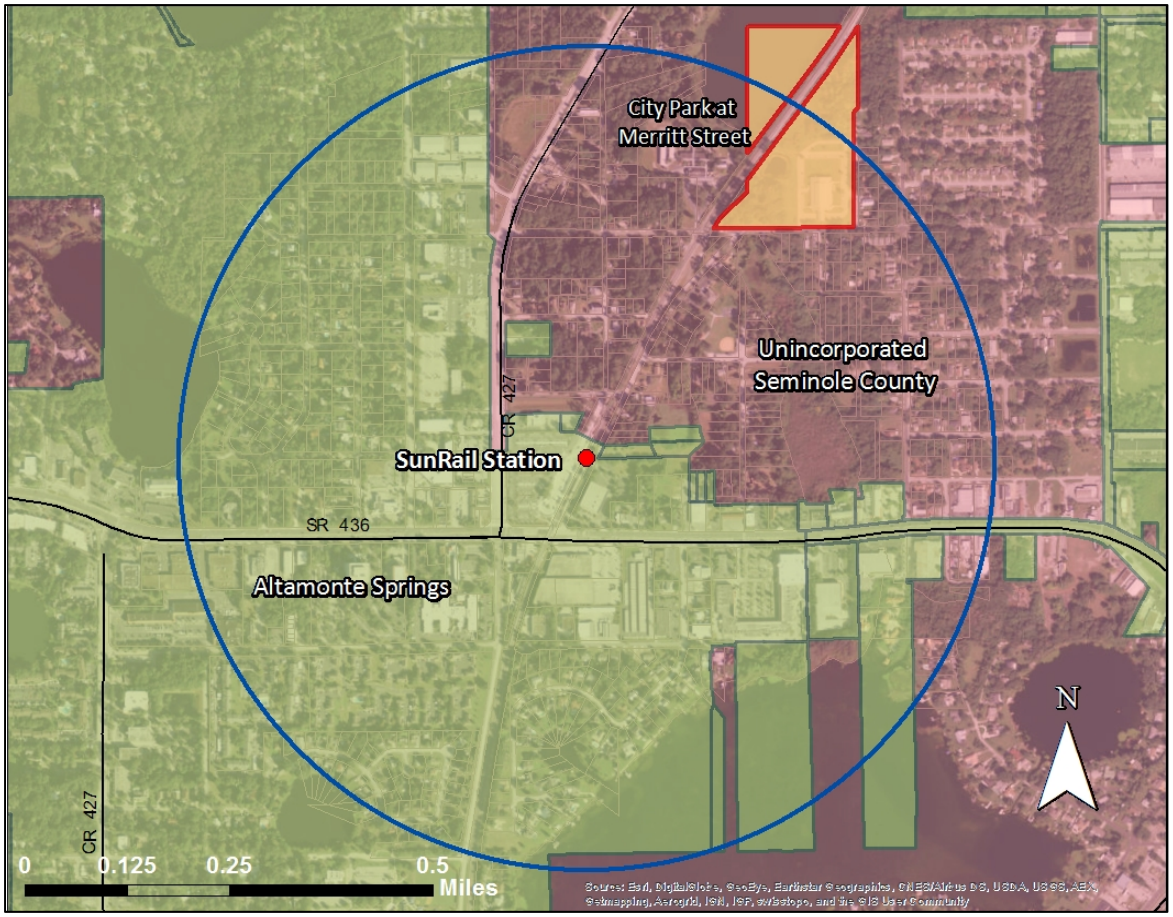

Figure 8-2: Satellite Image of the Altamonte Springs City Limits with SunRail Station Half-Mile Radius

East Town Center Vision Plan for Urban Infill Redevelopment

On March 18, 2014, Altamonte Springs adopted the East Town Center Vision Plan for guiding growth in three targeted sub-districts (seen in Figure 8-3) on the east side of the city. This plan compliments additional plans for other parts of the city, including the West Town Center, the Regional Business Center, and the Gateway Center. General goals amongst these plans are aimed at discouraging urban sprawl, creating compact and TOD in walkable neighborhoods, increasing the jobs-to-housing balance, and supporting infill and redevelopment.

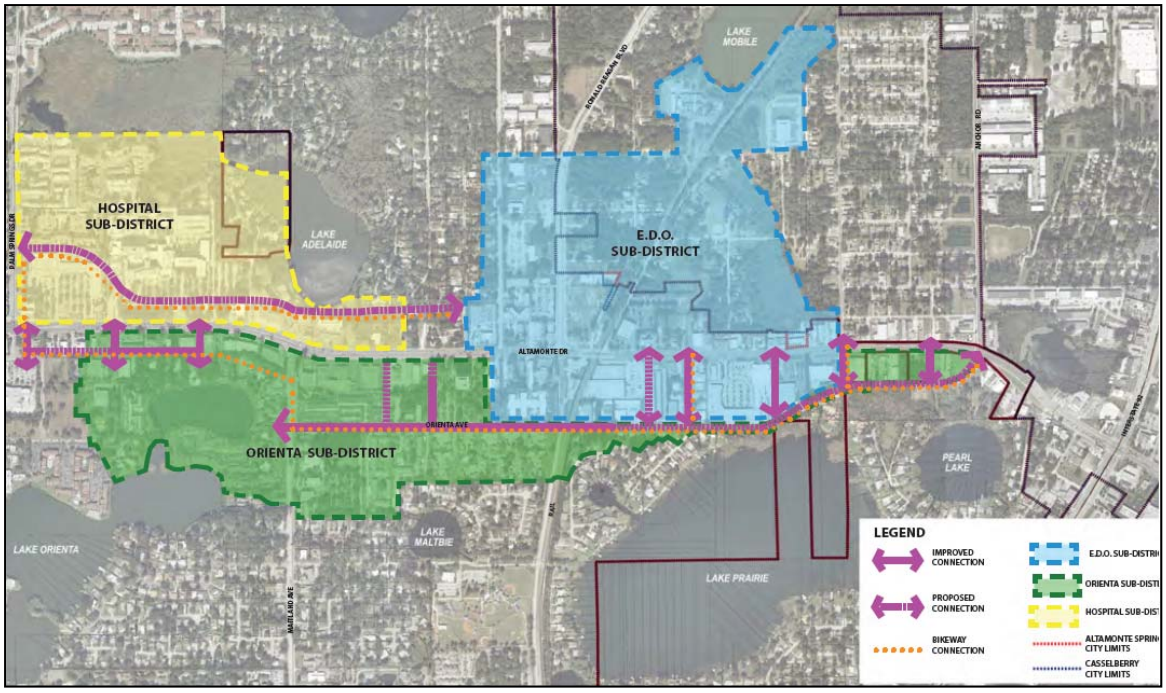

Figure 8-3: Map of Altamonte Springs' East Town Vision Plan Redevelopment Sub-Districts[8]

The East Town Center is a "mixed use district intended to serve as the transportation hub for the east side of the city" that facilitates intense urban development and infill[9]. The area includes three sub-districts, including the Economic Development Opportunity (EDO) sub-district around the SunRail station; the Hospital sub-district around Florida Hospital Altamonte; and the Orienta sub-district, "a typical highway commercial district with a concentration of employment uses.[9]" Almost the entirety of the EDO sub-district is within the half-mile radius of the SunRail station, as seen in Figure 8-4, though the other two sub-districts are only partially within the radius. The vision plan indicates that "the city intentionally limited the [EDO] study area so as to create protections for surrounding Low Density Residential areas that are not immediately surrounding the station.[9]"

Strategies suggested by the vision plan for the EDO are primarily focused on TOD, including improved walkability and pedestrian friendly designs such as the use of broad sidewalks, tree-lined streets, on-street parking, hidden parking lots, garage placement in rear, and narrow slow speed streets. The EDO sub-district also encourages mixed land use, mixed housing, high density, maximum parking requirements, and streetscape design. Design principals for the EDO include complete streets with urban street design and strong connectivity, a range of housing options, and the use of an urban parking model.

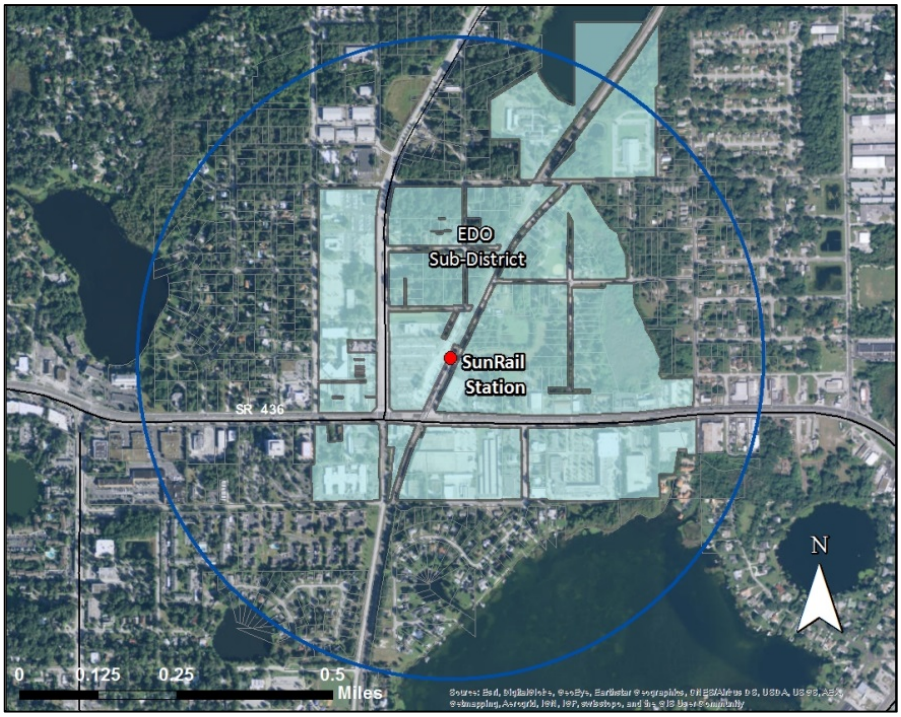

Figure 8-4: Satellite Image Showing Approximate EDO Sub-District

Specific development opportunities noted for the city to utilize include new and improved roadway grade crossings, connecting employment centers with FlexBus, creation of a Stormwater Master Plan to meet future development needs, and notes particular buildings that are ideal for transit oriented redevelopment. The vision plan notes that "without supporting alternative mobility options like walkability and flexible transit (FlexBus), most SunRail stations will not independently be able to drive development density and an intensity of uses.[9]"

8.3 Zoning, Future Land Use, and Overlay Districts

Due to the boundary between Altamonte Springs and unincorporated Seminole County that exists within the half-mile radius surrounding the city's SunRail station (Figure 8-2), zoning and FLU classifications within the study area are defined by both the city and the county. The Enhance Central Florida Study Area Plan anticipates this land will be "eventually be annexed into the city when development occurs.[4]"

The station is zoned by the city as MOC-2 (Mixed Office Commercial Medium), as seen in Figure 8-5, while surrounding zoning within the TOD area includes MOI-1, MOI-2, MOR-1, MOR-2, IN, R-1, R-1A, R-1AA, R-1AAA, R-3, CG, and GO. The remaining study area is zoned by the county as R-1, R-2, PD, and C-2, with a very small amount of incursion by M-1A.

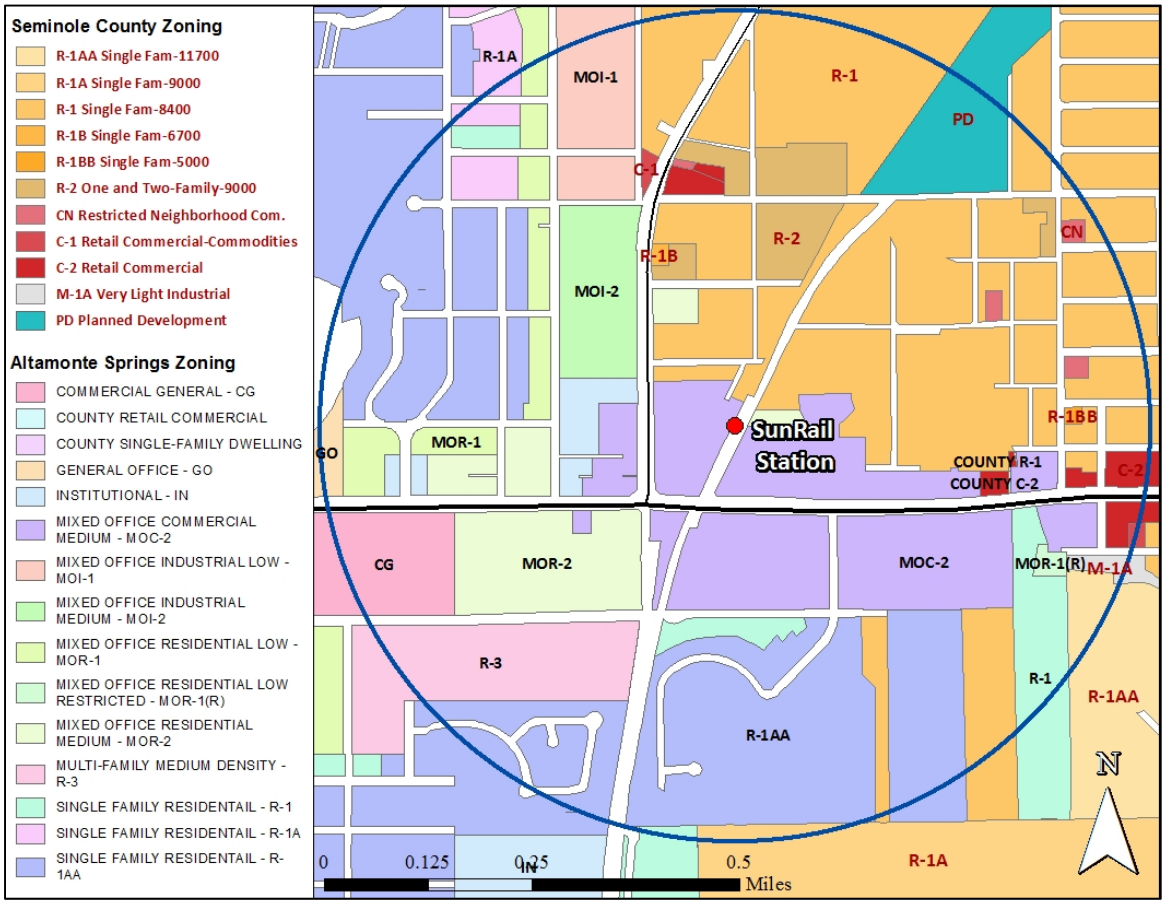

Figure 8-5: Seminole County and Altamonte Springs Zoning in the SunRail Station TOD Area

Seminole County FLU designations within the station TOD area include COM and PUBS, though it is mostly MDR, as illustrated in Figure 8-6. Altamonte Springs FLU areas in the station TOD area include East Town Center around the station area, along with Low Density Residential, Medium Density Residential, and smaller amounts of Industrial, Office/Commercial, and some Right of Way – Rail and Regional Business Center extending into the half-mile radius.

Seminole County has established an Energy Conservation Overlay (ECO) within half-mile radii of all SunRail stations in the county with the comprehensive plan's Policy FLU 5.17.[10] This overlay also impacts areas within a quarter mile of the right-of-way of major urban transit corridors, and unincorporated Dense Urban Land Areas. The Energy Conservation Overlay is intended to encourage compact, multi-modal, energy conserving developments that balance jobs and housing, and includes a framework for performance evaluation.[10]

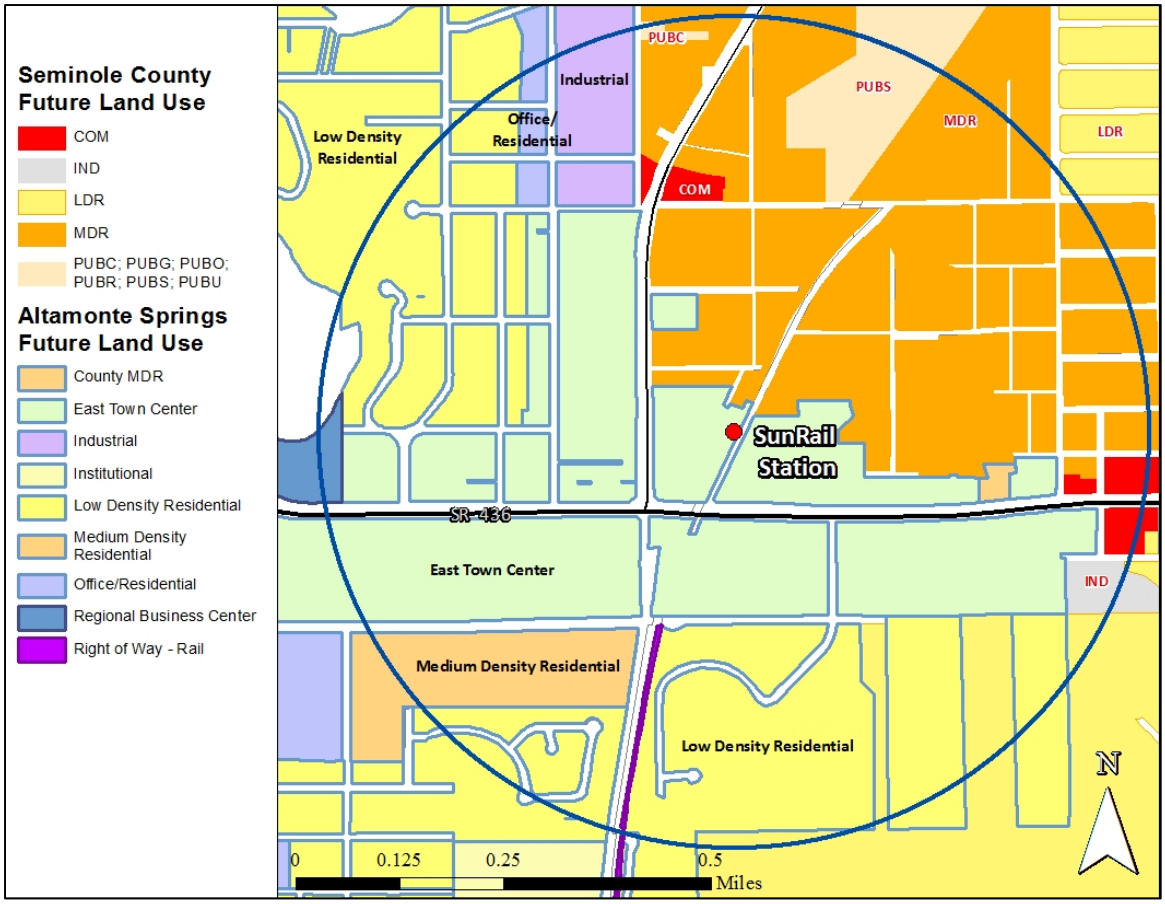

Figure 8-6: Seminole County and Altamonte Springs FLU in the SunRail Station TOD Area

Objective FLU 4 generalizes the ECO, stating "The County shall also encourage redevelopment of areas identified as contained within the [ECO] to achieve a more compact land use pattern" that conserves energy and reduces greenhouse gasses.[10] Also related is Objective FLU 10, which "encourages a range of housing types and a range of household incomes with close proximity to SunRail commuter rail stations and within [the ECO].[10]" Objective CON 8.13 expands on the county's efforts towards energy conservation, stating "The County shall continue to support efforts put forth in the County Transit, Pedestrian and Bicycle Multi-Modal Mobility Strategy… to increase mass transit ridership, use of SunRail commuter rail, bicycle and other alternative modes of travel as a means to minimize fuel consumption, and to encourage redevelopment in a more energy efficient land use pattern that will enable more use of alternative modes of travel.[10]"

Enhance Central Florida Station Area Study Plan for Altamonte Springs

In 2014, the East Central Florida Sustainable Communities Consortium produced detailed station area plans for six SunRail stations[4]. Altamonte Springs was included in the $2.4 million study funded by the federal Department of Housing and Urban Development, which includes an overview of the station area and its existing conditions. More specifically, the plan provided a review of relevant city and county policies and regulations, an employment market study, and a housing-needs report, along with several development scenarios for guided growth. The Renaissance Planning Group was hired as a project consultant and provided community outreach.

Working groups were organized to receive community input from local residents and landowners, and "previous work of the community was incorporated into the plan recommendations", which included "amending the [FLUE] of the County's Comprehensive Plan, identifying community development strategies, and consideration of other policies, programs, and partnerships.[4]"

The Study Plan and defines the East Altamonte study area as "an historically African American neighborhood that has relatively lower household incomes and high unemployment compared to the rest of Seminole County," noting that "thirty eight percent of households earn less than $20,000 per year.[4]"

Future development needs are also identified, noting that growth in the EDO "depends on the ability to serve the area with utilities", which "is key to enabling development to occur at a scale of density and intensity appropriate for [TOD].[4]"
The housing analysis identifies a "mismatch between resident needs and the existing housing stock", noting a lack of rental housing and a "solid base" of low-income, burdened homeowners.[4] This imbalance has created a need for affordable multi-family housing TOD surrounding the East Altamonte area.

The plan's market assessment suggests emphasizing both job creation and job access, ensuring improved access to the SunRail, stating that "given the limits of the market and concerns about neighborhood compatibility with existing established residents, the focus… is to enhance access to the SunRail station so residents can better reach jobs and job training opportunities elsewhere in the region.[4]"

Possible development scenarios are included in the study to provide the city with visions to guide changes in regulations and policies. Plans included a "Trend Scenario" with the continued growth of existing conditions, and a "Recommended Plan Scenario" that

provides two new parks, a change in FLU to include more mixed-use and high-density residential development, and a change in industrial areas to commercial. Both scenarios include proposed connectivity improvements, particularly for pedestrians and bicyclists. It is also suggested that an overlay be created to match the County's ECO focused on TOD, and to establish policies that support aging residents in the community.

Development Incentives

The Land Development Code (LDC) for Altamonte Springs includes Article XVII – Incentive Program, which defines an incentive program for use in an incentive zone within the regional business center of the city[11]. The Incentive Zone includes the area immediately surrounding area east of the I-4/S.R. 436 interchange, and west of Palm Springs Drive (North of 436). While the city utilizes this to promote new development, the entirety of the city's incentive zone is slightly west of the station's half-mile radius and is outside of the SunRail's TOD area.

Section 3.44.25 of the LDC, Project Development Incentives, does provide the city with the more general "ability to reduce on-site development requirements for projects that qualify as: (1) affordable housing; (2) redevelopment in activity centers; (3) infill development inside activity centers; (4) infill development outside activity centers; and (5) project renovations requiring city approvals or permits[12]", which does apply to the SunRail station area and the EDO. More generally, the city also offers

Seminole County also provides a number of incentives for attracting new and relocating businesses. Specific programs include a Qualified Target Industry Tax Refund to attract high-value industries[13]; a Jobs Growth Incentive Fund established in 1995 to award "funds for expenses such as impact and permit fees, relocation costs, equipment purchases, land acquisition, building construction, loan interest pay-down, lease-hold improvements or any other legitimate business expense as determined by the Board of County Commissioners" with special consideration "given to projects seeking to locate in targeted redevelopment areas" and preference "given to projects that will be constructing new buildings.[13]" The County also notes that Altamonte Springs provides "incentives that reduce building and impact fees for qualified new construction projects within the Central Business District.[13]"

Capital Improvements

Figure 8-7 depicts the extent of ongoing capital improvement projects surrounding the Altamonte Springs SunRail station. The Big Wekiva Basin Master Study is a Stormwater project that is seen from the southwest of the map to the northeast. The scope of this

project is described as a “basin evaluation including hydrologic and hydraulic modeling as well as pollutant loading analysis.[14]”

The area to the northwest and northeast of the SunRail station is a part of the East Altamonte Area Sidewalks Phase I project, which is described as a “proposed sidewalk along various streets to connect E. Altamonte community to the new commuter rail station.[15]” Design ended in April 2016, and construction is expected to begin in October 2016, though no End date is set for construction.

The circle on the Capital Improvements map represents the roadway project for SR 436 at Ronald Reagan Blvd Intersection Improvements. “This project is an intersection improvement study that aims to provide motorists safer intersections by improving continual flow in through lanes, and providing left turn entrance to another roadway.[17]” The Aid to Govt. Agencies – Design phase is set to continue from October 2014 to September 2018.

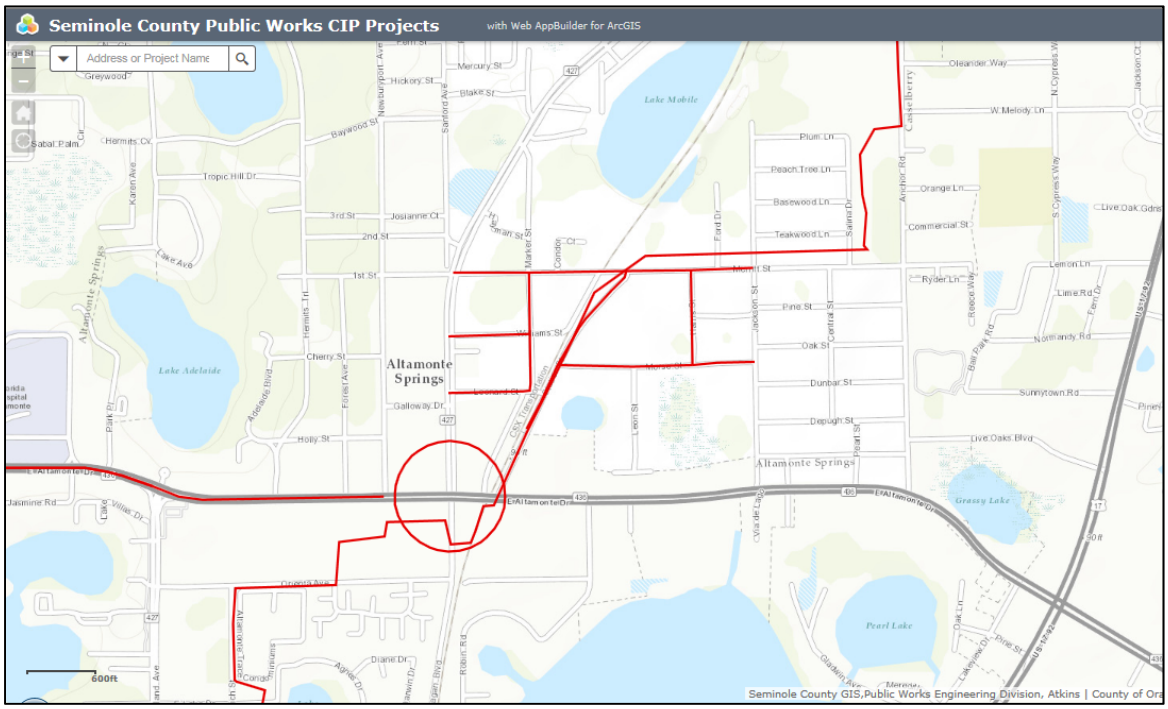

Figure 8-7: Capital Improvement Projects Surrounding the Altamonte Springs SunRail Station[16]

Altamonte Springs' Capital Improvements Program details funding for city-wide projects. Funded Stormwater Management projects include East Town master drainage, which is budgeted for $250,000 in FY 15/16, $2 million in FY 16/17, and another $2 million in FY 17/18, providing a total of $4,250,000 [18].

Transportation related projects include $1 million of corridor enhancements on SR 436 east of I-4 from Maitland Avenue to Boston Avenue, which bisects the station's half-mile radius, and is to include "widening for westbound right turn lanes, all drainage modifications.[18]" East Town Center roadway improvements are also budgeted for a total of $4,583,750 in FY 15/16 and FY 16/17 to be paid with a combination of sales tax and impact fees[18]. Orienta Drive is budgeted for a $2.3 million worth of repaving, drainage, and pedestrian related improvements for FY 16/17 [18].

A MPO identified project that is not being funded by the city involves intersection improvements from Newbury port to Ronald Reagan Avenue, and is budgeted for $1.25 million between FY 16/17 and FY 17/18.

FDOT's Central Florida Roads website lists project 412994-4 for Track Renewal and Grade Crossing Upgrades throughout the SunRail corridor. "Improvements include rail replacement, ballast installation, track surfacing, and pedestrian and roadway grade crossing" and "will enhance the safety and quality of the corridor for train, pedestrian and vehicular traffic.[19]" Grade crossing improvements were scheduled in Altamonte Springs on Leonard Street in July, 2016 approximately 650 feet northeast of the SunRail station platform[19].

8.4 Altamonte Springs SunRail Station Area Bicycle & Pedestrian Connectivity Study

In May 2014, FDOT initiated a study with Kittelson & Associates, Inc. to describe existing conditions and opportunities for improvement for bicycle and pedestrian networks in the area surrounding the Altamonte Springs SunRail station. The study notes that the SunRail "is a significant local, state, and federal investment which can ultimately be successful only if riders can access the SunRail stations through multiple modes of travel," marking the importance of identifying infrastructure needs and "enhancing multi-modal connectivity.[20]"

Station metrics detail a comparatively high number of multi-family homes and higher than average number of total residential units within the half-mile radius surrounding the

SunRail station[19]. The Altamonte Springs station area also has the seventh highest employment and sixth highest connectivity of the twelve station areas[20].

A field review identifies specific opportunities for improvement, including rebuilds for sidewalk ramps, sidewalk hazard repairs, detectable warning surfaces, crosswalk striping, widening the sidewalk and adding pedestrian-scale lighting on Altamonte Drive (SR 436), adding a sidewalk to the south side of Leonard Street with pedestrian-scale lighting, providing a pedestrian crosswalk across the rail line on Leonard Street, adding five foot sidewalks to Morse Street, Williams Street, and Merritt Street, including bicycle lanes and/or on-street parking to Ronald Reagan Boulevard (CR 427), and providing dedicated bicycle routes to the area. A total of eleven specific projects are listed for immediate priority, another sixteen for short-term, and four for long-term.

Chapter 9: Maitland Station Area Profile

9.1 Introduction

Maitland claims a "history of strong residential identity, sustained by… the diverse economy in the region", and though the city has grown in recent years, it has continued to prioritize the preservation of its historical residential neighborhoods.[1] The local communities that surround Maitland's SunRail station lend a variety of land uses to the overall station area, complementing the mixed use center along the city's busy US 17 corridor and office space along Maitland Avenue, though these strict buffers have possibly resulted in a limited amount of available land for new TOD and associated parking.[2]

Despite these potential challenges for new TOD, new developments have occurred in the Maitland Station area since the introduction of the commuter rail, including Uptown Maitland Senior Apartments and Maitland Station Apartments, which together have provided the area with almost 400 new multi-family units, parking garages, office space, and retail.[3] Due to these new developments and continued efforts from the city to support TOD, the Maitland SunRail station area compares favorably with other station areas as one that has experienced TOD based around the commuter rail.

Figure 9-1: View from Maitland SunRail Station

Relative to other SunRail station areas, Maitland is a small city with an estimated 2014 population of 16,823 people within 5.27 square miles. [4] The majority of the station's TOD area exists within Maitland city boundary and Orange County, though the northern boundary of the half-mile TOD area extends beyond city limits into unincorporated Seminole County.

9.2 Recent and Planned Developments

The Parker Lumber Company, Maitland's oldest family-run business, closed after 77 years of operation in January of 2012 to begin selling its land, enabling change that has allowed Maitland's Sawmill district to be focused around facilitating new TOD near the SunRail station.[5] The first two acres of this land were purchased by FDOT for an entryway and

parking lot for the SunRail station, while the remaining 5.5 acres of land were purchased for the TOD Maitland Station Apartments.[6] The extent of these projects within the station's half-mile radius can be seen in Figure 9-2

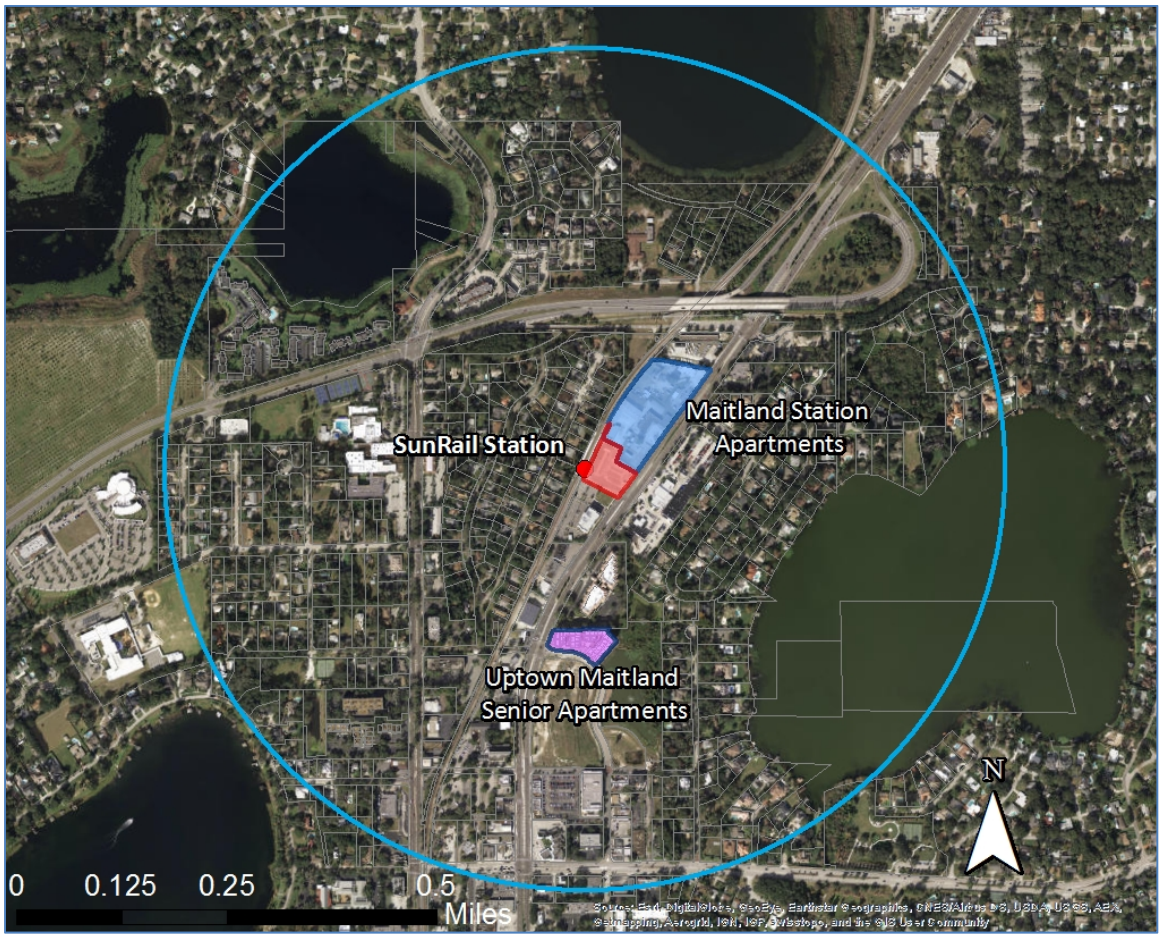

Figure 9-2: Satellite Image of Maitland SunRail Station with Half-Mile Radius Study Area

Uptown Maitland Senior Apartments (525 Sybelia Pkwy) is a $22 million, five-story, 93-unit affordable senior living development located off of North Orlando Avenue between Maitland Boulevard and East Horatio Avenue. The apartment community provides 6,800 square feet of street-facing retail commercial office space on its first two floors, along with parking and an additional three floors dedicated to apartments.[3, 7] Individual residential units range from 1 bedroom / 1 bathroom to 3 bedrooms / 2 baths, or 724 square feet to 1,132 square feet, which start at $722 to $938 and month.[8] The development is partially funded by tax credits "provided by the Florida Housing Financing Corporation to allow the housing to be offered at an affordable rate to households led by folks ages 55 and older."[9]

Maitland Station Apartments (801 N Orlando Ave) is a 293-unit, six-story apartment complex that is to be directly adjacent to the Maitland SunRail station. Epoch Residential (who also developed the 200 unit Lake Mary Station House) purchased the land directly adjacent to the city's SunRail station for $5,187,000.[10, 11] As of February 21, 2016, construction was expected to begin in the following month, with project costs being estimated at approximately $47 million.[12]

Approval for the development was reported to be somewhat difficult, as the "Maitland City Council begrudgingly — but unanimously — approved [the] apartment complex next to the city's SunRail station, despite ambivalence by some members and outright hostility by Mayor Dale McDonald."[13] Specific issues with the project included a lack of mixed-use on the property, particularly retail, though it was argued that a lack of adequate non-residential parking would hinder retail development.[13] "McDonald and Councilwomen Bev Reponen and Joy Goff-Marcilsaid that the project met all city code requirements and there was nothing that mandated any retail."[13]

Plans for a five-story, $3.4 million SunRail Parking Garage were included early in conceptual drafts of the Maitland station.[11] The garage is to include approximately 440 parking spaces provided by the city and is intended to help attract people to the downtown area.[14] The city has reportedly stated that they intend on receiving "federal or state grant money to build" the garage.[14] The location and connectivity of the garage can be seen in the top-left of the concept plans for Maitland Station (Figure 9-3).

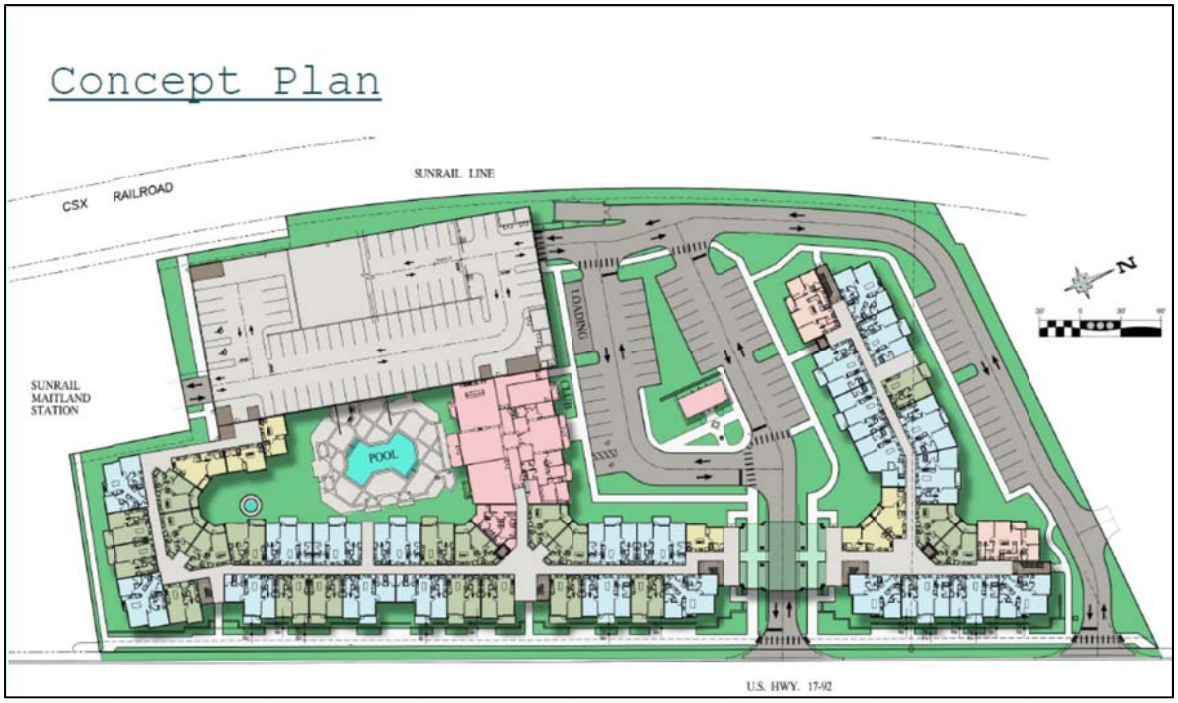

Figure 9-3: Concept plan for Maitland Station Apartments

9.3 Zoning, Future Land Use, and Overlay Districts

As seen in Figure 9-4, a portion of the half-mile radius surrounding the Maitland SunRail station extends outside of Maitland city limits into unincorporated Seminole County. Although Maitland is within Orange County, this small portion of the station's study area has its zoning and land use designated by Seminole County.

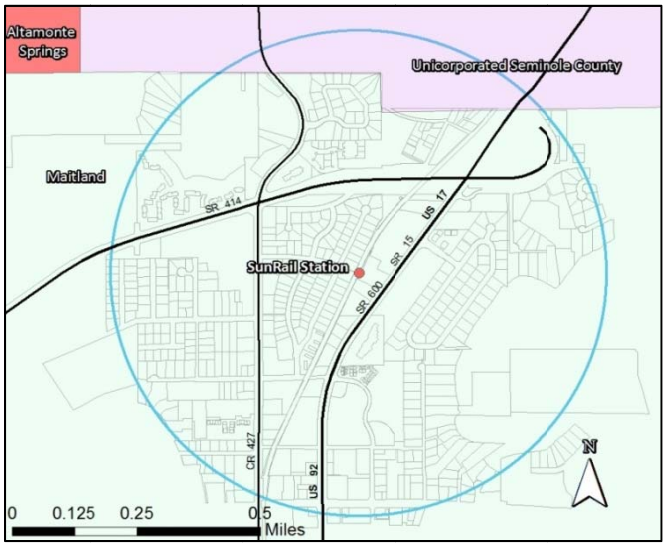

Figure 9-4: City and County Limits near Maitland SunRail Station

One of the more significant strategies utilized by Maitland to intended to guide transit-oriented growth comes from ordinance #1167, which was approved extremely early in SunRail's development on July 14, 2008. The ordinance establishes two TOD Overlay District Study Areas surrounding the Maitland SunRail

station that delineate where different types of growth are to occur and which management strategies are to be utilized, including focused planning studies based on local community input. FLUE Policy 3.24 describes the overlay as specifically being "established to guide the future development and redevelopment surrounding the Maitland Commuter Rail Station to create opportunities for compact pedestrian and bicycle friendly neighborhood centers accessible to transit."[15] The two study areas, Study Area A and Study Area B (seen in Figure 9-5) are defined in the city's FLUE and section 21-23 of Code of Ordinances.

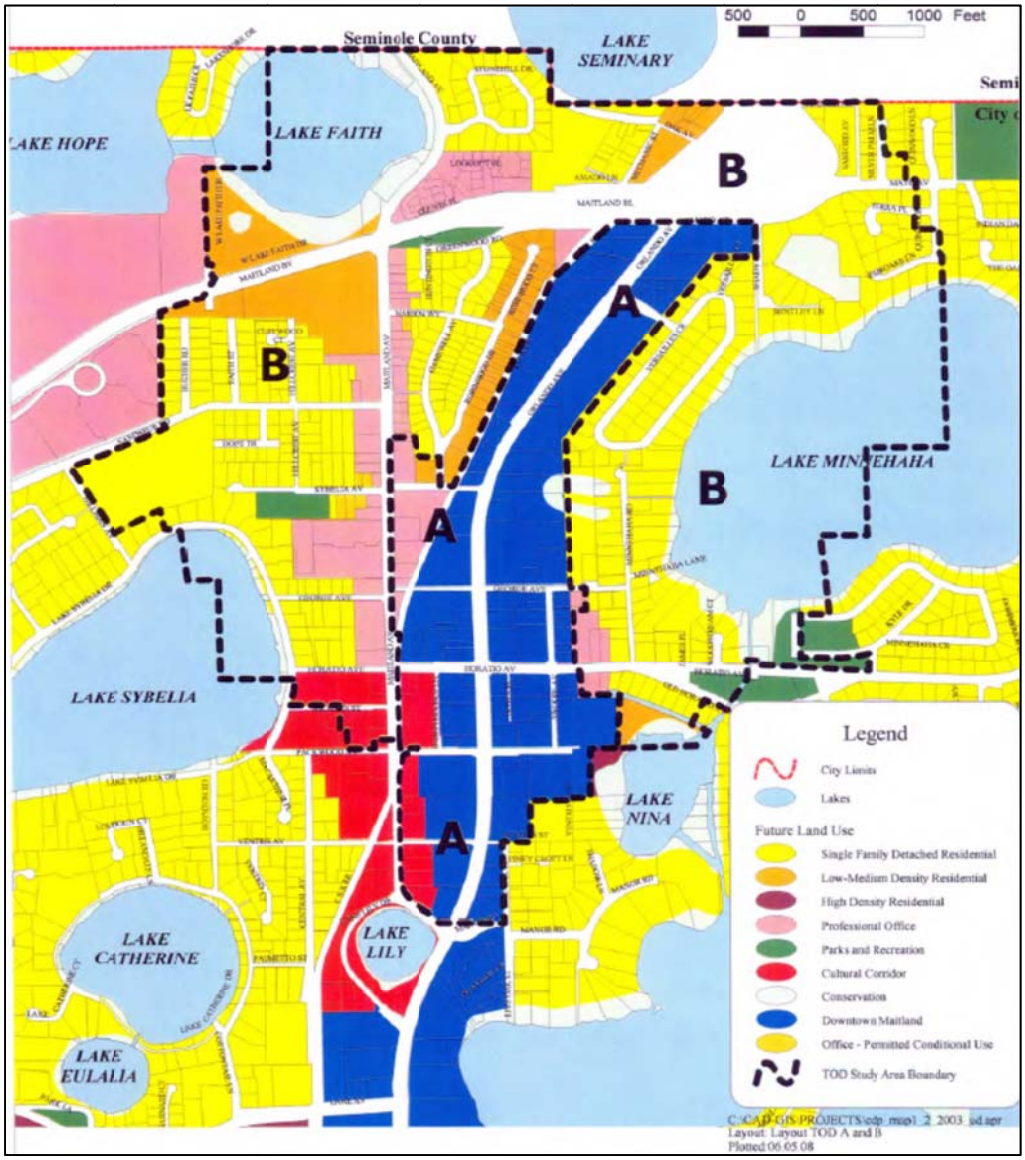

Figure 9-5: Maitland Future Land Use Map Depicting TOD Overlay Study Areas

Study Area A is “designed to provide support to urban infill development, redevelopment, and the achievement of the city's redevelopment goals by addressing mobility, urban design, land use mix, and network connectivity.”[16] Study Area A also represents the area “that shall be evaluated for future economic development opportunities, as well as evaluation and determination of areas that may be appropriate for future increased residential densities and increased nonresidential intensities.”[16] FLUE Standard 3.24.5 describes goals for community involvement, stating “the City shall hold a series of public workshops to gain public input and participation in establishing the location, design configuration and mixture of land uses, as well as the appropriate residential densities and commercial intensities that will support high levels of transit use in Study Area A.”[15]

Study Area B is notably distinct from Study Area A based on efforts to preserve the existing historic neighborhoods, though pedestrian and bicyclist networks are intended to link the two areas to enhance ridership. FLUE Standard 3.24.2 states that “Study Area B represents the area of the TOD district in which it is acknowledged that current residential uses are to be maintained. Within Study Area B bicycle, traffic, and pedestrian circulation will be emphasized and evaluated to identify opportunities to improve access and connections to Study Area A.”[15] FLUE Standard 3.24.6 continues further, stating that “the City shall hold a series of public workshops to gain public input and participation in identifying opportunities to improve pedestrian and trolley car access, street connectivity and crossing and bicycle path connections from Study Area B to Study Area A that will facilitate high levels of commuter rail ridership.”[15]

Zoning for the Maitland SunRail station area (Figure 9-6) reflects general trends established in the overlay districts. General Commercial (GC) zoning is designated along the North Orlando Avenue corridor as far north as SR 414, and is surrounded predominantly by residential units of varying density, as well as some professional office and mixed use.

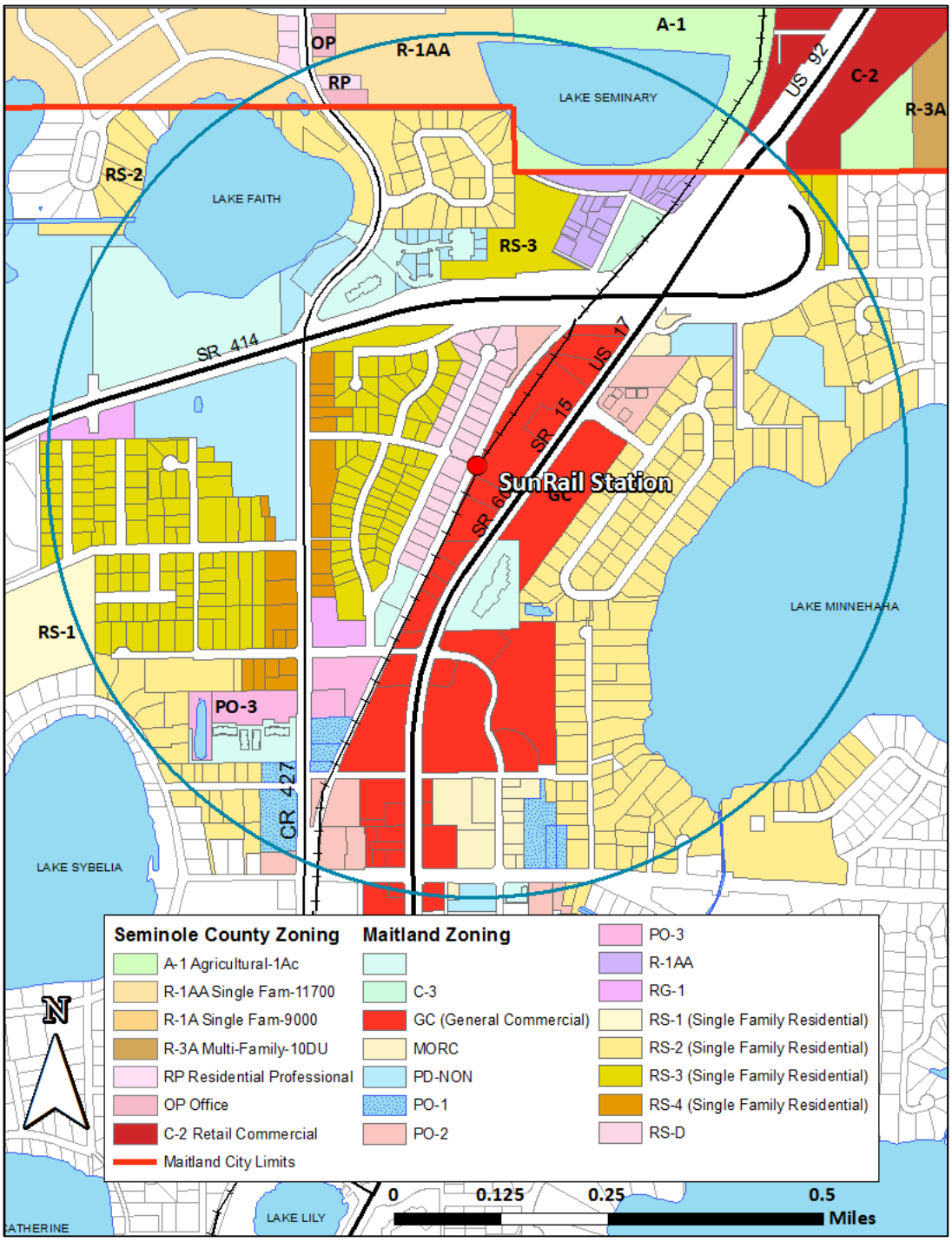

Figure 9-6: Maitland SunRail Station Area Zoning

The Mixed Office Residential Commercial (MORC) district used to encourage these mixed uses along U.S. 17-92, "provided existing residential areas are preserved", again highlighting the importance balancing new growth with the protection of established neighborhoods.[15] A small portion of the northern part of the study area is zoned by Seminole County, though this is primarily comprised of single family and agriculture use.

FLU designations within the half-mile radius surrounding the SunRail station reflect general patterns seen in the city's Zoning and TOD Overlay with the U.S. 17 corridor prominently designated as Downtown Maitland Master Plan (DMMP). This Land Use designation is intended to "guide future development and redevelopment toward creating an attractive urban pattern that balances the pedestrian and traffic needs of residents, and to encourage, but not require, mixed-use development by generally desiring residential use development to be provided above commercial and/or office use... The design and land development standards are intended to be flexible... [and] will ensure that the architectural integrity and details of existing significant structures are maintained, and will affirm the appropriateness of new development into the historic fabric of the area."[15]

The FLUM also shows the general clustering of residential neighborhoods and the corridor of residential-scale office development on CR 427 / North Maitland Avenue, which is also represented by the Maitland Avenue Special District seen in Figure 9-7. Policies are included in the city's FLUE to encourage similar development for any lots in the area with frontage and to establish site design criteria and procedures for site plan review. Parcels in this district adjacent to Maitland Avenue without frontage are encouraged to be preserved for residential uses.[15]

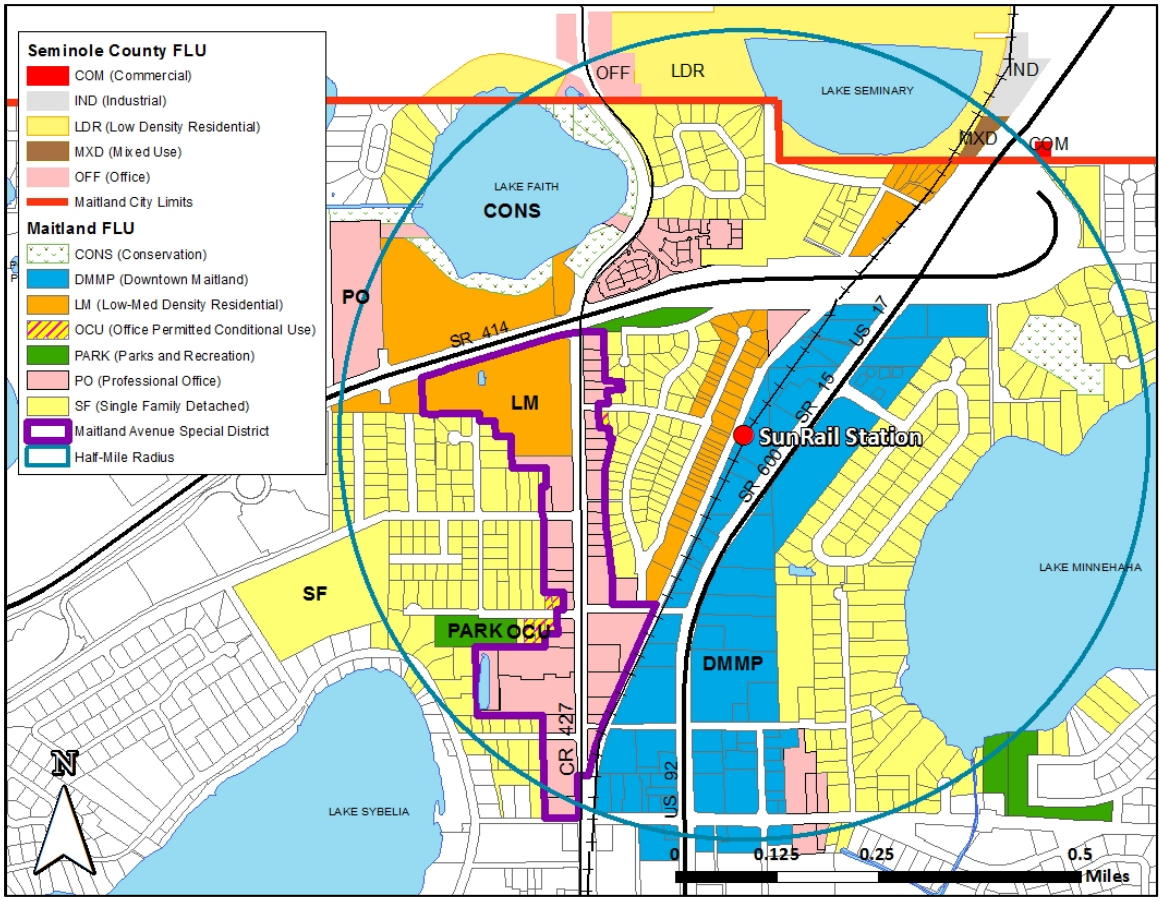

Figure 9-7: Maitland SunRail Station Area Future Land Use

In mid-2016, GAI Consultants Company provided an updated draft to Maitland's downtown master plan from 2003. This recent draft proposes a $1.2 million project focused on Independence Lane, just south of the SunRail station's half-mile radius, while other recent discussions related to the plan have considered possibly narrowing Maitland Avenue.[17] Likewise, the Maitland City Council has recently discussed an update to its 2004 Area Transportation Study, which is budgeted in the city's FY16 CIP for $230,000. The study is to consider pedestrian networks along Maitland Avenue and take a closer look at a road diet for the corridor, though community engagement in the study has been emphasized.[17]

On April 11, 2016, the Maitland City Council passed Ordinance 1305, which encourages a greater variety of mixed-uses in the city's downtown area. Ground floor residential, multi-family, and townhome uses are no longer permitted in the Downtown Maitland Zoning District (DMZD, not reflected in the most recent FLUM), except as a part of parcels zoned as Planned Development. Planned developments within the Sawmill District, which represents the north gateway to the city's downtown and includes the city's SunRail

station, is subject to additional criteria, and "the location of ground-floor residential uses... will be evaluated based upon compatibility with surrounding uses, character of the surrounding areas, street type, road visibility, street frontage, access, and the purpose and intent of [the] district."[18] The ordinance continues, specifically referring to the district as being "based upon transit-oriented principles, such as a pedestrian and bicycle friendly environment with a compact and functional mix of uses."[18] Also added was the restriction that properties facing major streets, such as North Orlando Avenue must have a minimum of 25 percent of its ground floor space dedicated to retail, office, and/or other commercial use, not including parking garages, unless given approval from the city.

9.4 Development Incentives

Maitland's FLUE Standard 3.24.4 states "The City of Maitland shall recommend development incentives for projects located within the TOD overlay district that meet the criteria and provide the facilities, programs, and/or services set forth in the design guidelines and the Downtown Maitland Revitalization Plan (DMRP)."[15]

Section 23-2.7.1 in Maitland's Code of Ordinances provides expedited review and application process for developments in downtown Maitland. Additionally, applicants can apply for off-site accommodation to meet requirements for open space, pervious surfaces, and/or parking.[19] Section 23-2.7.2 also allows for a density and intensity bonus within the TOD Study Area that exceeds maximum standards by an addition 25 percent.[19]

The Maitland City Council also approved to place a referendum in January 2012 for an ad valorem tax exemption program to authorize the an exemption for qualifying businesses of up to 100% for up to 10 years. The measure was approved, with 54.81% of voters voting yes, and is codified by Section 17-41 in the city's Code of Ordinances.[20]

9.5 Maitland SunRail Station Area Bicycle and Pedestrian Connectivity Study

In May, 2014, a Bicycle and Pedestrian Connectivity Study for the Maitland SunRail station area was prepared by Kittelson & Associates, Inc. for FDOT. Included in the study was a crash history review noting specific incidents with pedestrians and a field evaluation identifying problems and opportunities regarding pedestrian and bicyclist networks. Suggested improvements such as crosswalks, railroad crossings, sidewalk expansions, detectable warning surfaces, and the relocation of utilities were assembled and organized by priority, including immediate, short-term, and long-term projects.[15]

Supporting this connectivity study is Objective 4 in Maitland's Transportation Element: "Implement a coordinated and integrated transit, bicycle and pedestrian system that recognizes the needs and desires of the City's pedestrians and cyclists, furthers the reduction of greenhouse gas emissions and allows for their safe travel to the City's parks, schools, shopping and employment centers."[21] Standard 4.1.1 notes that "Sidewalk networks to schools, parks, and transit facilities shall be given priority." Standard 4.1.3 refers to the city's TOD overlay, stating "the city shall develop a city-wide Pedestrian Connections Master Plan that... [identifies] primary and secondary pedestrian routes within and connecting to the [TOD] overlay district and Study Areas with the surrounding areas and establish guidelines to upgrade these routes consistent with TOD guidelines."[21] The Connectivity Study is expected to be expanded on in the near future, as Maitland City Manager Sharon Anselmo commented in July 2016, "a bikes and pedestrian plan is on deck for next year", in addition to a parks-and-recreation master plan, a possible Maitland Avenue Corridor study, and funding for improved sidewalks.[22]

9.6 Capital Improvements

Maitland's Capital Improvement Program FY 2016 – 2020 includes several planned projects near the city's SunRail station. Priority 5 of the Traffic section is a new traffic signal at the SunRail station, scheduled for Fiscal Year 2020.[23] Priority 6 is the Maitland Avenue Corridor Planning Study to develop a planning level Corridor Management Plan for the downtown area.[23]

In 2016, the city completed a $284,000 boardwalk connecting the SunRail station with the Greenwood Gardens neighborhood. The elevated boardwalk crosses a retention pond, includes railings and security lighting, and eliminates several blocks of travel for pedestrians and bicyclists traveling between the neighborhood and SunRail station.[24, 25]

The city's Capital Improvements Program has budgeted $280,000 in FY20 for a Traffic Signal Installation along US 17 at the SunRail station.[23] Another $225,000 has been budgeted in FY18 for a Traffic Signal Refurbishment including mast arms at Sandspur Road and Maitland Avenue, just west of the SunRail station.[23]

In July 2016, FDOT's Central Florida Roads posted project 424217-1, a $10 million road widening project for SR 414 (Maitland Boulevard) going east/west from just east of I-4 to Maitland Avenue, extending into the half-mile radius of Maitland's SunRail station. The facility is to be expanded from four to six lanes, with a wide raised median, continuous sidewalks, and drainage improvements.[26]

Chapter 10: Downtown Road Station Profile

10.1 Introduction

The LYNX Central station (Figure 10-1) and the Church Street SunRail station areas were consolidated into one downtown profile due to their close proximities and similar influences on new development guided by the same policies and regulations. Both study areas utilized quarter-mile buffers that were combined and compared against the remaining area within the downtown boundary (Figure 10-2). Within these study areas are a number of new, high-profile developments that, along with other nearby projects, represent a significant recovery for the city from the 2008 recession. New construction has primarily been comprised of luxury apartments, hotels, mixed-use TOD, and cultural-investment developments, such as the Performing Arts Center and a new stadium. While some of this development has been strategically located around the SunRail stations, such as the TOD Crescent Central Station, other projects were possibly developed independently of the SunRail, and were arguably influenced largely by existing levels of density and intensity in the downtown. However, the extensive use of multi-modal network connectivity in the downtown area, including SunRail, the Juice bike-share program, LYNX, and the LYMMO Bus Rapid Transit system, collectively provides a considerable amenity for any downtown development.

New development in the area has been complimented by the recent growth of neighborhoods within the downtown, such as the North Quarter, and planned revitalizations, such as the Paramore Comprehensive Neighborhood Plan, and Creative Village, which partially overlaps with the LYNX station study area.

10.2 Recent and Future Study Area Developments

While there have been a variety of recently completed and potential future developments in the downtown Orlando study areas, some of the most noteworthy and high-profile projects have been explicitly related to TOD and the SunRail. Perhaps most notable are the Crescent Central Station, which is across the street from the LYNX station, and Tremont Tower, which is planned to integrate with the Church Street station by including an indoor station platform and a wide variety of mixed-uses. On August 2, 2016, “two prominent high-rise office buildings in downtown Orlando”, just southeast of the Church Street SunRail station within the station area, were “sold as part of a $167.8 million deal,” which shows in part the revived strength and growing momentum of the downtown Orlando market.[1, 2]

Crescent Central Station (480 N Orange Ave) is a 279-unit condominium with ground floor retail that opened in November 2015. The project was developed for $39 million by Crescent Communities, LLC / Crescent Central Station Venture, LLC, and sold for $60.5 million in December 2015 to UBS Global Real Estate as a part of a larger nine property purchase worth $700 million.[3-6] The property is directly adjacent to the LYNX Central Station and is perhaps "the most prominent real estate development in connection with" the SunRail.[3] Apartments range from 532-square foot studio units with 1 bathroom for $1,243 a month, to 1,585 square foot 3 bedroom / 2 bathroom units for $2825 a month. The ground floor of the building includes brownstone-style homes and 12,000-square feet of retail leased to tenants, including Dunkin' Donuts, Philly Connection, Ugrean (a salad restaurant), Kabob, Elegant Tailor & Dry-cleaning, and Envy Nails & Spa.[4, 7]

Figure 10-1: LYNX Station

Skyhouse Apartments (335 N. Magnolia Ave) is a luxury high-rise apartment building on the periphery of the LYNX study area. The $63 million, 23-story, 320-unit development opened in December 2013. Floorplans include one-bedroom/one-bathroom, 2/2, 3/3, and studio apartments ranging from 555 square feet to 1,527 square feet, costing between $1,309 and $2,554. The building includes first floor retail, with available spacing ranging from 1,290 square feet to 3,001 square feet. Commercial tenants have included a Subway restaurant and Blo Blow Dry Bar salon. Also included is an attached 8-level parking garage with 80 dedicated spaces for retail customers.[8-10]

Creative Village (600 W. Amelia Street) is a long-term, neighborhood revitalization project that has been envisioned since 2011. The general Creative Village plan is indented to redevelop the former Amway Arena site, located 0.4 miles west of the

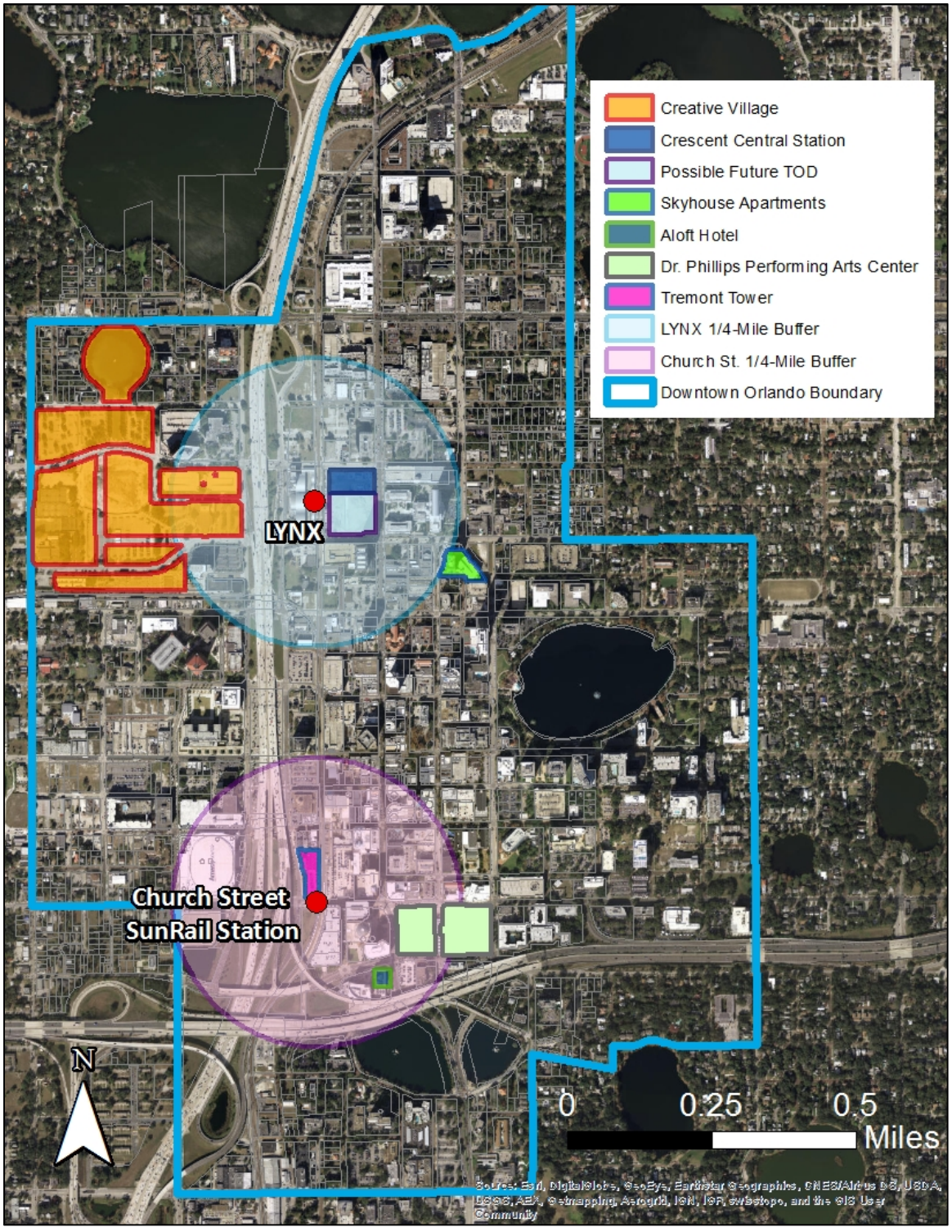

Figure 10-2: Map of Downtown Orlando with New Development

LYNX Central station, into 68 acres of mixed-use, transit oriented, urban infill. Full build-out of the area is expected to take between 15 and 20 years. Future projects identified for phase one include a new downtown University of Central Florida (UCF) campus that is expected to attract approximately 7,700 new students to downtown Orlando after it is completed in the fall of 2018. [11-14]

In February 2016, the Orlando City Council unanimously approved to provide "$75.2 million in land and other commitments" to help UCF build its downtown campus.[12] Assistance includes a 15 acre parcel at Parramore Avenue & Livingston Street valued at $20 million, a $22.5 million building on West Livingston Street, and $19 million in infrastructure improvements, all in addition to a $10 million federal transportation grant that has been used to break up a "superblock" into more realistic parcels for new development.[12, 15] The proposed site for the campus is 0.6 miles from the LYNX Central station and is outside of the half-mile TOD study area. Talk of the 165,000 square foot campus has stimulated a considerable amount of new attention for the area. In February 2016, Premier-Nelson Group Inc. expressed interest in purchasing land in Creative Village in order to develop a hotel and apartment complex.[12, 13] However, there have also been concerns amongst the local community about the effects such development will have on the historic Parramore neighborhood.

Construction began in May 2016 to provide approximately $13 million worth of infrastructure improvements the Creative Village area, which includes the expansion of the LYNX bus services and a new Lymmo Bus Rapid Transit line.[15, 16]

Possible Unannounced Project (400 N. Orange Ave.): In January 2016, Bizjournals reported Houston-based Rida Development Corp sold a 3.57 acre parcel adjacent to the Crescent Central Station for $10 million to Midtown Opportunities XIIIB LLC.[4] A $25 million hotel was previously planned for this parcel, though any details on future development have not been publicized.

Other Noteworthy Developments Near LYNX Station: A number of developments have occurred in the downtown area outside of the periphery of the LYNX Central study area, particularly in the growing North Quarter neighborhood 0.59 miles northeast of the station. The North Quarter has a "mix of apartments, Class A office buildings, hotels, professional services and award-winning restaurants."[17] Recently developments in the neighborhood include NORA Apartments (899 N. Orange Ave.), The Sevens Apartments (777 N. Orange Ave.), Park North at Cheney Place (860 N. Orange Ave), Steelhouse Apartments (750 N. Orange Ave.), Residence Inn by Marriott Hotel (680 N. Orange Ave.), and Uptown Place (911 N. Orange Ave.). Restaurants include North Quarter Tavern,

Pearson's Café, Citrus Restaurant, Café Trastevere, Two Chefs Seafood Oyster Bar, The Bistro at the Courtyard Marriot, and Swin Japanese Cuisine Sushi and Sake Bar.

Aloft Hotel (500 S. Orange Ave.) is a redevelopment of the Orlando Utilities Commission building originally built in 1968. [18] The eight-story, 118-room hotel is 0.3 miles southeast of the Church Street SunRail station, and serves as an example of adaptive reuse in the downtown area.[19] The building was purchased by GDC Properties in 2011 and reopened in October 2013.[20] The redevelopment project has since received an LEED gold certification by the U.S. Green Building Council as a project that has promoted "designs that reduce the environmental impact of the building and improves the health and well-being of its occupents."[20]

Tremont Tower (to be located at S. Garland Ave. and W. South Street) is a planned 28-story MXD, and will be the first high-rise development in downtown Orlando in almost a decade. The plaza is expected to include an indoor SunRail station with a new platform inside of the building.[21] The main anchor for the development will be Fairwinds Credit Union, "Central Florida's largest locally based financial institution", which will occupy 40,000 of the building's 200,000 square feet of office space.[21] The lobby and first floor will also include "shopping, a restaurant, and banking space" and an "eight-story AC Hotel by Marriott with 180 rooms and 10-level parking garage with 650 spaces."[21] Construction on the plaza has been delayed, though a permit for foundation work was approved in December 2015. [21]

Dr. Phillips Performing Arts Center (DPAC) (445 S Magnolia Ave.): The DPAC is a 330,000 square-foot building that includes a performance venue, a banquet hall, a School of Arts, two theatres, and a 2700-seat amplified hall.[23] The center, which opened in November, 2014, was constructed through the efforts of a public-private-partnership between Orlando, Orange County, and the center to become one of three projects in the Orlando Community Venues program.[23, 24]

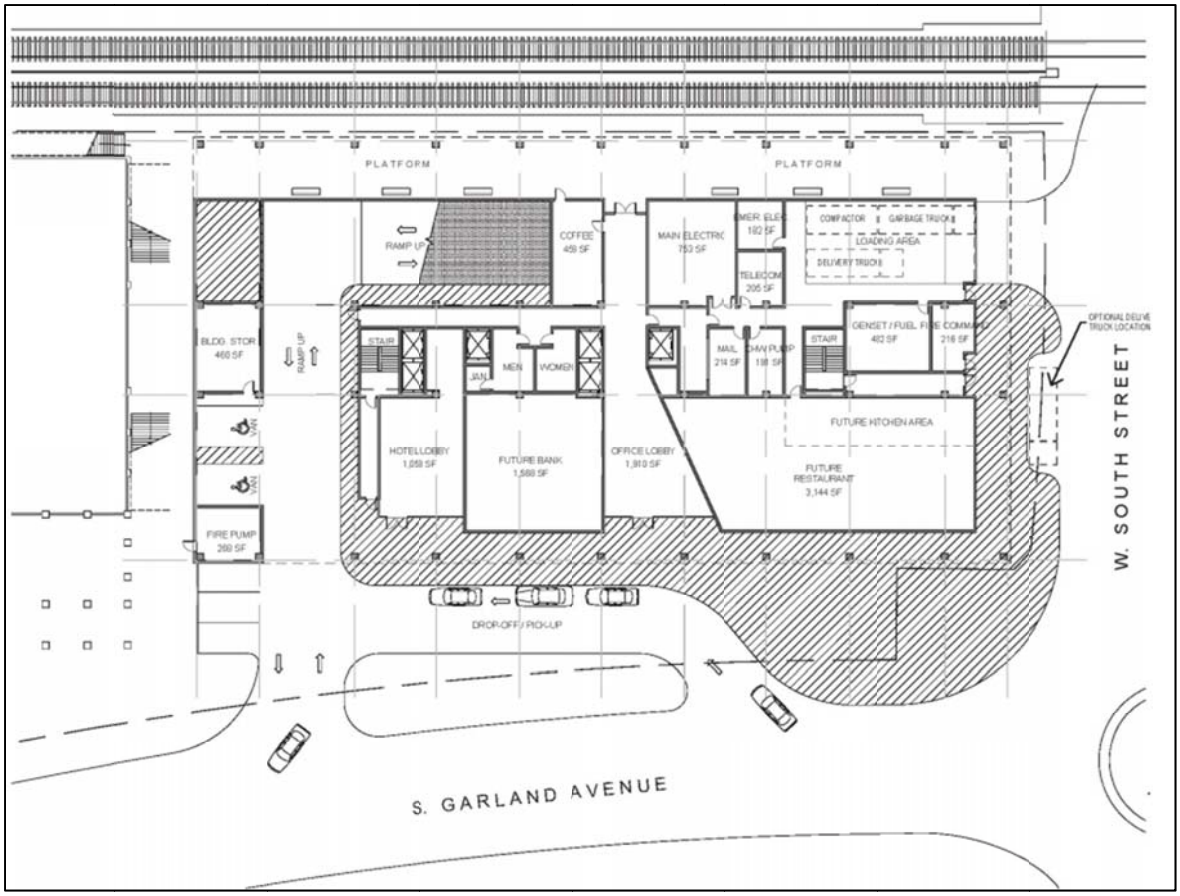

Figure 10-3: Proposed Design for Tremont Towers[22]

The center has been reported as having become "an integral part of downtown Orlando in its first year, with record attendance at touring Broadway shows, [and] a unique education partnership with Florida Hospital."[25] The entrance to the DPAC is fronted by the CNL Arts Plaza (Figure 10-4), a "vibrant welcoming place for the community" that can accommodate up to 3,000 people for public-space gatherings and outdoor performances, serving as a sort of town square for the local region.[26] The space was dedicated to the CNL Financial Group, which had its corporate offices across the street and who also provided $10 million donation to the center.[26] Additional plans for the center have included a proposed 155-room hotel that was officially canceled in favor of the Arts Plaza, as well as a 1,700-seat acoustical hall, though funds were not secured for its development as of April 2016.[27]

Figure 10-4: Design Rendering of DPAC CNL Arts Plaza[26]

10.3 Zoning, Future Land Use, Overlay District, and Land Development Regulations

A considerable portion of the downtown Orlando area is composed of various activity center districts, including AC-N, AC-1, AC-2, and AC-3, as seen in Figure 10-5. These sub-districts are clarified in the city's Code of Ordinances with section 58.341. AC-N is a neighborhood activity center, which encourages but does not require mixed-use, and is intended for locations where "arterials and collectors are available, providing convenient access to the surrounding neighborhood."[28] There is one AC-N parcel within the entirety of the downtown area overlapping the east-central boundary. AC-1 is a community activity center, providing higher intensity development than AC-N, and is meant for areas where "arterials and four lane collectors and mass transit service are available."[28] There is one AC-1 parcel partially in the downtown area, with a tiny amount of its area overlapping the boundary west of the Church Street station. AC-2 is an urban activity center with significantly higher intensities than AC-N, and is intended to provide "access between metropolitan sub-regions."[28] There is one small AC-2 parcel on the west-central boundary of the downtown area, and a significantly larger group of AC-2 parcels to its southeast, or northwest of the Church Street study area. AC-3 is the metropolitan activity center, comprising the vast majority of downtown Orlando's activity center, and includes the

highest intensities in the district, with single-type land uses "strongly discouraged."[28] As per section 58.340, these activity centers collectively implement FLU objective 2.1, and policies 2.1.1 through 2.1.4 to provide standards for activity centers, in addition to FLU objective 2.4 and policies 2.4.1 through 2.4.3 to encourage mixed development at or near maximum permitted intensities.[29]

Other zoning within the station study areas includes a notable amount of public use, high-intensity mixed-use, and planned developments, such as the recently constructed DPAC and the long-term vision for Creative Village.

Future Land Use for the downtown area is depicted in Figure 10-6, which shows the predominance of the Downtown Activity Center in the downtown area and within the two station study areas. Both station areas also include some Urban Activity Center land use, as well as Public / Recreation / Institutional. The Church Street station area also includes some High Intensity Residential and a small amount of Medium Intensity Office uses.

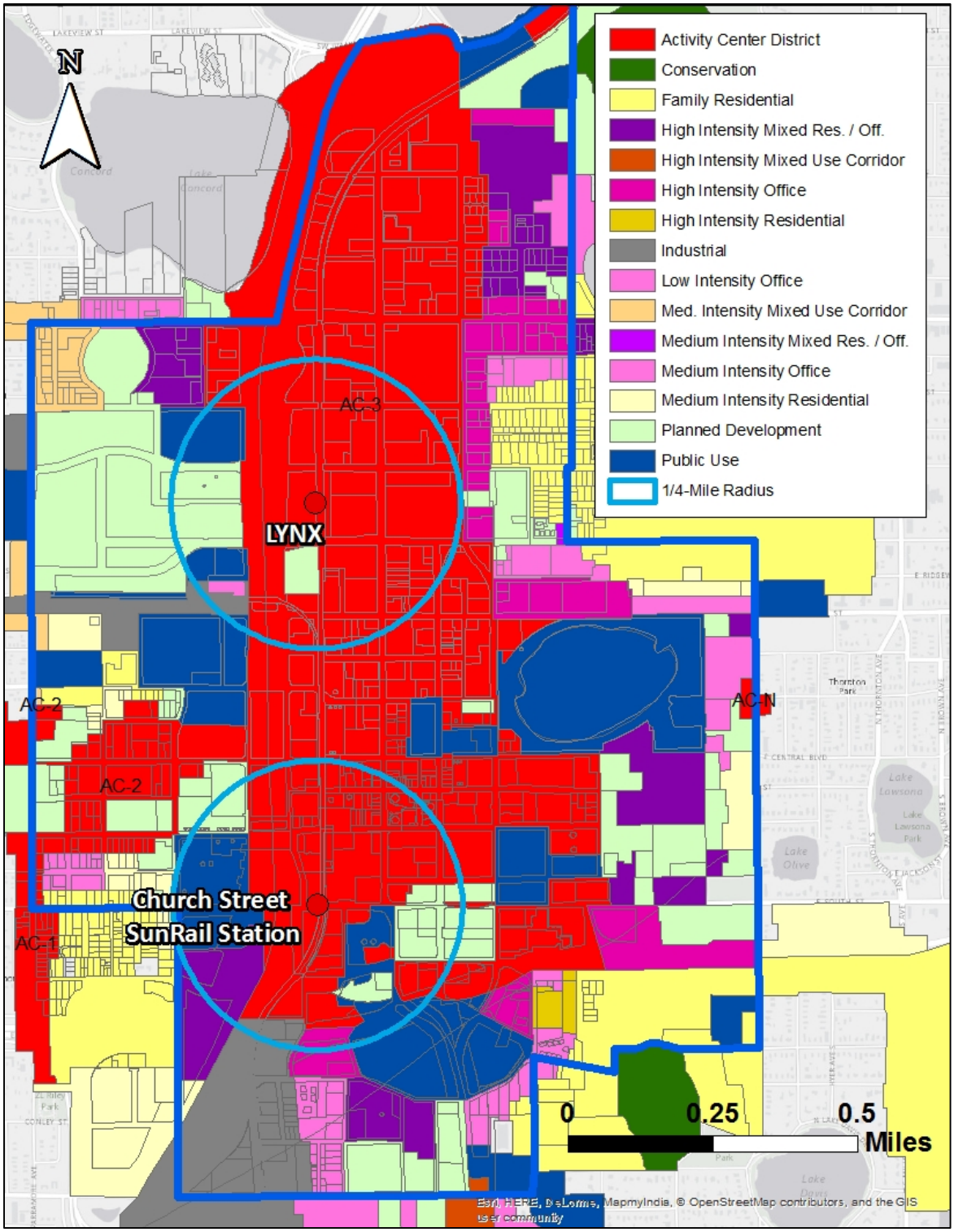

Figure 10-5: Downtown Orlando Zoning

Code of Ordinances and Comprehensive Plan

The Orlando Code of Ordinances references comparatively little information regarding either the SunRail or TOD. Specific mention of these are limited to the city's definition of TOD in Section 56.04, which is described as "a development site within a quarter mile walking distance along a designated roadway from a premium transit stop or station (SunRail or LYMMO)."[30]

Section 56.15 provides an exemption from paying a Transportation Impact Fee for any new development located on a development site defined as TOD, provided certain conditions are met, including compact mixed-use, adequate pedestrian and bicyclist facilities, and that "the developer shall enter into an agreement(s) to fund or subsidize transit ridership for employees, residents, and/or guests at the development site."[31] Goal 2 of Orlando's Future Land Use Element states that the city is "...to link high intensity Activity Centers and promote use of mass transportation along Mixed Use Corridors..."[32] This goal is expanded upon further with Policy 2.1.3, which describes how intensity bonuses shall be used to "encourage mixed-use development [and] multi-modal public transit facilities..."

10.4 Enhance Central Florida Station Area Study Plan and Community Vision

From 2013 to 2015, the East Central Florida Sustainable Communities Consortium worked on producing a detailed analysis of the downtown Orlando area as a part of its $2.4 million study funded by the federal Department of Housing and Urban Development.[33] The study analyzed a wide variety of existing conditions, including previous planning initiatives, infrastructure, the local financial market, and traffic. These analyses were collectively formed into a comprehensive neighborhood plan for the historic Parramore area in downtown Orlando. Goals identified for the community include economic development, creation of job opportunities, social and environmental justice, increased housing and education opportunities, promoting access to healthy food, and the encouragement of mixed-used development. There is also an explicit emphasis placed on creating a safe, healthy environment in which children can live, play, and learn.

The area comprising the Parramore Community Vision can be seen in Figure 10-7, which reveals its relative location to both the LYNX and Church Street SunRail stations and its overlap with a notable portion of each station's quarter-mile study area. The FLUE Support Document describes the city's revitalization strategies for

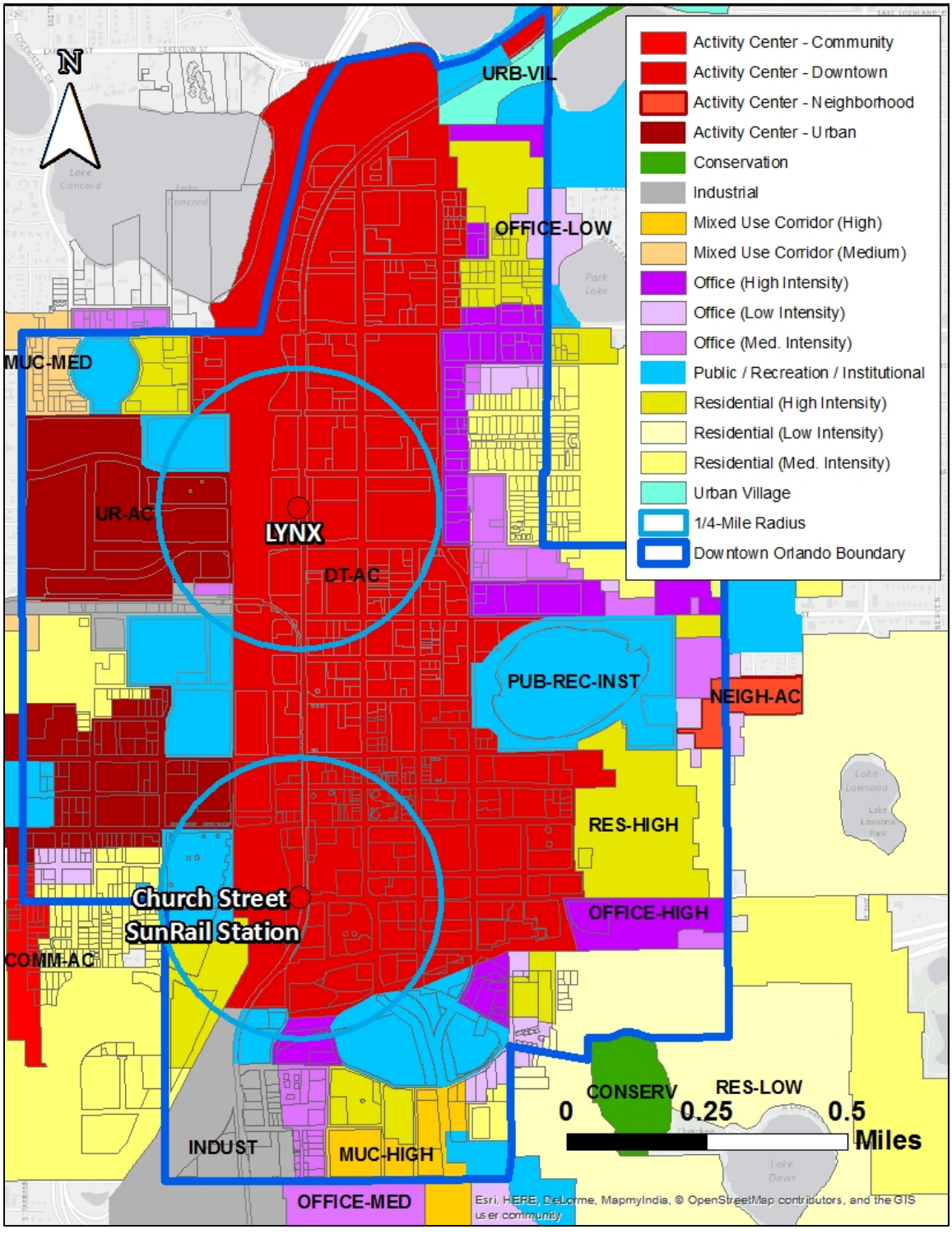

Figure 10-6: Downtown Orlando Future Land Use

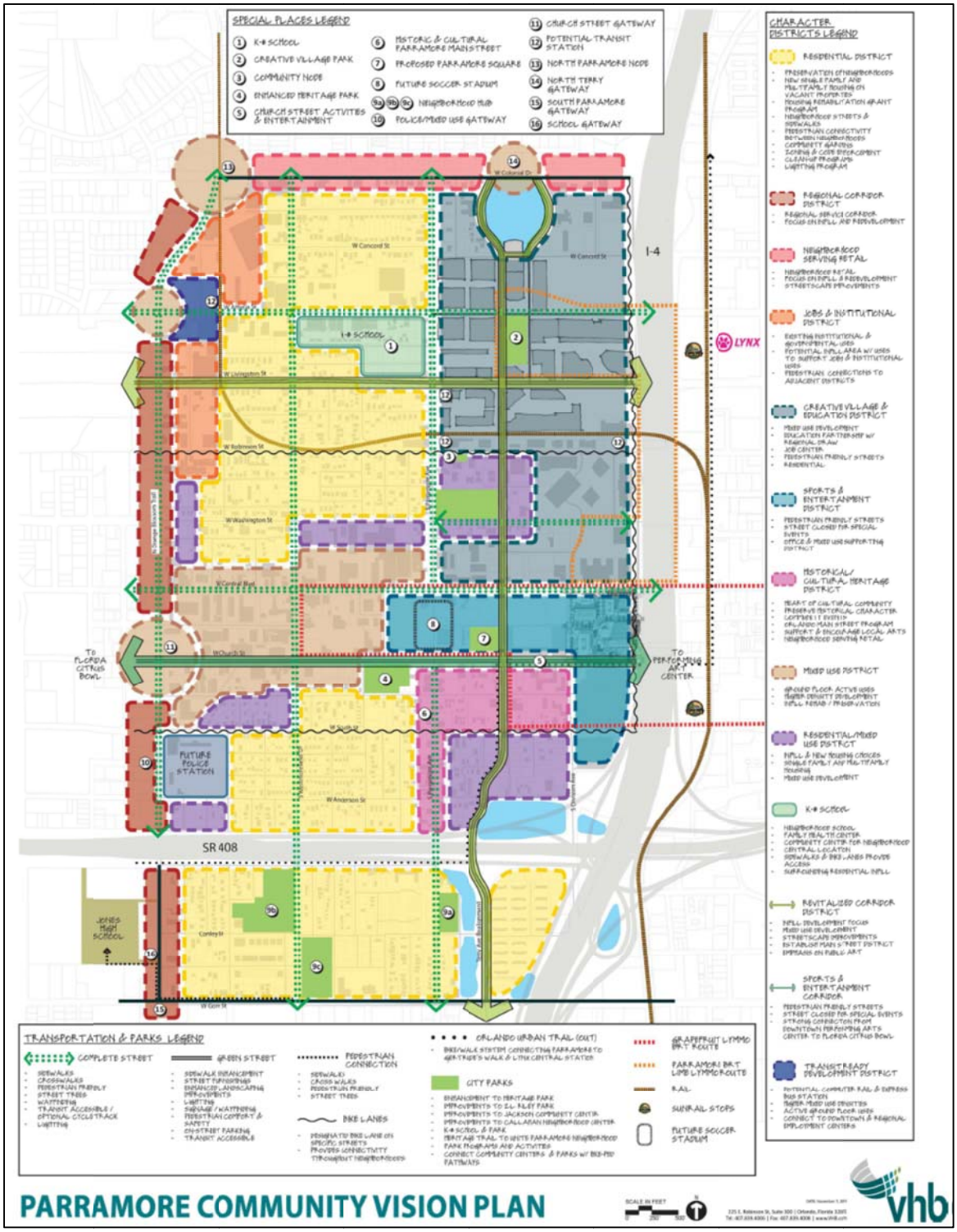

Figure 10-7: Parramore Community Vision Plan[35]

the community as being focused on "new single and multi-family mixed-income residential units with an emphasis on home ownership, neighborhood-serving retail, employment and training centers through the expansion of the Downtown core to Division Avenue, and cultural and education facilities."[34] The document continues, boldly stating "by 2030, many of the social challenges that faced the Parramore Heritage community in the 1980's and 1990's will be remedied."[34] Pedestrian-connectivity is also emphasized, noting the various multi-modal opportunities in the downtown area, and citing goals for improved network connectivity between the areas west and east of I-4.

Orlando has supported efforts to help redevelop the Parramore community through the adoption of several FLU policies. Perhaps most direct is FLU Policy 1.6.4, which states "the City of Orlando shall revitalize the historic Parramore Heritage Community through the Pathways for Parramore initiative which focuses on business development, children and education, housing, public safety and quality of life."[32] Subarea 6 Goal A in the FLUE Support Document describes the vision behind this goals, which hopes realize Parramore as "an established and desirable community for people to live, work and play {where} residents will enjoy a strong community base supported by neighborhood schools and a rich system of parks and open spaces."[34] Development strategies to be used include the "relocation of industrial areas into defined locations," zero-tolerance zones targeted crime, new residential and business areas, "integrated land uses [that] will encourage stable residential neighborhoods accentuated by pockets of mixed-use neighborhood centers," and "a significant arts, cultural and entertainment presence, while office and industrial developments will provide employment opportunities."[34] Improved connectivity strategies include "the implementation of well-designed open, inviting portals underneath the Interstate, connecting the new Events Center with the Performing Arts Center along South Street", which would also lead directly to the Church Street SunRail station.[34]

10.5 Incentives for Economic Development

In the fiscal year 2013/2014, Orlando approved incentive agreements for 61 businesses, helping create 1,760 new jobs and nearly $187 million in capital investment.[36] Orlando helped encourage these projects with the use of numerous incentive programs targeting different parts of the city with various strategies.

One approach to incentivizing development included the Urban Job Tax Credit Program (UJTCP). The program's boundary for qualified businesses overlaps with a significant portion of the downtown TOD study areas. The Florida Legislature created the UJTCP in 1997 to encourage urban job creation throughout the state, providing credits between

$500 and $2,000 per qualified job, which “can be taken against the Florida Corporate Income Tax or the Florida Sales and Use Tax.”[37]

Orlando’s Downtown Development Board and Community Redevelopment Agency both identify available incentives that can be provided, such as the Minority/Women Entrepreneur Business Assistance (MEBA) Program for minority-owned businesses; the Downtown Facade & Building Stabilization Program for building upgrades within the Downtown Orlando CRA; the waiver of transportation impact fees for TODs; improvements to buildings made within the Downtown Orlando CRA; a Business Assistance Program for small businesses in the downtown; a Non-Profit Impact Fee Assistance program for transportation and sewer impact fees; the Orlando Economic Enhancement District Program (OEED) for redeveloping brownfields; the Enterprise Zone program for providing tax incentives and other benefits to encourage business retention and expansion in select areas (one of which overlaps partially with the southwest portion of the Church Street study area).[38, 39]

Chapter 11: Sand Lake Road Station Profile

11.1 Introduction

Figure 11-1: Sand Lake Road SunRail Station

The Sand Lake Road SunRail station is notable for currently serving as the southern terminus of the SunRail commuter line. The station area includes a mix of some residential communities, strip commercial development, and industrial use, though these areas are largely segregated by Sand Lake Road and Orange Avenue. Future growth around the station is being targeted with the aid of a TOD overlay zone to encourage MXD around the core of the zone. Despite early efforts to encourage TOD, recent growth has been primarily comprised of auto-oriented uses targeting park-and-ride commuters.

11.2 Station Area Study Plan and Conceptual Sketchbook Plan

In June, 2010, stakeholder interviews were conducted with "twenty-eight residents, property owners, business owners and other interested parties" from the Sand Lake SunRail station area.[1] Themes identified from these meetings generalized the station area as "a regional connection" to surrounding points of interest, such as the airport, Florida Mall, employers, downtown Orlando, and hospitals.[1] This perception is also reflected in SunRail's own website description of the station, describing it as being designed to serve "an expanding residential and business hub in south Orlando" offering "easy bus access to… area attractions."[2] The description also notes the station was "designed to connect with future rail options" and serves residents in surrounding communities with its park-and-ride lot.[2]

Stakeholder interviews also revealed local desires for increased accessibility and mixed-use around the SunRail station, as well as upgraded streetscapes and pedestrian and bicyclist friendly infrastructure. Support for the integration of the area's historic neighborhoods was mixed, with some residential representatives wanting more connectivity, while others emphasized preservation with "a barrier between the new development and existing residential area."[1]

In 2011, FDOT provided an update to its 2007 conceptual sketchbook for each of the phase one SunRail stations, including Sand Lake Road. The sketchbook provided suggestions for growth and strategies based on TOD principles and guided by community workshops, which were presented together to serve as a general reference for how local governments overseeing SunRail stations can advance TOD, while also emphasizing that it is a long term investment and commitment.[3]

The Sand Lake Road station area is described by the sketchbook as having the potential "to create a unique transit district, blending new forms of development and redevelopment with necessary park-and-ride functions" east of the station, including offices, ground floor retail, and multi-family residential uses" as seen in Figure 11-2.[4]

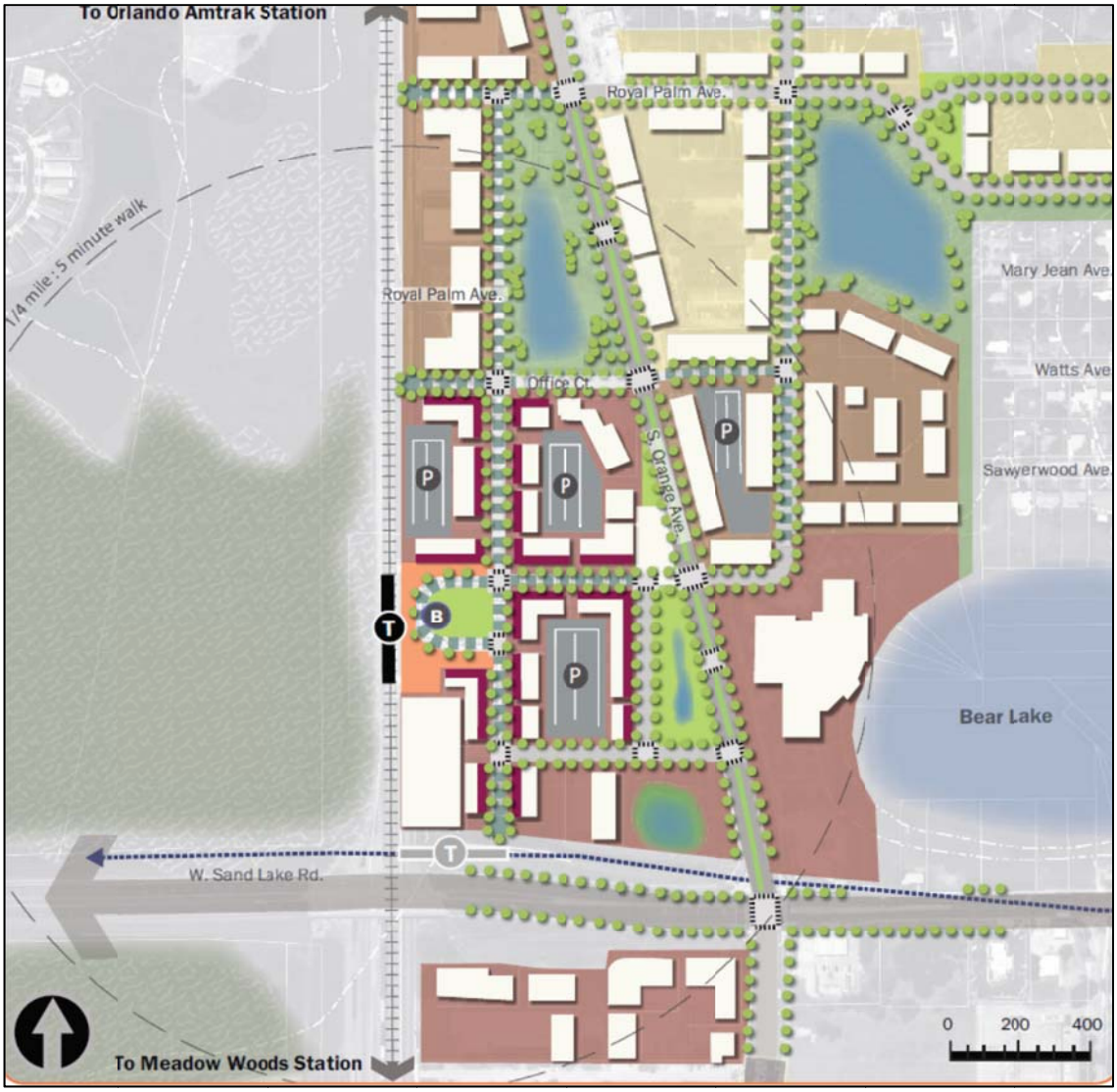

Figure 11-2: Conceptual Site Design for SunRail Station

Specific strategies and visions for the area were illustrated to show improved streetscapes and pedestrian improvements intended to "facilitate local connections and crossings of South Orange Avenue," a significant five-to-seven lane corridor for the area.[4] While it is noted that "Orange County has been proactive by undertaking station area planning" for the station, it is also emphasized that coordinated efforts are required to "explore funding and partnership opportunities for the development and implementation of a shared district-wide stormwater management plan, and strategic improvements along the South Orange Avenue corridor."[4]

Suggestions for realizing the station area's potential include a proposed Mixed Use Code, though the study notes "it will be important to withhold development entitlements until area stakeholders commit to a fair share of necessary area improvements."[4] Other suggested strategies include "an integrated approach towards parking, and future street connections, open space stormwater management for the entire area", as well as TOD friendly policies and minimum densities.[4]

11.3 Comprehensive Plan, Land Use Policies, and Zoning

Figure 11-3: Sand Lake Road TOD Overlay Zone

The Sand Lake SunRail station is located directly outside of the Orlando city limits in Pine Castle, a census designated place within Orange County. In February, 2008, Orange County showed comparatively early support for SunRail related TOD when the Board of County Commissioners (BCC) approved Ordinance No. 2008-02, establishing standards and guidelines encouraging TOD around the Sand Lake Road SunRail station. Specifically, the ordinance added Article VII, Division 16, Chapter 38 to the County Code to adopt a TOD Overlay Zone within half-mile radius of the station (Figure 11-3). The overlay was created to promote mixed-use, pedestrian friendly developments with greater density and intensity, particular towards the Figure 11-3: Sand Lake Road TOD Overlay Zone core of the zone near the station. The code also strives for reduced auto-dependency and discourages auto-

oriented uses such as automobile service stations and drive-through facilities, though these standards are only "encouraged to be applied."[6]

The overlay reinforces policies in the county's Transportation Element, including policy 2.1.4, which states that "Orange County shall encourage the use of new urbanism concepts, such as... [TOD] and incorporate such concepts into the Land Development Code, in order to reduce urban sprawl, decrease trip lengths, promote internal capture and promote multi-modal travel."[6] Policy 2.1.5 continues, "Orange County will support land use policies that reinforce effective transportation management. This includes support for activity centers, transportation-oriented developments, and sector planning."[6]

Design guidelines are outlined in the county's Urban Design element with Policy UD 1.4.3, stating "Traffic-calming measures such as speed bumps, roundabouts, raised crosswalks, reduced pavement widths and continuous walking and bicycling routes shall be encouraged around TODs."[7] Policy UD 1.4.4 adds that the county is encouraged to "seek to reduce parking requirements for development within established distances of" TOD.[7]

Figure 11-4 depicts zoning within the TOD area surrounding Sand Lake station. The station area is zoned as Industrial District (Light) - (IND-1/IND-5), while surrounding zoning districts within the TOD radius include Industrial (General) - (IND-2/IND-3); Industrial (Heavy) - (IND-4); Single-Family Dwelling (R-1, R-1A); Multiple-Family Dwelling (R-3), Professional Office (P-O); Planned Development (P-D), Retail Commercial (C-1), General Commercial (C-2), and Wholesale Commercial (C-3).

Figure 11-5 illustrates land classification from the Sand Lake TOD area's FLUM. The station area is classified as industrial, while the surrounding TOD includes Low-Medium Density Residential, Commercial, Water Body, and Planned Development-Office/Commercial/Medium Development Residential.

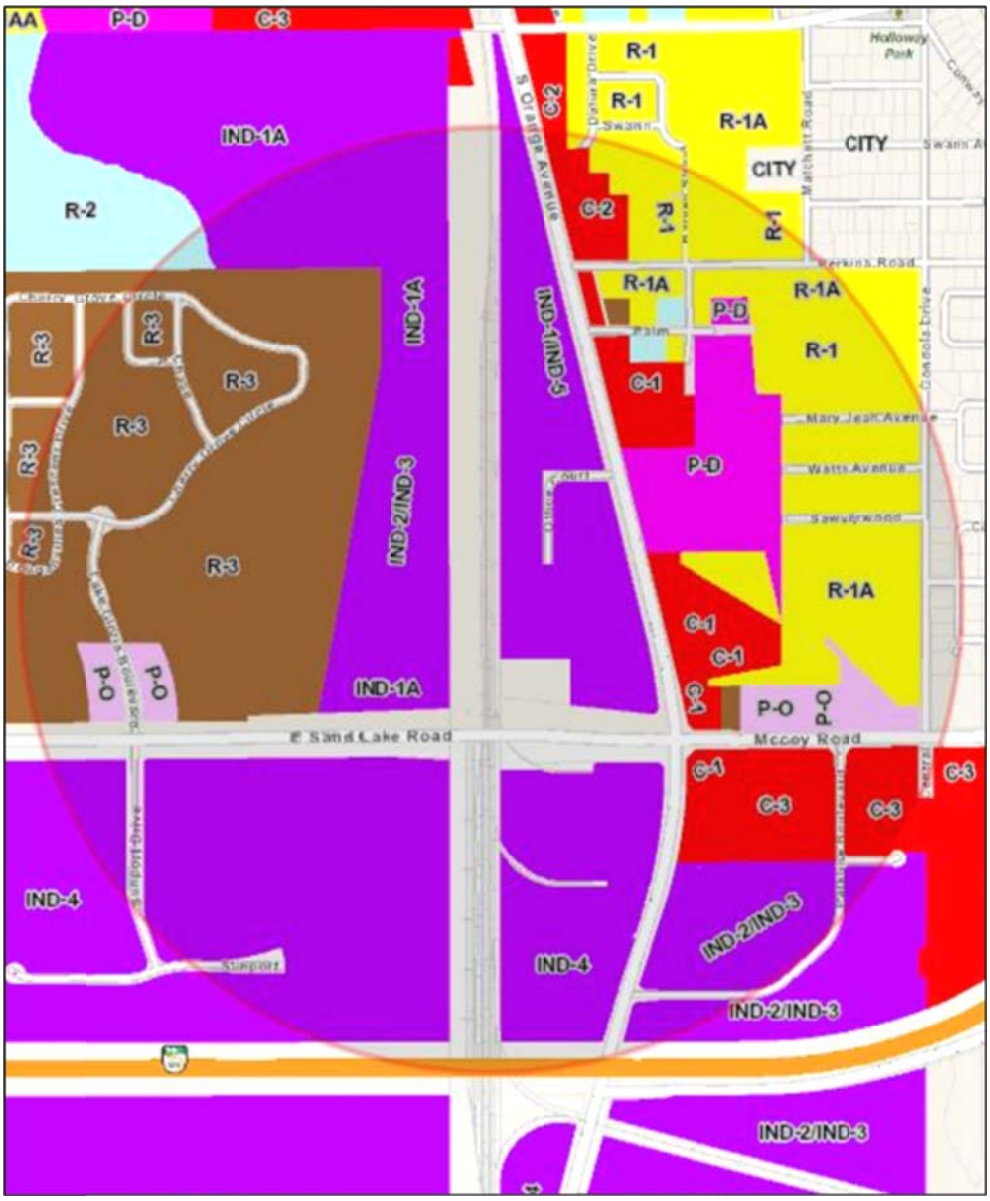

Figure 11-4: Sand Lake Road Station Area Zoning

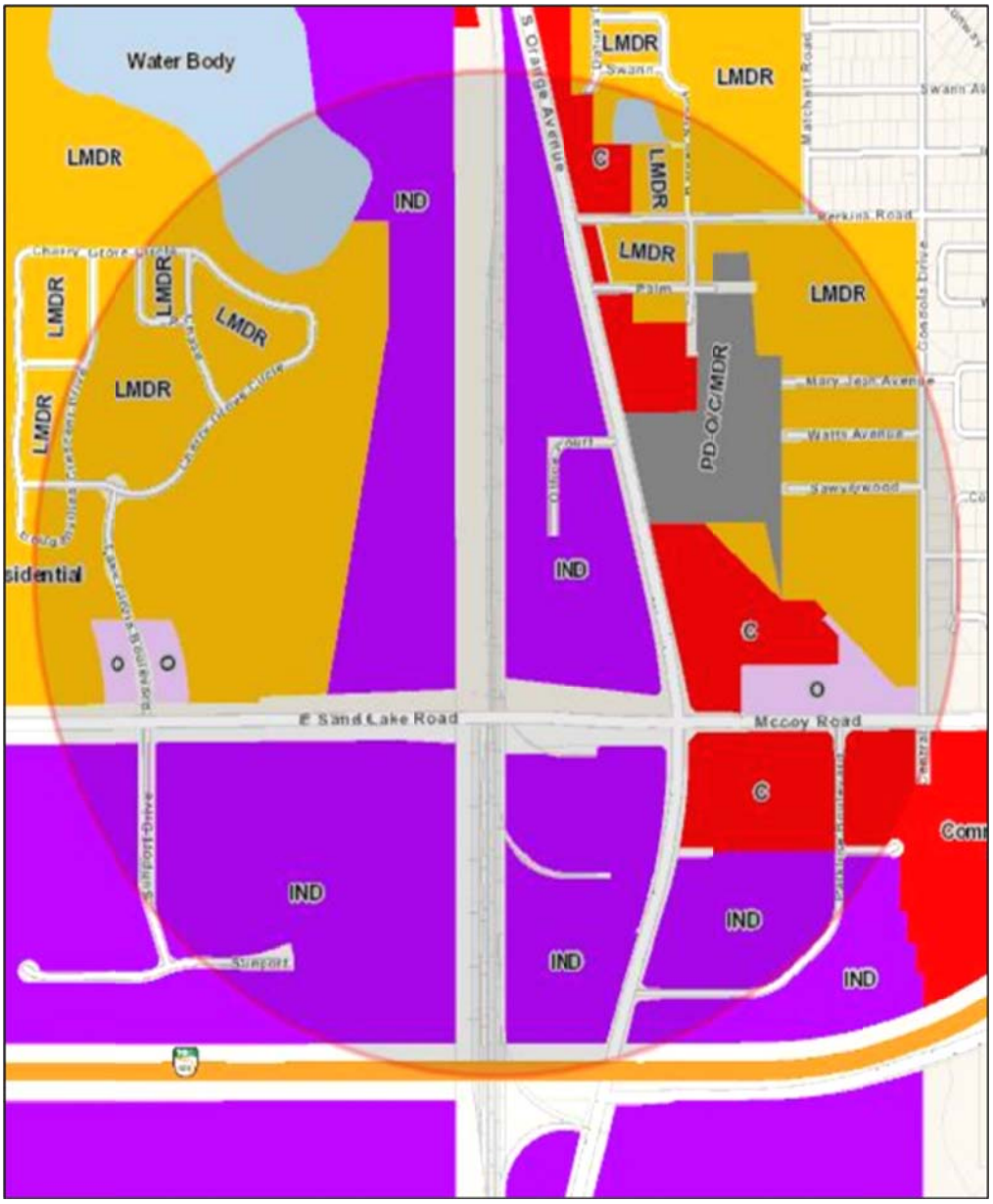

Figure 11-5: Sand Lake Road Station Area FLU

11.4 Recent and Planned Station Area Development

As reflected in Figures 11-4 and 11-5, development surrounding the Sand Lake SunRail station is generally comprised of clustered low-medium density residential neighborhoods, commercial use along Sand Lake Road east of the rail line, and industrial south of Sand Lake Road. As evident in Figure 11-6, wetlands are prominent in the areas directly west and southwest of the station, which combined with a lack of ingress and egress opportunities and drainage management issues, presents significant challenges for any new development.

Neighborhoods include a significant portion of the Lake Gloria Preserves community northwest of the SunRail station, which contains approximately 276 homes built around 2001, as well as long the long established residential neighborhoods Graham Gardens and Pine Castle Park to the east of the station, which are comprised of homes built since the 1930s. Some Auto-oriented commerce have also opened recently, despite the TOD Overlay discouraging them, including a Chevron gas station with a Food Mart, and several fast food restaurants, including a Wendy's and a Taco Bell.

A Planned Development-Office/Commercial/Medium Development Residential zoned area exists at 7803 S Orange Avenue within the station's TOD area. This 16.95 acre parcel labeled as South Orlando Urban Center, which was last assessed as being valued at $1,589,822, was purchased by Gold Mil Railroad Holdings LLC of 4675 Macarthur CT STE 1550, Newport Beach, CA in 2012. No buildings or features are currently associated with this parcel, and its current property use is designated as 0001 – Vacant Residential and 1000 – Vacant Commercial, though no other information regarding plans for the property could be discovered.

Figure 11-6: Satellite Image of the Sand Lake Road SunRail Station with Half-Mile Radius and New Developments

11.5 Previous Area Studies

Between 2012 and 2014, a series of studies in the Sand Lake SunRail station TOD area with the goal of providing more transportation choices to support surrounding communities. These studies included a FDOT Corridor Planning Study, an Orange County/HUD Sustainable Communities program, and an Orange Avenue Corridor Planning

Study. Consistent priorities for the Sand Lake station area included safety, walkability, increased density, and new development aimed at motorists, transit riders, pedestrians, and bicyclists. Stakeholder and citizen feedback was taken to help create visions and recommended strategies for the area to achieve these goals, and to set plans of action for FDOT, SunRail, and Orange County. Issues pertaining to drainage were identified, and five potential sites for a required drainage pond were suggested, though this was to be refined during PD&E. Costs associated with construction based on the preliminary engineering concept were estimated at $9.4 million in the TOD area.[8]

In May, 2014, a Bicycle and Pedestrian Connectivity Study for the Sand Lake Road SunRail station area was prepared by Kittelson & Associates, Inc. for FDOT. Included in the study was a crash history review noting specific incidents with pedestrians and a field evaluation identifying problems and opportunities regarding pedestrian and bicyclist networks. The study notes the station's extremely low connectivity, especially when compared with other SunRail station areas, as well as its relatively low employment. Future development in the area is conceptualized around the SunRail TOD Facilitation Team's recommendation of a central core with high density surrounded by transitional and edge sub-districts, including bicycle and pedestrian infrastructure improvements, streetscaping and street design guidelines, and other development guidelines.[9] The document also refers to the Orange Avenue Corridor Planning Study, which identifies multimodal improvement opportunities, including improved connectivity to the SunRail station and support along Orange Avenue, including portions within the station's half-mile radius. The area is further generalized as being auto-oriented with strip commercial, institutional, and industrial land uses fronting the major roads, though it also notes the lack of a strong grid system leaves area residents, employees, and commuters dependent on a system of arterials and collectors… creating congestion in the area.[9]

The study's field review identifies issues and opportunities for potential solutions, including a safe bike/pedestrian railroad crossing not currently provided by the half-mile highway bridge; the addition of detectable warning surfaces at major intersections; improved sidewalk connectivity on Orange Avenue; improvements to paved shoulders on Orange Avenue; improved signalization; and added sidewalks to Office Court.[9]

Six projects are suggested for immediate priority, all of which involve improvements to Orange Avenue. Another nine projects are suggested for short term priority, with most also involving improvements to Orange Avenue. Three long term projects are also suggested for pedestrian improvements to the Sand Lake Road Bridge and for Orange Avenue.

11.6 Capital Improvements

Orange County's August 2016 Roadway Capital Improvement Program Report lists the project Office Court, type sidewalk, going from Sand Lake Road SunRail Station to S. Orange Ave., though construction start and completion dates are still to be determined.[10]

Chapter 12: Conclusion

The purpose of this project was to assess the development impacts and property tax increases that could be attributed to investments in the SunRail commuter rail system in the metropolitan Orlando area. This was done by employing a mixed methods approach, one that included both quantitative analyses of property value and property tax changes for all station areas, and qualitative analyses of the land planning and development trends in selected station areas. The project team compared property value changes in SunRail station areas to control areas with similar land use mixes to try isolate the effects of SunRail investments on land values. Follow-up case studies allowed the project team to determine the role of market forces and land planning efforts in promoting (or hindering) new development in these station areas.

The quantitative analyses of property value and property tax changes found that over half of the SunRail station areas outperformed their control areas, indicating that investments in the SunRail system catalyzed new development that otherwise would not have occurred. Most notably, SunRail station areas in downtown and with medical centers experienced massive new investment, with property values going up over a billion dollars during the period of study. However, much of this new development is not taxed, so the property tax revenues that flow from these new projects are limited.

Another key finding is that suburban station areas experienced a positive shift in property taxes in the 2011-2015 period, the period during which SunRail improvements were being made and the system ultimately got up and running. This upward shift in suburban SunRail station area property values and property tax returns is much more closely linked with SunRail investments and subsequent redevelopment initiatives. Whereas new development in downtown and around medical centers is most closely linked to broader economic forces, several suburban station areas have experienced new development that almost certainly would not have occurred without SunRail coming online.

Overall, actual property tax increases to date are robust, with SunRail reasonably linked to over $20 million in annual property tax increases in the early years since the system came online. This increment is certain to increase as well, as several large new projects have yet to hit the tax rolls.

The other major takeaways from the property value and property tax analyses are:

- Changes in property values around SunRail stations reflect broader economic conditions, with declines between 2007-2011 and recovery between 2011-2015.
- County location is a major factor in overall economic performance, with Orange County station areas performing much better than station areas in outlying counties.

- Property value and assessed value increases have been very uneven around SunRail stations, with just over half of the stations outperforming their control areas.
- Downtown stations and stations at medical centers have experienced the greatest increases in assessed property values.

To be clear, a significant portion of the changes in property values and property taxes is most attributable to broader economic forces, ongoing downtown redevelopment initiatives, and major investments in and around medical centers. Having said that, SunRail has played an important role in supporting these (re)development initiatives and, within several suburban jurisdictions, served as a catalyst for TOD style redevelopment in line with the vision established over a decade ago.

Case studies of selected SunRail station areas found wide variation in existing land use and market conditions, political response in support of (re)development interests, and success in the promotion of TOD in areas nearby the rail stations. Taken as a whole, the case studies point to the importance of planning and regulatory reform to support and help promote redevelopment. The analysis illustrates that the local government's "Commitment to TOD", as evidenced by changes to land use regulations and infrastructure investments, can be an important factor in promoting (re)development around the SunRail station.

It is important to note that this level of redevelopment is robust given what is known about the role of transit systems in promoting development outcomes. SunRail has several inherent challenges that hinder its potential development impact, including operation as a commuter rail line along an existing industrial rail corridor. Unlike traditional light rail systems, SunRail operates less frequently, the corridor wasn't designed from scratch to maximize ridership and development opportunities, and the land use setting for most station areas was not ideal for redevelopment. Given these challenges, the finding that a majority of SunRail stations outperformed their control areas suggests that FDOT and its local partners have done well in promoting a TOD-centered (re)development agenda.

This study has benchmarked the early development-related outcomes of the SunRail system, an important part of understanding the full range of benefits of transit systems. Moving forward it is recommended that FDOT, SunRail and their local partners continue to monitor development trends around SunRail stations. There is every indication that continued redevelopment around many stations will continue, and in some cases gain real momentum.

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Appendix A: Land Use Maps of SunRail Station Areas and their Control Areas

Figure A-1: DeBary SunRail Station Area with Selected Control Area

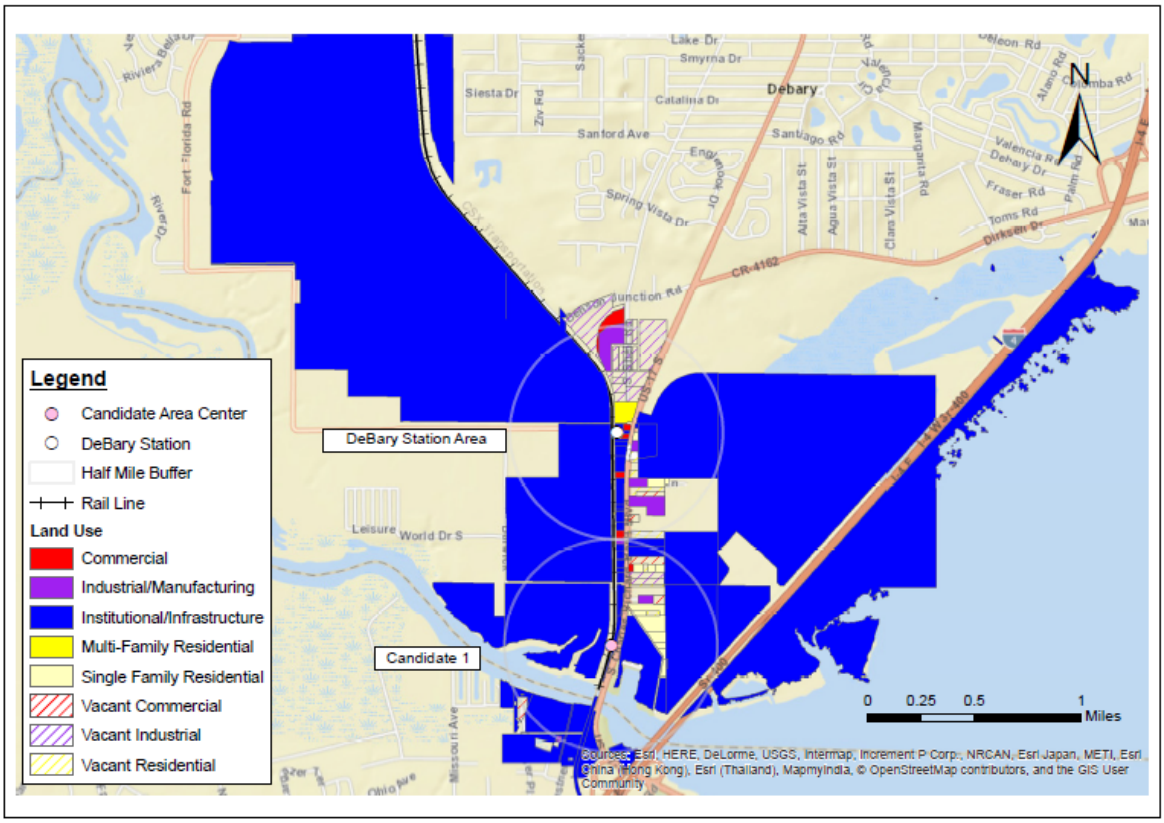

Figure A-2: Sanford SunRail Station Area with Selected Control Area

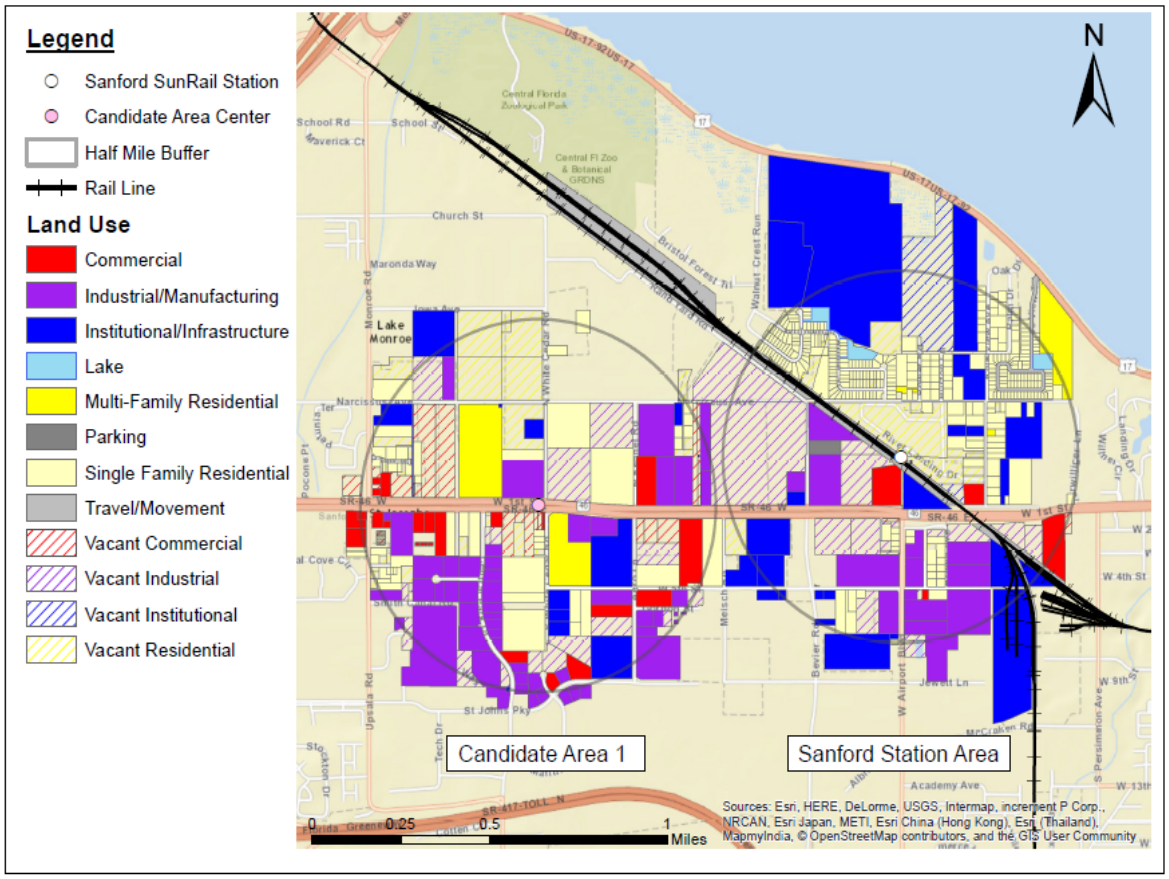

Figure A-3: Lake Mary SunRail Station Area with Selected Control Area

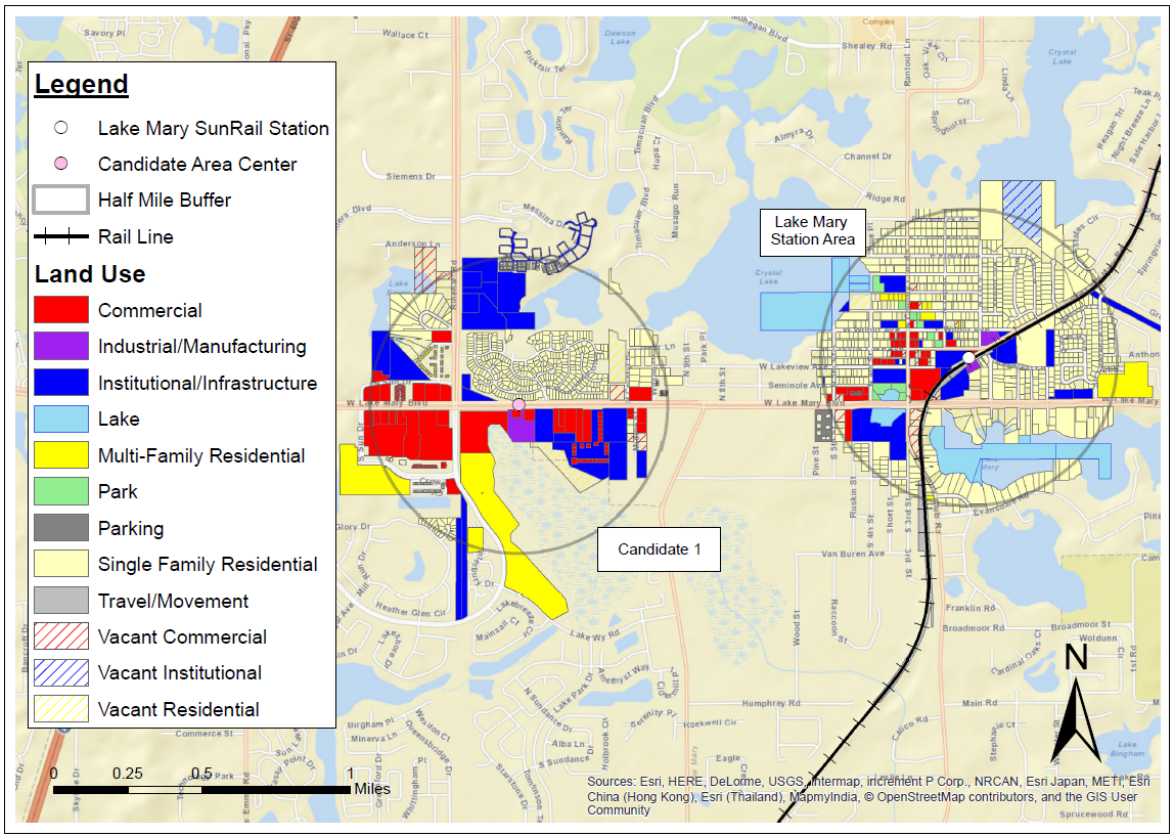

Figure A-4: Longwood SunRail Station Area with Selected Control Area

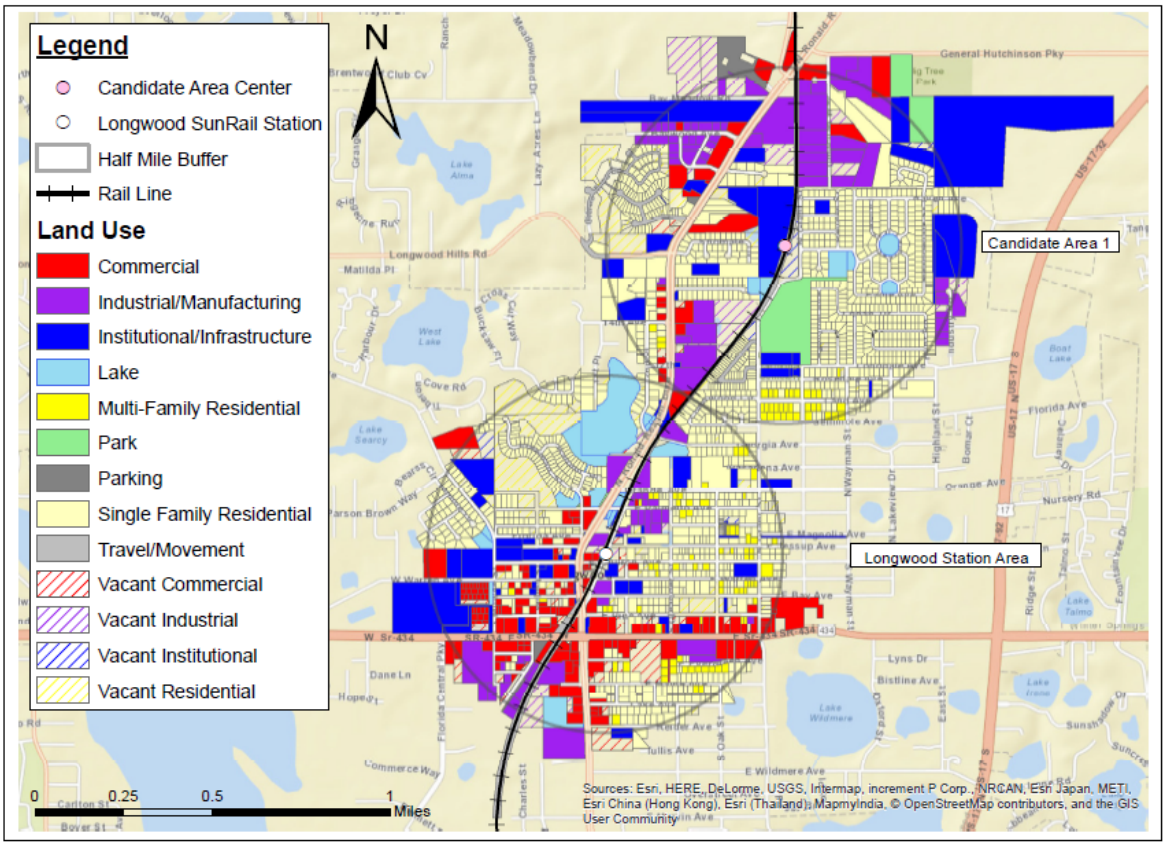

Figure A-5: Altamonte Springs SunRail Station Area with Selected Control Area

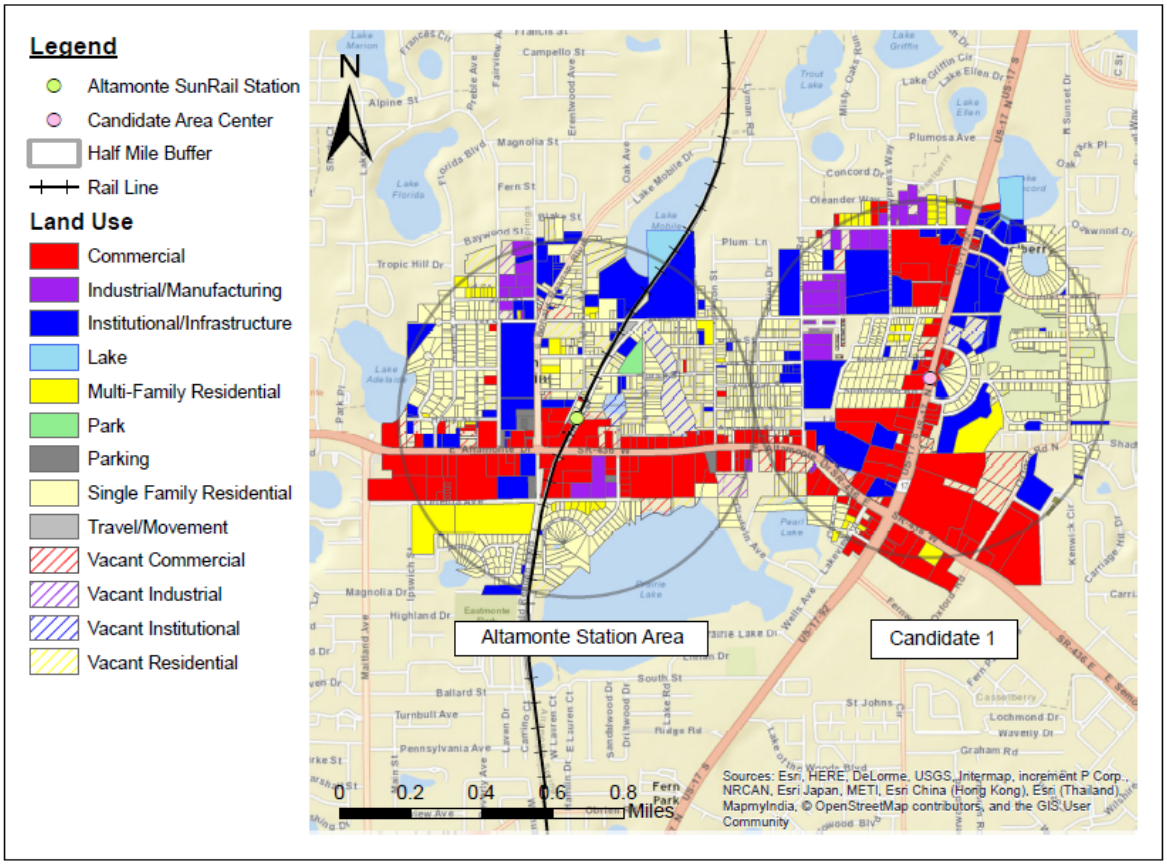

Figure A-6: Maitland SunRail Station Area with Selected Control Area

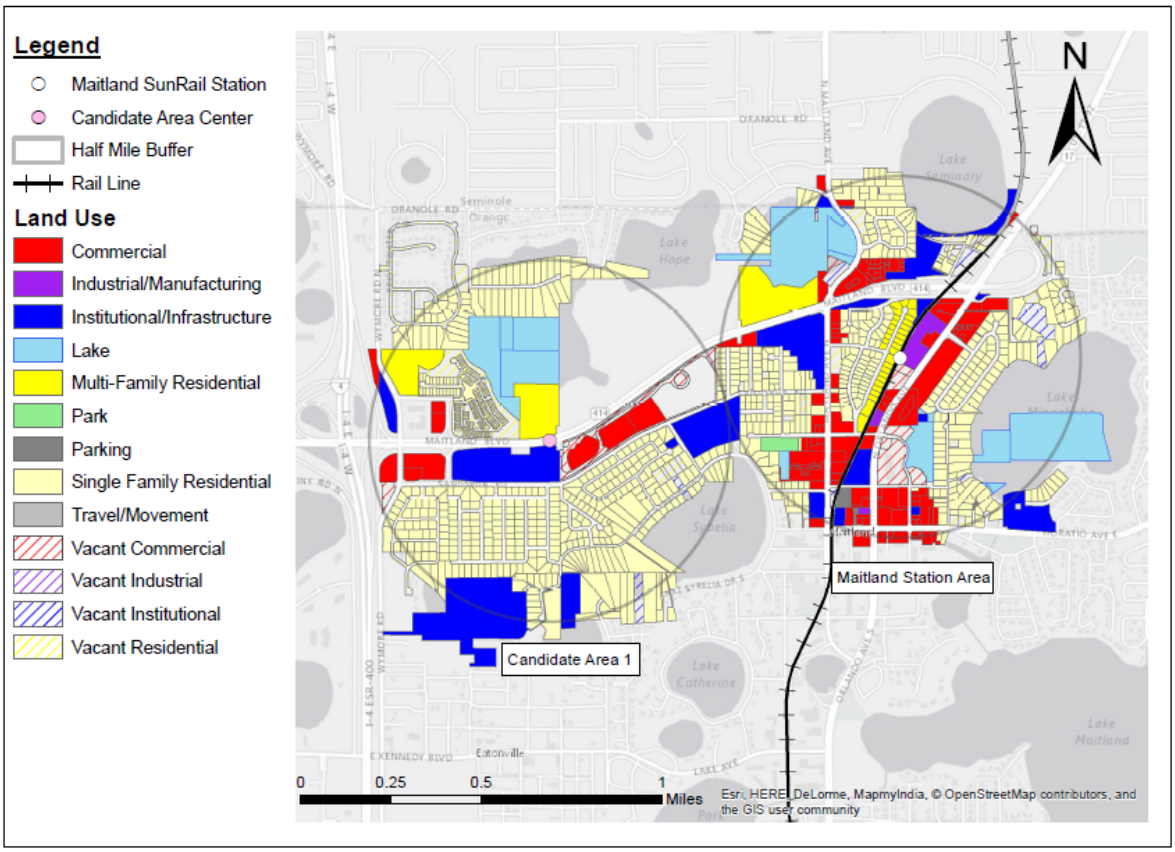

Figure A-7: Winter Park SunRail Station Area with Selected Control Area

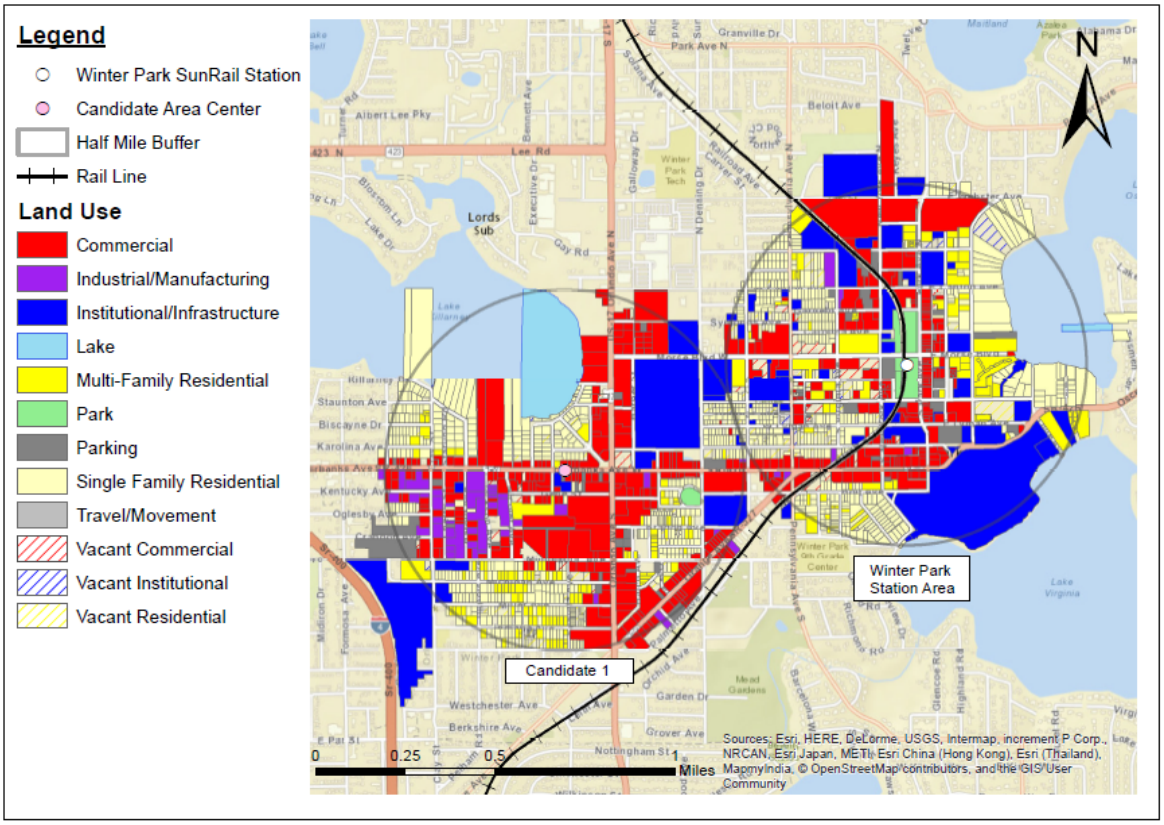

Figure A-8: FL Hospital SunRail Station Area with Selected Control Area

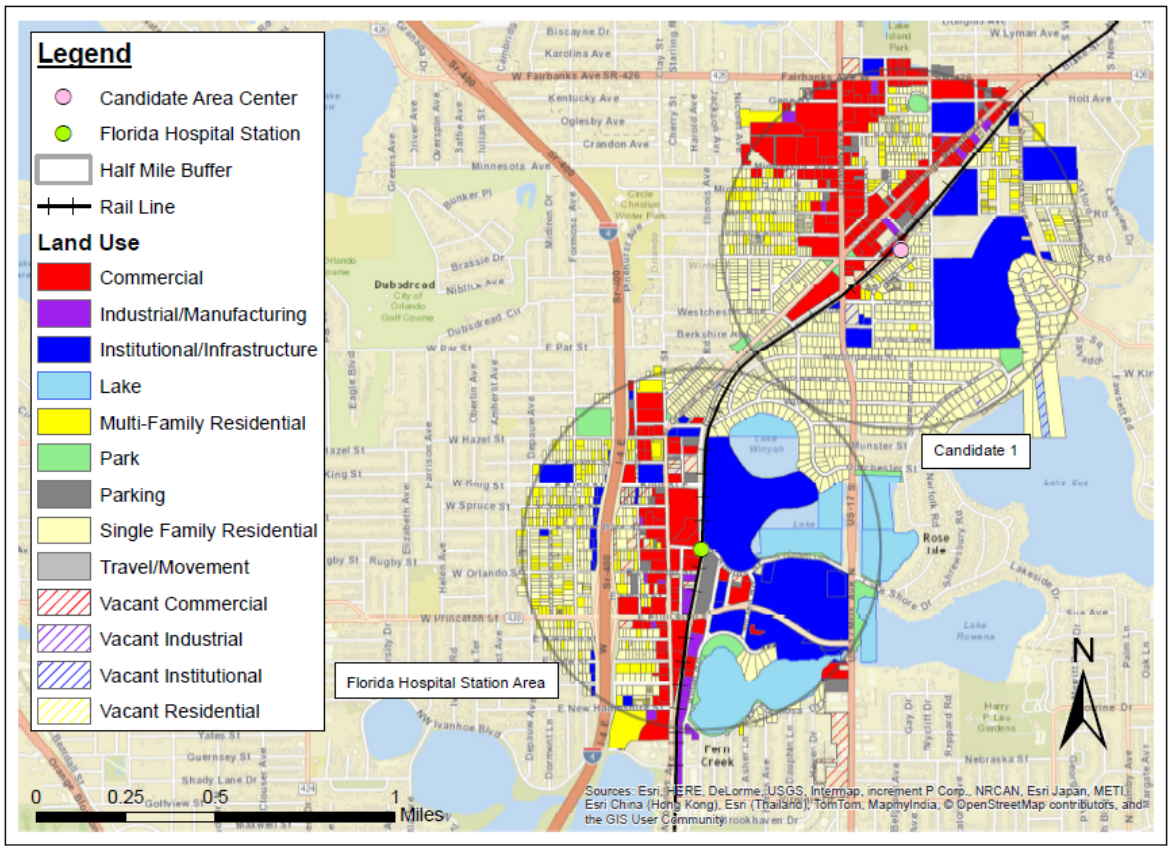

Figure A-9: Downtown Control Area for LYNX and Church Street SunRail Station Areas

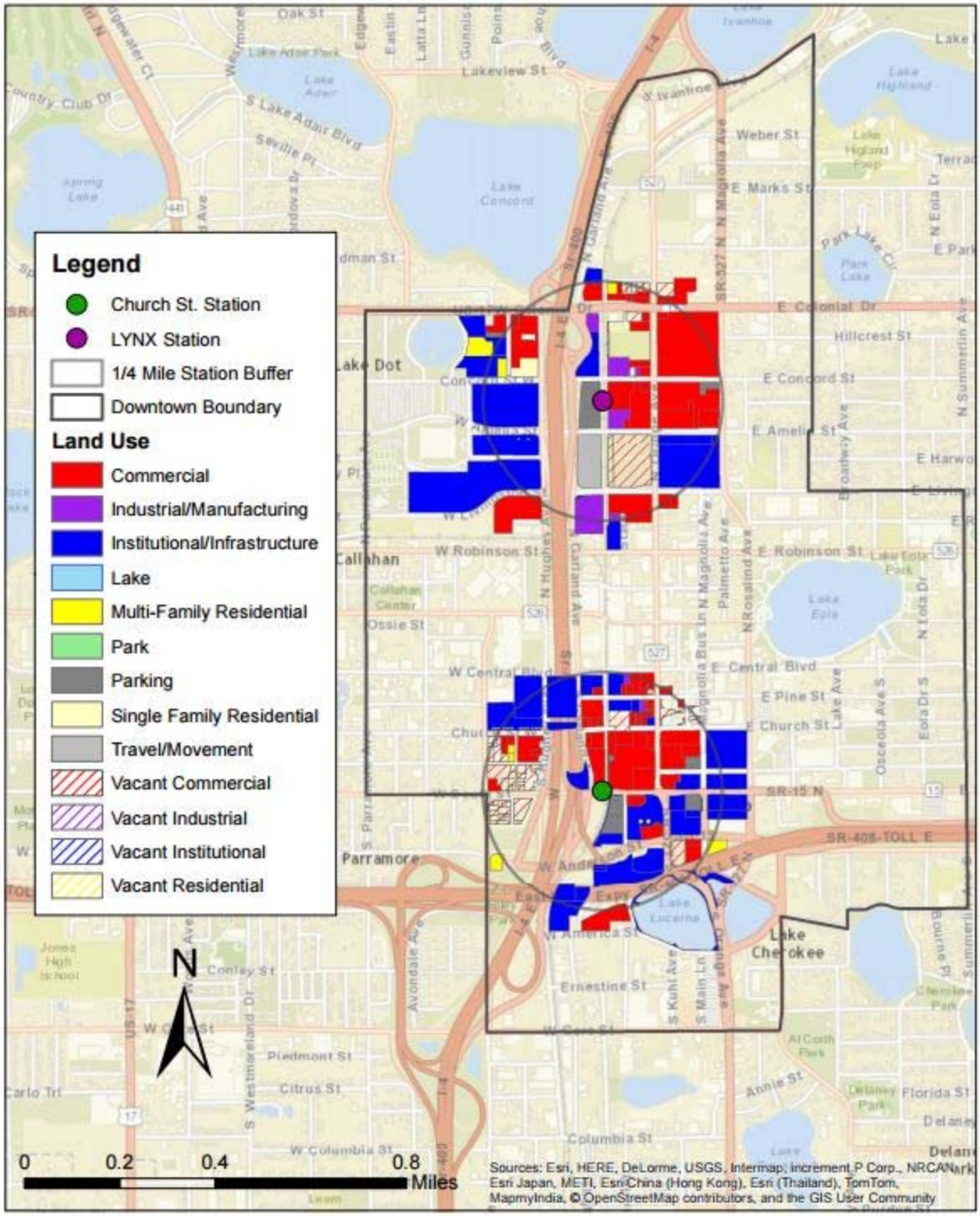

Figure A-10: Orlando Health SunRail Station Area with Selected Control Area

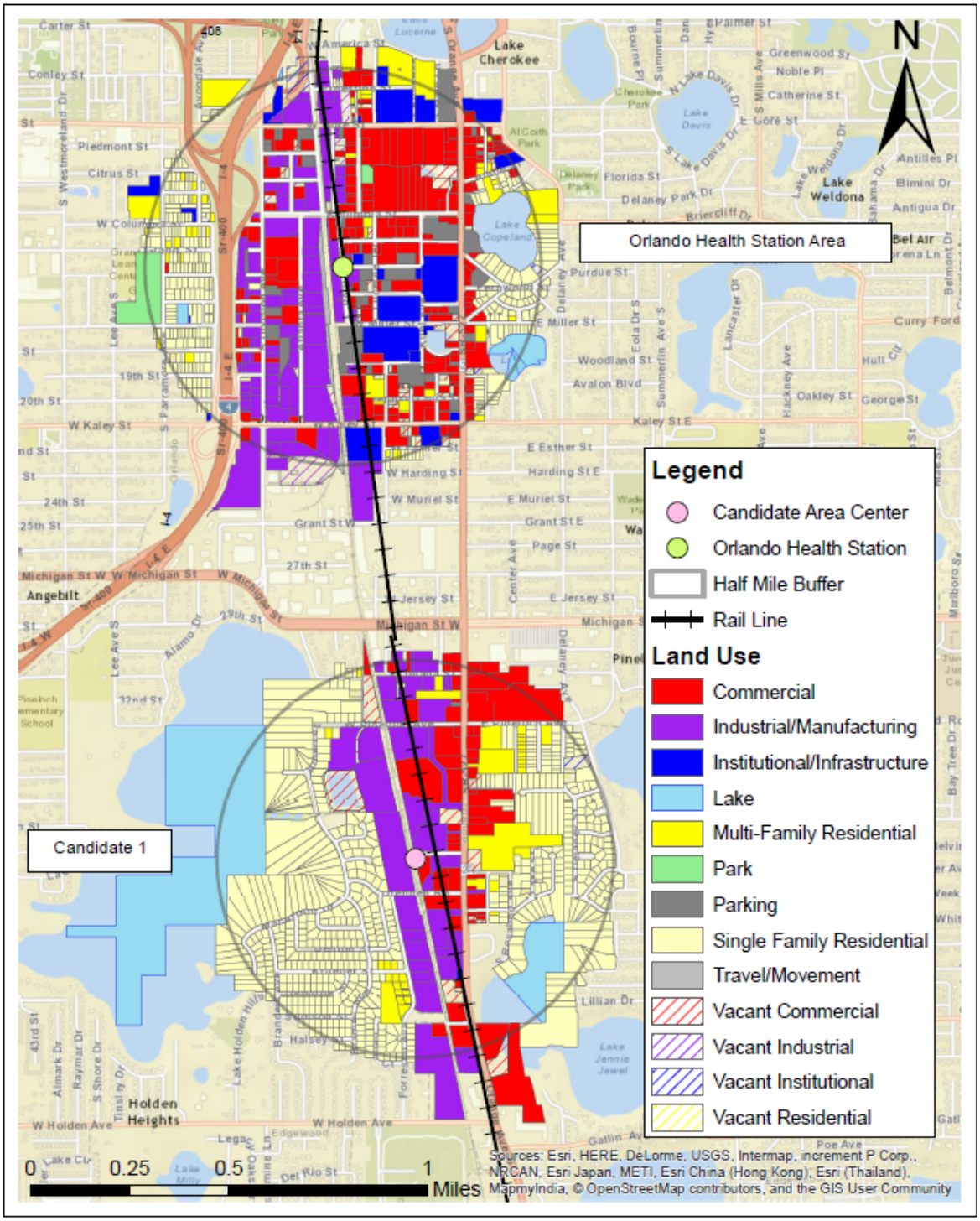

Figure A-11: Sand Lake SunRail Station Area with Selected Control Area