



TALLAHASSEE
**Community
Redevelopment
Agency**



GREATER FRENCHTOWN SOUTHSIDE REDEVELOPMENT PLAN

Greater Frenchtown/Southside (GFS) Community Redevelopment Plan

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EXECUTIVE SUMMARY

Description of the Redevelopment Area

The Redevelopment Area is comprised of 1,858 acres of residential, office, commercial/retail, industrial and green/open space. It is located near downtown Tallahassee, Florida State University (FSU) and Florida A&M University (FAMU). The Redevelopment Area contains some of Tallahassee's oldest neighborhoods, an array of community services, religious institutions and social service agencies. Several major thoroughfares, carrying traffic into Downtown and to area suburbs, are located within the Redevelopment Area.

The Redevelopment Area has a population of 13,236, representing approximately seven percent of the population of the City of Tallahassee. Some key findings in the Redevelopment Area demographics shows the Redevelopment Area's population has grown at a higher rate over the last ten years than the City. However, the percentage change in median household income and the percent of owner-occupied units is less than the City as a whole.

There are assets throughout the Redevelopment Area that can provide the framework for decisions that will affect the future character of the Redevelopment Area. Among the major assets are the following:

- Long established neighborhoods with mature trees
- Established neighborhood institutions and services such as schools, churches health facilities and recreation centers
- Historic properties
- Proximity to downtown Tallahassee and other major commercial districts

At the same time, there are issues which affect the entire Redevelopment Area. Issues are problems or constraints that need to be addressed. Issues that can be addressed by the CRA include:

- Need for shopping and business options that are closer to neighborhoods
- Need for sidewalks, streetlights and other streetscape improvements in neighborhoods
- Design of major arterials that discourages pedestrian oriented development
- Houses in need of rehabilitation

In addition to the assets and issues in the Redevelopment Area, there are opportunities that could become action strategies to promote redevelopment. Those opportunities include but are not limited to:

- Support mixed-income housing throughout the Redevelopment Area
- Provide goods and services near neighborhoods
- Support rehabilitation of housing
- Support redevelopment in appropriate areas, given market demands and community priorities

Redevelopment Priority Areas and Community Goals

There are six priority areas, one for each community goal, in the Redevelopment Plan. The priority areas were derived from the City's Five-Year Strategic Plan. The goals represent community comments from a number of workshops. The six priority areas and goals, listed below, were used to establish the objectives and strategies contained in the GFS Strategic Investment Plan and will be used to help guide redevelopment.

Priority Area 1: Economic Development

Goal: To create a thriving economic environment in the GFS District.

Priority Area 2: Impact on Poverty

Goal: To assist GFS residents with access to resources which lead to opportunities for wealth accumulation.

Priority Area 3: Public Safety

Goal: To create a place where residents and visitors feel safe and secure.

Priority Area 4: Quality of Life

Goal: To promote a healthy, vibrant and culturally rich community.

Priority Area 5: Public Infrastructure

Goal: To provide GFS residents with various means of safe mobility and improved infrastructure.

Priority Area 6: Public Trust and Organizational Effectiveness

Goal: To create an environment where residents are encouraged to participate in the civic process, ensuring redevelopment efforts aligned with community goals.

Redevelopment Plan Management and Implementation

Implementation of the Redevelopment Plan will require the coordinated efforts of the residents of the Redevelopment Area, the Community Redevelopment Agency, the City, other government agencies, various organizations and businesses. These efforts will be joined with funding from tax increment financing, legal and promotional procedures to successfully implement the Redevelopment Plan.

GREATER FRENCHTOWN SOUTHSIDE REDEVELOPMENT AREA COMMUNITY VISION STATEMENT

Our vision places priority on economic development, quality affordable housing and security for all neighbors. We seek to improve educational facilities and programs by using the increased taxable value generated in the District. We strive for a healthy community with improved open spaces and beautiful neighborhoods, promoting new and existing infrastructure. This will bring art and entertainment opportunities to the area, attracting visitors and allowing us to showcase our historic character.

INTRODUCTION

The Tallahassee City Commission is responsible for creating and governing the Tallahassee's Community Redevelopment Agency (CRA). The CRA Board, made up of the City Commission, is the governing body of the CRA. The Greater Frenchtown/Southside (GFS) Community Redevelopment Plan (the "Redevelopment Plan"), which is statutorily required by Chapter 163, Part III of the Florida Statutes, serves to guide the activities of the CRA within the designated GFS Community Redevelopment Area (the "Redevelopment Area"). The Redevelopment Area has an advisory committee, the GFS Citizens' Advisory Committee, who provides recommendations to the CRA Board on the activities within the Redevelopment Area.

In June 2000, the City Commission adopted the GFS Redevelopment Plan and established the GFS Community Redevelopment Trust Fund. The 2000 Redevelopment Plan is being updated to capture additional community goals expressed by residents' vision for their neighborhood.

This update to the 2000 Redevelopment Plan was prepared using the following methodology:

- The Redevelopment Plan goals were developed in community meetings involving community residents, businesses and organizations.
- A market analysis was prepared for the Redevelopment Area.
- A comprehensive Inventory of Existing Conditions in the Redevelopment Area was developed as required by Chapter 163, F.S.
- Using the Inventory of Existing Conditions, the Redevelopment Area was divided into eight distinct sub-areas and an analysis of each sub-area was conducted.

The eight sub-areas are:

- West Tharpe Street
- North Monroe Street
- Frenchtown
- FAMU Way/Lake Bradford
- South Monroe/South Adams
- Bond Community
- Providence Community
- South City

Based on the community driven goals and the analysis of the sub-areas, the Redevelopment Plan was prepared. Implementation of the Redevelopment Plan will be accomplished in coordination with its companion document, the GFS Strategic Investment Plan and other existing plans and programs. It is not the intent of the GFS Redevelopment Plan to replace previously approved plans and programs.

The updated Redevelopment Plan is intended to be a guiding document to overcome deterrents to redevelopment and to stimulate private investment. It addresses those programs and projects that fall within the statutory responsibilities of the CRA, representing the goals and the vision of the GFS community members. This Redevelopment Plan identifies, in general, where primary land uses (residential, retail and office) and activity centers will be located to best attract prospective businesses and residents and to integrate future transportation and land use patterns. It includes capital improvements projections based upon known future public project needs, demands and proposed locations.

This Redevelopment Plan contains descriptions of several activities, including capital projects, public/private partnership (P3) projects and government programs. It also contains projects that provide opportunities for the public and private sector to work together toward mutually beneficial development and business activities.

Over time, portions of the Redevelopment Plan and the GFS Strategic Investment Plan may be updated and revised to reflect changes in the economy, public concerns and opportunities associated with public redevelopment proposals, ensuring future development is consistent with redevelopment objectives.

SECTION 1: **REDEVELOPMENT PLAN DESCRIPTION, PRIORITY AREAS AND** **GOALS**

1.1. PLAN CONTENT AND DESCRIPTION

The Redevelopment Plan is intended to be a guiding document for local government actions to overcome deterrents to redevelopment and to stimulate private investment. The Redevelopment Plan was developed after analyzing the demographic data, land uses and environmental conditions within the Redevelopment Area, reviewing previous plans and soliciting public engagement.

The most important aspects of the Redevelopment Plan are the following:

1. Addresses those programs and projects that fall within the statutory responsibilities of the CRA;
2. Represents the goals and the vision of the GFS community members;
3. Identifies, in general, where primary land uses (residential, retail and office) and activity centers will be located to best attract prospective businesses and residents and to integrate future transportation and land use patterns; and
4. Allows the CRA and the City to make capital improvements based upon known future public project needs, demands and proposed locations.

The Redevelopment Plan is comprehensive in its assessment of the issues impacting the future of the Redevelopment Area and will work with various organizations and agencies to fulfill the goals contained herein. The CRA will maintain close relationships with its partner organizations and support their efforts through supplemental funding and other program initiatives. The redevelopment programs will be pursued at multiple levels by numerous agencies and organizations. The CRA may take the lead in certain efforts, while other departments and organizations will lead their efforts where appropriate.

The Redevelopment Plan contains descriptions of several types of projects and programs, including capital projects, public/private projects and government programs. Capital projects are those that address specific infrastructure needs such as roads, streetscape, community centers and other municipal features. The Redevelopment Plan also contains public/private partnership projects that provide opportunities for the public and private sector to work together toward mutually beneficial development and business activities. The public and private sectors can bring different resources and capabilities to projects that fulfill the goals of the Redevelopment Plan.

Finally, the Redevelopment Plan anticipates government actions to be undertaken by the City and/or the CRA for a variety of purposes. Regulatory actions may include revisions to the City's Comprehensive Plan, land development regulations and building code. Land acquisition programs, such as land banking, right of first refusal and property swapping are expected to be incorporated in the redevelopment process to control prime development sites; thereby ensuring future development in a manner consistent with redevelopment objectives.

1.2. REDEVELOPMENT PLAN PRIORITY AREAS AND GOALS

This subsection of the Redevelopment Plan contains the priority areas and goals for the entire Redevelopment Area. Identifying the goals for the Redevelopment Area was the first step in preparing the Redevelopment Plan. Broad goals addressing a wide variety of concerns were developed in meetings involving community residents, businesses and organizations. This holistic process addressed the full range of issues of importance to residents and business owners.

From the community meetings, twelve goals, which are outlined in Table A.1. of Appendix A, were identified by Redevelopment Area residents based on residents' vision for their neighborhood. At the community meetings each resident recorded three vision statements. The vision statements were categorized and consolidated into the twelve community goals and approved by residents. At another community workshop, GFS residents prioritized the twelve goals by order of importance. Residents placed priority markers on each goal indicating its level of importance. The goal with the highest number of priority markers was ranked first. It should be noted three of the twelve goals had the same number of priority markers allowing for the same priority ranking. The twelve community goals were then mapped to six of the priority areas in the City's Five-Year Strategic Plan. The community goals falling under the same priority area were consolidated. This was done in order to leverage the City's resources with the Redevelopment Area resources in accomplishing similar goals. The twelve community goals may be linked to more than one priority area; however, they were placed in the priority area deemed most applicable.

The objectives and strategies of each goal are contained within a separate companion document called the GFS Strategic Investment Plan. The GFS Strategic Investment Plan allows the community and the CRA to modify the objectives and strategies within a quick time frame rather than placing the objectives and strategies in the Redevelopment Plan which takes several months to amend. Both plans will work together to guide the redevelopment efforts of the CRA. The GFS Strategic Investment Plan will be monitored

on a constant basis and revised every three to five years or at the direction of the CRA Board. The goals, objectives and strategies of the Redevelopment Area will be updated based upon changes in the economy, relevant public concerns and opportunities associated with private development.

The priority areas listed below were derived from the City's Five-Year Strategic Plan. The goals below represent community comments from various workshops. They are the result of combining the community goals from Table 1 of Appendix A with community comments, so they fit within a priority area. The goals are listed in order of importance which were developed by GFS residents involved in the public participation process. The six priority areas and goals were used to establish the objectives and strategies contained in the GFS Strategic Investment Plan and will be used in the Redevelopment Plan moving forward.

Priority Area 1: Economic Development

Goal: To create a thriving economic environment in the GFS District

The establishment of marketplaces and small businesses throughout the Redevelopment Area can create an economic base for neighborhoods and offer many benefits to residents. Neighborhood marketplaces create job opportunities for residents, produce business ownership opportunities and provide neighborhood residents with convenient shopping options close to home. Emergency/disaster assistance programs can stimulate businesses during catastrophic events maintaining the health of the Redevelopment Area economy.

Priority Area 2: Impact on Poverty

Goal: To assist GFS residents with access to resources which lead to opportunities for wealth accumulation

It will take the efforts of the CRA and other governmental entities and non-profits to meet the needs of the most vulnerable in the Redevelopment Area. Providing access to various resources to address housing, education and social services can result in a holistic approach to redevelopment. The availability of quality, affordable housing to all residents is very important to the future of the Redevelopment Area. It is important to have diversity in residential development projects to provide housing options to meet multiple household income levels. Additionally, during an emergency or disaster, assistance programs can provide residents with resources during challenging times.

Furthermore, an educational system that provides children with the resources needed to become well-educated citizens is vital to the residents of the Redevelopment Area. The Leon County School Board has the primary responsibility of publicly educating residents within the District. While the CRA does not share this responsibility, it can recommend the School Board utilize increased tax revenues for schools within the District, aiding residents in obtaining their educational goals and creating a brighter future. Furthermore, the CRA can encourage neighborhood revitalization projects to incorporate art, history and culture as an educational tool.

Throughout the planning process, residents have expressed a need for more available social services within the community. The CRA does not directly assist with providing social services but can support social service agencies with resources to improve their facilities within the Redevelopment Area allowing the agency's resources to be used for residents.

Priority Area 3: Public Safety

Goal: To create a place where residents and visitors feel safe and secure

Improved safety throughout the Redevelopment Area is a top priority for the Redevelopment Plan. A safe neighborhood is one in which people feel secure because crime is contained. This can be achieved through effective community policing, the physical design of public and private spaces and promoting employment opportunities for residents.

Priority Area 4: Quality of Life

Goal: To promote a healthy, vibrant and culturally rich community

Residents have expressed an interest in promoting a community in which all residents have opportunities to improve their well-being by promoting a healthy lifestyle through the built environment. An important aspect of residents' community vision includes the addition of more well designed and well-maintained green spaces. Arts, culture and entertainment opportunities contribute to the vibrancy and vitality of neighborhoods, contributing to the neighborhood's identity which can be a source of pride and connectivity. Additionally, maintaining, preserving and promoting the historic character of Redevelopment Area neighborhoods can increase tourism opportunities. A key element in this Redevelopment Plan is to maintain a connection to the past and provide historic continuity for future development.

Priority Area 5: Public Infrastructure

Goal: To provide GFS residents with various means of safe mobility and improved infrastructure

The Redevelopment Area's infrastructure system must be developed and strengthened into one that meets the basic needs of all the residents. The infrastructure system includes streets, sidewalks, water, sewer, electrical and stormwater. A recurring theme that has surfaced during the preparation of this Redevelopment Plan is the need to improve the transportation system to make it more attuned to residents' needs. Residents want to see a system of mobility that includes all types of transportation and one that better meets the needs of residents who do not own cars.

Priority Area 6: Public Trust and Organizational Effectiveness

Goal: To create an environment where residents are encouraged to participate in the civic process, ensuring redevelopment efforts aligned with community goals

Citizen participation is an essential element to successful neighborhood improvement and community development. Citizens should be afforded the opportunity to learn about the community development process and participate in decisions that affect their neighborhoods. Although several neighborhood associations exist throughout the Redevelopment Area, broader citizen participation should be encouraged.

SECTION 2: **ANALYSIS OF REDEVELOPMENT AREA AND SUB-AREAS**

2.1. ANALYSIS OF REDEVELOPMENT AREA

The Redevelopment Area is physically divided into two areas separated by the Downtown Community Redevelopment Area and FSU. The northern area is named “Greater Frenchtown” and the southern area is named “Southside,” hence the Greater Frenchtown/Southside Community Redevelopment Area. For planning purposes, these two areas were further subdivided into eight sub-areas based on similarities between land use composition, physical characteristics and function. The eight sub-areas will be discussed in greater detail in Section 2.2.

The Redevelopment Area is comprised of 1,858 acres of residential, office, commercial/retail, industrial and green/open space. It is located near downtown Tallahassee, FSU and FAMU. The Redevelopment Area contains some of Tallahassee’s oldest neighborhoods such as Frenchtown, an array of community services, religious institutions and social service agencies. Several major thoroughfares, carrying traffic into Downtown and to area suburbs, are located within the Redevelopment Area.

The population of the Redevelopment Area is 13,236 and represents approximately seven percent of the population of the City of Tallahassee. Key findings of an analysis of demographic and socioeconomic conditions in 2000 compared to 2019 are as follows:

- The population of the Redevelopment Area has grown at a rate of 47.9 percent, higher than the City as a whole with a rate of 29.9 percent. In 2016 and 2018, the Redevelopment Area was expanded to include four new areas, all in the southern portion of the Redevelopment Area, increasing the population of the area.
- The percentage change in median (average) household income is lower in the Redevelopment Area with a rate of 31.7 percent as compared to the City as a whole with a rate of 48.7 percent.
- The percentage of owner-occupied units is 16.5 percent in the Redevelopment Area; this is less than the City which has 36.6 percent owner-occupied units.

2.1.1. REDEVELOPMENT AREA ASSETS, ISSUES AND OPPORTUNITIES

In analyzing the Redevelopment Area's assets, issues and opportunities were examined for the development of the Plan. Assets are strengths that should be built upon. Issues are problems or constraints that should be addressed. Opportunities are resources or conditions that can be leveraged to promote redevelopment and revitalization.

There are assets that can be built upon to provide the framework for decisions that will affect the future character of the Redevelopment Area. The Redevelopment Area's assets include but are not limited to:

- Long established neighborhoods with mature vegetation, such as Frenchtown, Levy Park, Providence and Bond
- Established neighborhood institutions and services such as schools, churches, health clinics and recreation centers
- Historic properties
- Proximity to downtown Tallahassee and other major commercial districts

At the same time, there are issues which affect the entire Redevelopment Area. The Redevelopment Area issues that can be addressed by the CRA include but are not limited to:

- Need for shopping and business options near neighborhoods
- Lack of sidewalks, streetlights and other streetscape improvements in neighborhoods
- Design of major arterials that discourages pedestrian oriented development
- Homes in need of rehabilitation

There are many resources in the Redevelopment Area that could promote redevelopment. Those opportunities include but are not limited to:

- Support mixed-income housing throughout the Redevelopment Area
- Provide goods and services near neighborhoods
- Support rehabilitation of housing
- Support redevelopment in appropriate areas

2.2 ANALYSIS OF THE REDEVELOPMENT SUB-AREAS¹

The analysis of the sub-areas considers existing conditions and current issues as they relate to potential redevelopment priorities. The analysis is based on information collected from several sources, including site visits, previous planning studies and reports, technical documents, as well as public workshops and interviews with City staff, citizens and property owners conducted by Wendy Grey Consulting, BBP Consultants and QCA Consultants.

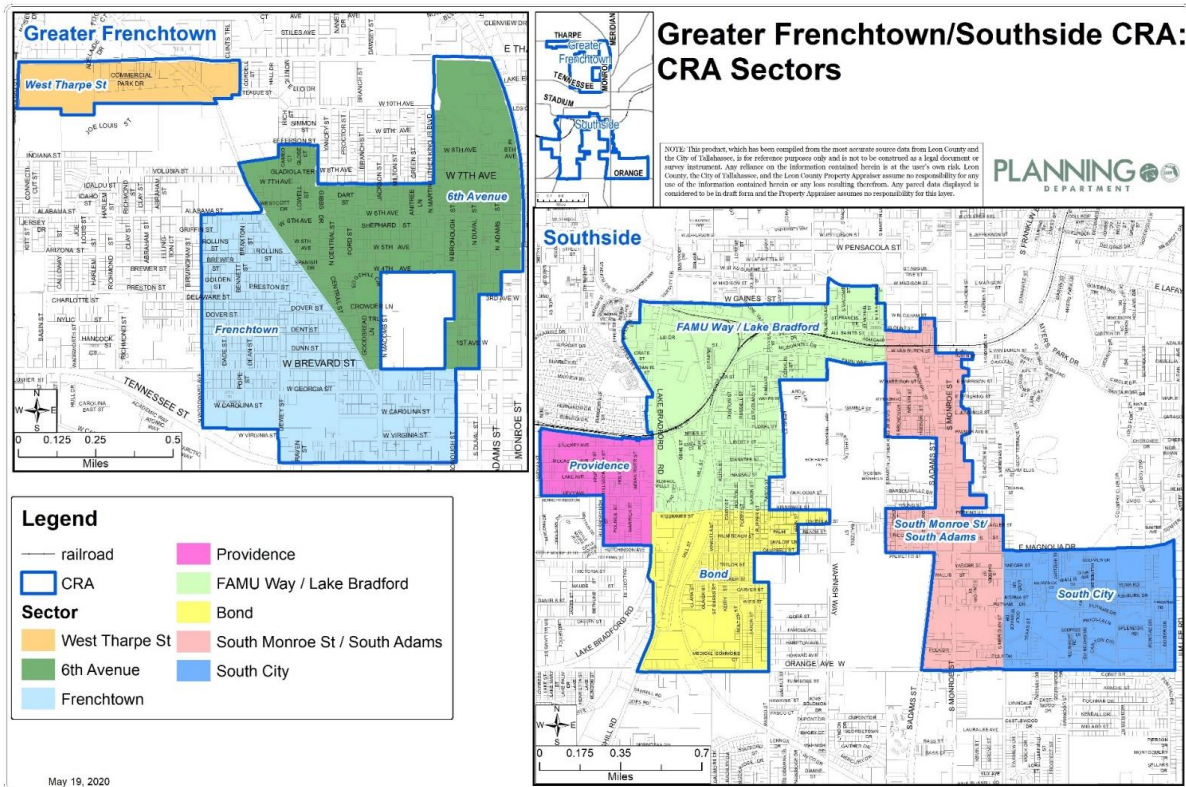
The description of each sub-area contains an inventory of assets, issues and opportunities which are not all-inclusive to the areas. This inventory is used for purposes of analyzing the sub-areas. The inclusion of an asset, issue, or opportunity does not imply related actions are the responsibility of the CRA. The redevelopment actions will be a collaborative approach involving the CRA and its many partner organizations.

The intent of this effort is to develop a general understanding of the existing conditions of each sub-area to serve as a basis for the objectives and strategies in the GFS Strategic Investment Plan. The eight sub-areas are listed below and graphically displayed in Map 1.

- Sub-Area 1: West Tharpe Street
- Sub-Area 2: Sixth Avenue
- Sub-Area 3: Frenchtown
- Sub-Area 4: FAMU Way/Lake Bradford
- Sub-Area 5: South Monroe/South Adams
- Sub-Area 6: Bond Community
- Sub-Area 7: Providence Community
- Sub-Area 8: South City

¹ See Appendix A for the data compiled for use in this analysis.

Map 1: Sub-Area Analysis Key Map



Sub-Area 1: West Tharpe Street

The West Tharpe Street sub-area is a discrete area at the northernmost edge of the Redevelopment Area. The sub-area is shown below in Map 2 illustrating the area's assets, issues and opportunities.

Existing Conditions

The West Tharpe Street sub-area contains a significant amount of student-oriented housing, located primarily in the western half of the sub-area. Zoning allows residential densities between 8 and 20 dwelling units per acre and a range of commercial and office uses.

The eastern half of the sub-area is comprised primarily of commercial and light industrial uses. There is a mix of zoning that allows medium density residential, a range of commercial and office uses and light industrial. Zoning in the vicinity of Tharpe Street and Old Bainbridge Road contains development standards intended to encourage a more walkable development pattern.

Over 44 percent of the population was enrolled in school in 2018. Perhaps reflective of the large college student population, this sub-area has the lowest median household income of \$16,438 with an owner-occupied rate of 13.9 percent. The West Tharpe Street sub-area has a population of 676, the smallest of the eight sub-areas.

West Tharpe Street is a major east-west connector for the community. Within the sub-area, the road is four lanes without medians. Old Bainbridge Road, a major arterial into the Greater Frenchtown area, intersects West Tharpe Street. The result is an intersection with a high volume of vehicular traffic which is unfavorable to pedestrians and cyclists. As noted above, the zoning of properties in the vicinity of this intersection is intended to promote more walkable and transit-oriented development. This provides an opportunity to promote more bicycle and pedestrian improvements along the intersection of Old Bainbridge and West Tharpe Street.

The assets, issues and opportunities of the sub-area are listed below.

Assets

- The buildings in the sub-area are generally in good condition, making the area aesthetically pleasing.

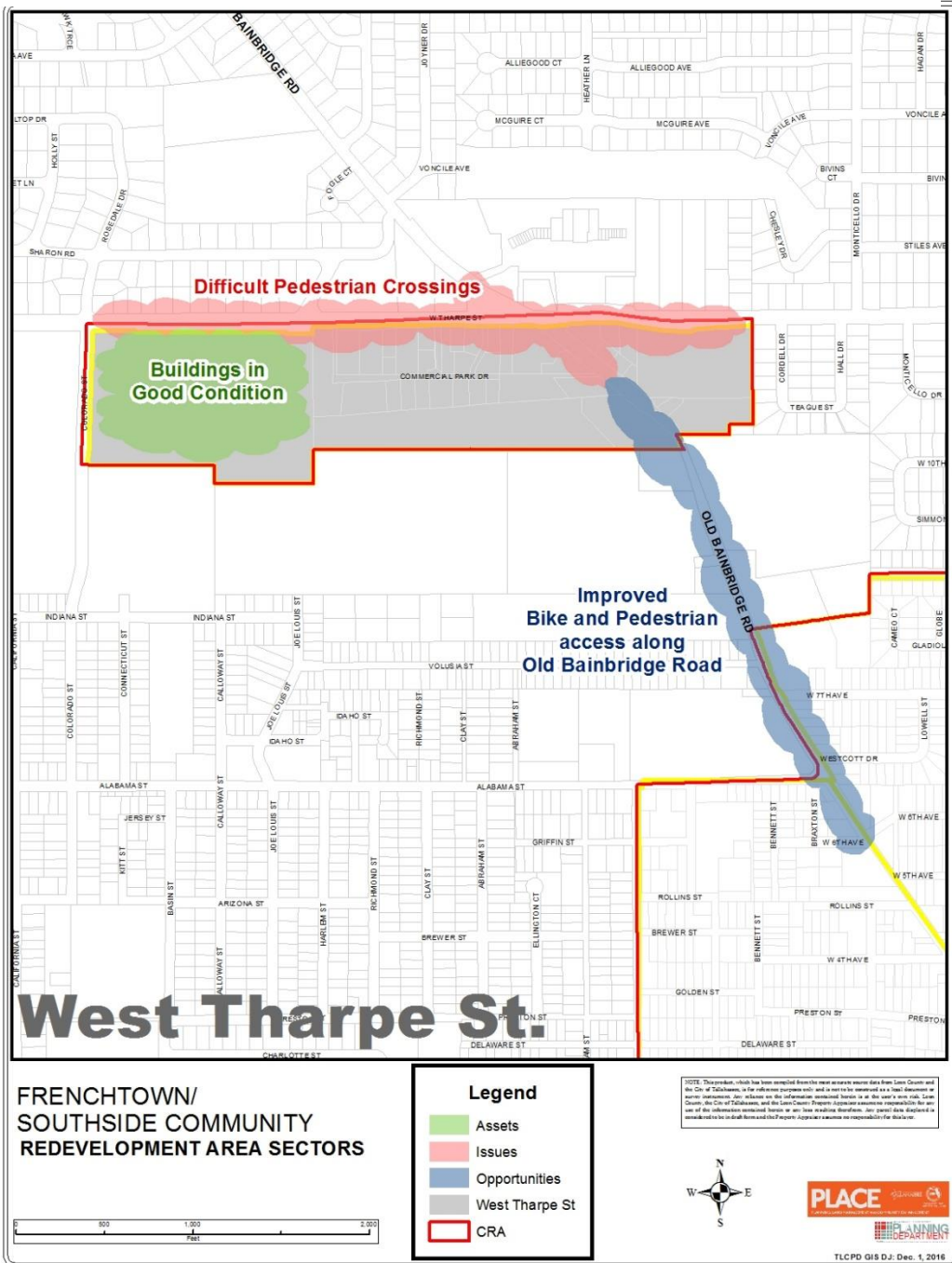
Issues

- The intersection at West Tharpe Street and Old Bainbridge Road is a busy and difficult intersection for pedestrians.
- West Tharpe Street and Old Bainbridge Road have high volumes of traffic causing physical barriers for pedestrians and cyclists.
- Due to the size of the sub-area, there are limited redevelopment opportunities.

Opportunities

- The promotion of bicycle and pedestrian improvements along West Tharpe Street and Old Bainbridge Road, as well as the intersection of the two roads.

Map 2: West Tharpe Street Sub-Area



Sub-Area 2: Sixth Avenue

The Sixth Avenue sub-area is near the revitalizing “Midtown Neighborhood,” which is located on the east side of North Monroe Street. The vitality of the Midtown area, with new shops, restaurants and housing, is influencing redevelopment activity in the Sixth Avenue sub-area. The sub-area is shown below in Map 3 illustrating the area’s assets, issues and opportunities.

Existing Conditions

North Monroe Street, the eastern boundary of the sub-area, is a commercial, auto-oriented corridor. The rest of the sub-area is characterized primarily by lower density residential development, with a limited amount of multifamily development. Most of the area between Brevard Street and Seventh Avenue is zoned for low density residential. Zoning along the Bronough/Duval corridor allows residential densities ranging from 18 to 45 dwelling units per acre and a range of non-residential uses.

The portion of this sub-area adjoining North Monroe Street has been experiencing some “spill over” effect in recent years from Midtown redevelopment. New development in this portion of the sub-area includes mixed-use development and housing.

Despite this new development, over 70 percent of the persons in the sub-area have incomes below the poverty level and less than 22 percent of homes are owner occupied. Nearly 22 percent of the sub-area is enrolled in college. The population of the Sixth Avenue sub-area is 1,898.

The Sixth Avenue sub-area community facilities include the LeVerne Payne Community Center, the Senior Center, Levy Park and the Lincoln Center. Lake Ella is located north of Sixth Avenue, east of North Monroe Street.

North Monroe Street is a major arterial roadway connecting I-10 to downtown. It is a four-lane road, with limited medians and has many curb cuts serving individual businesses. In an effort to improve the safety and aesthetics of the road, medians have recently been constructed on North Monroe Street from Tharpe Street to Seventh Avenue and a pedestrian crossing has been added in the vicinity of Lake Ella.

The assets, issues and opportunities of the sub-area are listed below.

Assets

- The sub-area is easily accessible to downtown.

- Community facilities such as Lake Ella Park, Levy Park, Senior Center, LeVerne Payne Community Center and the Lincoln Center are located within the sub-area.
- Shopping and services along North Monroe Street are within walking distance of the sub-area.
- Proximity to the revitalizing “Midtown” district allows the sub-area to experience residential infill on vacant lots, rehabilitation of existing homes and new mixed-use development.

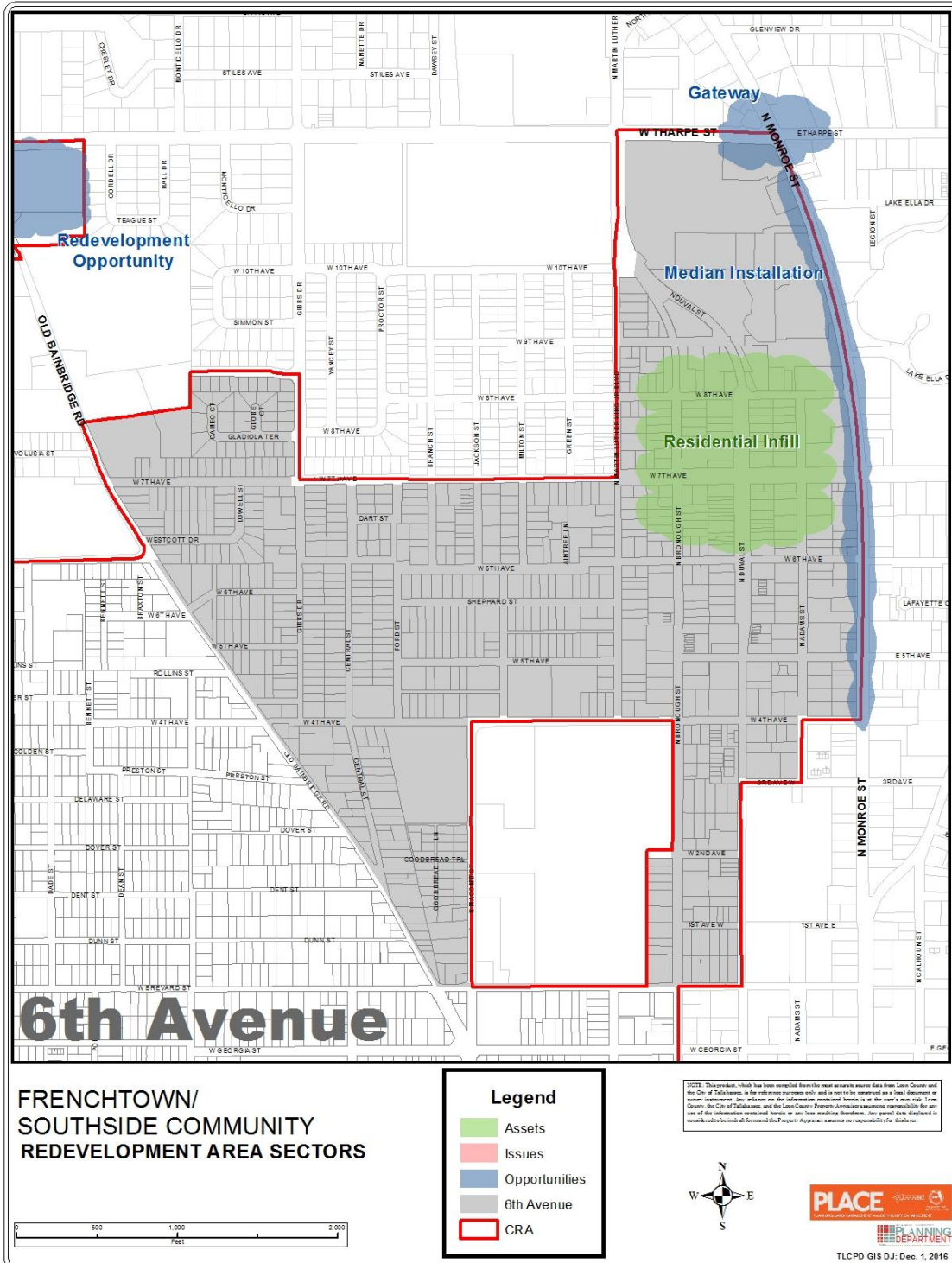
Issues

- There are numerous curb cuts into businesses on North Monroe Street allowing for a high-volume of traffic.
- The high-volume of traffic and one-way streets are physical barriers for pedestrians.

Opportunities

- There are numerous mixed-use development opportunities along North Monroe Street.
- Pedestrian safety improvements are needed along North Monroe Street.
- One-way pair streets should be evaluated for their usefulness.
- Aesthetics should be improved along North Monroe Street to create attractive gateway and to reinforce sense of place.

Map 3: Sixth Avenue Sub-Area



Sub-Area 3: Frenchtown

The Frenchtown sub-area includes some of the oldest residential and commercial areas in the City of Tallahassee. Many of the older homes in the neighborhood were built between 1900 and 1930. There are numerous churches and religious affiliated activities located throughout the area. The historic character of the neighborhood remains an integral part of the community identity. Map 4 shows an illustration of the Frenchtown sub-area and its assets, issues and opportunities.

The Frenchtown neighborhood was once a self-contained African American neighborhood with various businesses such as dry cleaners, jewelers, tailors, restaurants and groceries supporting the residents. Neighborhood business started to decline after integration in the 1960s, when shoppers seeking additional choices ventured out of the neighborhood. The Frenchtown sub-area is located close to downtown and FSU.

Existing Conditions

The prevailing land use north of Brevard Street is low density residential. This portion of the sub-area is zoned for low density residential (up to six units per acre).

Brevard Street is a neighborhood oriented commercial corridor and West Tennessee Street is a major auto-oriented commercial district. Multifamily, student-oriented housing is located between these two streets. This area is zoned for a mix of residential and commercial uses, with densities ranging from 26 to 45 units per acre. The southeastern-most portion of the sub-area is zoned for a mix of residential and commercial uses, with densities up to 150 units per acre.

The population of the Frenchtown sub-area is 3,192. More than half of the sub-area, 60.7 percent, have incomes below the poverty level. The percentage of the persons enrolled in college in the sub-area is nearly 29 percent, which may contribute to the high percentage of persons below the poverty level and the low percent of owner-occupied units, approximately 17 percent in the sub-area.

The sub-area contains two community parks, the Carter Howell Strong Park and the Lawrence Gregory Center and Robinson Trueblood Pool. Levy Park and the Lincoln Community Center are nearby. The sub-area is adjacent to C.K. Steele Plaza and the Star Metro main transfer station.

Culturally, the Soul Voices historic markers project has been constructed in the sub-area. The markers reflect the history of Frenchtown with photographs and narrations from past and present residents.

The relocation of the homeless shelter, formerly located near the intersection of West Tennessee and Macomb Streets, has created a new redevelopment opportunity. A consulting group is proposing a mixed-use development featuring a medical clinic at the northwest corner of Martin Luther King Jr. Boulevard and West Tennessee Street. The only hotel in the Frenchtown sub-area, Four Point Sheraton, has created new event space, Bricks & Brass, at the northeast corner of Martin Luther King Jr. Boulevard and West Tennessee Street.

As part of an effort to promote “Healthy Living, Healthy Community,” the Frenchtown Heritage Hub, located at Georgia Street and Martin Luther King Jr. Boulevard, provides a source of fresh local produce and other food products to nearby residents as well as the rest of the community. The Heritage Hub includes a farmers’ market every Saturday and a KitchenShare incubator program that allows small food entrepreneurs to rent kitchen space and equipment. The area also consists of the Frenchtown Urban Farm, formerly the Dunn Street Youth Farm. The urban farm is a vendor at the farmers’ market on Saturdays.

West Tennessee Street is a major east/west road through the community. Within the sub-area, it is a six-lane road with a turning lane. Although a zoning overlay is intended to encourage pedestrian and bicycle friendly development, minimal sidewalks, long block lengths, numerous driveways and high-speed traffic are all factors impeding the development of pedestrian and bicycle-oriented development.

The assets, issues and opportunities of the sub-area are listed below.

Assets

- The historic character of the sub-area and well-established residential neighborhoods is a benefit.
- The grid street network allows motorists to travel without relying on major roadways.
- The mature vegetation helps with the environment and is pleasing aesthetically.
- The sub-area is in close proximity to StarMetro’s C.K. Steele terminal, Lincoln Neighborhood Service Center, Levy Park, Carter Howell Strong Park and Lawrence Gregory Center and Robinson Trueblood Pool.
- The Soul Voices Historical Markers are located in the sub-area and could bring tourists to the area.

- Frenchtown Heritage Hub is located in the sub-area providing rental kitchen space for small business and hosting a Saturday farmers' market for the neighborhood.

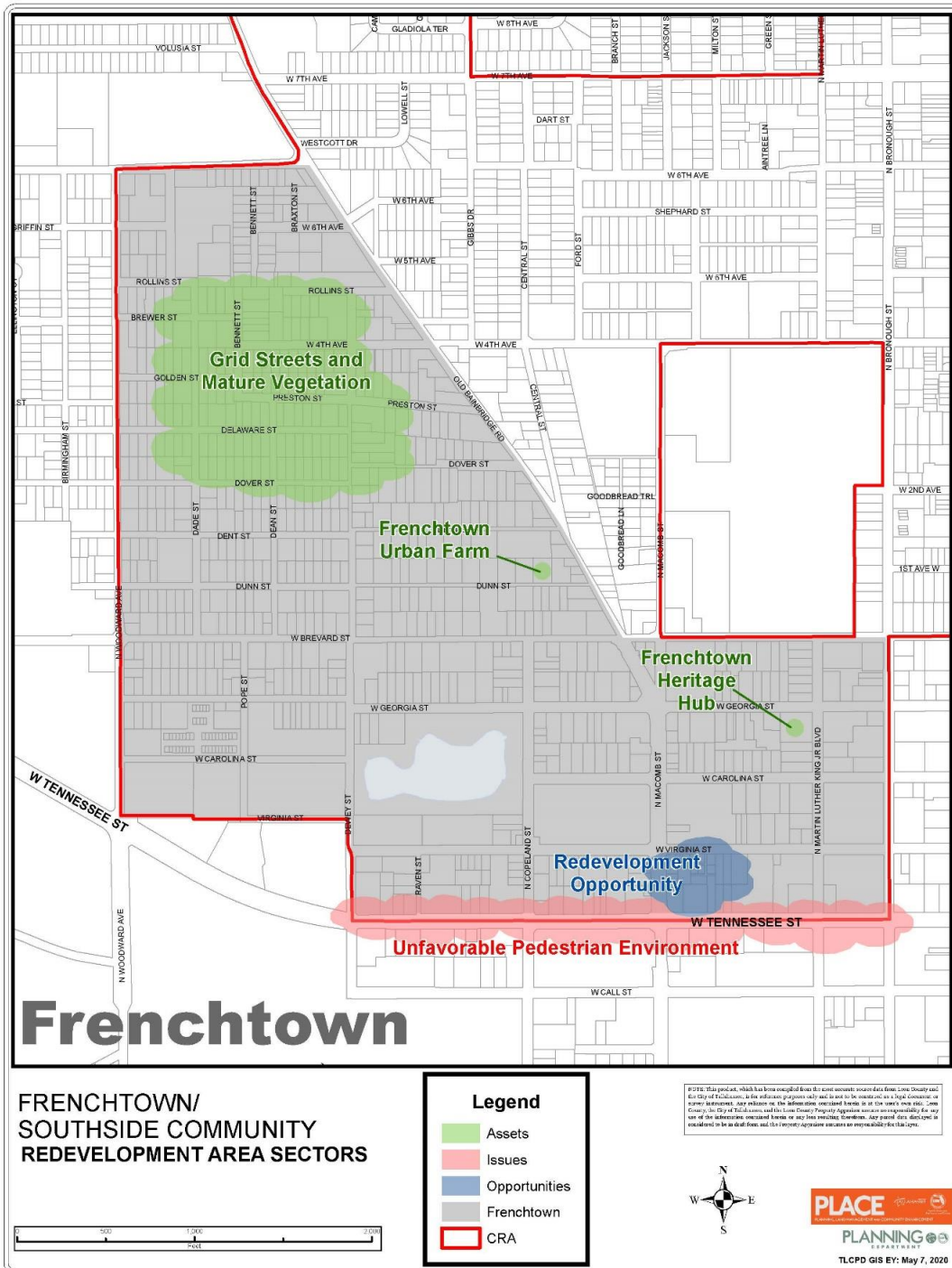
Issues

- The encroachment of student housing threatens the character of the neighborhood.
- The major arterial roadway, Tennessee Street, is unfavorable for pedestrians.
- There is limited access to shopping and services for sub-area residents.

Opportunities

- There are redevelopment opportunities along Tennessee and Macomb Street corridors.
- There are opportunities to promote mixed-income housing throughout the sub-area.
- Quality redevelopment that enhances the character of Frenchtown should be promoted.
- There should be a recognition of historical significance through events, signs and/or markers.
- Rehabilitation of existing housing should continue to be promoted.
- Opportunities to expand urban agriculture should be explored.

Map 4: Frenchtown Sub-Area



Sub-Area 4: FAMU Way/Lake Bradford

The FAMU Way/Lake Bradford corridor, located near a rail line, was a historically industrial area with residential areas for workers. Over time, the expansion of FSU and FAMU resulted in a growing demand for student housing, entertainment and commercial services. Map 6 below illustrates the assets, issues and opportunities of the sub-area.

Existing Conditions

The FAMU Way/Lake Bradford sub-area is the primary gateway into downtown from the airport and the main corridor connecting three of the City's most significant institutions: The State Capitol Complex, FSU and FAMU. The FAMU Way/Lake Bradford sub-area has a population of 1,387. Owner occupied units comprise 13 percent of the total dwelling units. The percentage of the population enrolled in college is 37.5 percent and 56.6 percent of the population has an income below the poverty level.

Community facilities in the sub-area include the Cascades Trail, Lake Elberta Park, parts of St. Marks Trail and Speed Spencer Stephens Park.

Due to the diversity in assets, issues and opportunities of the FAMU Way/Lake Bradford sub-area, the rest of the analysis of this sub-area will be divided into two parts: FAMU Way/Lake Bradford Road 'Commercial Corridor' and the 'Residential Area.'

FAMU Way/Lake Bradford Road Commercial Corridor

Previously, the Redevelopment Plan focused on the revitalization of the Gaines Street corridor. The adopted Gaines Street Vitalization Plan set forth a vision based on a demand for student and young professional housing near the universities in a more urban environment. The corridor has subsequently been transformed from an underutilized industrial area into a new in-town neighborhood, with student housing, a grocery store, art and cultural activities, a hotel and a center for business incubation.

Gaines Street continues to transition from warehouse uses to student housing, with related commercial and entertainment uses. The All Saints District, east of Railroad Avenue and south of Gaines Street, has developed into an urban residential neighborhood, consisting primarily of townhouses. Railroad Square, an arts district and Domi Station, a business incubator, are located west of Railroad Avenue and south of Gaines Street. A new Marriott Hotel is under construction in Railroad Square. Property in this area is zoned for a mix of commercial uses and residential use with a density range of 100 – 150 dwelling units per acre.

With the revitalization of Gaines Street well underway, the focus of the Redevelopment Plan is now on FAMU Way. FAMU Way has been extended west of Railroad Avenue to Lake Bradford Road. The Cascades Trail runs along the length of FAMU Way and provides access for pedestrians and cyclists to the FAMU campus and Railroad Square.

The Donald L. Tucker Civic Center is located north of the All Saints neighborhood. FSU owns the Civic Center site, now referred to as the “Arena District.” FSU proposes upgrades to the Civic Center facility, a convention hotel and the addition of academic buildings. The Civic Center is located within the Downtown CRA district, enhancing opportunities for coordination.

Currently, Lake Bradford Road resembles the Gaines Street of 10 years ago with outdated commercial development, underutilized property and potential contamination. The property along Lake Bradford Road is zoned for a mix of commercial uses and residential uses with a prevailing density of 45 units per acre.

FAMU Way/Lake Bradford Residential Area

The residential area within the FAMU Way/Lake Bradford sub-area is located generally south of FAMU Way, east of Mill Street, north of Kissimmee Street and west of Perry Street. It includes part of the Greater Bond neighborhood, located between Floral and Okaloosa Street, which was established in 1925. The “Stearns-Mosely” neighborhood, which was platted in the 1880s and was a vibrant African American neighborhood, is now mostly a student-oriented residential development.²

Much of this area is zoned for residential uses up to six units per acre. However, the area north of Gamble Street is zoned for residential densities up to 100 dwelling units per acre and a range of non-residential uses. The area east of Pasco Street is zoned for residential densities ranging from 18 to 45 dwelling units per acre and a range of non-residential uses.

The assets, issues and opportunities of the sub-area are listed below.

Assets

- The sub-area is close to FSU and FAMU, two major universities in the state.
- Residential developments with mature vegetation are a benefit to the area.
- An emerging innovation district with hotel development in the vicinity of Railroad Avenue is a benefit.

² Sources: Subdivision plats and Gaines Street Corridor Historic Preservation Report, Fall 1999.

- Cascades Trail, Lake Elberta Park and Speed Spencer Stephens Park are located within the sub-area.
- FAMU Way extension provides another east-west corridor for the area.

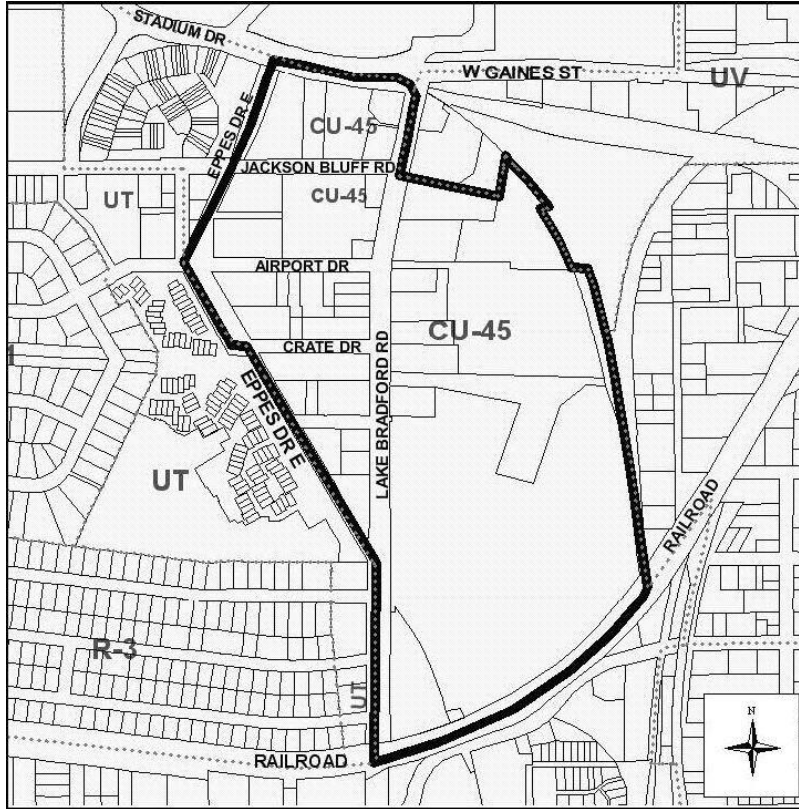
Issues

- There is inadequate parking, especially during peak demand times.
- There are strip commercial development patterns, with cluttered signage and overhead utilities on Lake Bradford Road.
- Lake Bradford Road is unfavorable for pedestrians.
- There is potential for brownfields along Lake Bradford Road.
- The zoning along Lake Bradford Road and some residential areas may not be reflective of neighborhood character.
- There is limited access to goods and services for residential areas along Lake Bradford Road.
- The impact of the Arena District near the Civic Center on future redevelopment in sub-area is a potential issue.

Opportunities

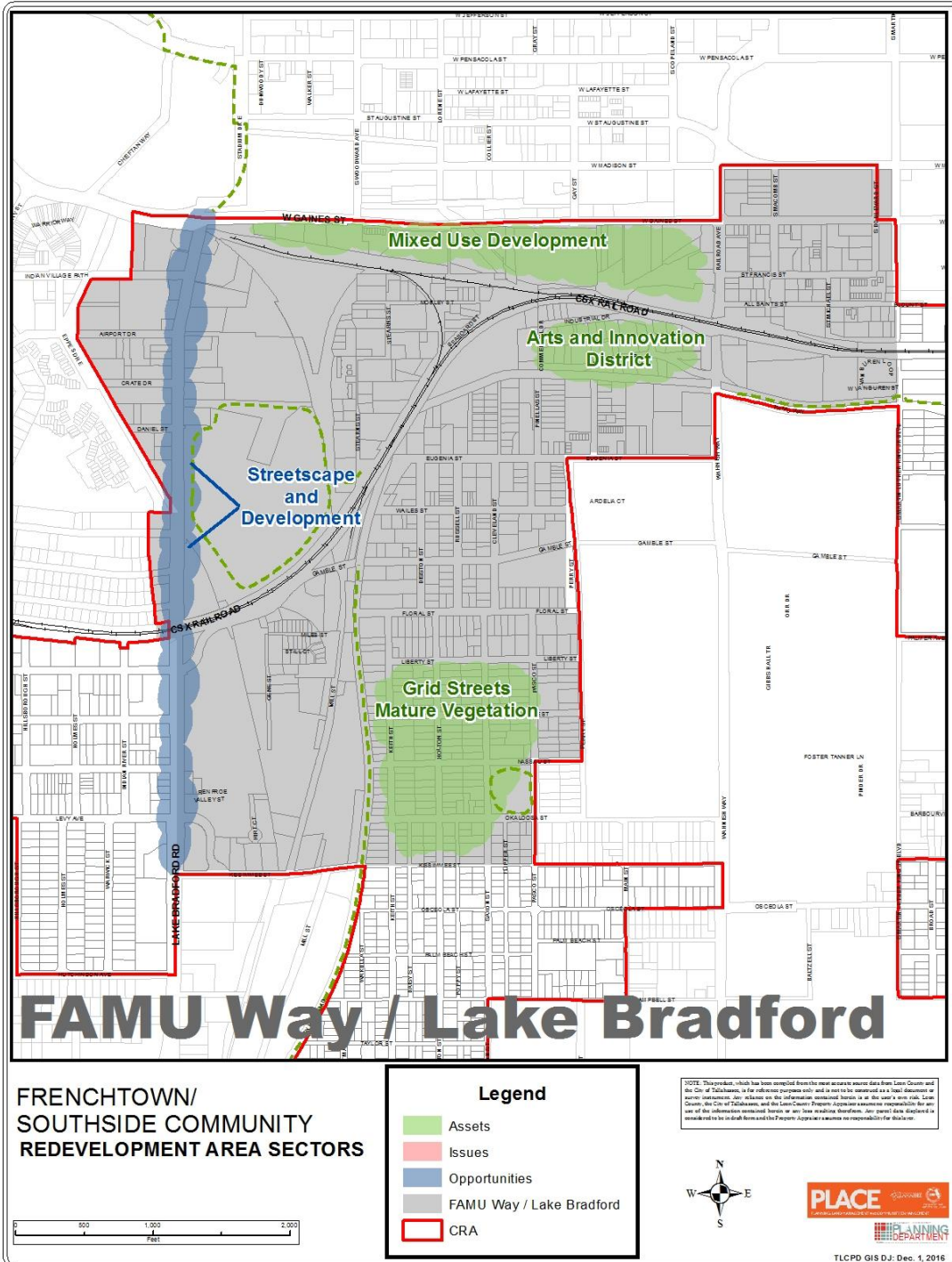
- Appropriate redevelopment along Lake Bradford Road and residential areas, given market demand and neighborhood character, should be supported.
- The provision of goods and services near residents should be promoted.
- Future housing opportunities should be evaluated.

Map 5: Lake Bradford Commercial Corridor Zoning Overlay



Source: Tallahassee Zoning Code Section 10-168(b)

Map 6: FAMU Way/Lake Bradford Sub-Area



Sub-Area 5: South Monroe/South Adams

South Monroe and South Adams Streets are major gateways into downtown. South Adams also serves as a gateway to FAMU. Map 7 illustrates the sub-area with its assets, issues and opportunities.

Existing Conditions

The South Monroe/South Adams corridor is composed of these two major roads as well as small residential areas to the east and west. South Monroe Street is an arterial road that connects the southern side of Tallahassee to Downtown and Interstate 10. It has a high number of vehicles per day, which provides opportunities for regional scale developments. South Adams Street serves as a parallel road, with less traffic, but direct access to FAMU and local businesses. Residential areas are found west of South Adams Street in an area bounded by Young Street; Martin Luther King, Jr. Blvd. and Palmetto Street; and west of Bronough Street and north of Palmer. The residential area east of South Monroe Street is generally bounded by South Gadsden Street, Perkins Street, South Meridian Street and Palmetto Street.

The majority of the corridor, including the residential area off Bronough Street, is zoned for a mix of residential and commercial uses with residential densities ranging from 4 to 45 units per acre. The residential areas east of Young Street and west of South Meridian are zoned for residential uses up to six units per acre.

The South Monroe/South Adams corridor has a population of 900. Owner occupied units comprise 15.6 percent of the total dwelling units. The percentage of the population enrolled in college is 46.5 percent and 52.6 percent of the population has an income below the poverty level. This is likely due to the number of college students living in the area.

Community facilities in the sub-area include the Bond Community Health Clinic Specialty Care and Wellness Center and the Care Point Health and Wellness Center. In September 2015, the CRA Board approved \$1.5 million to support the construction of the new 25,000 square foot Care Point facility in the South Monroe/South Adams corridor by Big Bend Cares. Construction was completed in December 2018. The development includes space for clinical, dental, laboratory, mental health services and a pharmacy. Another community facility is The Dr. B.L. Perry, Jr. library located just south of the sub-area on South Adams Street.

Cascades Park, a major community amenity, is located just to the northeast of the sub-area within the Downtown CRA District. A recently completed pedestrian bridge over

South Monroe is part of the Cascades Trail, which connects Cascades Park to Lake Bradford Road. The Magnolia Drive Multi-Use Trail will extend from South Adams Street through the CRA district, eventually connecting to Apalachee Parkway.

Redevelopment within the sub-area may be affected by the area's previous industrial character. A recent study of potential brownfield contamination identified a number of sites requiring further assessment. Sources of contamination include underground storage tanks and Resource Conservation and Recovery Act waste generator sites. Similar studies and subsequent clean-up efforts in the Gaines Street corridor addressed contamination issues and enabled private sector investment. In 2016, the City of Tallahassee designated areas of South Monroe corridor as a Brownfield area.

As was seen in the Gaines Street corridor, a coordinated revitalization plan, based on market potential and identifying needed capital projects, can trigger private investment. The same model can be used in the South Monroe/South Adams corridor.

The sub-area assets, issues and opportunities are listed below.

Assets

- The sub-area has access to goods and services.
- The Capital Cascades Trail is in the northern portion of the sub-area.
- South Monroe and South Adams are major gateways into downtown Tallahassee, with a viewshed.
- Community health facilities, such as Bond Specialty Care and Care Point, are located in the sub-area.

Issues

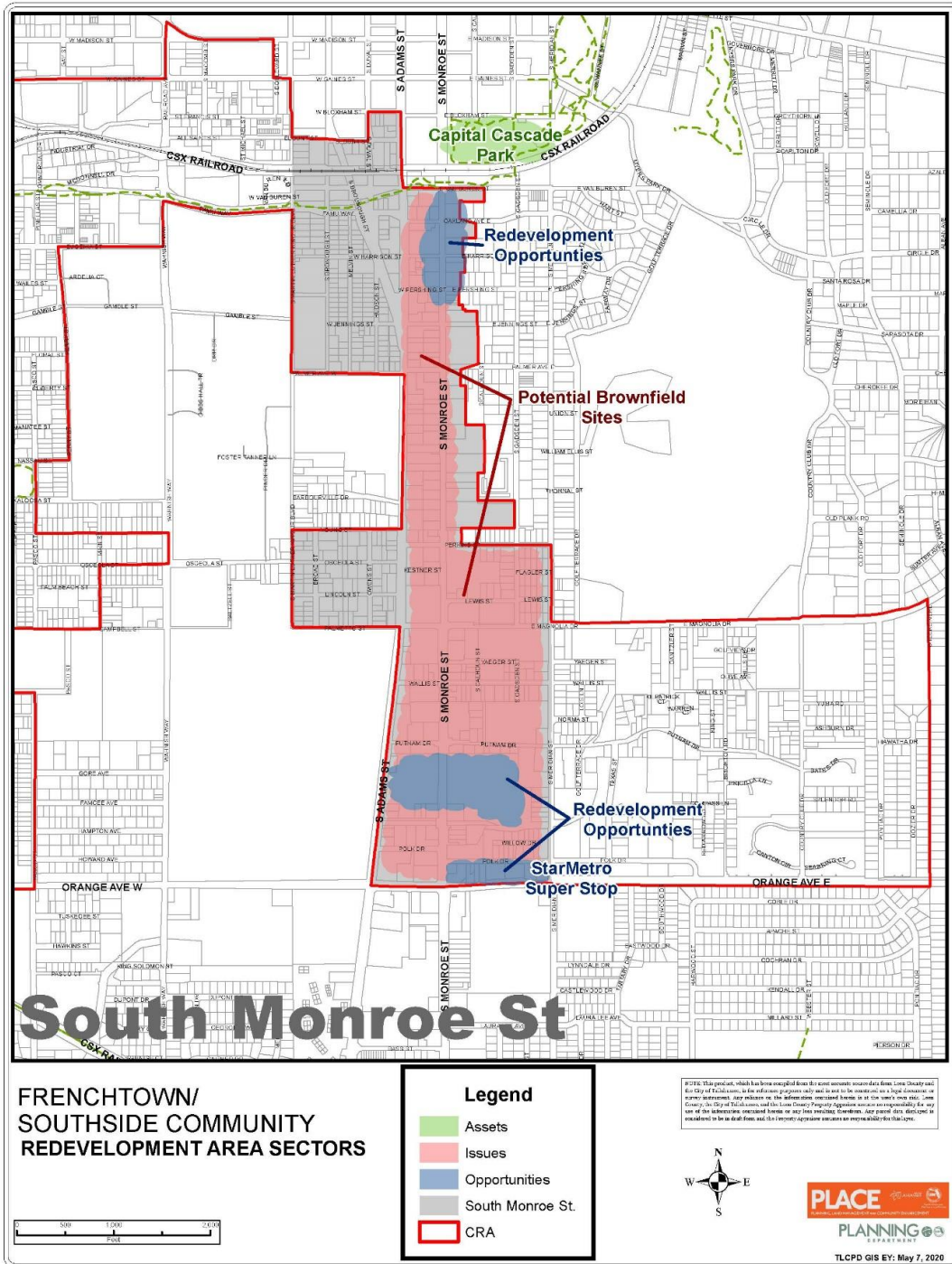
- There are obsolescent, underutilized and vacant structures and lots along South Monroe and South Adams.
- There is a lack of pedestrian infrastructure along South Monroe and Adams Streets.
- There is a lack of tree canopy and landscaping along South Monroe and South Adams Streets.
- Orange Avenue is unfavorable for pedestrians and vehicles.
- Brownfields will need to be addressed prior to redevelopment.

Opportunities

- There are redevelopment opportunities provided by high traffic on South Monroe Street.

- There is redevelopment activity associated with Cascades Park and Trail.
- There are opportunities for improved streetscape and infrastructure with new redevelopment.

Map 7: South Monroe/South Adams Sub-Area



Sub-Area 6: Bond Community

The Bond Community is a historic community comprised of several subdivisions, including Medical Commons, Villa Mitchell, Normal School and Leon Arms. Map 8 illustrates the sub-area with its assets, issues and opportunities.

Existing Conditions

The Bond sub-area west of the St. Marks Trail is mostly industrial and commercial uses. To the east of the Trail is primarily single family, with a mix of multifamily development and commercial uses. This sub-area also contains a number of churches and non-profit entities. The zoning of the Bond Community east of the St. Marks Trail primarily allows low density residential, with a density of up to six units per acre. Zoning west of the Trail allows a range of non-residential uses and residential densities of up to 45 dwelling units per acre.

The Bond Community sub-area has a population of 1,819. Owner occupied units comprise 25.5 percent of the total dwelling units, the highest of any sub-area. The percentage of the population enrolled in college is 13.9 percent (by far the lowest of any sub-area) and 53.6 percent of the population has an income below the poverty level.

Bond Elementary School and the Walker-Ford and Smith Williams Community Centers border the Bond Community sub-area. The Richardson-Lewis Health Center is located in the sub-area at its southern border. The St. Marks Trail, a multi-use trail connecting Tallahassee to the Gulf Coast, runs down the center of the sub-area.

The assets, issues and opportunities are listed below.

Assets

- Community facilities such as Smith Williams Service Center, Walker Ford Community Center and Richardson-Lewis Health Center are located in or near the sub-area.
- The St. Marks Trail runs through the sub-area.
- The Bond Neighborhood is within the Bond Elementary School walkshed.

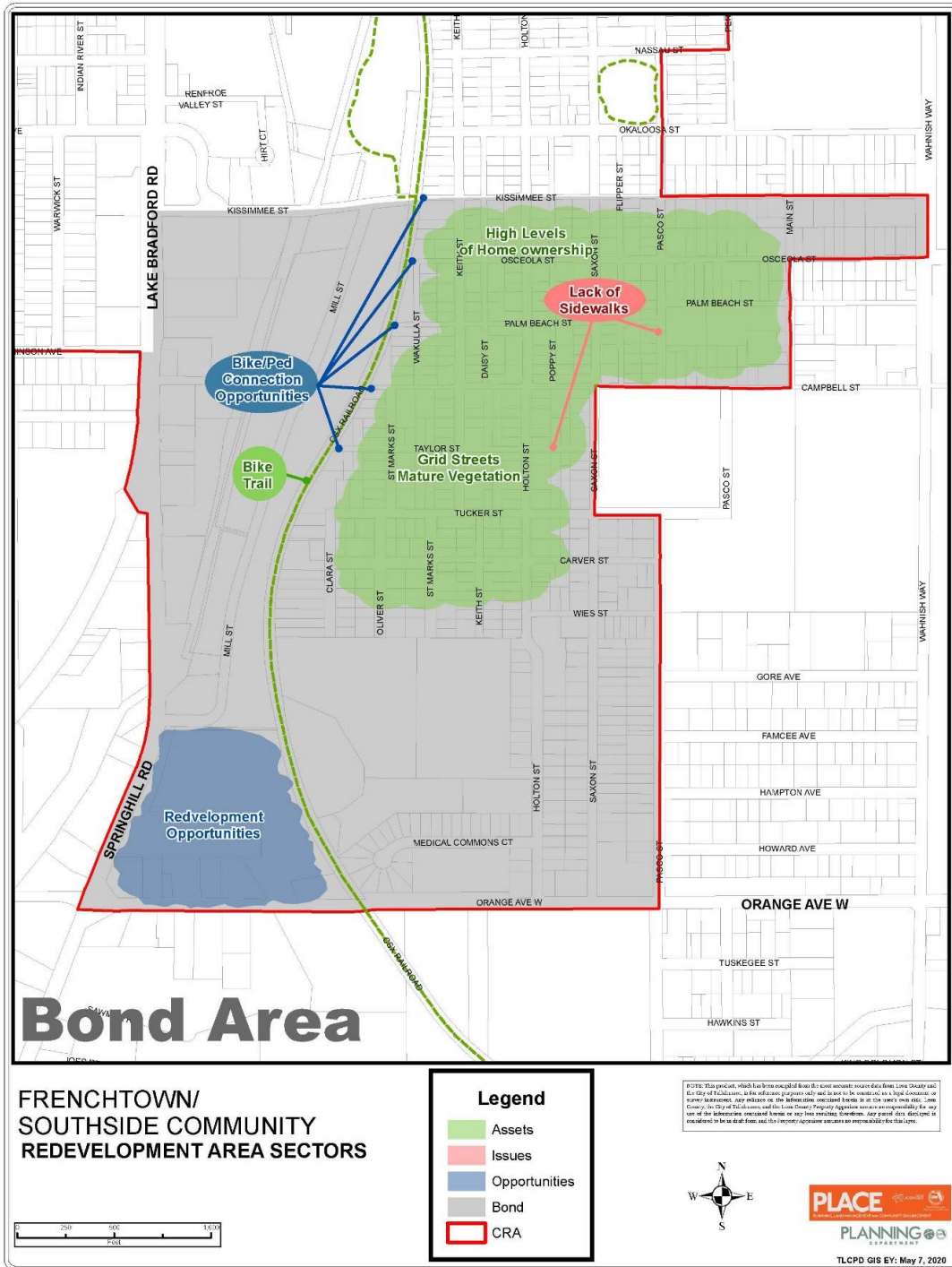
Issues

- There is limited access to goods and services for the residents.
- There is inadequate streetscape throughout the sub-area.
- There is a lack of neighborhood commercial uses.

Opportunities

- The access to goods and services should be improved and supported.
- The promotion of Safe Route to School improvements to Bond Elementary School is an opportunity.
- Streetscape improvements should be supported.

Map 8: Bond Community Sub-Area



Sub-Area 7: Providence Community

The Providence Community is comprised of several early subdivisions including Bloxham Heights (first platted in 1928), Hutchinson Heights (1947) and Sunny Hill (1958). Map 10 illustrates the sub-area and its assets, issues and opportunities.

Existing Conditions

The predominant land use in the Providence Community is residential. The areas south of Levy Street and north of Levy Street east of Hillsborough Street are primarily single family. The area south of Levy Street is zoned for low density residential, up to six units per acre.

Approximately one half of the land north of Levy Street and west of Hillsborough Street is multifamily. There is a significant amount of vacant land north of McCaskill Street. Zoning north of Levy Street and along Lake Bradford Road allows a mix of residential and commercial development with densities ranging from 18 to 45 units per acre.

The Providence Community sub-area has a population of 935. It has the lowest owner-occupied housing rate in the Redevelopment Area at 5.4 percent. The percentage of the population enrolled in college is 19.6 percent and 41.8 percent of the population has an income below the poverty level.

As a result of the Providence Renaissance Plan (2003), the area south of Levy Street has a sidewalk network and the Providence Community Center. The Center was a cooperative effort between the City of Tallahassee, Tallahassee Community Redevelopment Agency and the Delta Kappa Omega Foundation of Alpha Kappa Alpha Sorority, Inc. Members of the sorority manage the Center and provide various programs. Pineview Elementary is located approximately 0.15 miles south of the Providence Community sub-area border.

To the west of the Providence Community sub-area is Innovation Park, a research and development park. The National High Magnetic Field Laboratory, an internationally recognized facility, is located here. Levy Street is one of the main access roads into the Park.

The assets, issues and opportunities of the sub-area are listed below.

Assets

- There is active citizen participation through the Providence Community Neighborhood Association.

- Delta Kappa Omega/Providence Community Service Center is in the sub-area.
- The sub-area is within the Pineview Elementary walkshed.

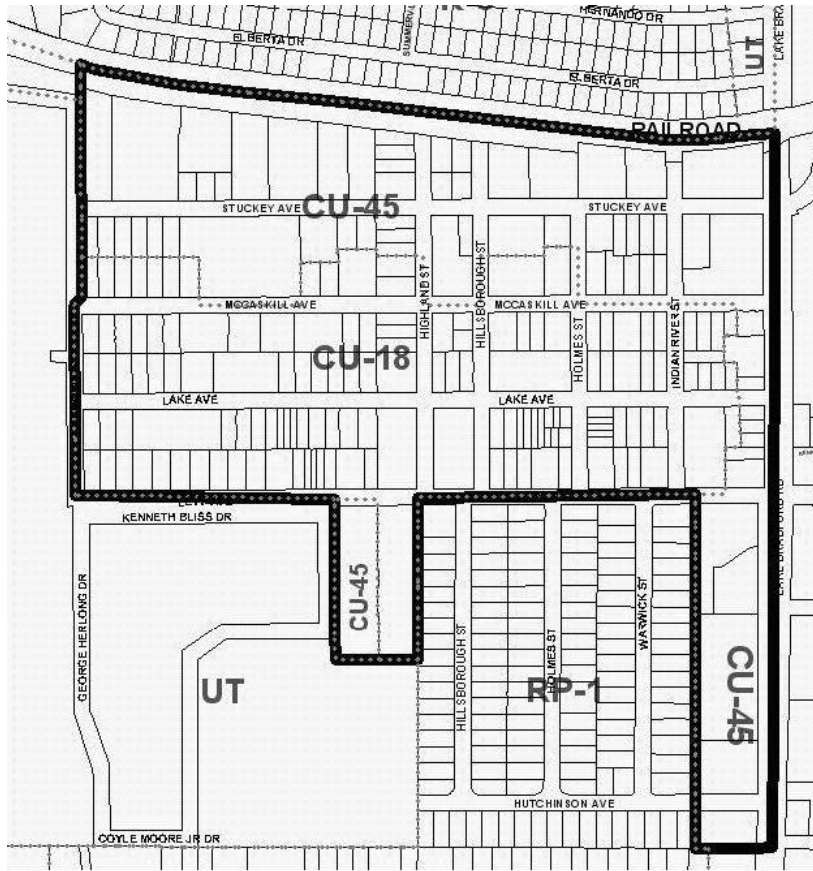
Issues

- There are poor housing conditions along the west end of Stuckey Street.
- Lake Bradford Road is a barrier to commercial uses for neighborhood residents.
- The sub-area has limited access to goods and services.
- Zoning along Lake Bradford Road and some residential areas may not be reflective of the market, available infrastructure or neighborhood character.
- There is limited open space in the neighborhoods.
- There is potential contamination due to industrial uses along Lake Bradford Road.

Opportunities

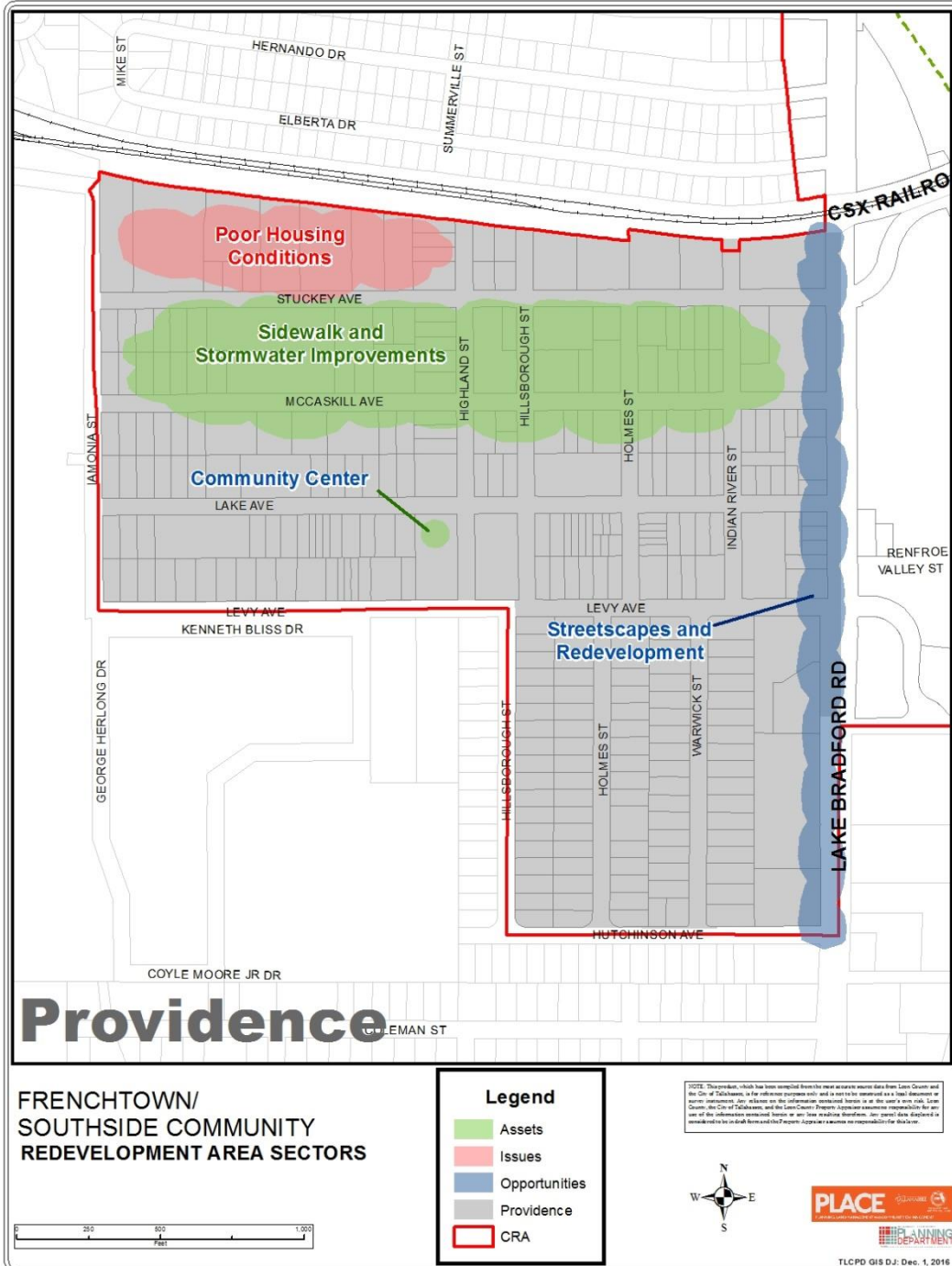
- Rehabilitation of existing housing should be supported and promoted.
- There should be support for the integration of the Providence neighborhood into the surrounding areas.
- Appropriate development along Lake Bradford Road and residential areas, given market demand and neighborhood character, should be supported.
- There should be support for opportunities to provide goods and service to residents.

Map 9: Providence Neighborhood Zoning Overlay



Source: Tallahassee Zoning Code Section 10-168(c)

Map 10: Providence Community Sub-Area



Sub-Area 8: South City

South City sits in the shadow of the South Monroe/South Adams corridors. It is in close proximity to FAMU to the west. The sub-area is comprised of mostly residential areas with very few commercial uses. The area was included in the Redevelopment Area in 2018. Map 11 illustrates the sub-area and its assets, issues and opportunities.

Existing Conditions

The predominant land use in South City is residential. The area is zoned Central Urban and has a mixture of multi-family developments scattered throughout. The area is zoned for 18 to 45 dwelling units per acre.

Approximately one quarter of the land south of Putnam Drive is multifamily. There is a significant amount of vacant land throughout the area. Zoning for the sub-area is primarily Central Urban, with densities ranging from 18 to 45 dwelling units per acre. East of Pontiac Drive is the only area in the sub-area zoned Residential Preservation.

The South City sub-area has a population of 2,428. The owner-occupied housing rate in the sub-area is 15 percent. The percentage of the population enrolled in college is 27.4 percent and 43.2 percent of the population has an income below the poverty level.

The largest multi-family development in the area is the Orange Avenue Apartments. The Tallahassee Housing Authority is working with Columbia Residential to revitalize the 200-unit apartment complex to include 500 residential mixed-income units with some commercial development. The units will also include senior housing.

The assets, issues and opportunities are listed below.

Assets

- Magnolia Multi-Use Trail is near the sub-area.
- The sub-area is adjacent to the future StarMetro Superstop.
- The area is within close proximity to Country Club Park.

Issues

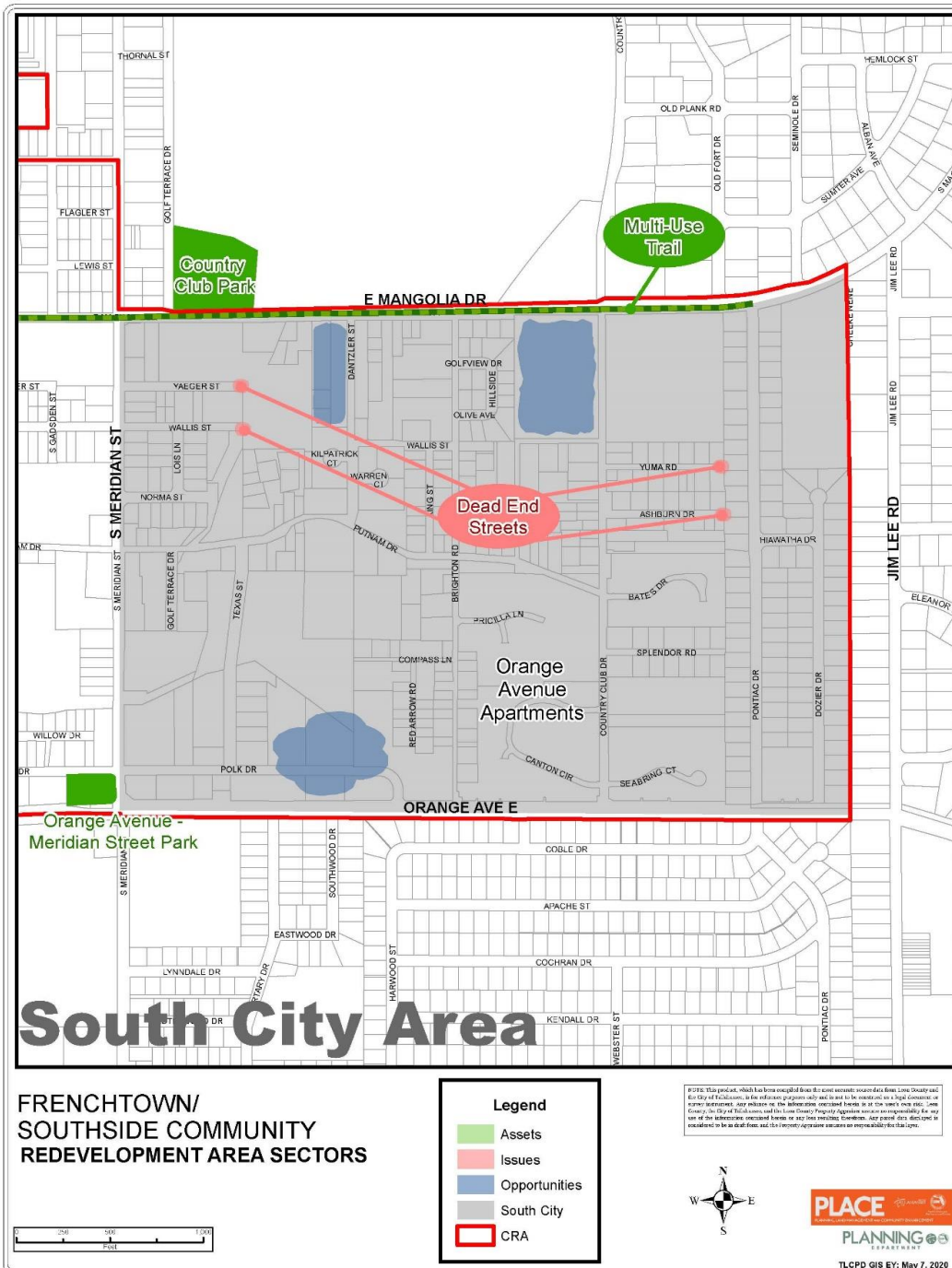
- There are aged multi-family developments within the sub-area.
- There are poor housing conditions throughout the sub-area.
- There are open ditches in the sub-area.

- There are several dead-end streets.
- There is limited open space in neighborhoods.

Opportunities

- Improvements to blighted housing and multi-family developments should be supported.
- The creation of more open space within the neighborhood should be supported.
- Most appropriate development along Orange Avenue and residential areas, given market demand and neighborhood character should be supported.
- Streetscape improvements should be supported and promoted.

Map 11: South City Sub-Area



SECTION 3: **SUB-AREA REDEVELOPMENT PLAN OPPORTUNITIES**

This section of the Redevelopment Plan highlights redevelopment opportunities for each sub-area in the Redevelopment Area. The opportunities below are not all-inclusive.

Sub-Area 1: West Tharpe Street

- Promote improved bicycle and pedestrian accessibility at the intersection of West Tharpe Street and Old Bainbridge Road.
- Promote pedestrian improvements along Old Bainbridge Road.

Sub-Area 2: Sixth Avenue

- Improve aesthetics along North Monroe Street to create attractive gateway and to reinforce sense of place.
- Support opportunities for mixed use redevelopment along North Monroe Street and Old Bainbridge.
- Promote opportunities to improve traffic circulation, parking, aesthetics and the pedestrian environment as redevelopment occurs along North Monroe Street.
- Promote the evaluation of the conversion of one-way streets to two-way.

Sub-Area 3: Frenchtown

- Promote opportunities to improve traffic circulation, parking, aesthetics and the pedestrian environment as redevelopment occurs along West Tennessee Street and Macomb Street. Strategies include, but are not limited to: sidewalk repair and reducing the number of driveways through cross-access easements; shared parking, landscaping and improved bus shelters.
- Continue to promote the construction of new housing and the rehabilitation of existing housing.
- Promote the historic character of Frenchtown. Strategies may include, but are not limited to: displays, kiosks, special events, signage and walking tours.
- Support efforts to expand urban agriculture.
- Support efforts to improve transportation services for the elderly and disabled.
- Support opportunities to improve residents' access to goods and services.

Sub-Area 4: FAMU Way/Lake Bradford

- Support appropriate development along Lake Bradford Road and residential areas, given market demand and neighborhood character.
- Support opportunities for provision of goods and services to sub-area residents.
- Evaluate future housing opportunities.

Sub-Area 5: South Monroe/South Adams

- Promote a coordinated plan for revitalization of South Monroe/Adams corridor, based on Gaines Street model. The plan should address, at a minimum: market demand, infrastructure needs, land use compatibility, environmental constraints and appearance.
- Support the establishment of recurring community events in conjunction with First Friday or other happenings at Cascades Park to capture interest and spending on the commercial corridor. Some examples of community events include pop-up shops, a food truck night, or a weekend market.
- Support a wayfinding signage project within the Redevelopment Area that identifies significant landmarks, historic resources and university/community facilities.
- Provide matching funds for commercial façade enhancements as part of the Business Facility Improvement Program in the Redevelopment Area.
- Support the creation of a weekly mobile farmers' market in a commercial area within the Redevelopment Area through private redevelopment and/or public infrastructure improvements.

Sub-Area 6: Bond Community

- Support opportunities to improve access to goods and services.
- Support pedestrian and transit improvement, including, but not limited to: Safe Route to School projects, sidewalk improvements and bus shelters.
- Support efforts to increase neighborhood identity and beautification with landscaping and signage at key entry points.
- Continue to promote the construction of new housing and the rehabilitation of existing housing.
- Support efforts to improve transportation services for the elderly and disabled.

Sub-Area 7: Providence Community

- Support appropriate development along Lake Bradford Road and residential areas given market demand, infrastructure and neighborhood character.
- Support opportunities to improve residents' access to goods and services.
- Support pedestrian and transit improvement, including, but not limited to: Safe Route to School projects, sidewalk repair and bus shelters.
- Continue to promote the construction of new housing and the rehabilitation or demolition of existing substandard housing.

Sub-Area 8: South City

- Promote the construction of affordable housing and multi-family developments, including rehabilitation of existing housing.
- Support new open space areas within the neighborhood.
- Support most appropriate development along Orange Avenue and residential areas, given market demand and neighborhood character.
- Support streetscape improvements.

SECTION 4: **PROGRAM MANAGEMENT AND IMPLEMENTATION**

Implementation of the Redevelopment Plan will require the coordinated efforts of the City, the Redevelopment Agency, other government agencies, local business organizations, property owners and residents. These efforts will be coupled with the employment of various organizational, legal, funding and promotional techniques to successfully implement the program. This section of the Redevelopment Plan sets forth a process to realize the planning, goals and objectives that have been devised for the Redevelopment Area.

4.1. Leadership

While leadership is a highly intangible quality, it is the single most important factor for successful implementation of a redevelopment plan. This leadership must come from both the public and private sectors. Some projects will require considerably more leadership, effort and collaboration because of their difficulty and/or importance to the overall revitalization program. Participation in a particular project will depend upon necessary resources which must be brought to bear on the project for its successful implementation.

4.2. Organizational Roles and Relationships

To have a strong redevelopment program, you must first establish lines of communication between all sectors and facets of the community. The planning process has started to establish relationships between key players in this effort but does not fully develop their roles. The City and CRA should develop the organizational framework and institutional relationships to facilitate effective redevelopment activities in cooperation with area businesses, residents and community representatives.

A network of relationships must be established and nurtured to provide focus on the redevelopment effort to maximize the use of available resources and avoid duplication of responsibilities enabling effective program implementation. The City, CRA and their staffs must work cooperatively with other jurisdictions, including, but not limited to:

- The State of Florida
- Leon County
- Tallahassee-Leon County Planning Department
- Tallahassee – Leon Office of Economic Vitality
- Blueprint IA
- Cultural Planning Commission
- Tallahassee Housing Authority

- Tallahassee Trust for Historic Preservation
- Capital Region Transportation Planning Agency
- Florida Department of Transportation
- StarMetro
- North West Florida Water Management District
- Community Development Corporations
- Colleges and Universities
- Leon County Research and Development Authority
- Tourist Development Council
- Neighborhood Associations
- Business Associations
- Tourist Development Council
- Other local, state or federal agencies

4.3. City Commission/CRA Board/Staff

The CRA Board is the leader of the redevelopment program and must assume this role with vitality and enthusiasm. The CRA, in cooperation with City leaders, must support the program's activities and provide a well-devised management system to carry out the Redevelopment Plan. They will be responsible for establishing the administrative, financial and programmatic mechanisms necessary to achieve the goals and objectives of the Greater Frenchtown Southside Community Redevelopment Plan. They should establish policies that support the principles described in this Plan and concentrate on the following actions throughout the redevelopment process.

- Provide commitment of public policy and resources for the redevelopment effort.
- Support the redevelopment mission and ensure implementation of scheduled projects.
- Commit to making the necessary public improvements identified in the GFS Strategic and Investment Plan.
- Provide necessary staffing and administrative support to properly implement the Redevelopment Plan.

4.4. Planning Activities

The purpose of the redevelopment effort is to promote the goals identified in the Redevelopment Plan and encouraging private sector investment. The City and CRA will need to continue to promote economic development and redevelopment through additional planning efforts and the creation of new programs in concert with the public improvements that this Redevelopment Plan proposes. The CRA staff, supported by

other City Departments, will be charged with the execution of the Redevelopment Plan. They will need to coordinate and manage the actions called for in the Redevelopment Plan. They must provide leadership and support for administering public development controls and incentives to promote high-quality private development. This may include streamlining development review to minimize the time involved in the approval process, establishing new zoning requirements, initiating financial incentive programs and the provision of additional public facilities through coordinated capital improvement programs.

4.5. Finance and Management

Community redevelopment will not be successful without funding through tax increment financing. Therefore, the ultimate goal of the redevelopment program is to increase the tax base to generate additional revenue for capital improvements and services through implementation of projects and programs, as described in this Redevelopment Plan. Managed effectively, tax increment resources can be leveraged to enable the undertaking of substantial public and private sector improvements. The following finance and management practices should be employed.

- Coordinate with the City Manager, Finance Director and other department heads to strategically devise annual operating and capital improvements budgets to maximize the use of anticipated tax increment revenues.
- Coordinate with appropriate County, State and other public officials who may be sponsoring capital improvements in the District to maximize the leveraging of CRA resources.
- Through the use of tax increment financing and other funding sources, infrastructure improvements such as water, sanitary sewer, electrical, telephone, cable, internet and stormwater conveyance systems should be designed and constructed with the capacity to meet future demand based on the future land use activities identified in the Redevelopment Plan.
- The CRA should leverage tax increment revenues through grants, commercial loans, or other financial mechanisms to expedite the completion of projects.
- The Agency should work with area banks and bond counsels to research bond feasibility for financing major public facilities.
- The Agency should work with area financial institutions to develop favorable loan programs for private sector development and property rehabilitation projects.

- The Agency should routinely undertake project proforma analysis on proposed development and redevelopment projects to determine projected revenues and devise strategies to maximize the use of these resources on a site-specific project or on an area wide programmatic basis.

4.6. Redevelopment Project Implementation

In attempting to attract investment from private developers, the CRA will target strategic development projects, solicit developers and then negotiate a public/private development agreement. The agreement sets forth terms and conditions involving the disposition of land, the nature of the prospective development, City/Agency contributions and other conditions pertaining to the project. Following are fundamental components in this process:

- Contact affected property owners to determine their level of interest in participating in proposed redevelopment activities.
- Master plan targeted public/private projects reinforcing positive aspects of existing activity and providing attractive combinations of buildings and open spaces. These plans can then be used to illustrate the CRA's intention for the site, facilitating proforma analysis when soliciting interest from the private sector.
- Formulate policies and procedures for developer solicitation and form basic public/private development agreements to enable strategic development on selected projects.

4.7. Promotion and Communication

The CRA, staff and Advisory Committee should work with area residents, property owners and businesses to establish channels of communication that foster support for the redevelopment effort and facilitate program implementation.

Staff should provide public information concerning all aspects of the redevelopment program throughout the process using venues such as newsletters, radio, television, newspapers and the Internet as well as presentations to neighborhood and civic organization meetings to generate public support.

SECTION 5: **CAPITAL PROJECTS AND FUNDING**

This section discusses capital improvement projects and provides a listing of the capital projects planned for the Redevelopment Area. The CRA, the City of Tallahassee Underground Utilities and Public Infrastructure Department, Blueprint Intergovernmental Agency, StarMetro and the Capital Regional Transportation Agency (CRTPA), have capital projects planned for the Redevelopment Area and listed in Table 1 below. These projects may be executed by one or more agencies or coordinated with several for implementation.

Capital improvement projects are major projects that address specific infrastructure needs such as roads, streetscape, community centers and other municipal features. Public Infrastructure is the fifth priority area in the Redevelopment Plan, with residents looking to enhance existing infrastructure while promoting new infrastructure in the area. The CRA can provide funding through tax increment financing to support infrastructure projects within the Redevelopment Area provided it coincides with the priorities of the community.

To implement capital improvement projects, projects must first be included in the capital budget for funding. The budget is developed based on anticipated actions and funding conditions as they exist at the time of adoption. While the capital budget may contain many of the projects and strategies outlined in the GFS Strategic Investment Plan, it does not include every project/strategy. Funding may not be limited to the amount of tax increment funds collected each year. The CRA may also use short-term loans and revenue bonds secured by future tax increment revenue to fund projects. Chapter 163.385, Florida Statutes, specifically authorizes the CRA to issue redevelopment revenue bonds to finance the undertaking of any community redevelopment activity that supports implementation of the Redevelopment Plan.

In addition, the CRA may also seek funding support through private and public sources, such as donations and grants. The CRA, working closely with the City, other government entities and the private sector, will always pursue funding resources to implement the goals and strategies prioritized by the community. The CRA will also work closely with the Greater Frenchtown Southside Citizen Advisory Committee which will provide the CRA Board with recommendations regarding the implementation of the Redevelopment Plan and the GFS Strategic Investment Plan, including the development of projects, incentives and recommended funding.

On an annual basis, the CRA will adopt a budget reflecting the Redevelopment Plan priorities for the upcoming year. As a matter of practice, the CRA may also prepare one, three and five-year work programs for budgetary and administrative purposes. The budget and work plans can be adjusted from time to time during the year, as conditions warrant, allowing the CRA to respond to changing conditions. Finally, in addition to the various projects listed in the capital budget, the CRA should be prepared to assist other government bodies, such as Blueprint IA or CRTPA, in efforts that further support implementation of the Redevelopment Plan.

Table 1 on the following page outlines the various capital improvement projects planned and budgeted for the GFS Redevelopment Area.

Additional capital improvement projects include non-motorized projects such as bike lanes, sidewalks, trails and traffic calming. These projects focus on getting people from their neighborhood to activity centers, restaurants, local events, etc. without the use of a vehicle. The Neighborhood Network approach is one of several methods used by the CRTPA to assist citizens with another mode of transportation. The network places priority on pedestrians and bicycles by focusing routes on residential streets with low traffic volume and low speeds. There are several neighborhood routes in the Redevelopment Area planned for improvements as part of the 2040 Long Range Transportation Plan (LRTP). These routes are listed in Table 2 (see page 57).

Table 1: Capital Budget (1)

| Budgeted City of Tallahassee Projects | Cost (\$M) | Source | Year(s) |
|--|------------------------|-----------------|-------------------|
| Railroad Avenue Supplemental Stormwater Outfall | 2.1 | City/FSU | 2020 |
| Lower Central Drainage Ditch Erosion Control | 11.1 | City | 2020 |
| SPI (Small Projects Initiative) - 2027 Holmes St., 2016 Warwick St. | 0.1 | City | 2021 |
| Country Club/Putnam Drive Drainage and Sidewalk Improvements | 3.1 | City | 2020 |
| Copeland Street Drainage Improvement | 0.5 | City | Unknown |
| CRTPA 2040 Projects (2) | Cost (\$M) | Source | Years(s) |
| 1554 Orange Avenue Road Widening | See Blueprint Projects | | |
| StarMetro Projects | Cost (\$M) | Source | Years(s) |
| South City Transfer Facility | TBD | TBD | 2022 |
| Redevelopment of C.K. Steele Plaza | 17.5 | City/Blueprint | 2025 |
| Bus Stop Upgrades | TBD | City | 2020-2024 |
| BluePrint Projects (3) | Cost (\$M) | Source | Years(s) |
| Capital Cascades Trail: Seg. 3 (FAMU Way and Subprojects) | 67.7 | BP 2000 | Ongoing |
| Capital Cascades Trail: Seg. 4 | 18.5 | BP 2000 | FY 2020 - 2024 |
| Magnolia Drive Trail | 11.4 | BP 2000 | Ongoing |
| Implementation of the Greenways Master Plan – Phase 1 | 15.8 | BP 2020 | Ongoing |
| Airport Gateway | 67.2 | BP 2020 | FY 2020 - 2029 |
| Orange-Meridian Placemaking | 3.7 | BP 2020 | FY 2020 - 2023 |
| FAMU Entry Points | 1.8 | BP 2020 | FY 2035 - 2036 |
| Monroe-Adams Corridor Placemaking | 8.2 | BP 2020/FDOT | FY 2020 - 2024 |
| N. Monroe Gateway: 7 th Ave to I-10 | 11.4 | FDOT/CRTPA | Ongoing |
| Orange Ave Widening: Adams to Springhill | 33.1 | FDOT/CRTPA | Ongoing (PD&E) |
| Planned GFS CRA Capital Projects (4) | Budget (\$M) | Source | Year(s) |
| Redevelopment Area Business Façade Incentives | 1.5 | TIF | 2021-2025 |
| Bond Neighborhood First Plan | 6.5 | TIF | 2019-2022 |
| Frenchtown Neighborhood Plan | 6.5 | TIF | 2020-2023 |
| Other Neighborhood Plans | 3.0 | TIF | 2021-2025 |
| Infrastructure Improvements | 0.5 | TIF | 2024-2025 |
| Affordable Housing Incentives | 5.5 | TIF | 2021-2025 |
| Redevelopment Projects | 2.4 | TIF | 2021-2025 |
| Emergency/Disaster Fund | 5.0 | TIF | 2021-2025 |
| Total Project (\$M) | 304.1 | | |
| Other Sources (\$M) | 273.2 | | |
| TIF Sources (\$M) | 30.9 | | |
| (1) Project Timeline may be impacted due to Covid-19 Pandemic | | | |
| (2) Capital Region Transportation Planning Agency Year 2040 Long Range Transportation Plan, Cost Feasible Plan | | | |
| (3) Subject to change based on Blueprint IA Board Annual Capital Improvement Program process | | | |

(4) Anticipated CRA projects of the Greater Frenchtown Southside Community Redevelopment Area at the time of plan adoption. However, the Agency may, from time to time, adjust the capital budget based upon changes in circumstances related to implementation of the redevelopment area plan. Funds listed represent the TIF portion of the project. Where appropriate, TIF will be leveraged with other funds (i.e., Agency, City, County, Blueprint 2000, State, Federal, etc.) to enhance the success of this initiative/project.

Table 2: Non-Motorized Needs Plan (1)

| CRTPA 2040 Adopted Nonmotorized Needs Plan | | | |
|--|-----------------|------------------|-------------------------|
| Project Name | From | To | Description/Type |
| MLK Jr. Blvd | W. Tennessee St | W. Brevard St | Bike lanes |
| MLK Jr. Blvd | Fourth Ave | Tharpe St | Bike Lanes |
| Jackson Bluff Rd | Capital Cir SW | Lake Bradford Rd | Bike Lanes |
| Woodward Ave | Tennessee St | Alabama St | Bike Lanes |
| Fourth Ave | Central St | Adams St | Multi-Use Path |
| Iamonia St | Stuckey St | Roberts Ave | Multi-Use Path |
| Neighborhood Network Bicycle & Pedestrian Improvements | | | |
| Route 2A | | | |
| Route 2B | | | |
| Route 2D | | | |
| Route 3A | | | |
| Route 3E | | | |
| Route 3F | | | |
| Route 5F | | | |
| Route 5G | | | |
| Route 5H | | | |
| Route 2K | | | |
| Route 2N | | | |
| <i>Source: Capital Region Transportation Planning Agency Year 2040 Long Range Transportation Plan & Cost Feasible Plan</i> | | | |
| <i>Source: Tallahassee - Leon County Bicycle and Pedestrian Master Plan</i> | | | |
| <i>(1) Cost of non-motorized needs are to be determined.</i> | | | |

SECTION 6: **PROJECTIONS OF TAX INCREMENT FINANCE RETURNS**

6.1. WHAT IS TAX INCREMENT FINANCING?

Tax increment financing (TIF) is a method available to community redevelopment agencies (CRA) in Florida and in many other states to help finance local redevelopment projects and programs by encouraging public-private partnerships. In Florida, tax increment financing is derived from the Community Redevelopment Act of 1969, which is codified as Part III, Chapter 163 of the Florida Statutes. Once a CRA's local governing authority, such as the City of Tallahassee City Commission, has approved a community redevelopment plan and established a trust fund for the redevelopment plan, they may collect tax increment revenues to fund redevelopment projects and programs within the redevelopment area.

The tax increment revenues for a trust fund are provided from increases in the redevelopment district's annual assessed taxable value. The assessed value of the district on the date the trust fund is established is set as the baseline value and any increases (the tax increment revenues) above the baseline value are available for improvements to the area. The local governments, in this case the City of Tallahassee and Leon County, continue to receive ad valorem (property) taxes from the baseline value but any increases above the baseline value are provided to the CRA. The property appraiser determines any increase (the tax increment) above the baseline value and provides that information to the CRA, city and county. The CRA, in coordination with the City and County, determines the amount of tax increment due to the CRA based on the millage rates for the city and county. Of this amount, the City and County are required to contribute up to 95 percent of the tax increment to the CRA by December 31st of each year. The City and County retain 5 percent of the tax increment as a collection fee. As an example, Table 3 outlines how the tax increment was calculated in FY 2017. This example illustrates how tax increment was calculated using two different millage rates. Subsequent to FY 2017, the County uses the same millage rate as the City to calculate the tax increment.

Background Information:

- The 2016 taxable value, which was determined by the Leon County Property Appraiser, was used to determine the tax increment the CRA received in FY 2017, which started on October 1, 2016.

- Because the GFS Community Redevelopment Plan was adopted in June 2000, the 1999 value of the properties was used to establish the baseline value.
- The City's millage rate in 2016 was 4.1 mills per thousand dollars of value, or 0.0041.
- The County's millage rate in 2016 was 8.3144 mills per thousand dollars of value, or 0.008314.
- The CRA collected 95 percent of tax increment generated in taxable value from 2015 to 2016.

Table 3

| | |
|--|-----------------------|
| 2016 Taxable Value (FY 2017 TIF Revenue) | \$349,531,411 |
| 1999 Baseline Value | <u>-\$167,640,940</u> |
| Change in Taxable Value | \$181,890,471 |
| | |
| Tax Increment from City of Tallahassee: $\$181,890,471 \times 0.0041 \text{ mills} \times .95 =$ | \$708,463 |
| Tax Increment from Leon County: $\$181,890,471 \times 0.0083144 \times .95 =$ | <u>\$1,436,695</u> |
| | |
| Total Tax Increment Received by the CRA: | \$2,145,158 |

6.2. HOW CAN TIF BE USED?

Funds from the redevelopment trust fund may be used by the community redevelopment agency for the financing or refinancing of redevelopment projects and programs within an approved redevelopment district provided the project and/or programs are consistent with the approved community redevelopment plan. Section 163.387(6)(c), F.S., identifies the following eligible expenses:

- Administrative and overhead expenses directly or indirectly necessary to implement a community redevelopment plan adopted by the agency.
- Expenses of redevelopment planning, surveys and financial analysis, including the reimbursement of the governing body or the community redevelopment agency for such expenses incurred before the redevelopment plan was approved and adopted.
- The acquisition of real property in the redevelopment area.

- The clearance and preparation of any redevelopment area for redevelopment and relocation of site occupants within or outside the community redevelopment area (as provided in s. 163.370).
- The repayment of principal and interest or any redemption premium for loans, advances, bonds, bond anticipation notes and any other form of indebtedness.
- All expenses incidental to or connected with the issuance, sale, redemption, retirement, or purchase of bonds, bond anticipation notes, or other form of indebtedness, including funding of any reserve, redemption, or other fund or account provided for in the ordinance or resolution authorizing such bonds, notes, or other form of indebtedness.
- The development of affordable housing within the community redevelopment area.
- The development of community policing innovations.
- Expenses that are necessary to exercise the powers granted by the local government to the community redevelopment agency under s. 163.370, as delegated under s. 163.358.

6.3. HOW TIF CANNOT BE USED?

However, as described in F.S. 163.370(3) and summarized below, tax increment funds may not be used for the following purposes:

- To construct or expand administrative buildings for public bodies or police and fire buildings unless each taxing authority involved agrees or unless the construction or expansion is contemplated as part of a community policing innovation.
- Installation, construction, reconstruction, repair, or alteration of any publicly owned capital improvements or projects if such projects or improvements were approved by the governing body (in adopted capital improvement plan and/or budget) and scheduled to be installed, constructed, reconstructed, repaired, or altered within three years of the approval of the community redevelopment plan.
- General government operating expenses unrelated to the planning and carrying out of a community redevelopment plan.

6.4. GFS DISTRICT TIF REVENUES AND PROJECTIONS

TIF revenue is based on the annual increase (or decrease) in assessed/taxable property values and local government millage rates. The GFS District has been receiving TIF revenue since FY 2002. The TIF revenue listed in Table 4 includes actual (Final) revenue received from FY 2002 to FY 2020, the Estimated revenue for FY 2021 and staff projections of revenue from FY 2022 to FY 2038. With the exception of staff projections, the Estimated, Preliminary and Final taxable values are provided by the

Leon County Property Appraiser. From FY 2002 to FY 2020, the GFS District has generated \$32.1 million in tax increment for reinvestment in the district. The FY 2021 Estimated Taxable Value, if it does not significantly change prior to the Final Taxable Value notice in October, would increase that amount by \$3.8 million to \$35.9 million. Assuming an annual increase in taxable value of 4.0 percent starting in FY 2021, the GFS District is projected to generate approximately \$142.9 million in tax increment during the district's 37-year term.

From FY 2002 to FY 2020, the Final Taxable Value of the GFS District increased by over \$345.1 million, an average annual increase in taxable value of approximately 7.1 percent. Approximately \$46.7 million of the increase came from two expansions of the GFS District boundary in FY 2017 and 2018, which added approximately 403 acres of commercial, office and residential properties to the district. The district has also seen losses in taxable value. Between FY 2009 and 2013, as part of recession from the housing finance crisis, the taxable value of the GFS District dropped by approximately 31.8 percent, from \$419.5 million to \$286.2 million.

The amount of tax increment the CRA receives is dependent not only on the increase in taxable value from one year to the next, but the individual, annual millage rates adopted by the City and County which have varied over the years. In FY 2018, the City TIF contribution was based on 4.1 mils per thousand of taxable value and County contribution was based on 8.3144 mils of taxable value. In May 2018 the CRA, City and County approved an amendment to the interlocal agreement governing the GFS District that established millage parity, with the County contributing tax increment at the same millage rate as the City. Starting in FY 2019 the TIF contribution to the GFS District for both the City and County has been 4.1 mils each. This reduces the amount of tax increment the district received prior to the establishment of TIF parity by approximately 33.8 percent.

CRA investment in the GFS District has included, but has not been limited to, large-scale mixed-use developments, hotels, small-scale business improvement grants, large and small-scale affordable housing projects, infrastructure projects and large and small promotional/special event grants. Development projects currently under construction in the GFS District or under some level of permit review that may add taxable value to the GFS District in the next two to three years are listed below. None of these developments are currently receiving CRA financial assistance.

- Hyatt House at Tallahassee – 120 rooms and 6,247 square feet of retail space on west side of Railroad Avenue south of Gaines Street. Construction expected to be completed in early 2021. Estimated value is \$16.6 million.

- Hotel (Un-named)– 110 rooms on east side of Railroad south of Gaines Street. Submitted for Pre-Development review, no details on construction start/end date or estimated value.
- Gaines Street Hotel – 162 rooms with small retail component on west side of Stone Valley Way south of Gaines Street. Submitted for Pre-Development review, no details on construction start/end date or estimated value.
- Bronough Street Multi-Family Apartments – 12 apartments (6 efficiencies and 6 three-bedroom). Site plan has been approved but no construction activity.
- Magnolia Apartments – 110 affordable/workforce housing apartments. Submitted for Pre-Development review, no details on construction start/end date or estimated value.

Since late FY 2019, the CRA Board has focused on neighborhood investments based on multi-year investment plans developed and implemented by the neighborhoods with assistance from the City. These projects will have a significant, positive impact on the quality of life of residents in the district by improving housing, economic opportunities and neighborhood connectivity. At this point it is not clear how the COVID-19 pandemic might impact future taxable values increases in the GFS District. As a result, staff is projecting annual taxable values in the GFS District will increase by a conservative 4.0 percent from FY 2022 through FY 2038 when the district will sunset.

**TABLE 4: Greater Frenchtown/Southside Community
Redevelopment Area
Annual Tax Increment Income and Projections**

| Certified Tax Year Value | Fiscal Year Payment | Annual Taxable Value | Base Value Change | Tax Increment Revenue ² | | Tax Increment Change (%) | City Contribution | County Contribution |
|--------------------------|------------------------------------|----------------------|-------------------|------------------------------------|------------|--------------------------|---------------------|---------------------|
| | 1999 Base Value¹ | \$167,640,940 | | | | | | |
| 2001 | FY 2002 | \$189,154,313 | \$21,513,373 | \$240,552 | Final | 0.00% | \$65,401 | \$175,151 |
| 2002 | FY 2003 | \$202,219,451 | \$34,578,511 | \$380,253 | Final | 58.08% | \$105,119 | \$275,134 |
| 2003 | FY 2004 | \$225,835,188 | \$58,194,248 | \$668,463 | Final | 75.79% | \$204,553 | \$463,910 |
| 2004 | FY 2005 | \$254,334,899 | \$86,693,959 | \$1,008,077 | Final | 50.81% | \$304,729 | \$703,348 |
| 2005 | FY 2006 | \$294,147,999 | \$126,507,059 | \$1,471,024 | Final | 45.92% | \$444,672 | \$1,026,352 |
| 2006 | FY 2007 | \$358,387,589 | \$190,746,649 | \$2,118,337 | Final | 44.00% | \$670,474 | \$1,447,862 |
| 2007 | FY 2008 | \$398,730,490 | \$231,089,550 | \$2,169,357 | Final | 2.41% | \$695,619 | \$1,473,738 |
| 2008 | FY 2009 | \$419,514,411 | \$251,873,471 | \$2,646,793 | Final | 22.01% | \$768,447 | \$1,878,346 |
| 2009 | FY 2010 | \$351,798,085 | \$184,157,145 | \$2,020,664 | Final | -23.66% | \$647,312 | \$1,373,352 |
| 2010 | FY 2011 | \$339,625,729 | \$171,984,789 | \$1,887,103 | Final | -6.61% | \$604,527 | \$1,282,576 |
| 2011 | FY 2012 | \$305,741,420 | \$138,100,480 | \$1,515,307 | Final | -19.70% | \$485,423 | \$1,029,884 |
| 2012 | FY 2013 | \$286,243,835 | \$118,602,895 | \$1,353,696 | Final | -10.67% | \$416,889 | \$936,807 |
| 2013 | FY 2014 | \$286,557,287 | \$118,916,347 | \$1,357,273 | Final | 0.26% | \$417,991 | \$939,282 |
| 2014 | FY 2015 | \$292,635,280 | \$124,994,340 | \$1,426,646 | Final | 5.11% | \$439,355 | \$987,291 |
| 2014 | FY 2016 | \$340,271,858 | \$172,630,918 | \$2,052,353 | Final | 43.86% | \$688,797 | \$1,363,556 |
| 2016 | FY 2017 | \$349,531,411 | \$181,890,471 | \$2,145,158 | Final | 4.52% | \$708,463 | \$1,436,695 |
| | 2017 Base Value³ | \$173,275,771 | | | | | | |
| 2017 | FY 2018 | \$393,448,763 | \$220,172,992 | \$2,595,675 | Final | 21.00% | \$857,574 | \$1,738,101 |
| | 2018 Base Value⁴ | \$214,387,105 | | | | | | |
| 2018 | FY 2019 ⁵ | \$497,509,432 | \$283,122,327 | \$2,263,563 | Final | -12.79% | \$1,102,761 | \$1,160,802 |
| 2019 | FY 2020 | \$559,501,602 | \$345,114,497 | \$2,759,190 | Final | 21.90% | \$1,344,221 | \$1,414,969 |
| 2020 | FY 2021 | \$685,933,808 | \$471,546,703 | \$3,770,016 | Estimate | 36.63% | \$1,836,674 | \$1,933,341 |
| 2021 | FY 2022 | \$713,371,160 | \$498,984,055 | \$3,989,378 | Projection | 5.82% | \$1,943,543 | \$2,045,835 |
| 2022 | FY 2023 | \$741,906,007 | \$527,518,902 | \$4,217,514 | Projection | 5.72% | \$2,054,686 | \$2,162,827 |
| 2023 | FY 2024 | \$771,582,247 | \$557,195,142 | \$4,454,775 | Projection | 5.63% | \$2,170,275 | \$2,284,500 |
| 2024 | FY 2025 | \$802,445,537 | \$588,058,432 | \$4,701,527 | Projection | 5.54% | \$2,290,488 | \$2,411,040 |
| 2025 | FY 2026 | \$834,543,358 | \$620,156,253 | \$4,958,149 | Projection | 5.46% | \$2,415,509 | \$2,542,641 |
| 2026 | FY 2027 | \$867,925,093 | \$653,537,988 | \$5,225,036 | Projection | 5.38% | \$2,545,530 | \$2,679,506 |
| 2027 | FY 2028 | \$902,642,096 | \$688,254,991 | \$5,502,599 | Projection | 5.31% | \$2,680,753 | \$2,821,845 |
| 2028 | FY 2029 | \$938,747,780 | \$724,360,675 | \$5,791,264 | Projection | 5.25% | \$2,821,385 | \$2,969,879 |
| 2029 | FY 2030 | \$976,297,691 | \$761,910,586 | \$6,091,475 | Projection | 5.18% | \$2,967,642 | \$3,123,833 |
| 2030 | FY 2031 | \$1,015,349,599 | \$800,962,494 | \$6,403,695 | Projection | 5.13% | \$3,119,749 | \$3,283,946 |
| 2031 | FY 2032 | \$1,055,963,583 | \$841,576,478 | \$6,728,404 | Projection | 5.07% | \$3,277,940 | \$3,450,464 |
| 2032 | FY 2033 | \$1,098,202,126 | \$883,815,021 | \$7,066,101 | Projection | 5.02% | \$3,442,460 | \$3,623,642 |
| 2033 | FY 2034 | \$1,142,130,211 | \$927,743,106 | \$7,417,306 | Projection | 4.97% | \$3,613,559 | \$3,803,747 |
| 2034 | FY 2035 | \$1,187,815,420 | \$973,428,315 | \$7,782,559 | Projection | 4.92% | \$3,791,503 | \$3,991,056 |
| 2035 | FY 2036 | \$1,235,328,037 | \$1,020,940,932 | \$8,162,423 | Projection | 4.88% | \$3,976,565 | \$4,185,858 |
| 2036 | FY 2037 | \$1,284,741,158 | \$1,070,354,053 | \$8,557,481 | Projection | 4.84% | \$4,169,029 | \$4,388,452 |
| 2037 | FY 2038 | \$1,336,130,805 | \$1,121,743,700 | \$8,968,341 | Projection | 4.80% | \$4,369,192 | \$4,599,149 |
| \$141,867,526 | | | | | | | \$64,458,810 | \$77,408,716 |

Notes:

1. The baseline of properties in the GFS District when the redevelopment plan was adopted and the trust fund established in June 2000.
2. Tax increment revenue descriptions: Final is based on the Final Tax Roll Value issued by the Leon County Property Appraiser (LCPA) in October, Preliminary is based on the Preliminary Tax Roll Value issued by the LCPA in July, Estimate is based on the Estimated Taxable Value prepared by the LCPA in June, and Projections are staff assumptions based on anticipated increases or decreases in property values.
3. The revised baseline value following the expansion of the GFS boundary includes the 26 parcels on the east side of S. Monroe Street between Van Buren and Perkins Streets in October 2017. The millage rate for the 26 new parcels for both the City and County in FY 2018 was based on the City's millage rate of 4.1 mils.
- 4 The revised baseline value following the addition of 552 Southside parcels to the GFS District in 2018.
5. Starting in FY 2019 the County's tax increment contribution is based on the City's millage rate, which is currently 4.1 mils.

SECTION 7: **STATUTORY REQUIREMENTS**

This section addresses the specific requirements of Chapter 163, Part III, Florida Statutes, as they relate to the preparation and adoption of the Greater Frenchtown/Southside Community Redevelopment Plan in accordance with Sections 163.360 and 163.362. Provided below is a brief synopsis of each Sub-Section requirement from 163.360 and 163.362 and a brief description of how the redevelopment plan and adoption process meet those requirements.

163.360 – COMMUNITY REDEVELOPMENT PLANS

Section 163.360 (1), Determination of Slum, Blight or Affordable Housing Shortage by Resolution

This section requires that a local governing body determine by resolution an area to be a slum, blighted and/or having a shortage of housing affordable to residents of low or moderate income, including the elderly and designate such area as appropriate for community redevelopment before a redevelopment area can be established.

Action:

On August 26, 1998, July 13, 2016 and May 23, 2018, the City of Tallahassee City Commission adopted Resolution Numbers 98-R-0039, 16-R-29 and 18-R-0023 respectively, establishing the conditions of blight in the Greater Frenchtown/Southside Redevelopment Area and designating the area as appropriate for community development.

Section 163.360 (2)(a), Conformance with the Comprehensive Plan

The Local Planning Agency is charged with determining that the Greater Frenchtown/Southside Community Redevelopment Plan is in conformance with the adopted Comprehensive Plan.

Action:

On January 5, 2021, the Tallahassee/Leon County Local Planning Agency found that the Greater Frenchtown/Southside Community Redevelopment Plan conforms with the City's Comprehensive Plan.

Section 163.360 (2)(b), Completeness

This section requires that the redevelopment plan be sufficiently complete to address land acquisition, demolition and removal of structures, redevelopment, improvements and rehabilitation of properties within the redevelopment area as well as zoning or planning changes; land uses, maximum densities and building requirements.

Action:

These issues are addressed in the Development Plan section of the Redevelopment Plan and in the GFS Investment and Strategic Plan.

Section 163.360 (2)(c), Development of Affordable Housing

This section requires the redevelopment plan to provide for the development of affordable housing or to state the reasons for not addressing affordable housing.

Action:

The Greater Frenchtown/Southside Community Redevelopment Plan anticipates the need to maintain and provide affordable housing within the redevelopment area. The redevelopment agency will coordinate with the local housing authority to seek opportunities for the development of affordable housing. Specifically, affordable housing development is addressed in Section II, Priority Area 2, Impact on Poverty and in the GFS Investment and Strategic Plan.

Section 163.360 (3), Community Policing Innovations

The redevelopment plan may provide for the development and implementation of community policing procedures.

Action:

The Greater Frenchtown/Southside Redevelopment Plan supports the use of community policing as stated in Section II, Priority Area 3, Public Safety of the Development Plan.

Section 163.360 (4), Plan Preparation and Submittal Requirements

The community redevelopment agency must prepare a community redevelopment plan. Prior to considering this plan, the redevelopment agency will submit the plan to the local planning agency for review and recommendation as to its conformity with the comprehensive plan.

Action:

The City Commission has authorized the preparation of this Community Redevelopment Plan through the services of the Community Redevelopment Agency. On month, day, year, the Local Planning Agency determined that the redevelopment plan conformed with the City's Comprehensive Plan.

Section 163.360 (5)(6)(7)(a)(b)(c)(d)(e), Plan Approval

163.360 (5). The community redevelopment agency will submit the redevelopment plan, along with written recommendations, to the governing body and each taxing authority operating within the boundaries of the redevelopment area.

Action:

The Tallahassee Community Redevelopment Agency submitted the Greater Frenchtown/Southside Community Redevelopment Plan, along with written recommendations, to the City of Tallahassee City Commission and the Leon County Board of Commissioners on or near month, day, year. Following this, the City Commission will proceed with a public hearing on the redevelopment plan as outlined in subsection (6), below.

163.360 (6)(a). The governing body shall hold a public hearing on the community redevelopment plan after public notice by publication in a newspaper having a general circulation in the area of operation of the Greater Frenchtown/Southside Community Redevelopment Area.

Action:

A public hearing on the Greater Frenchtown/Southside Community Redevelopment Plan was held on month, day, year in the Tallahassee City Commission Chambers, City Hall. A public hearing notice describing the time, date, place and purpose of the public hearing, identifying generally the redevelopment area covered by the plan and outlining the general scope of the plan was published in the Tallahassee Democrat on month, day, year.

163.360 (7). Following the public hearing described above, the City Commission may approve the redevelopment plan if it finds that:

(a) A feasible method exists for the location of families who will be displaced from the Redevelopment area in decent, safe and sanitary dwelling accommodations within their means and without undue hardship to such families;

Action:

To minimize the relocation impact, the Agency will provide supportive services and equitable financial treatment to any individuals, families and businesses subject to relocation. When feasible, the relocation impact will be mitigated by assisting relocation within the immediate neighborhood and by seeking opportunities to relocate within new/redeveloped buildings that will contain residential and commercial space.

(b) The Redevelopment Plan conforms to the general or comprehensive plan of the county or municipality as a whole;

Action:

The Tallahassee/Leon County Planning Commission found the Greater Frenchtown/Southside Community Redevelopment Plan conforms to the City's Comprehensive Plan on month, day, year.

(c) The Redevelopment Plan gives due consideration to the utilization of community policing procedures and to the provision of adequate park and recreational areas and facilities that may be desirable for neighborhood improvement, with special consideration for the health, safety and welfare of children residing in the general vicinity of the site covered by the Plan;

Action:

The need to utilize community policing procedures are contained in the Development Plan, Section II, Priority Area 3, Public Safety. The need for improved recreational opportunities are contained in the Development Plan, Section II, Priority Area 4, Quality of Life.

(d) The Redevelopment Plan will afford maximum opportunity consistent with the sound needs of the county or municipality as a whole, for the rehabilitation or redevelopment of the Redevelopment Area by private enterprise.

Action:

The need for, and role of, private enterprise/investment to ensure the successful rehabilitation or redevelopment of the redevelopment area is described throughout the Redevelopment Plan Elements section of the Greater Frenchtown/Southside Community Redevelopment Plan.

(e) Maintenance of coastal area evacuation time and protection of property against exposure to natural disasters.

Action:

Not applicable. This is for redevelopment areas that are not located in a coastal tourist area.

Section 163.360 (8)(a)(b), Land Acquisition

These sections of the statute establish requirements for the acquisition of vacant land for the purpose of developing residential and non-residential uses. The Redevelopment Plan supports future development of both residential and non-residential uses at various locations in the redevelopment area as defined in the Redevelopment Plan. In addition to the potential acquisition of vacant land by the Redevelopment Agency for residential and non-residential uses, the GFS Investment and Strategic Plan also identifies strategies that will promote and facilitate private sector investment in vacant land acquisition for these purposes.

Section 163.360 (9), Full Force and Effect

Upon approval by a governing body of a community redevelopment plan or any modification thereof, the plan and/or modification shall be deemed in full force and effect.

Action:

None, this sub-section will apply once the City Commission adopts the Greater Frenchtown/Southside Community Redevelopment Plan.

Section 163.360 (10), Need as a Result of Emergency

Provides guidance for development of a redevelopment plan when an area has been designated as blighted as the result of an emergency under Chapter 252.34(4).

Action:

Not Applicable.

Chapter 163.362 - Contents of Community Redevelopment Plans

Every community redevelopment plan shall:

Chapter 163.362 (1) Legal Description

Contain a legal description of the boundaries of the redevelopment area and the reasons for establishing such boundaries shown in the plan.

Action:

A legal description of the boundaries of the redevelopment area and the reasons for establishing the boundaries are contained in Resolutions 98-R-0039, 16-R-0029 and 18-R-0023, adopted by the City of Tallahassee City Commission on August 26, 1998, July 13, 2016 and May 23, 2018 respectively. Appendix E contains the legal description of the redevelopment area.

Chapter 163.362 (2) Show By Diagram and General Terms:

(a) Approximate amount of open space and the street layout.

Action:

This task is accomplished through the Redevelopment Plan maps and diagram.

(b) Limitations on the type, size, height and proposed use of buildings.

Action:

The City's zoning ordinance and land development regulations will continue to provide the regulatory framework for any building dimension or style limitations.

(c) The approximate number of dwelling units.

Action:

Based on current development proposals, the future land use concepts contained in the Redevelopment Plan and the expressed desire to increase residential occupancy in the Redevelopment Area, it can be reasonably expected that more than 3,750 residential dwelling units will be developed over the 18 year period.

(d) Such property as is intended for use as public parks, recreation areas, streets, public utilities and public improvements of any nature.

Action:

A current summary of these uses and facilities is contained in the Existing Conditions and Inventory Report in Appendix B. Proposed future uses and activities of this nature are described in the Redevelopment Plan.

Chapter 163.362 (3) Neighborhood Impact Element

To minimize the relocation impact, the Agency will provide supportive services and equitable financial treatment to any individuals, families and businesses subject to relocation. When feasible, the relocation impact will be mitigated by assisting relocation

within the immediate neighborhood and by seeking opportunities to relocate within new/redeveloped buildings that will contain residential and commercial space.

The Neighborhood Impact Element is included as Appendix A to the Greater Frenchtown/Southside Community Redevelopment Plan.

Chapter 163.362 (4) Publicly Funded Capital Projects

Identify specifically any public funded capital projects to be undertaken within the community redevelopment area.

Action:

A list of publicly funded projects located within the boundaries of the redevelopment area is contained in the Capital Projects section of the plan. Information for this section was obtained from the City's Capital Improvement Plan and the Capital Region Transportation Planning Agency Long-Range Plan, which defines anticipated capital expenditures for City Departments through 2024 and transportation projects through 2030.

Chapter 163.362 (5)(6) Safeguards and Retention of Control

Contain adequate safeguards that the work of redevelopment will be carried out pursuant to the plan. Provide for the retention of controls and establishment of any restrictions or covenants running with land sold or leased for private use for such periods of time and under such conditions as the governing body deems necessary to effectuate the purposes of this part.

Action:

The following safeguards and procedures will help ensure redevelopment efforts in the redevelopment area are carried out pursuant to the redevelopment plan:

The Greater Frenchtown/Southside Community Redevelopment Plan and the GFS Investment and Strategic Plan is the guiding document for future development, redevelopment and ancillary programs, projects and activities in and for the redevelopment area. In order to assure that redevelopment will take place in conformance with the projects, goals and policies expressed in this plan, the Tallahassee Community Redevelopment Agency will utilize the regulatory devices, instruments and systems used by the City of Tallahassee to permit development and redevelopment within its jurisdiction. These include but are not limited to the Comprehensive Plan, the Land Development Code, the Zoning Code, adopted design guidelines, performance standards and City authorized development review, permitting and approval processes. Per Florida

Statute, the Tallahassee City Commission retains the vested authority and responsibility for:

1. The power to grant final approval to Redevelopment Plans and modifications.
2. The power to authorize issuance of revenue bonds as set forth in Section 163.385.
3. The power to approve the acquisition, demolition, removal or disposal of property as provided in Section 163.370(3) and the power to assume the responsibility to bear loss as provided in Section 163.370(3).

The Redevelopment Agency Board shall be fully subject to the Florida Sunshine Law and will convene, at a publicly noticed meeting, at least on a quarterly basis in a public forum.

In accordance with Section 163.356(3)(c), by March 31 of each year, the Redevelopment Agency shall file an Annual Report with the City of Tallahassee detailing the Agency's activities for the preceding fiscal year. The report shall include a complete financial statement describing assets, liabilities, income and operating expenses. At the time of filing, the Agency shall publish in a newspaper of general circulation a notice that the report has been filed with the City and is available for inspection during business hours in the office of the City's Treasurer-Clerk and the Tallahassee Community Redevelopment Agency.

The Tallahassee Community Redevelopment Agency shall maintain adequate records to provide for an annual audit, which shall be conducted by an independent auditor and will be included as part of the City of Tallahassee Comprehensive Annual Financial Report for the preceding fiscal year. A copy of the Agency audit, as described in the CAFR, will be forwarded to each taxing authority.

The Agency shall provide adequate safeguards to ensure that all leases, deeds, contracts, agreements and declarations of restrictions relative to any real property conveyed shall contain restrictions and/or covenants to run with the land and its uses, or other provisions necessary to carry out the goals and objectives of the redevelopment plan.

The redevelopment plan may be modified, changed, or amended at any time by the Tallahassee Community Redevelopment Agency and City Commission provided that; if modified, changed, or amended after the lease or sale of property by the Agency, the modification must be consented to by the developer or redevelopers of such property or their successors in interest affected by the proposed modification. Where the proposed modification will substantially change the plan as previously approved by the governing body, the City Commission will similarly approve the modification. This means that if a developer acquired title, lease rights, or other form of development agreement from the

Agency to a piece of property within the redevelopment area with the intention of developing it in conformance with the redevelopment plan, any amendment that which might substantially affect his/her ability to proceed with that development would require his/her consent.

When considering modifications, changes, or amendments in the redevelopment plan, the Agency will take into consideration the recommendations of interested area property owners, residents and business operators. Proposed minor changes in the Plan will be communicated by the agency responsible to the affected property owner(s).

Chapter 163.362 (7) Assurance of Replacement Housing for Displaced Persons

Provide assurances that there will be replacement housing for the relocation of persons temporarily or permanently displaced from housing facilities within the community redevelopment area.

Action:

To minimize the relocation impact, the Agency will follow the City's Temporary Relocation Policy and provide supportive services and equitable financial treatment to any individuals, families and businesses subject to relocation.

Chapter 163.362 (8) Element of Residential Use

Provide an element of residential use in the redevelopment area if such use exists in the area prior to the adoption of the plan or if the plan is intended to remedy a shortage of housing affordable to residents of low to moderate income, including the elderly.

Action:

There are residential uses of various types and character, including, single-family, multi-family, rental units, owner occupied units and detached units in existence in the redevelopment area at the time of this writing. The efforts undertaken by the Agency, as described in this Redevelopment Plan, are intended to retain and enhance a high quality of residential use, particularly with regard to developing and maintaining sustainable neighborhoods. Redevelopment program activities will strive to cultivate the positive neighborhood characteristics cited by the community during public workshops and reduce or eliminate any negative characteristics.

The establishment of a revitalized and expanded residential base within the redevelopment area and adjacent neighborhoods is essential to achieve a successful

economic redevelopment program. Residents living within the redevelopment area will comprise components of the work force and the market, which will generate economic activity.

Chapter 163.362 (9) Statement of Projected Costs

Contain a detailed statement of the projected costs of development, including the amount to be expended on publicly funded capital projects in the community redevelopment area and any indebtedness of the community redevelopment agency or the municipality proposed to be incurred for such redevelopment if such indebtedness is to be repaid with increment funds.

Action:

Project costs and funding sources are described in the Capital Projects section of the redevelopment plan. Included are projects identified in the City's Capital Improvements Plan, Florida Department of Transportation and the Blueprint 2000 Plan.

Chapter 163.362 (10) Duration of Plan

Provide a time certain for completing all redevelopment financed by increment revenues.

Action:

The Greater Frenchtown/Southside Community Redevelopment Plan shall remain in effect and serve as a guide for the future redevelopment activities in the redevelopment area through 2038.

Chapter 163.362 (11) Statutory Predisposition

This section provides relief to some of the subsections of Section 163.360, if the redevelopment plan was adopted before Chapter 84-356, Laws of Florida, became a law.

Action:

Not Applicable.

SECTION 8

APPENDIX A: EXISTING CONDITIONS

This appendix contains information related to the Greater Frenchtown/Southside Community Redevelopment Area (GFS District). This database of community goals, land use and demographic conditions, studies, regulations, programs, and policies has been used to analyze opportunities and constraints within the GFS District and formulate the Community Redevelopment Plan (Redevelopment Plan) concepts. The appendix consists of the following components:

- Community Vision Statements/Goals
- Plans Compatibility Report
- Inventory of Existing Conditions
 - Population and Demographics
 - Land Use
 - Future Land Use
 - Land Development Regulations
 - Historic Properties
 - Public Facilities
 - Mobility
 - Parking
 - Environmental Characteristics

Table A.1 highlights twelve community goals which were derived from vision statements residents recorded at community workshops. Residents and business owners later prioritized the twelve goals by order of importance.

Table A. 1

| Number | Rank | Community Goals | City Priority Area |
|--------|------|---|-----------------------|
| 1 | 1 | Encourage a thriving economic base | Economic Development |
| 2 | 2 | Facilitate quality, affordable, mixed-income housing | Impact on Poverty |
| 3 | 3 | Increase neighborhood safety | Public Safety |
| 4 | 4 | Encourage quality education | Impact on Poverty |
| 5 | 5 | Promote a healthy community | Quality of Life |
| 6 | 6 | Improve open space and neighborhood beautification | Quality of Life |
| 7 | 7 | Enhance existing and promote new infrastructure | Public Infrastructure |
| 8 | 7 | Support arts, culture and entertainment opportunities | Quality of Life |
| 9 | 7 | Emphasize historical significance | Economic Development |
| 10 | 8 | Support social services | Impact on Poverty |
| 11 | 9 | Enhance transportation opportunities | Public Infrastructure |
| 12 | 10 | Facilitate citizen/community participation | Public Trust |

Plans Compatibility Report

Consistency between the Redevelopment Plan and existing plans and programs is essential for achieving greater community goals. Implementation of the Redevelopment Plan will be accomplished in coordination with existing plans and programs. It is not the intent of the GFS Redevelopment Plan to replace, or for the CRA to be responsible for, the implementation of previously approved plans and programs. The most significant plans affecting the GFS District are described below:

- **Finding of Necessity for Redevelopment, Tallahassee, FL**, adopted in 1998 and as amended. A survey was conducted in 1998 in a 581 block study area in Tallahassee to determine the extent of the physical blight. A second finding of necessity for an additional 26 parcels along South Monroe Street was adopted in

2016. A third finding of necessity was adopted in 2018 adding three southside areas, including South City to the GFS District.

- **City of Tallahassee Five-Year Strategic Plan** adopted in April 2019 and as amended. The City's strategic plan encompasses the City's mission, vision and organizational values. The Plan focuses on seven priority areas over a five-year period (2020-2024): Economic Development, Impact on Poverty, Organizational Effectiveness, Public Infrastructure, Public Safety, Public Trust and Quality of Life. The six priority areas in the GFS Redevelopment Plan are closely related and tied to the City's priority areas.
- **Bond Neighborhood First Plan** adopted in 2018 and as amended. The Bond Neighborhood First Plan was developed through a multi-step planning process guided by the City's Parks Recreation and Neighborhood Affairs Department designed to assist the neighborhood with developing an action plan to address four priority areas: Community Beautification, Economic Development and Resident Empowerment, Land Use and Neighborhood Safety and Crime Prevention. The CRA Board committed \$6.4 million over three years for the implementation of the Bond Plan. The goals, objectives, and strategies outlined in the GFS Redevelopment Plan and the GFS Strategic Investment Plan are directly related to the strategies in the Bond Plan.
- **Other Bond Sub-Area Plans and Projects**
 - The FAMU Master Plan: One of the major objectives of the plan is to clearly identify a sense of place for FAMU within the community. This would be accomplished, in large part, by identification of primary entrances along the perimeter of campus which include parts of the Bond Neighborhood.
- **Frenchtown Neighborhood First Plan** anticipated adoption date December 2020. The Frenchtown Neighborhood First Plan is being developed through the same multi-step planning process as the Bond Plan, guided by the City's Parks Recreation and Neighborhood Affairs Department. The Frenchtown community has developed three priority areas: (1) Land Use & Transportation and Placemaking & Neighborhood Image; (2) Economic Development & Community Reinvestment and Housing and (3) Neighborhood Safety & Crime Prevention and Health & Resident Empowerment. The goals, objectives and strategies outlined in the GFS Redevelopment Plan and the GFS Strategic Investment Plan are directly related to the strategies in the Frenchtown Plan.

- **Frenchtown Placemaking Plan** adopted in September 2019 and as amended. The purpose of this document is to identify opportunities to strengthen the Frenchtown Community. There are two overarching goals for this plan, (1) Ensure that development patterns in the Frenchtown community moving forward are consistent with the vision of the community; and (2) Ensure that funding from the sale of The Standard parcel, Community Redevelopment Agency (CRA) Funding and other funding being allocated through this process will be used in a way that produces tangible outcomes.

- **Other Frenchtown Sub-Area Plans and Projects**
 - The Florida State University Master Plan; (revised in 2015). Relevant components of the Plan include the following:
 - The Arena District is a 30-acre site including the Donald L. Tucker Civic Center and adjacent properties. The plans call for a new College of Business and a hotel with a convention center.
 - An “Outer Traffic Loop,” bounded by Tennessee Street, Macomb Street, Gaines Street and Stadium Drive. The purpose of the loop is to remove through traffic from entering the campus.
 - Redevelopment along Tennessee Street will have an orientation to the street to visually and functionally tie the campus to the pedestrian and vehicular traffic.

- **The Providence Community Neighborhood Renaissance Plan** adopted by City Commission Resolution 03-R-39, 2003. The Plan includes five major themes: getting everyone involved, keeping the neighborhood clean and safe, taking care of our people, we must own our own neighborhood and a face for the future. The Providence Community is working with the City’s Parks, Recreation and Neighborhood Affairs Department to update their Renaissance Plan into a Neighborhood First Plan.

- **Other Providence Sub-Area Plans and Projects**
 - **Providence Neighborhood Overlay:** This overlay (Section 10-168(c)) applies to portions of the Providence Community sub-area, based on the Providence Renaissance Plan (See map 9). The overlay prohibits cocktail lounges and bars; retail package liquor stores; pet day care; and hotels, motels, inns, single room occupancy hotels and boarding houses in those portions of the overlay zoned Central Urban -45. Allowed uses in portions of the overlay zoned Central Urban-26 or Central Urban-18 are limited to residential; passive recreation; active recreation, limited to daytime hours; community facilities; personal services; and accessory uses.

- Airport Gateway: Springhill Road to Lake Bradford Road/Blueprint: This project creates a gateway into Tallahassee from the airport. The improvements along Lake Bradford Road are intended to complement the Gaines Street redevelopment and support further redevelopment by creating an attractive and safe pedestrian, bicycle and vehicular environment within walking distance to FSU, FAMU and Gaines Street.
- Leon County Research and Development Authority Strategic Plan 2019 – 2021: Vision Statement: The LCRDA will be an economic driver for the community through the creation of vibrant programs, a collaborative environment, and inviting state of the art spaces where creative people want to live, work and play.
- **City of Tallahassee Downtown Community Redevelopment Plan** adopted 2004 and as amended. There are many similar themes between the Downtown Community Redevelopment Plan and the GFS Redevelopment Plan. The following elements of the Downtown Redevelopment Plan may specifically influence the GFS Redevelopment Plan:
 - Streetscape improvements on Tennessee Street and Monroe Street
 - Gaines Street Revitalization. Gaines Street Area improvements such as streetscaping and gateway treatments, high density developments, reuse of warehouses, plans for pedestrian connectivity and expansion of student housing. It is noted that many of these projects have been achieved since the adoption of the Downtown Plan in 2004.
- **Greater Frenchtown/Southside CRA Investment Plan** adopted in 2015 for Fiscal Years 2016 – 2021, and as amended. To efficiently implement the GFS Redevelopment Plan, the Investment Plan has been revised and renamed the
- **Greater Frenchtown/Southside Strategic Investment Plan**. The GFS Strategic Investment Plan is a tool to implement the GFS Redevelopment Plan. It is a five-year plan that establishes funding for both programs and projects that may be implemented throughout the GFS District.
- **City of Tallahassee Sidewalk Program** adopted April 2015 and as amended. This is a prioritized list of proposed sidewalks in the City. Sidewalk projects within the CRA that are ranked within the first 50 projects in the sidewalk program are listed in the narrative of the Redevelopment Plan for the relevant sub-area. (The projected cost for the first 50 projects is approximately \$20 million.)
- **Tallahassee-Leon County Comprehensive Plan**. The Comprehensive Plan is adopted by the City and sets the foundation for future development in the community. It establishes goals, objectives and policies for several key issues,

including land use, infrastructure, housing, parks and open space. Pursuant to State law, all development must be consistent with the Comprehensive Plan.

Future Land Use Categories: Redevelopment is significantly affected by the future land use element of the Comprehensive Plan. Future land use categories established in the element identify the broad range of uses and densities and intensities that may be allowed on a property. The categories that apply to private property within the Area are **Residential Preservation, High Intensity Activity Center, Central Urban, Central Core, Suburban, and University Transition**. (See Map B.3, Future Land Use)

The Residential Preservation category is intended to protect existing stable and viable residential areas from incompatible land use intensities and density intrusions. The Comprehensive Plan includes policies that are intended to protect existing residential areas from the encroachment of incompatible uses that are destructive to the character and integrity of the residential environment.

The other future land use categories applicable to private property generally allow mixed use development at higher densities (ranging from 45 to 150 dwelling units per acre) and intensities (ranging from approximately 20,000 square feet of non-residential development per acre to no limit). See the future land use section of this appendix for a description of each category.

Southern Strategy: The portion of the GFS District south of FAMU Way falls within the Comprehensive Plan's Southern Strategy (The Southern Strategy Area is shown on Map B.3A). Future Land Use Element Goal 11 states: *"The goal of the Southern Strategy is to encourage quality land development and redevelopment which results in increased population growth toward the southern part of the Tallahassee urban area, to retain and increase employment opportunities and to attain an income mix in the Southern Strategy Area that is comparable to the remainder of the urbanized County. To achieve this goal, the Southern Strategy will seek to reverse the trend of population loss in the urban core area, reverse the continued increase of families that are living below the poverty level in this area and to stop the further physical deterioration of this vital part of the community. This goal is also to be achieved through considered land development decisions, capital investments and policies by all levels of*

government so as to serve as a catalyst for private sub-area investment in the area. Such decisions are to be based on a sound balance of social, economic and physical development criteria that are designed to make better use of the available resources to the south, while lessening development pressure in the north and east. “

General Goals, Objectives, and Policies: The Comprehensive Plan also contains goals, objectives and policies that discourage urban sprawl, promote increased mobility choices (including transit, walking and cycling) and protect existing residential areas from the encroachment of incompatible uses.

- **Tallahassee Land Development Code.** The Land Development Code contains regulations regarding the use of land (the Zoning Code) and requirements for development (such as parking and stormwater management requirements). The Zoning Code, including the Multimodal Transportation District Zoning Overlay, is described in greater detail in the land development regulation section of this appendix.

- **Blueprint Intergovernmental Agency.** Blueprint is the name of the agency funded through the one penny sales tax for a variety of infrastructure projects throughout the City and County. These infrastructure projects include road widenings, stormwater improvements and parks and trails. Blueprint also funds improvements to specifically designated “Placemaking” areas. In these areas, a variety of coordinated improvements are intended to create a unique sense of place. Blueprint infrastructure and Placemaking projects within the CRA district are noted below.
 - **South Adams and South Monroe Placemaking, Blueprint:** The Blueprint project is intended to create a more pedestrian, bicycle and transit friendly environment through the installation of South Monroe Street medians from FAMU Way/Oakland Avenue to Magnolia Avenue. Other streetscape improvements may include: sidewalks; lighting; signage; landscaping; underground utilities; intersection crossings at South Monroe Street and Adams Street; and on-street parking (where possible) on Harrison Street, Pershing Street, Jennings Street, Perkins Road and Kestner Street.
 - **FAMU Entry Way, Blueprint:** This project is intended to provide a prominent gateway to FAMU through intersection enhancements to make access to the campus easier and safer. Intersections designated for improvement include Palmer Avenue/Adams Street, Osceola Street/Adams Street, and Perry

- Street/Gamble Street. The project also includes signage to beautify and emphasize the entrances to Florida A&M University.
- Orange Avenue/Meridian Road Placemaking/Blueprint: This project is intended to promote the revitalization of the commercial area from Orange Avenue north to the Town South shopping center through stormwater improvements and enclosure of the East Drainage Ditch, beautification of a stormwater facility south of Orange Avenue and construction of a StarMetro Superstop (improved bus shelter where several routes intersect).
 - Magnolia Drive-Use Trail, Blueprint and Florida Department of Transportation: This project is intended to improve pedestrian and cycling mobility through construction of 10-foot multi use trail from South Adams to Meridian.
- **Economic Development Strategic Plan** adopted October 2016, and as amended. The one penny sales tax that funds Blueprint infrastructure projects also earmarks \$90 million for economic development. The City and County Commissions have recently adopted a strategic plan to guide the use of these funds to support the expansion of existing businesses, help create new businesses and to recruit businesses.
 - **Capital Area Cultural Plan** adopted January 2014 and as amended. The Cultural Plan contains numerous recommendations related to the CRA plan priority areas of economic development and quality of life. Key Cultural Plan recommendations that potentially support activities in the Redevelopment Area are listed below:
 - City of Tallahassee and Leon County should continue to identify and support districts with cultural components by providing appropriate wayfinding, parking opportunities and transportation links for ease of accessibility to arts, culture and heritage entities.
 - Promote more “Art in Public Spaces,”
 - Make funding available for current and future festivals, subject to annual assessment and evaluation determined by the grantor.
 - **Capital Region Transportation Planning Agency (CRTPA), Year 2040 Long-Range Transportation Plan,** adopted 2015 and as amended. The CRTPA is responsible for all aspects of transportation planning in a multi-county area. The Year 2040 Long-Range Plan is a list of transportation projects encompassing roadway, transit, bicycle and pedestrian improvements that are needed and can be funded up to the Year 2040. Each year the CRTPA approves a five-year funding plan drawn from projects from the long-range plan. Projects listed in the five-year plan are noted in the narrative in the Redevelopment Plan for the relevant sub-area.

- **Leon County School Board Safe Routes to School:** The Safe Routes to School Plan contains an analysis of each school zone in the Redevelopment Area. The analysis includes an assessment of safety issues related to student travel to and from school and identifies programs, policies and projects to improve conditions. Projects in the Safe Routes Plan that are within the Redevelopment Area are noted in the narrative in the Redevelopment Plan for the relevant sub-area.

- **FAMU Way/Lake Bradford Sub-Area Plans and Projects**
 - **Lake Bradford Road commercial corridor zoning overlay:** This overlay (Section 10-168(b)) applies to the portion of Lake Bradford Road located within the Gaines Street Revitalization Plan area (see Map 5). The overlay allows highway commercial services and related uses, including drive-in facilities, such uses are not allowed elsewhere in the Gaines Street revitalization area.
 - **Airport Gateway: Springhill Road to Lake Bradford Road, Blueprint:** This project creates a gateway into Tallahassee from the airport. The improvements along Lake Bradford Road are intended to complement the Gaines Street redevelopment and support further redevelopment by creating an attractive and safe pedestrian, bicycle, and vehicular environment within walking distance to FSU, FAMU and Gaines Street.
 - **The FSU Master Plan:** FSU owns numerous properties adjacent to the FAMU Way/Lake Bradford sub-area. Major properties include the Donald L. Tucker Civic Center and the O'Connell block immediately to the Civic Center's south. FSU's plans for this area, now referred to as the "Arena District" are described above. Additionally, the Master Plan calls for an Academic Support Building to be constructed on FSU property east of Lake Bradford Road, south of Gaines Street. The Master Plan also calls for FSU to continue to work with the City to promote quality development along the Gaines Street corridor.
 - **The FAMU Master Plan:** One of the major objectives of the plan is to clearly identify a sense of place for FAMU within the community. This would be accomplished, in large part, by identification of primary entrances along the perimeter of campus.

- **South Monroe/South Adams Sub-Area Plans and Projects**
 - **The FAMU Master Plan:** One of the major objectives of the plan is to clearly identify a sense of place for FAMU within the community. This would be accomplished, in large part, by development of a perimeter roadway system.

- South Monroe/Adams Corridor Action Plan (adopted June 2011): The Plan contains goals and objectives to:
 - Make safe, comfortable streets for pedestrians, transit users and cyclists and a suitable gateway to the Capital City.
 - Improve the appearance, comfort and safety of public streets and private property.
 - Encourage urban infill and mixed-use buildings.
 - Inform the public of business incentives, redevelopment assistance, Codes and Code Enforcement.
 - Support local business and bring in new business.
 - Implement an initial Placemaking Project.
 - Follow with similar improvements to all east-west streets in the Corridor.

- South City Sub-Area Plans and Projects
 - Tallahassee Housing Authority Orange Avenue Apartments Rehabilitation includes demolishing 200 public housing units, replacing them with 240 new public housing units, as part of a 500-unit mixed income development.
 - StarMetro Superstop, a Blueprint project near Orange Avenue and S. Meridian Street transforming a temporary park into a bus transfer station.

Inventory of Existing Conditions

The Inventory Summary documents the existing conditions in the Redevelopment Area. This data was used in preparation of the recommendations in the Redevelopment Plan.

Population and Demographics: Redevelopment Area Compared to the City of Tallahassee

The following analysis provides data on the socioeconomic conditions in the Redevelopment Area. It is not the role of the CRA to directly address such issues of household income and employment. This data, however, provides a context for developing strategies within the Redevelopment Area.

The estimated population of the Redevelopment Area in 2019 was 13,236; this is 6.8 percent of the total City of Tallahassee population of 195,713. Table A.2 shows key demographic characteristics in the Redevelopment Area and the City of Tallahassee in 2000 and 2019.

Table A.2: City of Tallahassee and Redevelopment Area Demographics

| | Redevelopment Area | | | City of Tallahassee | | |
|--|--------------------|-------------------|----------------|---------------------|----------|----------------|
| | 2000 | 2019 ¹ | Percent Change | 2000 | 2019 | Percent Change |
| Population | 8,951 | 13,236 | 47.9% | 150,624 | 195,713 | 29.9% |
| Enrolled in College | 2,678 | 3,374 | 26.0% | 45,144 | 52,320 | 15.9% |
| Percent Enrolled in College | 30% | 28.0% | -6.7% | 30% | 28.7% | -4.3% |
| Percent Age 18-24 | 30% | 22.7% | -24.3% | 30% | 27.1% | -9.7% |
| Percent Age 25-44 | 28% | 28.2% | 0.1% | 28% | 27.5% | -1.8% |
| Median Household Income | \$17,818 | \$23,462 | 31.7% | \$30,571 | \$45,299 | 48.2% |
| Persons below Poverty Level | 44.8% | 48.6% | 8.5% | 24.7% | 26.7% | 8.1% |
| Owner Occupied Units | 28.2% | 16.5% | -41.5% | 43.9% | 36.6% | -16.6% |
| Residential Vacancy | 15.6% | 19.3% | 23.7% | 7.6% | 11.3% | 48.7% |
| Of Families with Children, Percent Single Parent Family | 69% | 87.3% | 26.5% | 41% | 44.7% | 9.0% |

Sources: Tallahassee-Leon County Planning Department Analysis of ESRI Community Analyst and U.S. Census Bureau. 2013-2019 American Community Survey

A comparison between 2000 and 2019 shows several significant findings:

- The population of the Redevelopment Area has grown at a higher rate, 47.9 percent, than the City at 29.9 percent. The data for 2000 represent the original boundaries of the District. In 2016 and 2018, the Redevelopment Area was expanded to include four new areas (all on the Southside), increasing the population of the area in 2019.
- The percentage change in median household income is lower, at a rate of 31.7 percent, in the Redevelopment Area than in the City with a rate of 48.7 percent.
- The percentage of owner-occupied units in the Redevelopment Area is 16.5 percent compared to the City with 36.6 percent. The percentage of owner-occupied units is less than half the percentage in the City.
- Vacancy rates are higher in the Redevelopment Area, at a rate of 19.3 percent, compared to the City with 11.3 percent.

¹ Data for “Enrolled in College” “Percent Enrolled in College”, Persons below Poverty level, and Of Families with Children, Percent Single Parent Family are from 2017. All other data is from 2019.

Population and Demographics: Redevelopment Area

The following section describes the demographic characteristics of the Redevelopment Area. First, the attributes of the northern and southern sections are examined. Then, the Redevelopment Area is divided into eight sub-areas.

Greater Frenchtown and Southside

Table A.3 shows the characteristics of Greater Frenchtown and Southside in 2000 and 2019. It is not possible to determine a trend based on two data sets. However, there are some preliminary observations that can be made looking at the historic data.

- In 2000, the two areas had similar population. Over the last 19 years, the population of both areas has increased with Southside having a higher percentage increase due to the expanded boundaries of the Redevelopment Area all occurring on the Southside.
- The number of housing units in Greater Frenchtown has stayed relatively constant while the number of units in Southside has increased over 74%, primarily due to construction of student housing and expanded boundaries.
- Single family homes as a percentage of the total housing stock has decreased in both Greater Frenchtown and Southside. Attached single family and multifamily homes as a percentage of the total housing stock has increased in both areas.

Table A.3: Greater Frenchtown/Southside Area Demographics 2000 and 2019

| | Greater Frenchtown 2000 | | Greater Frenchtown 2019 | | Change | Southside 2000 | | Southside 2019 | | Change |
|------------------------------------|----------------------------|----------------|-------------------------------|----------------|--------|-------------------|----------------|-------------------|----------------|--------|
| | Number | Percent (%) | Number | Percent (%) | | Number | Percent (%) | Number | Percent (%) | |
| Total Population (2019) | 4,861 | | 5,767 | | 18.6% | 4,090 | | 7,470 | | 82.6% |
| White (2019) | 1,685 | 35% | 2,105 | 36.5% | 24.9% | 470 | 11% | 627 | 8.4% | 33.4% |
| Black/African American (2019) | 2,947 | 61% | 3,322 | 57.6% | 12.7% | 3,534 | 86% | 6,476 | 86.7% | 83.2% |
| Other (includes 2+ races) (2019) | 229 | 5% | 340 | 5.9% | 48.5% | 86 | 2% | 366 | 4.9% | 325.6% |
| Hispanic (2019) | 154 | 3% | 363 | 6.3% | 135.7% | 46 | 1% | 217 | 2.9% | 371.7% |
| Male (2019) | 2,379 | 49% | 3,051 | 52.9% | 28.2% | 1,889 | 46% | 3,349 | 44.8% | 77.3% |
| Female (2019) | 2,482 | 51% | 2,718 | 47.1% | 9.5% | 2,201 | 54% | 4,121 | 55.2% | 87.4% |
| Under 5 years old (2019) | 272 | 6% | 255 | 4.4% | -6.3% | 356 | 9% | 728 | 9.7% | 104.5% |
| Age 5 to 17 (2019) | 480 | 10% | 524 | 9.1% | 9.2% | 671 | 16% | 1,490 | 19.9% | 122.1% |
| Age 18 to 24 (2019) | 1,447 | 30% | 1,475 | 25.6% | 1.9% | 1,271 | 31% | 1,530 | 20.5% | 20.4% |
| Age 25 to 44 (2019) | 1,393 | 29% | 1,623 | 28.1% | 16.5% | 1,109 | 27% | 2,106 | 28.2% | 89.9% |
| Age 45 to 64 (2019) | 737 | 15% | 1,252 | 21.7% | 69.9% | 378 | 9% | 1,098 | 14.7% | 190.5% |
| Age 65 or older (2019) | 531 | 11% | 640 | 11.1% | 20.5% | 305 | 7% | 518 | 6.9% | 69.8% |
| Persons age 25 or older (2019) | 2,661 | 55% | 3,515 | 61.0% | 32.1% | 1,792 | 44% | 3,722 | 49.8% | 107.7% |
| Single Parent Families (2017) | - | 69% | 282 | 87.3% | - | - | 79% | 533 | 77.0% | - |
| No High School degree (2019) | 754 | 28% | 537 | 15.3% | -28.8% | 445 | 25% | 547 | 14.7% | 22.9% |
| High School degree only (2019) | 650 | 24% | 896 | 25.5% | 37.8% | 394 | 22% | 1,038 | 27.9% | 160.8% |
| Some College (2019) | 630 | 24% | 769 | 21.9% | 22.1% | 584 | 33% | 878 | 23.6% | 50.3% |
| Associate's Degree (2019) | 380 | 14% | 492 | 14.0% | 29.5% | 247 | 14% | 435 | 11.7% | 76.1% |
| Bachelor's Degree (2019) | 248 | 9% | 481 | 94.0% | 94.0% | 121 | 7% | 592 | 15.9% | 389.3% |
| Graduate Degree or higher (2019) | 1,516 | 31% | 337 | 9.6% | -77.8% | 1,163 | 28% | 231 | 6.2% | -80.1% |
| Unemployment (2019) | - | 15% | - | 12.4% | - | - | 22% | - | 11.5% | - |
| Median Household Income (2019) | \$20,687 | - | \$24,051 | - | -16.3% | \$13,885 | - | \$23,009 | - | 65.7% |
| Median Family Income | \$28,512 | - | n/a | - | - | \$19,923 | - | n/a | - | - |
| Persons below Poverty Level (2017) | - | 43% | - | 50.5% | 17.4% | - | 47% | - | 46.9% | 0.0% |

Table A.3: Greater Frenchtown/Southside Area Demographics 2000 and 2019

| | Greater Frenchtown 2000 | | Greater Frenchtown 2019 | | Change | Southside 2000 | | Southside 2019 | | Change |
|------------------------------------|----------------------------|-----|-------------------------------|-------|--------|-------------------|-----|-------------------|-------|--------|
| | | | | | | | | | | |
| Families below Poverty Level | 238 | 29% | n/a | - | - | 293 | 41% | n/a | - | - |
| Total Dwelling Units (2019) | 2,670 | - | 2,818 | - | 5.5% | 2,200 | - | 3,934 | - | 78.8% |
| Total Households (2019) | 2,378 | - | 2,441 | - | 2.6% | 1,734 | - | 3,005 | - | 73.3% |
| Owner Occupied Households (2019) | 716 | 30% | 521 | 18.5% | -27.2% | 445 | 26% | 590 | 15.0% | 32.6% |
| Renter Occupied Households (2019) | 1,662 | 70% | 1,745 | 68.1% | -2.7% | 1,289 | 74% | 2,415 | 61.4% | 87.4% |
| Vacancy Rate (2019) | - | 11% | - | 13.4% | - | - | 21% | - | 23.6% | - |
| Total Housing Units (2017) | 2,638 | - | 2,695 | - | 2.2% | 2,195 | - | 3,824 | - | 74.2% |
| Detached Single Family (2017) | 1,161 | 44% | 1,178 | 43.7% | 1.5% | 922 | 42% | 1,469 | 38.4% | 59.3% |
| Attached SF or multi-family (2017) | 1,460 | 55% | 1,517 | 56.3% | 3.9% | 1,253 | 57% | 2,329 | 60.7% | 85.9% |
| Mobile Home (2017) | 17 | 1% | 0 | 2.0% | -100% | 21 | 1% | 6 | 0.2% | -71.4% |
| No Vehicles Available (2017) | 576 | 24% | 409 | 18.2% | -29.0% | 493 | 29% | 752 | 27.0% | 52.5% |
| 1 Vehicle (2017) | 1,134 | 48% | 1,291 | 47.4% | 13.8% | 913 | 53% | 1,249 | 44.8% | 36.8% |
| 2 or more Vehicles (2017) | 668 | 28% | 523 | 34.4% | -21.7% | 316 | 18% | 786 | 28.2% | 148.7% |

Sources: Tallahassee-Leon County Planning Department analysis of ESRI Business Analyst and U.S. Census Bureau, 2013-2019 American Community Survey

Eight Sub-Areas

Understanding the geographical characteristics of the Redevelopment Area is extremely important when determining investment areas. In order to target redevelopment opportunities, the Redevelopment Area was divided into eight sub-areas:

1. West Tharpe Street
2. Sixth Avenue
3. Frenchtown
4. FAMU Way/Lake Bradford
5. South Monroe/South Adams
6. Bond Community
7. Providence Community
8. South City

Map A.1 shows the geographic locations of each of the eight sub-areas. Table A.4 provides a demographic snapshot of each of the eight sub-areas. A description of each sub-area is included in the Redevelopment Plan.

Map A.1 Redevelopment Area Sub-Areas

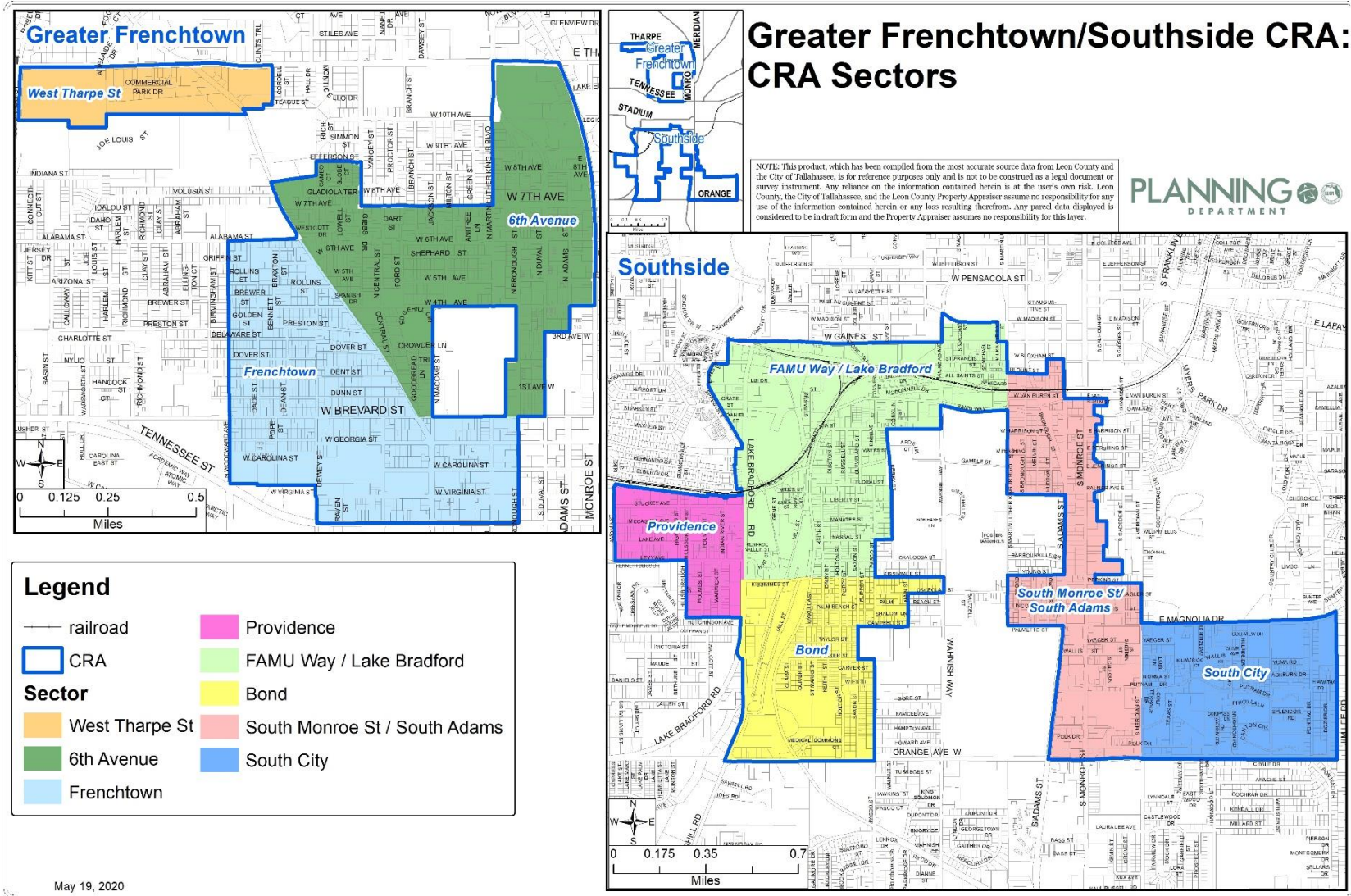


Table A.4 : Sub-area
Demographics

| | West Tharpe | 6 th Avenue | Frenchtown | FAMU Way/Lake Bradford | Providence | Bond | South Monroe St./ South Adams St. | South City |
|------------------------------------|-------------|------------------------|------------|------------------------------|------------|-----------|--------------------------------------|------------|
| Population (2019) | 676 | 1,898 | 3,192 | 1,387 | 935 | 1,819 | 900 | 2,428 |
| # of Families (2019) | 104 | 368 | 278 | 191 | 172 | 443 | 158 | 534 |
| Employed Population (2019) | 260 | 1,094 | 1,314 | 687 | 497 | 579 | 336 | 835 |
| Enrolled in College (2018) | 319 | 337 | 959 | 506 | 120 | 170 | 444 | 656 |
| Percent Enrolled in College (2018) | 44.5% | 21.8% | 28.5% | 37.5% | 19.6% | 13.9% | 46.5% | 27.4% |
| Median Household Income (2019) | \$16,438 | \$32,652 | \$19,248 | \$19,593 | \$27,380 | \$18,650 | \$30,897 | \$25,189 |
| Persons below Poverty Level (2018) | 59.5% | 73.7% | 60.7% | 56.6% | 41.8% | 53.6% | 52.6% | 43.2% |
| Owner Occupied Units (2019) | 13.9% | 21.7% | 16.9% | 13.0% | 5.4% | 25.5% | 15.6% | 15.0% |
| Residential Vacancy (2019) | 7.3% | 13.7% | 14.2% | 25.3% | 44.4% | 15.3% | 27.9% | 9.8% |
| White (2019) | 115 17% | 805 42% | 1,184 37% | 198 14% | 69 7% | 33 2% | 64 7% | 268 11% |
| Black/African American (2019) | 523 77% | 972 51% | 1,829 57% | 1,148 83% | 816 87% | 1,723 95% | 812 90% | 1,980 82% |
| Other Race(s) (2019) | 38 6% | 121 7% | 179 6% | 42 3% | 50 5% | 64 3% | 24 3% | 180 7% |
| Hispanic Origin (2019) | 42 6% | 99 5% | 223 7% | 37 3% | 46 5% | 29 2% | 26 3% | 75 3% |
| Male (2019) | 285 42% | 891 47% | 1,877 59% | 751 54% | 465 50% | 756 42% | 315 35% | 1,062 44% |
| Female (2019) | 392 58% | 1,007 53% | 1,315 41% | 637 46% | 470 50% | 1,063 58% | 585 65% | 1,366 56% |
| Under 5 Years of Age (2019) | 50 7% | 114 6% | 93 3% | 67 5% | 77 8% | 202 11% | 66 7% | 318 13% |
| 5 - 17 | 98 15% | 235 12% | 188 6% | 111 8% | 130 14% | 438 24% | 142 16% | 667 27% |
| 18 - 24 | 312 46% | 264 14% | 899 28% | 547 39% | 186 19% | 226 12% | 335 37% | 235 10% |
| 25 - 44 | 115 17% | 665 35% | 840 26% | 329 24% | 351 38% | 471 26% | 217 24% | 738 30% |
| 45 - 64 | 64 9% | 358 18% | 830 26% | 244 18% | 138 15% | 291 16% | 92 10% | 330 14% |
| 65 and over | 37 6% | 262 14% | 342 11% | 90 6% | 53 6% | 189 10% | 48 5% | 138 6% |
| 0 Vehicles Available (2018) | 65 | 103 | 286 | 87 | 130 | 168 | 117 | 302 |
| 1 Vehicle Available (2018) | 76 | 474 | 397 | 265 | 181 | 200 | 161 | 354 |
| 2+ Vehicles Available (2018) | 76 | 274 | 294 | 129 | 62 | 146 | 82 | 182 |

Source: ESRI Business Analyst, U.S. Census Bureau, 2014-2019 American Community Survey

Existing Land Use

There are approximately 1,588 acres of land in the Redevelopment Area, not including public roads and 4,456 parcels of land. The dominant land use, single family homes make up over 29 percent of the total acreage. Vacant land is the next largest land use with approximately 17 percent of the total acreage, followed by multi-family and two-family housing representing nearly 16 percent of the total acreage. These uses account for over 60 percent of land within the Redevelopment Area. Table A.5 shows the total distribution of existing land uses in the Redevelopment Area. Tables A.5A through A.5H shows the existing land uses for each sub-area. Map A.2 illustrates the existing land uses for the Redevelopment Area.

| Table A.5 :Existing Land Use (2018) | | | |
|--|--------------|----------------|-----------------|
| Use Description | Parcel Count | Acres | Acreage Percent |
| Single-Family | 2,471 | 464.6 | 29.3% |
| Vacant | 844 | 271.3 | 17.1% |
| Multi-Family and Two-Family Dwellings | 380 | 268.3 | 16.9% |
| Open Space | 94 | 137.4 | 8.7% |
| Retail | 224 | 134.9 | 8.5% |
| Warehouse | 125 | 94.1 | 5.9% |
| Right-of-Way | 80 | 49.7 | 3.1% |
| Religious/Non-profit | 79 | 47.5 | 3.0% |
| Office | 94 | 35.7 | 2.2% |
| Government Operation | 12 | 26.6 | 1.7% |
| Schools/Colleges/Universities | 28 | 25.2 | 1.6% |
| Transportation/Communications/Utilities | 18 | 21.3 | 1.3% |
| Medical | 5 | 7.1 | 0.4% |
| Hotel/Motel | 2 | 4.3 | 0.3% |
| Total Parcel Acreage | 4,456 | 1,588.0 | 81.9% |
| Public Roads (Non-parcels) | | 270.0 | 18.1% |
| Total Acreage GFS CRA | | 1,858.0 | 100.0% |

Source: Tallahassee-Leon County Planning Department, 2018

Single Family

There are 2,471 single family parcels in the Redevelopment Area totaling 464 acres, approximately 29 percent of the total Redevelopment Area acreage. These parcels are primarily located in the Frenchtown, Bond, Sixth Avenue, Providence and South City sub-areas and within portions of the South Monroe/South Adams Corridor.

Vacant

There are 271 vacant acres, approximately 17 percent of the total Redevelopment Area acreage. Larger vacant parcels are located in the Tharpe Street sub-area (on Tharpe Street east of Old Bainbridge Road), the FAMU Way/Lake Bradford sub-Area (west side of Lake Bradford Road south of the Gaines Street/Lake Bradford Road intersection), South Monroe/South Adams Street Corridor sub-area (in the vicinity of Wallis Street and South Monroe Street) and within the South City sub-area. There are smaller vacant lots scattered throughout single family areas, primarily in the Southside portion of the Redevelopment Area.

Multi-Family and Two-Family

A total of 268 acres, or 17 percent of the total Redevelopment Area acreage, is designated multi-family or two family and contains a mix of traditional and student-oriented housing. Large contiguous areas of multi-family housing are located along Gaines Street, West Tharpe Street, in the Frenchtown and Providence Community and along the South Adams Corridor.

Retail

Retail uses account for nearly 135 acres, more than eight percent of the total Redevelopment Area acreage. There are three shopping centers: The Lake Ella Shopping Center in the Sixth Avenue sub-area and the Southside Shopping Center and Towne South Shopping Center in the South Monroe/South Adams Corridor. In addition to these supermarket centers, there are commercial corridors along West Tennessee Street, North Monroe Street, South Monroe, South Adams, Lake Bradford Road and Gaines Street. South Monroe Street and Lake Bradford Road include several auto-oriented uses (e.g., car repair and service), as well as a mix of retail and service uses.

Open Space

Open Space accounts for 137 acres, approximately nine percent of the total Redevelopment Area acreage. Open space acreage includes neighborhood parks scattered throughout the Redevelopment Area, the Capital Cascades Trail and part of the St. Marks Bike Trail.

Warehouse

Warehouse uses account for 94 acres, nearly six percent of the total Redevelopment Area acreage. The largest concentrations of warehousing are in the West Tharpe Street sub-area and along South Monroe Street. South of Gaines Street, some properties classified as warehouse are currently mixed-use developments – e.g., some warehouse space mixed with artist's units in Railroad Square. It is expected that much of the

remaining warehouse space in the FAMU Way/Lake Bradford Road sub-area will transition to housing and retail uses.

Religious / Non-Profit

Religious/Non-Profit use accounts for 48 acres, three percent of the total Redevelopment Area acreage. Religious/Non-Profit uses are scattered throughout each of the sub-areas within the Redevelopment Area except for the West Tharpe Street sub-area.

Office

Office use accounts for 36 acres, approximately two percent of the total Redevelopment Area acreage. There is extensive office development Downtown, which borders the Frenchtown and Southside areas and contains the State Capitol, government offices, and the offices of private businesses associated with government activity.

Government Operational

Government Operations account for 27 acres of land, approximately two percent of the total Redevelopment Area acreage. Most of this acreage is associated with stormwater facilities along Lake Bradford Road, FAMU Way and in the Carter Howell Strong Park.

Schools/Colleges/Universities

The Schools/Colleges/Universities category accounts for 25 acres, two percent of the total Redevelopment Area acreage. This includes the new FAMU pharmacy building at M.L. King, Jr. Boulevard and Harrison Street and FSU owned property south of Gaines Street.

Transportation/Communications/Utilities

Transportation/Communications/Utilities uses account for 21 acres, 1.3 percent of the total Redevelopment Area acreage. An electric substation on FAMU Way and a former wastewater treatment facility located on Lake Bradford Road comprise the majority of this acreage.

Medical

There are four medical parcels in the Redevelopment Area, seven acres, comprising 0.4 percent of the total Redevelopment Area acreage. These uses are scattered throughout the Redevelopment Area and include Care Point Health and Wellness and other small private medical operations, such as walk-in clinics.

Hotel/Motel

There are two parcels containing hotel/motel uses comprising 4.3 acres in the Redevelopment Area. This is Four Points Sheraton on West Tennessee Street and the Hampton Inn and Suites on Railroad Avenue.

| Table A.5A: West Tharpe Street Sub-Area Existing Land Use (2018) | | | |
|---|--------------|-------------|-----------------|
| Use Description | Parcel Count | Acres | Acreage Percent |
| Multi-Family and Two-Family Dwellings | 1 | 23.1 | 38.6% |
| Vacant | 9 | 16.7 | 27.8% |
| Warehouse | 13 | 9.7 | 16.1% |
| Retail | 6 | 4.3 | 7.1% |
| Single-Family | 4 | 2.4 | 4.0% |
| Office | 6 | 2.2 | 3.6% |
| Right-of-Way | 1 | 1.1 | 1.7% |
| Transportation/Communications/Utilities | 2 | 0.7 | 1.1% |
| Total Parcel Acreage | 42 | 60.0 | 100.0% |

Source: Tallahassee-Leon County Planning Department, 2019

| Table A.5B: 6th Avenue Sub-Area Existing Land Use (2018) | | | |
|---|--------------|--------------|-----------------|
| Use Description | Parcel Count | Acres | Acreage Percent |
| Single-Family | 540 | 95.9 | 44.5% |
| Vacant | 92 | 19.5 | 9.0% |
| Multi-Family and Two Family Dwellings | 121 | 35.9 | 16.7% |
| Retail | 31 | 27.4 | 12.7% |
| Warehouse | 8 | 3.5 | 1.6% |
| Transportation/Communications/Utilities | 2 | 1.1 | 0.5% |
| Schools/Colleges/Universities | 1 | 0.3 | 0.2% |
| Open Space | 14 | 9.7 | 4.5% |
| Office | 37 | 13.9 | 6.4% |
| Religious/Non-profit | 7 | 5.2 | 2.4% |
| Government Operation | 1 | 1.3 | 0.6% |
| Medical | 2 | 2.1 | 1.0% |
| Transportation/Communications/Utilities | | | 0.0% |
| Total Parcel Acreage | 856 | 215.7 | 100.0% |

Source: Tallahassee-Leon County Planning Department, 2019

| Table A.5C: Frenchtown Sub-Area Existing Land Use (2018) | | | |
|---|--------------|--------------|-----------------|
| Use Description | Parcel Count | Acres | Acreage Percent |
| Single-Family | 451 | 83.7 | 37.9% |
| Vacant | 157 | 38.1 | 17.3% |
| Multi-Family and Two Family Dwellings | 160 | 35.1 | 15.9% |
| Open Space | 14 | 19.6 | 8.9% |
| Religious/Non-profit | 22 | 15.6 | 7.1% |
| Retail | 54 | 14.7 | 6.7% |
| Office | 14 | 4.3 | 2.0% |
| Government Operation | 2 | 3.0 | 1.4% |
| Warehouse | 6 | 2.9 | 1.3% |
| Hotel/Motel | 1 | 2.3 | 1.0% |
| Medical | 1 | 1.1 | 0.5% |
| Schools/Colleges/Universities | 1 | 0.2 | 0.1% |
| Total Parcel Acreage | 883 | 220.6 | 100.0% |

Source: Tallahassee-Leon County Planning Department, 2019

| Table A.5D: Providence Sub-Area Existing Land Use (2018) | | | |
|---|--------------|-------------|-----------------|
| Use Description | Parcel Count | Acres | Acreage Percent |
| Single-Family | 199 | 39.1 | 46.6% |
| Multi-Family and Two Family Dwellings | 48 | 21.2 | 25.3% |
| Vacant | 34 | 11.0 | 13.0% |
| Warehouse | 3 | 4.8 | 5.7% |
| Religious/Non-profit | 4 | 3.4 | 4.0% |
| Retail | 4 | 2.2 | 2.6% |
| Open Space | 1 | 1.0 | 1.2% |
| Office | 3 | 0.8 | 0.9% |
| Transportation/Communications/Utilities | 1 | 0.5 | 0.6% |
| Total Parcel Acreage | 297 | 83.9 | 100.0% |

Source: Tallahassee-Leon County Planning Department, 2019

Table A.5E: FAMU Way/Lake Bradford Sub-Area Existing Land Use (2018)

| Use Description | Parcel Count | Acres | Acreage Percent |
|---|--------------|--------------|-----------------|
| Multi-Family and Two Family Dwellings | 198 | 88.2 | 22.4% |
| Vacant | 255 | 88.2 | 22.4% |
| Open Space | 33 | 69.5 | 17.6% |
| Single-Family | 253 | 40.5 | 10.3% |
| Warehouse | 50 | 31.8 | 8.1% |
| Retail | 48 | 23.1 | 5.8% |
| Transportation/Communications/Utilities | 11 | 18.5 | 4.7% |
| Government Operation | 4 | 13.4 | 3.4% |
| Schools/Colleges/Universities | 11 | 9.5 | 2.4% |
| Religious/Non-profit | 12 | 7.1 | 1.8% |
| Office | 8 | 2.8 | 0.7% |
| Hotel/Motel | 1 | 2.0 | 0.5% |
| Total Parcel Acreage | 884 | 394.5 | 100.0% |

Source: Tallahassee-Leon County Planning Department, 2019

Table A.5F: Bond Sub-Area Existing Land Use (2018)

| Use Description | Parcel Count | Acres | Acreage Percent |
|---|--------------|--------------|-----------------|
| Single-Family | 373 | 56.7 | 30.2% |
| Vacant | 121 | 37.7 | 20.0% |
| Multi-Family and Two Family Dwellings | 59 | 31.4 | 16.7% |
| Open Space | 14 | 25.6 | 13.6% |
| Warehouse | 10 | 16.8 | 8.9% |
| Religious/Non-profit | 23 | 7.5 | 4.0% |
| Retail | 10 | 5.5 | 2.9% |
| Government Operation | 1 | 2.6 | 1.4% |
| Office | 4 | 2.0 | 1.1% |
| Schools/Colleges/Universities | 4 | 1.8 | 0.9% |
| Transportation/Communications/Utilities | 1 | 0.4 | 0.2% |
| Total Parcel Acreage | 620 | 187.9 | 100.0% |

Source: Tallahassee-Leon County Planning Department, 2019

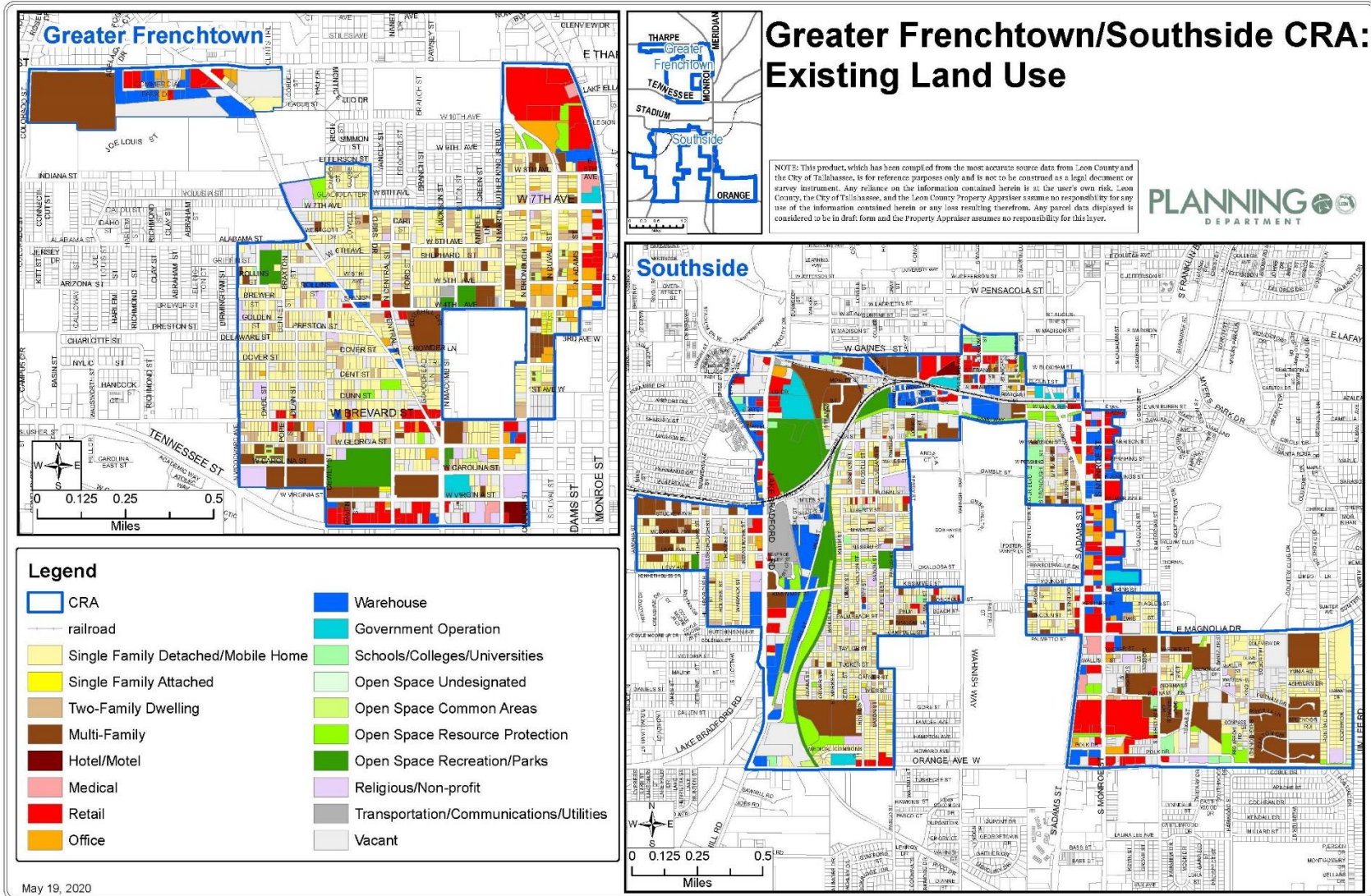
| Table A.5G: South Monroe Street/South Adams Sub-Area Existing Land Use (2019) | | | |
|--|--------------|--------------|-----------------|
| Use Description | Parcel Count | Acres | Acreage Percent |
| Retail | 71 | 57.7 | 22.8% |
| Vacant | 141 | 40.4 | 15.9% |
| Single-Family | 176 | 33.2 | 13.1% |
| Warehouse | 42 | 31.0 | 12.2% |
| Multi-Family and Two-Family Dwellings | 61 | 26.4 | 10.4% |
| Right-of-Way | 10 | 15.6 | 6.2% |
| Office | 26 | 12.2 | 4.8% |
| Open Space/Parks/Resource Protection | 11 | 11.0 | 4.3% |
| Schools/Colleges/Universities | 8 | 9.9 | 3.9% |
| Government Operation | 4 | 6.3 | 2.5% |
| Medical | 3 | 6.0 | 2.4% |
| Religious/Non-profit | 6 | 3.8 | 1.5% |
| Transportation/Communications/Utilities | 1 | 0.2 | 0.1% |
| Total Parcel Acreage | 560 | 253.6 | 100.0% |

Source: Tallahassee-Leon County Planning Department, 2019

| Table A.5H: South City Sub-Area Existing Land Use (2019) | | | |
|---|--------------|--------------|-----------------|
| Use Description | Parcel Count | Acres | Acreage Percent |
| Single-Family | 235 | 68.9 | 34.1% |
| Multi-Family and Two-Family Dwellings | 30 | 63.6 | 31.4% |
| Vacant | 105 | 54.0 | 26.7% |
| Open Space/Parks/Resource Protection | 12 | 6.8 | 3.4% |
| Religious/Non-profit | 5 | 4.9 | 2.4% |
| Schools/Colleges/Universities | 3 | 3.6 | 1.8% |
| Retail | 1 | 0.5 | 0.2% |
| Total Parcel Acreage | 391 | 202.2 | 100.0% |

Source: Tallahassee-Leon County Planning Department, 2019

Map A.2 Greater Frenchtown/Southside Existing Land Use



Future Land Use

Within the Community Redevelopment Area, there are nine future land use categories designated on the Comprehensive Plan Future Land Use Map:

1. Central Urban
2. Central Core
3. Educational Facilities
4. Government Operation
5. Recreation / Open Space
6. Recreation / Open Space / Stormwater Facilities
7. Residential Preservation
8. University Transition
9. Suburban

The future land use designations provided by the Tallahassee-Leon County Planning Department are intended to help shape growth in such a way that meets the goals of the community. Map B.3 shows the future land use designations within the Redevelopment Area.

Provided below, from the Future Land Use Element of the Comprehensive Plan, is a general description and intention of the nine land use categories.²

CENTRAL CORE: Policy 2.2.10: [L]: *The Central Core of Tallahassee is intended to expand into a vibrant 18-hour urban activity center with quality development. The emphasis in this area is intended to shift from cars to pedestrian, bike and transit modes of transportation.... Residential development may be permitted up to 150 units per acre.*

CENTRAL URBAN: Policy 2.2.8: [L]: *Characterized by older developed portions of the community that are primarily located adjacent to or in close proximity to the urban core and major universities. Intended to provide a variety of residential types (up to 45 DU/AC), employment (includes light manufacturing), office and commercial activities. Infill and potential redevelopment and/or rehabilitation activity should be encouraged.... Land use intensity is intended to be higher (up to 20,000 sq. ft. for minor commercial uses; up to 100,000 sq. ft. for neighborhood commercial uses; and up to 200,000 sq. ft. for community commercial uses) due to the*

² Tallahassee-Leon County Comprehensive Plan. 2020. Land Use Element.

presence of requisite capital infrastructure and location of employment and activity centers.

GOVERNMENT OPERATIONAL: Policy 2.2.16: [L]: *Contains facilities, which include those defined on the Land Use Development Matrix as Community Services, Light Infrastructure, Heavy Infrastructure, and Post-Secondary, that provide for the operation of and provision of services on property owned or operated by local, state and federal government. The government facilities may include services and uses provided by private entities operating on property owned by the local, state, or federal government....*

RECREATION/OPEN SPACE: Policy 2.2.14: [L]: *This category contains:*

- (1) Government owned lands which have active or passive recreational facilities, historic sites, forests, cemeteries, or wildlife management areas.*
- (2) Privately owned lands which have golf courses, cemeteries, or wildlife management areas.*

RECREATION/ OPEN SPACE / STORMWATER FACILITIES: Policy 2.2.15: [L]: *This is a sub-category of the Institutional Recreation/Open Space category. This category is intended for government owned stormwater facilities.*

Included in this category are the following:

- (1) Government owned lands which serve as structural or non-structural stormwater facilities.*
- (2) The primary function of land in this category is stormwater attenuation, stormwater treatment for water quality, or stormwater conveyance.*
- (3) These areas may be used for passive parks that do not contain any permanent structure. Allowable open space uses include parks, nature preserves, cultivation, grazing, and unimproved pervious parking areas.*

RESIDENTIAL PRESERVATION: Policy 2.2.3: [L]: *Characterized by existing homogeneous residential areas within the community which are predominantly accessible by local streets. The primary function is to protect*

existing stable and viable residential areas from incompatible land use intensities and density intrusions. Future development primarily will consist of infill due to the built out nature of the areas. Commercial, including office as well as any industrial land uses, are prohibited. Future arterial and/or expressways should be planned to minimize impacts within this category. Single family, townhouse and cluster housing may be permitted within a range of up to six units per acre. Consistency with surrounding residential type and density shall be a major determinant in granting development approval....

SUBURBAN: Policy 2.2.5: [L]: *To create an environment for economic investment or reinvestment through the mutually advantageous placement of employment and shopping opportunities with convenient access to low to medium density residential land uses. Employment opportunities should be located near residential areas, if possible within walking distance....*

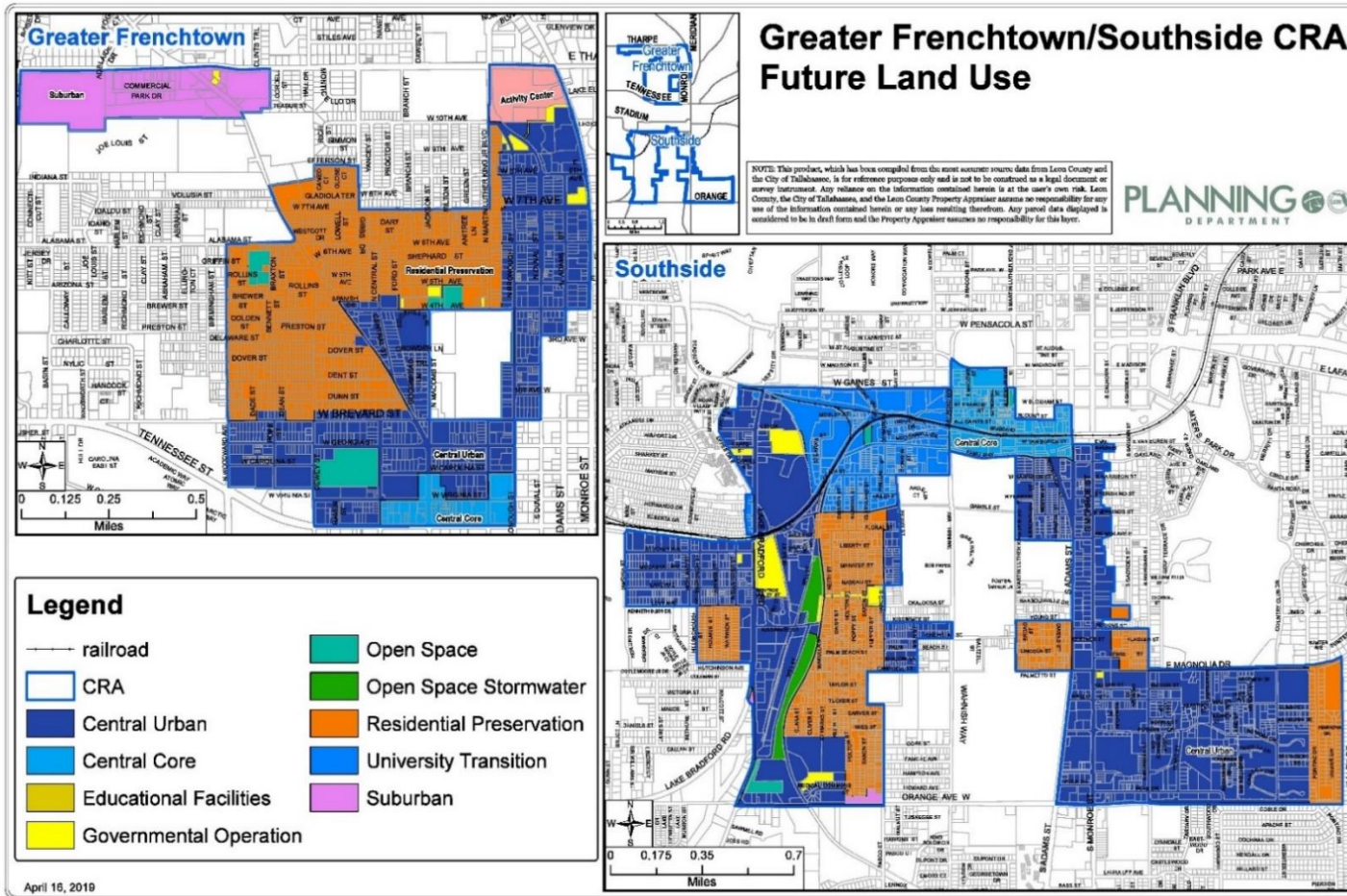
To complement the residential aspects of this development pattern, recreational opportunities, cultural activities, commercial goods and services should be located nearby.

UNIVERSITY TRANSITION: Policy 2.2.17:[L]: *The University Transition land use category may only be applied through amendment to the Future Land Use Map to lands located generally within the rectangle created by the Florida State University main campus and Florida A & M University, Tallahassee Community College/Lively Technical Institute campuses and Innovation Park. Specifically, lands lying west of South Adams Street, South of West Tennessee Street, north of Orange Avenue and adjoining Innovation Park and Tallahassee Community College to the east. It is intended to be a compact land use category that provides higher density residential opportunities near the campuses, serving both to provide opportunities for student housing near the universities and to protect existing residential neighborhoods located away from the campuses from student housing encroachment. However, it is not intended that this category be applied in a manner that would encourage or facilitate the premature conversion of existing viable single-family residential neighborhoods. The category is intended to transition from present industrial and lower density residential uses to those more compatible with vibrant urban areas and shall remain within a compact area located in close proximity land owned by the universities and existing areas designated as University Transition.*

Higher density residential redevelopment of up to 50 DU/AC is allowed to provide housing for students and close in housing opportunities to the downtown for professionals. Retail commercial limited to a smaller scale classification to provide essential services to immediate residents and ancillary needs of universities such as book stores and photo copying establishments may be permitted. State and private offices properly designed and scaled to surrounding uses may be permitted as well as central parking facilities, artistic studios and workshops. Restaurants, movie theaters, lounges and other entertainment commercial uses shall be permitted as commercial. Development regulations which allow flexibility in their design and operation to permit such uses as outdoor café and gardens shall be incorporated into zoning code. Pedestrian pathways and access systems shall be designed to connect universities, downtown, civic/arts center, and residential and commercial areas to cut down on dependence on automobile travel. Design controls shall be employed to provide land use compatibility by offsetting potential negative impacts.

The areas within the Gaines Street Revitalization Plan Study Area will have up to 100 DU/AC.

Map A.3 Future Land Use: Future Land Use Categories

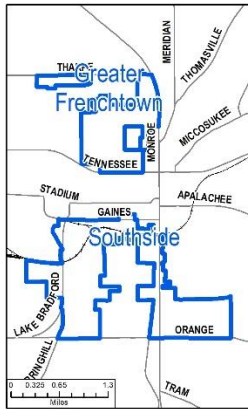


Map A.3A: Future Land Use: Southern Strategy




Greater Frenchtown/Southside CRA: CRA Sectors Inside Southern Strategy Area











NOTE: This product, which has been compiled from the most accurate source data from Leon County and the City of Tallahassee, is for reference purposes only and is not to be construed as a legal document or survey instrument. Any reliance on the information contained herein is at the user's own risk. Leon County, the City of Tallahassee, and the Leon County Property Appraiser assume no responsibility for any use of the information contained herein or any loss resulting therefrom. Any parcel data displayed is considered to be in draft form and the Property Appraiser assumes no responsibility for this layer.



Legend

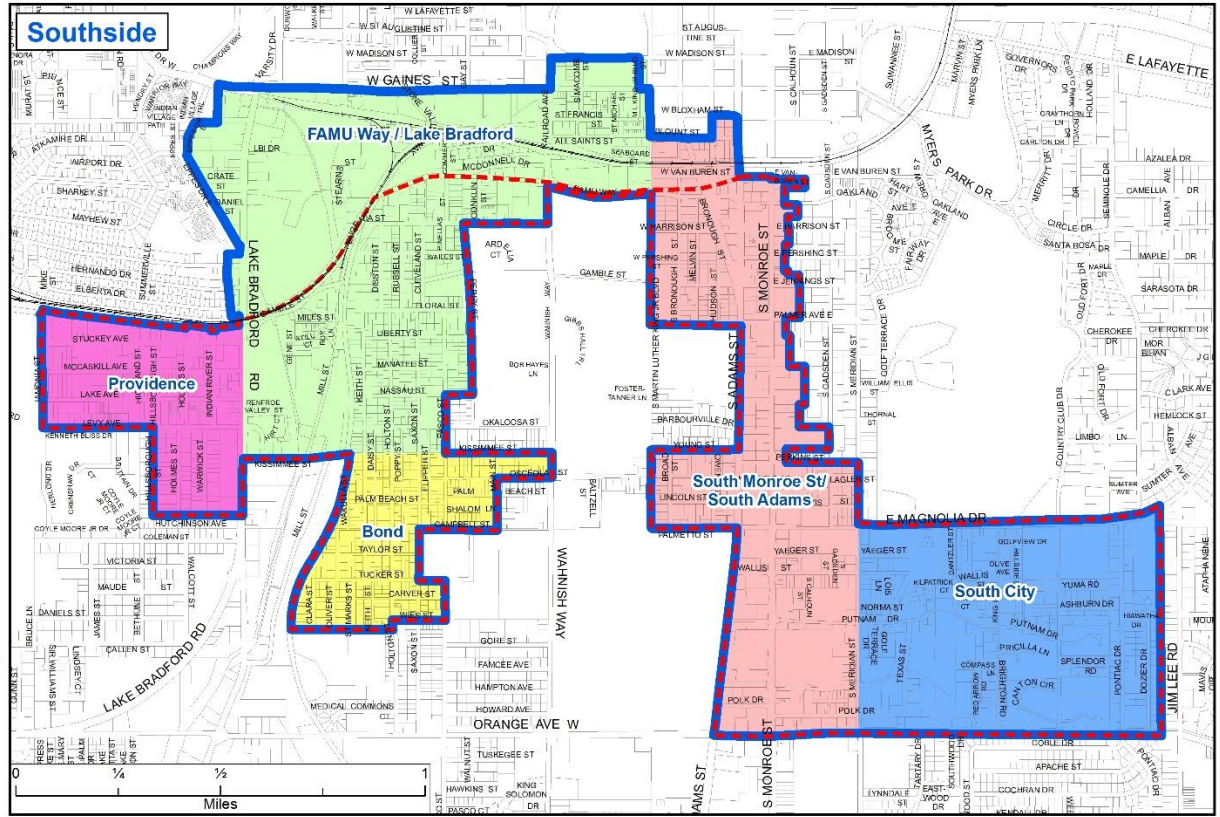
-  railroad
-  CRA in Southern Strategy Area
-  CRA

CRA Sectors

-  West Tharpe St
-  6th Avenue
-  Frenchtown
-  Providence
-  FAMU Way / Lake Bradford
-  Bond
-  South Monroe St / South Adams
-  South City



May 20, 2020



Land Development Regulations

Zoning

The Zoning Code primarily affects development in the Redevelopment Area through two mechanisms: zoning districts, which list specific allowed uses and the density and intensity of development; and the Multimodal Transportation District Overlay, which is intended to promote transit, walking and cycling through design standards. Each of these mechanisms is discussed below:

Zoning districts implement the future land use categories described in the previously in the appendix. The following zoning districts are applied within the Redevelopment Area. Note that densities and development standards are subject to change subject to amendments to the Tallahassee Land Development Regulations.

- The Residential Preservation future land use category is implemented by zoning districts RP-1 and RP-2. These districts allow residential development up to 3.6 and 6.0 dwelling units per acre, respectively.
- The Central Urban future land use category is implemented by zoning districts that allow residential at densities from 4 to up to 18, 26 or 45 dwelling units per acre (CU-18, CU-26, and CU-45) and non-residential between 20,000 and 60,000 square feet per acre.
- The University Transition future land use category is implemented by the University Transition (UT) zoning district. It allows residential densities of up to 50 dwelling units per acre and has no cap on the amount of non-residential development.
- The Central Core future land use category is implemented by the Central Core zoning district. The Central Core district allows residential density of up to 150 dwelling units per acre and has no cap on the amount of non-residential development.
- The Suburban future land use category is implemented through a variety of zoning districts that reflect the diverse character of this category. Zoning districts within the Area include the following:
 - Urban Pedestrian-1 and Urban Pedestrian-2 are intended to promote higher density mixed use neighborhoods (up to 16 to 20 dwelling units per acre and non-residential development up to 20,000 to 40,000 square feet per acre, respectively);
 - Medium Density Residential-1, which allows between 8 and 20 dwelling units per acre and non-residential up to 20,000 square feet;
 - Office-Residential-3, which allows between 8 and 20 dwelling units per acre and non-residential up to 20,000 square feet; and

- Manufacturing-1, which allows light industrial uses between 10,000 and 20,000 square feet per acre, depending on the use.
- The All Saints Zoning Districts implement the Gaines Street Vitalization Plan.
- ASN-A: Infill/Low Intensity District recognizes the significance of historical characteristics by encouraging the restoration and adaptive reuse of the existing structures for residential and complementary nonresidential uses. It allows residential densities between 8 and 50 dwelling units per acre and has no cap on the amount of non-residential development.
- ASN-B: Infill/Moderate Intensity District recognizes the area's historical industrial land use. The ASN-B district allows residential densities between 16 and 50 dwelling units per acre and has no cap on the amount of non-residential development.
- ASN-C: Corridor Mixed-Use District is established for the purpose of creating a high-intensity urban activity corridor that will be a primary local destination for living, working, shopping and entertainment. It allows residential densities between 16 and 75 dwelling units per acre and has no cap on the amount of non-residential development.
- ASN-D: Civic Center Corridor Mixed-Use District: The area is envisioned as a primary local destination for living, working, shopping and entertainment with a very urban character. It allows residential densities between 16 and 100 dwelling units per acre and has no cap on the amount of non-residential development.
- The Lake Bradford Road Commercial Corridor Overlay authorizes the highway commercial uses and drive-ins along portions of the Lake Bradford Road within the Gaines Street Revitalization Area.
- The Providence Neighborhood Overlay restricts uses within the Providence Neighborhood Plan area.

Map A.4 shows zoning within the Redevelopment Area.

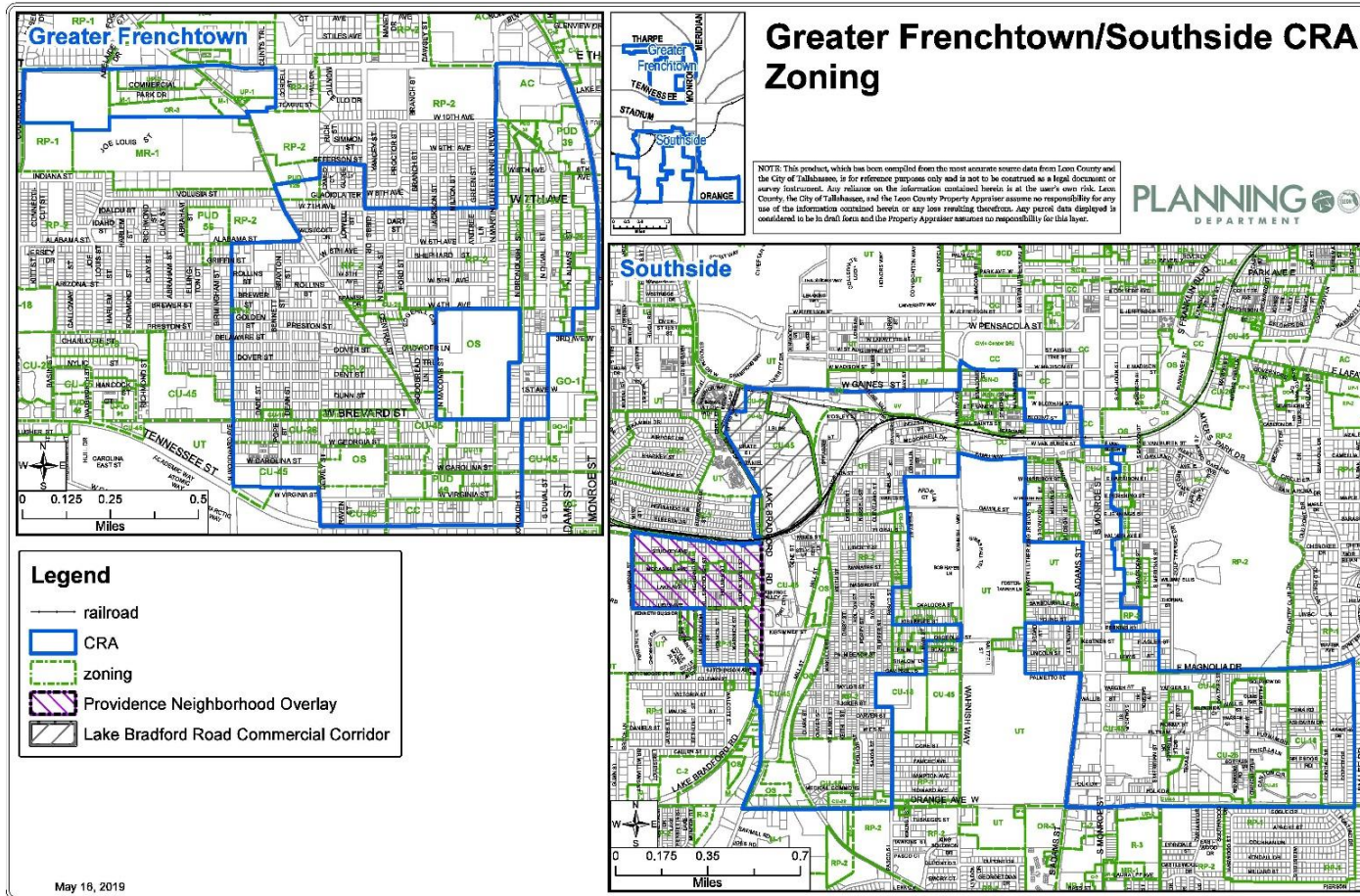
Multimodal Transportation District (MMTD) Overlay

The Multimodal Transportation District (MMTD) Overlay applies throughout the Redevelopment Area. The MMTD Overlay contains site design standards that apply in addition to the use, density and intensity standards contained in the zoning districts. (See also, Parking Section) The MMTD Overlay regulates aspects of site design such as sidewalk widths and landscaping, a building's proximity to the street and the maximum amount of parking allowed. The Tallahassee-Leon County

Planning Department is currently evaluating the effectiveness of the Overlay and ways to improve its implementation.

Residential density bonuses up to 25% are allowed in all zoning districts within the MMTD Overlay, except Residential Preservation, University Village and All Saints Neighborhood districts, for projects that meet certain development standards consistent with Section 10-280.6(c) of the Tallahassee Land Development Code.

Map A.4 Zoning



Historic Properties

This section describes the historic context of the Redevelopment Area and identifies designated historic properties. Reference is made to the two types of designation for historic properties: The City of Tallahassee local register of historic places and the National Register of Historic Places. Properties on the local register have an Historic Preservation Overlay zoning.

Frenchtown Sub-Area

The Frenchtown sub-area includes some of the oldest residential and commercial areas in the City of Tallahassee. Many of the older homes in the neighborhood are representative of the period from 1900-1930; the architecture styles are saddlebag, shotgun, cottage and bungalow.³ The Frenchtown neighborhood was a self-contained, African American neighborhood. Various businesses such as dry cleaners, jewelers, tailors, restaurants and groceries supported the residents. An article from the local newspaper noted, "The neighborhood of Frenchtown, from the time of emancipation until the 1960s, was home to the majority of Tallahassee's African-American population. If you were black, it was where you went to school, did your dry-cleaning, grocery shopping, and banking. At night for entertainment, you could hang at the Monroe Pool Hall on Macomb Street or listen to the sounds of Ray Charles and Nat and Cannonball Adderley at the Redbird Café."⁴ After integration in the 1960s, neighborhood business started to decline when shoppers seeking additional choices ventured out of the neighborhood.

In the Frenchtown sub-area there are eight designated properties: one is on the National Register, four are on the local register and three properties are on both the local and national registers. Five of the more familiar properties are listed below.

- 412 W. Virginia Street: Built in 1930, this building is listed on both the national and local registers. The building is known locally as the Tookes House. It was originally a boarding house and is planned to be renovated as a bread and breakfast inn.
- 648 W. Brevard Street: This building is on the national register. It was formerly known as the Women's Working Band House and is now B. Sharp's Jazz Club & Café.
- 505, 507, 509 W. Brevard Street: Built in 1933, these structures are on the local register. Locally known as Ashmore's, the property is currently vacant and owned by the City of Tallahassee.

³ City of Tallahassee, 2008.

⁴ Tallahassee Democrat, 2006.

- 709 W. Brevard Street: Built circa 1930, the property is on the local register and owned by Watson Temple Church of God in Christ. The property is currently vacant.
- 442 W. Georgia Street: Built in 1894 by Lewis W. Taylor, a community educator and leader, the home is listed on the National Register and serves as a museum of African American History, culture and civil rights.

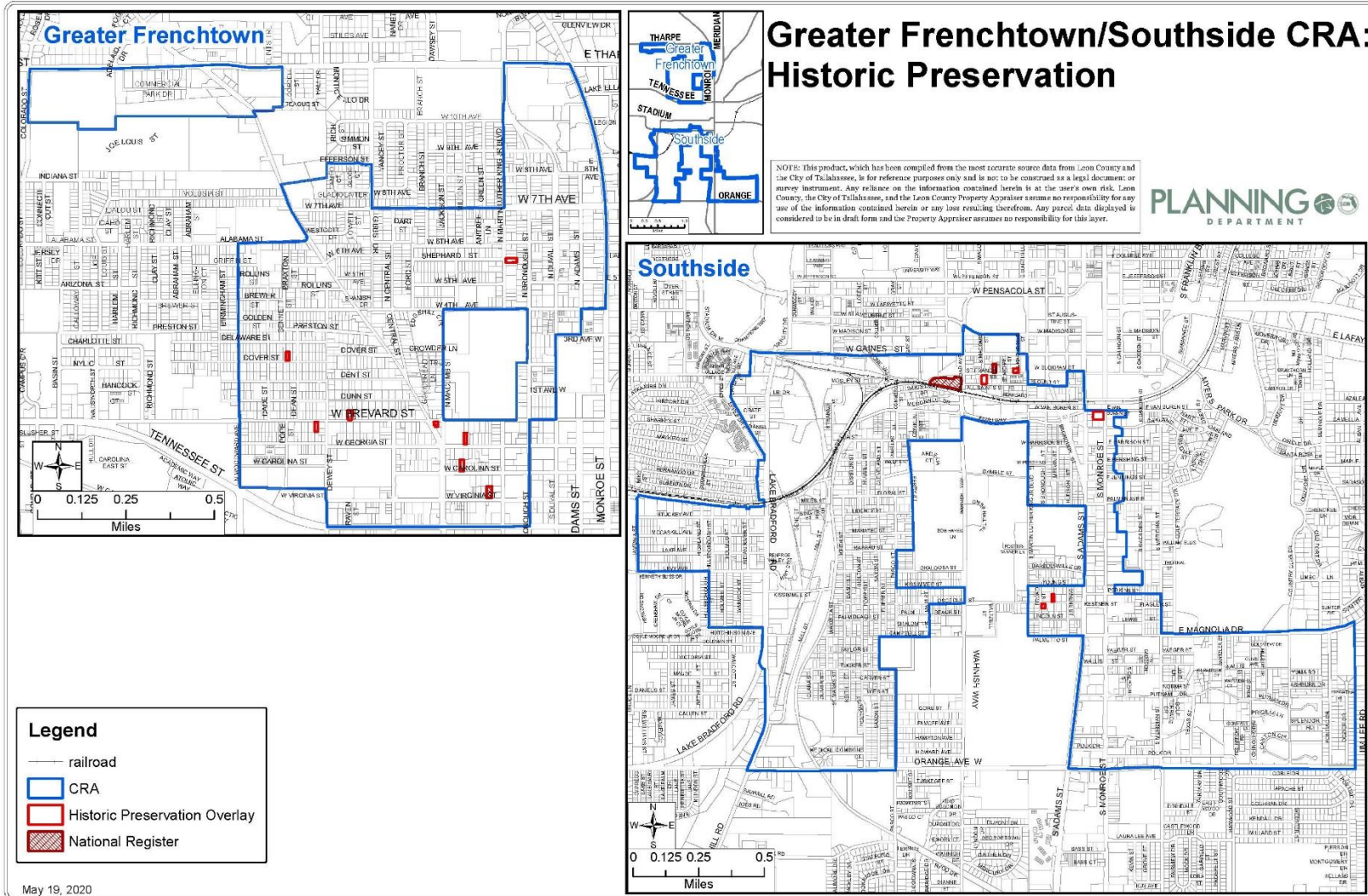
FAMU Way/Lake Bradford Sub-Area

The All Saints District, within the FAMU Way/Lake Bradford sub-area, contains elements of Tallahassee's industrial past as well as residential pockets that served workers. In the All Saints area there are two properties on the National Register and two properties on the local register.

- 918 Railroad Avenue: This is the Jacksonville, Pensacola and Mobile Railroad Company Freight Depot. It is on the National Register. Locally known as the Amtrak Station, it is currently owned by Leon County and used for office and community meeting space. Other buildings on the same property formerly served as warehouses and have been redeveloped for various uses, including a business incubator.
- 450 All Saints Street: This building is on the National Register. Locally known as the Williams House, it was originally a boardinghouse and is now used for offices.
- 469 St. Francis Street: Built in 1907, this building is on local register. Formerly the Wahnish Cigar Factory, it is currently an entertainment venue.
- 822 and 824 S. Martin Luther King Jr., Boulevard: Built circa 1885, this building is on the local register. Formerly a bowling alley, restaurant and dance hall, this building is now vacant.

Map A.5 shows the properties with a historic designation within the Redevelopment Area.

Map A.5: Historic Properties



Public Facilities

Parks:

Listed below are the parks and community centers within and adjacent to the Redevelopment Area:

- Greater Frenchtown:
 - LeVerne Payne Community Center: The site offers picnic shelters, grills, a playground, two tennis courts and a multi-purpose outdoor court. Directly across Fourth Avenue (and outside the Redevelopment Area boundary) is Lee Park ball field, with 13.3 acres available for passive and active recreation programs.
 - Lawrence-Gregory Community Center and Robinson-Trueblood Pool: The Center houses a gymnasium, meeting and activity rooms. The gym hosts a variety of basketball and volleyball leagues. The Center runs an after-school program and also features a weight and exercise room. Located on Dade Street, the Center was completely renovated in 2008.
 - Tallahassee Senior Center: The Center offers a wide variety of educational, cultural, artistic and health related programs. It is located on North Monroe Street.
 - Carter-Howell-Strong Park: This passive park features a lake that serves as a stormwater pond for the Greater Frenchtown area. It is located on West Georgia Street and Macomb Street.
 - Lake Ella: Located on North Monroe Street, east of the Sixth Avenue sub-area and outside of the Redevelopment Area. This passive park features a lake that serves as a stormwater pond.
 - Lincoln Service Center: The Center provides for the delivery of social and human services to residents of all ages. The Center's mission is to develop and implement programs, services and activities that will positively impact the quality of life of the community's residents. It is located on West Brevard Street and Macomb Street and is outside of the Redevelopment Area boundaries.
- Southside
 - Lake Elberta Park: This passive park features a lake that serves as a stormwater pond for the Gaines Street area. It is located on the east side of Lake Bradford Road.
 - Boulevard Park: In conjunction with Doug Burnette Park, Boulevard Park provides passive recreational opportunities. It is located in the FAMU Way/Lake Bradford sub-area, south of the Civic Center.
 - Speed-Spencer-Stephens Park: This passive park is located in the Bond Community.

- Capital Cascades Trail Park: As part of the Capital Cascades Trail project, this 5,000 square foot park with children's play equipment is located south of Railroad Square.
- Walker-Ford Community Center/Smith-Williams Service Center: This facility is located near Pasco and Saxon Streets, adjacent to the Redevelopment Area. The Centers offers recreational, educational, fitness, cultural and social programs for all ages.
- Delta Kappa Omega Providence Community Service Center: This Community Center provides educational, social and cultural programs to residents and is operated via a partnership between Delta Kappa Omega and the Providence Community. It is located on Highland Street and Lake Avenue.
- Cascades Park: Cascades Park is northeast of the Southside Redevelopment Area. It offers a variety of outdoor and recreational amenities, including a state-of-the-art amphitheater, interactive water fountain, children's play area, Smokey Hollow Commemoration and multi-use trails.
- FAMU Way/Cascades Greenway: The greenway extends from Cascade Park along FAMU Way to Lake Bradford, providing bicycle and pedestrian facilities as well as Lake Anita Favors Thompson.
- Bond Linear Park: The mid-block, multi-use trail and park connects Speed Spencer Stephens Park to the St. Marks Trail is currently under construction.

Community Medical Care

- The Roberts and Stevens Clinic, operated by the Leon County Health Department, is located just north of the Sixth Avenue sub-area. It provides clinical and nutrition services and wellness services including Healthy Start; the Women, Infants and Children program; immunizations and treatment for HIV/AIDS and sexually transmitted diseases.
- The Richardson Lewis Health Center, operated by Leon County Health Department, is located in the Bond Community sub-area. It provides Healthy Start; Women, Infants and Children program services and treatment for HIV/AIDS and sexually transmitted diseases.
- Bond Community Health Center, operated by the Bond Community Health Center, Inc., is located on South Monroe Street between Perkins and Palmer Streets, just outside of the South Monroe/South Adams sub-area. The Center is a 501(c)(3) community health center deemed as a Federally Qualified Health Center. It provides primary and preventive healthcare

services for residents of Leon, Gadsden, Wakulla, Jefferson, Taylor, Franklin, Liberty and Madison counties.

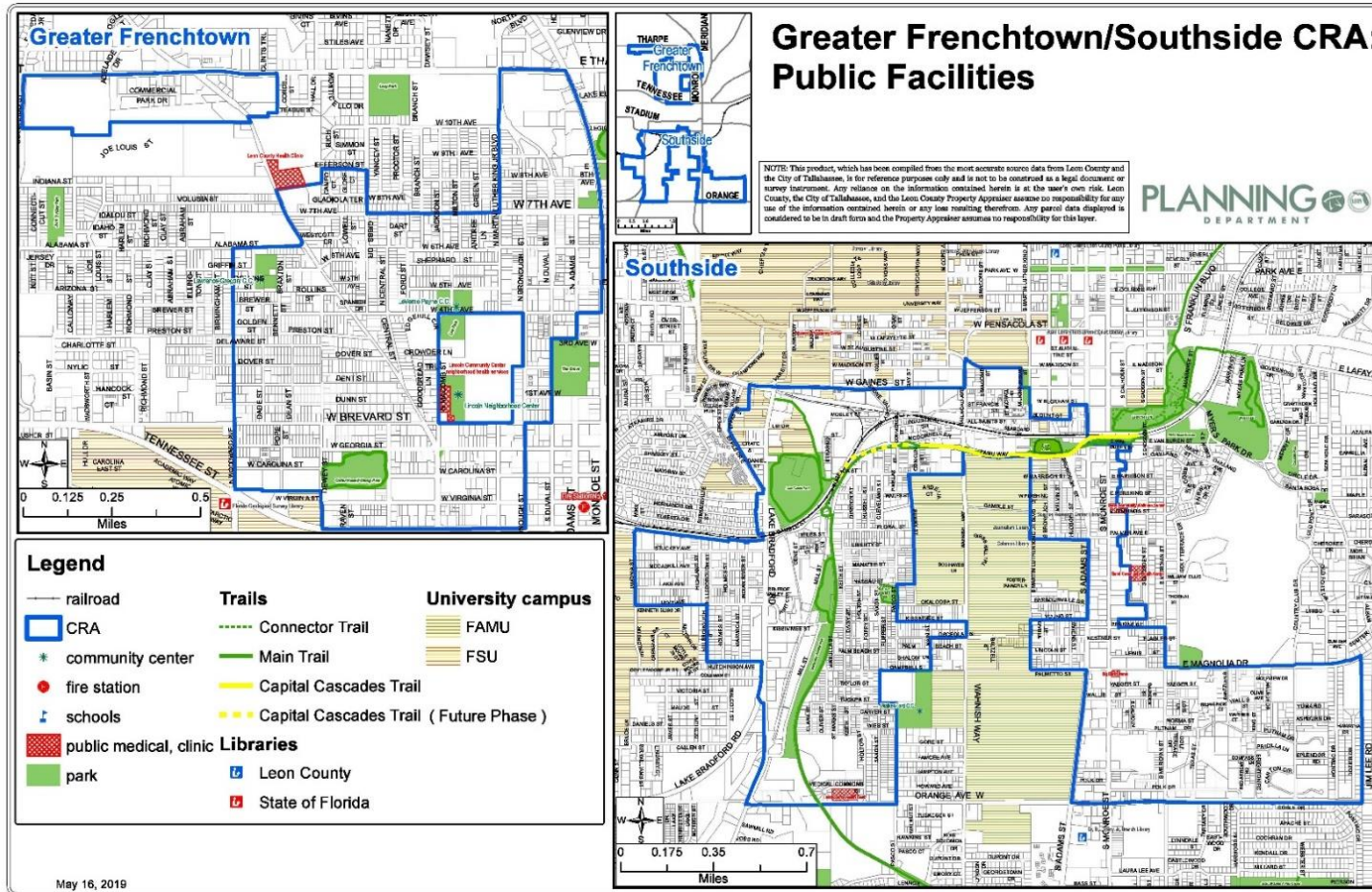
- Big Bend Cares, Inc. provides educational and comprehensive support to people infected with HIV/AIDS in Gadsden, Jefferson, Leon, Liberty, Madison, Taylor and Wakulla.
- Care Point Health and Wellness owned by Big Bend Cares provides comprehensive medical care to area residents. The 27,000 square foot facility offers clinical, dental, laboratory and mental health services and a pharmacy for both insured and uninsured clients.
- Neighborhood Medical Center is located in the Lincoln Center adjoining the Frenchtown sub-area. The Center provides an array of services including primary health care, women's health care, pediatric care, mental health care, radiology and case management.

Libraries

- The Leroy Collins Leon County Main Library is located on Park Avenue in downtown, two blocks south of Tennessee Street across from the downtown Chain of Parks.
- The Dr B.L. Perry Jr. Branch Library is located on South Adams Street, approximately 500 feet south of Orange Avenue.

Map A.6 shows the location of public facilities located within, or within one quarter mile, of the Redevelopment Area boundary.

Map A.6: Public Facilities



Schools

See Appendix B, Neighborhood Impact Element, Table B.1. for public schools in the Redevelopment Area.

Mobility

The Redevelopment Area is within the boundaries of the Multimodal Transportation District (MMTD). The goal of the MMTD, which is established in the Comprehensive Plan and implemented through a zoning overlay district, is to promote the use of transit, cycling and walking.

Level of Service Standards

For purposes of assessing traffic impacts, the Comprehensive Plan establishes Levels of Service for different forms of transportation within the MMTD. These standards are shown in Table A.7.

| Table A.7: Areawide Multimodal Level of Service Standards (Pursuant to F.S. 163.3180(15)(c)) | | | |
|---|---------|---------|------------|
| Pedestrian | Transit | Bicycle | Automobile |
| C | C | D | E+50% |

Source: Tallahassee-Leon County Comprehensive Plan Policy 1.5.5[M]

The Plan establishes long term performance standards to measure the quality of transportation methods other than automobiles. Examples of these standards include the following:

- All buses are equipped with bicycle racks.
- All pedestrian and bicycle facilities within 2 miles of primary schools function at LOS C or better.
- 50% of students at Florida State University, Florida A&M University, and Tallahassee Community College commute to campus via non-auto modes.
- 80% of transit routes operate at a frequency of 20 minutes or less.

Roadways

Monroe Street and Tennessee Street are the three roadways in the Redevelopment Area that serve regional and local transportation needs. North Monroe Street and Tennessee Street are major routes for commuters from northwestern Leon County and Gadsden County to downtown and the universities. They also provide access to I-10 from central

and southern Leon County. The design of these roads within the Redevelopment Area reflects their regional significance. Tennessee Street is six-lanes and Monroe Street is four-lanes. Although posted for speeds as low as 35 miles per hour, when not congested, traffic tends to move at a high rate of speed. Both have extensive turning lanes to facilitate entrances into businesses and very limited pedestrian amenities.

Sidewalks and Bike Paths

Most major roads have sidewalks in the Redevelopment Area. Local streets generally lack sidewalks, with the exception of the Providence neighborhood north of Levy Street and the Bond neighborhood south of Tucker Street, both in Southside portion of the Redevelopment Area.

There are two designated on-road bike lanes in Greater Frenchtown, Tharpe and Macomb Streets. There are several bike lanes in Southside; however, those have limited connectivity.

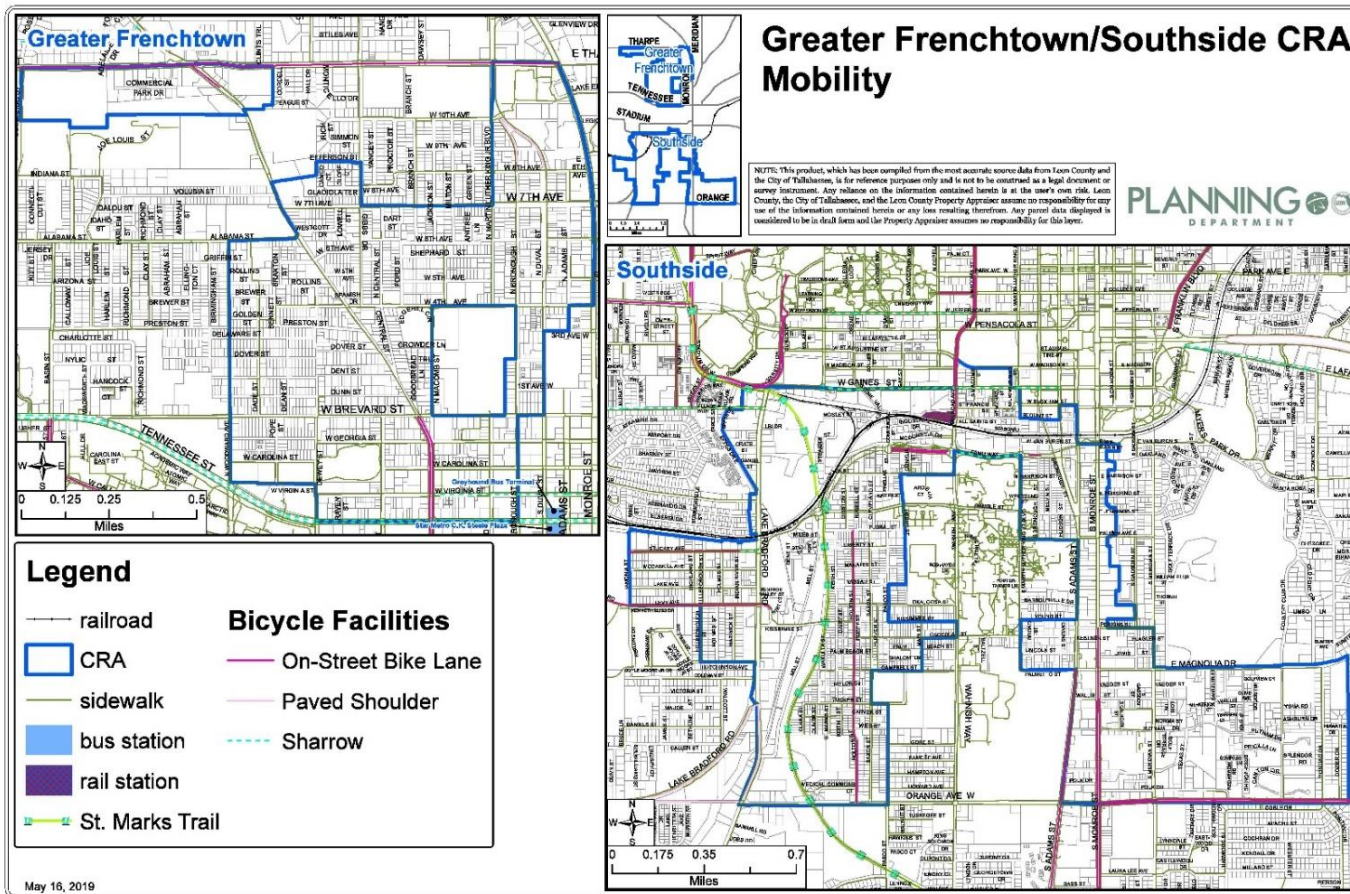
Two multi-use trails, St. Marks and Cascades are located in the Southside portion of the Redevelopment Area.

Sidewalk and bike paths are shown on the Mobility, Map A.7

Transit Service

Star Metro provides transit service throughout the Redevelopment Area.

Map A.7: Mobility



Parking

Parking standards within the Redevelopment Area are established within the Multimodal Transportation District (MMTD) Overlay section of the Tallahassee Land Development Code. The MMTD is intended to promote all forms of mobility, including cycling, walking and transit. As such, the MMTD establishes maximum, rather than minimum, parking standards. The Code allows for required parking to be provided on-site, on-street, purchased or leased from a civic or private parking provider, or secured through a cross-access or parking easement.⁵ Although the long term goal is to reduce reliance on automobiles as a form of transportation in the MMTD, the success of areas like Gaines Street has created a demand for additional parking. In May 2016, the City Commission approved changes to the Central Urban-45, the Central Core and the University Transition zoning districts within the Downtown Overlay to allow off-street surface parking facilities as a Special Exception Use. (Other zoning districts within the Downtown Overlay already allow this use.) These changes affect properties in both the Greater Frenchtown and the Southside areas. The City anticipates that off-street parking facilities will be temporary in nature and will only be used until such time as the properties are redeveloped.

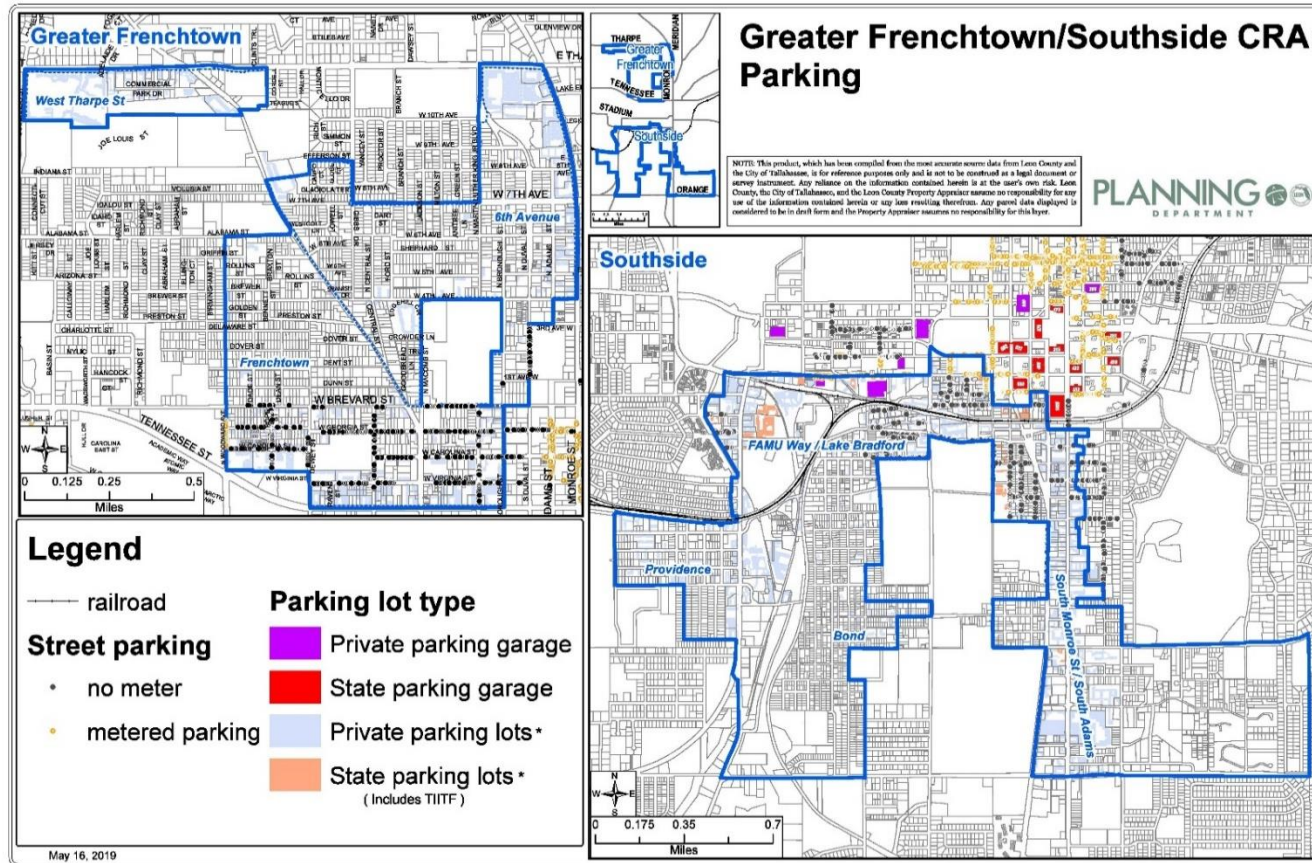
The City is undertaking a Comprehensive Parking Program which will address equipment and hours. These changes will apply to parking within the Redevelopment Area.

Map A.8 shows the locations where on street parking is provided within the Redevelopment Area. It also shows the location of structured parking garages that provide public access. A review of existing conditions shows the following:

- Parking for residential and commercial uses include both on-street and off-street parking.
- The amount of on-street parking allowed within the Redevelopment Area is very limited.
- The existence of parking garages is limited throughout the Redevelopment Area with only one government owned garage being located at the City of Tallahassee Renaissance Building in the Frenchtown sub-area.

⁵ Code sections 10-284.4 and 10-285.Tables 8A, 8B, and 8C.

Map A.8: Existing Parking Conditions



Environmental Characteristics

Flood Zones

Portions of the Redevelopment Area are within the 100-year flood zones and are designated by the Federal Emergency Management Agency (FEMA) as either “A” zones or “AE” zones. Zones designated as “A” do not have a base flood elevation established by FEMA. AE flood zones do have a base flood elevation established. Map A.9 shows the locations of the A and AE zones within the Redevelopment Area.

Stormwater

Greater Frenchtown: The Frenchtown Stormwater Facility is located in the Florida State University watershed of the Lake Munson Drainage Basin in southwest Tallahassee. The pond is surrounded by the Carter-Howell-Strong City Park, located in the Frenchtown sub-area. The facility is comprised of two ponds, a smaller pretreatment and sedimentation pond and a larger treatment pond. Together, the ponds comprise about five acres and provide 7.8 million gallons of floodwater storage. The pond provides both flood control and removal of pollutants from stormwater discharged downstream.

Southside:

FAMU Way: The Capital Cascades Trail along FAMU Way, completed in 2016, includes “Lake Anita,” an enhanced stormwater facility. Coal Chute Pond a stormwater treatment pond built for the FAMU Way roadway.

Vegetation

Established neighborhoods in the Redevelopment Area are characterized by mature trees that create an attractive framework for renovation and redevelopment.

Brownfields

The Gaines Street corridor was an industrial area for many years. Prior to redevelopment, the City of Tallahassee undertook a major brownfields study. With the assistance of the Environmental Protection Agency, the City identified sites requiring clean up and worked with property owners to establish appropriate remediation plans. That project was successfully implemented and was critical to the successful redevelopment that has subsequently occurred.

The City is now embarking on a similar project for South Monroe Street, another formerly industrial area. In April 2016, the City designated portions of South Monroe Street as a state brownfields area. Property owners will be able to enter into Brownfields Site Rehabilitation Agreements with the Florida Department of Environmental Protection

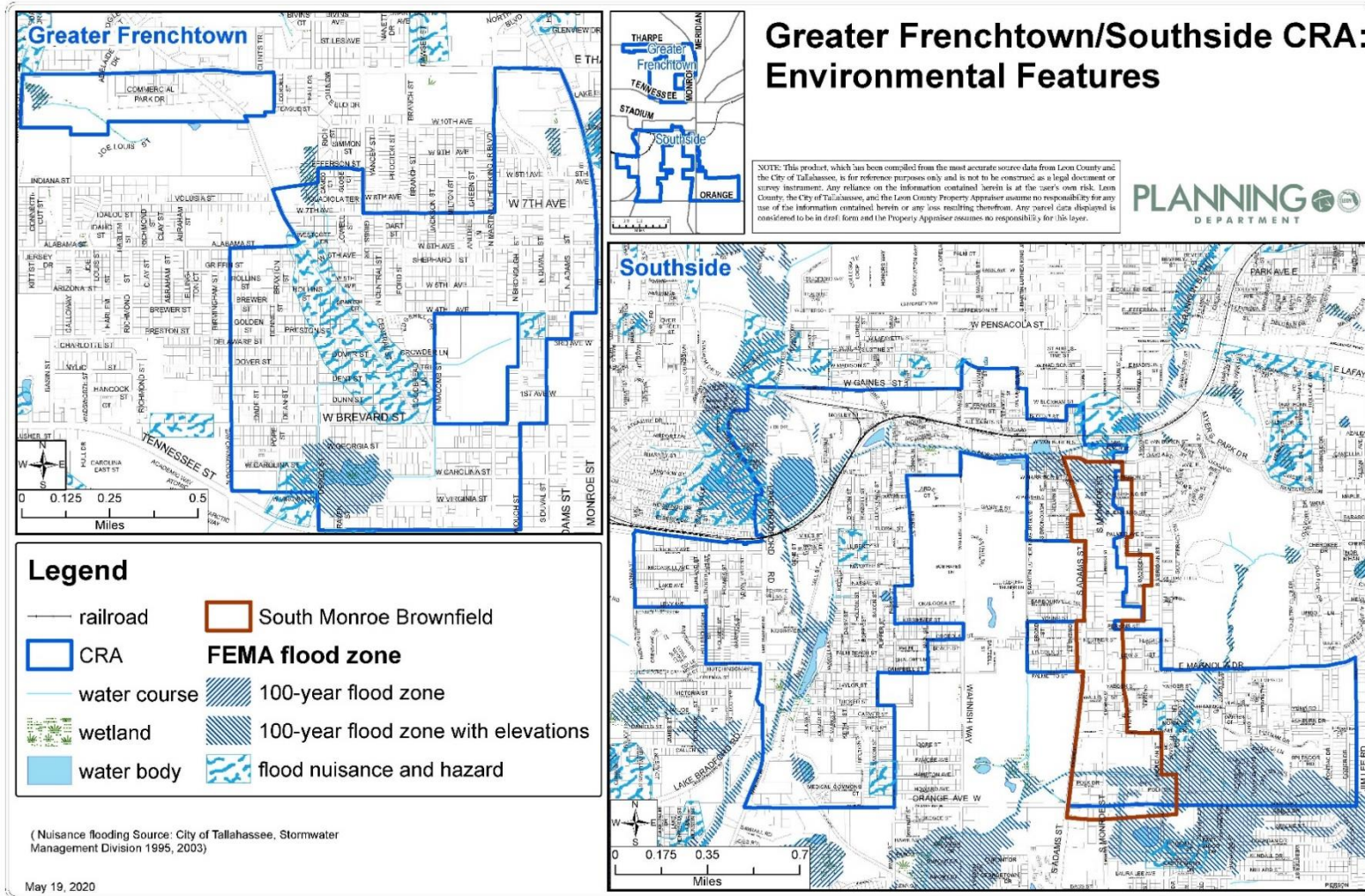
which would allow them to take advantage of various incentives offered by the state and federal brownfields programs.⁶

No studies of potential contamination have been conducted in the Lake Bradford Road area. Based on previous and current uses, the potential for contamination does exist.

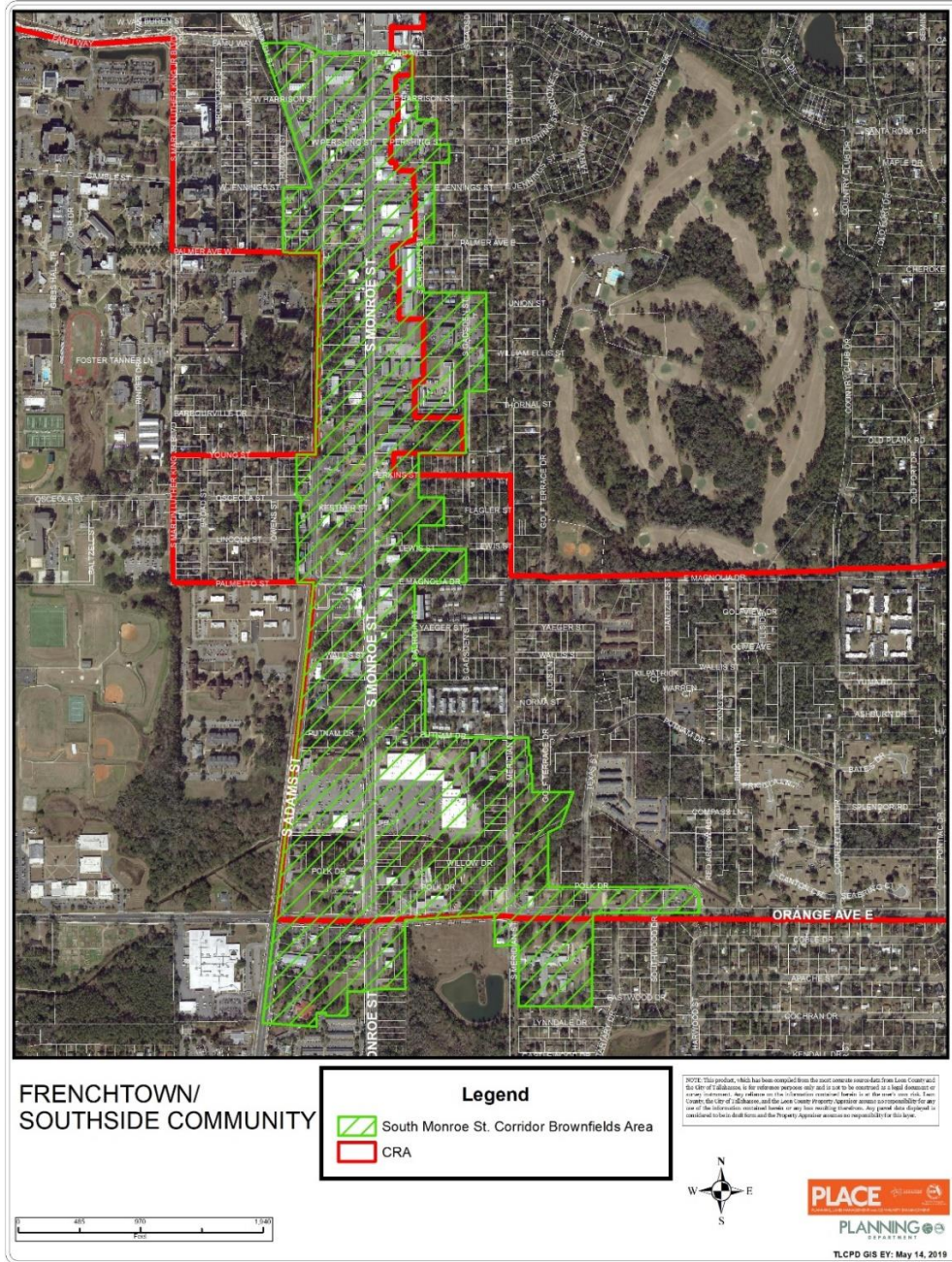
Map A.10 shows the designated brownfield area.

⁶ April 27, 2016 City Commission agenda item 15.04: Second public hearing on the South Monroe Street Corridor Brownfields Designation and approve Resolution No. 16R04

Map A.9: FEMA Flood Plains



Map A.10: South Monroe Brownfields Area



SECTION 9

APPENDIX B: NEIGHBORHOOD IMPACT ELEMENT⁷

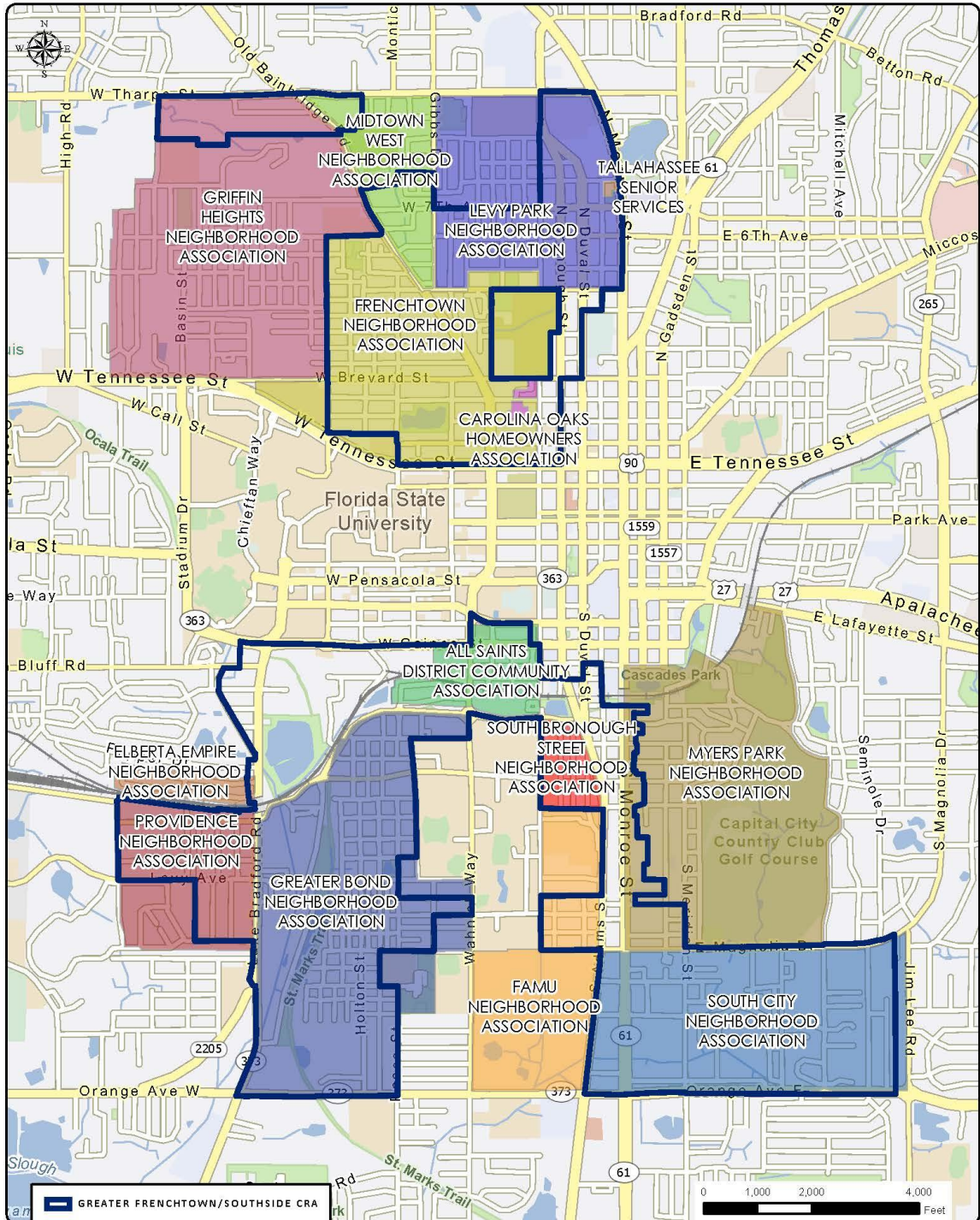
The implementation of the Greater Frenchtown/Southside Redevelopment Plan will help foster a better quality of life for residents of the Redevelopment Area and surrounding areas. The Redevelopment Area contains a number of neighborhoods, with many having their own association. Map B.1. shows the various neighborhood associations located in or near the Redevelopment Area. The Community Redevelopment Agency has, and will continue to, involve these associations in the planning and redevelopment process.

Neighborhoods will benefit from the Redevelopment Plan through increased levels of amenities, improved community facilities, improved environment and physical and social quality. While all the impacts cannot be determined without site-specific proposals which will evaluate impacts in detail, this appendix presents the range of impacts that can be expected in each category required by state statute (Ch. 163.362(3), F.S.). These categories include:

- Schools
- Resident Relocation
- Traffic Circulation
- Parking (not required)
- Environmental Quality
- Community Facilities and Services

⁷Appendix A contains a comprehensive collection of data on the Redevelopment Area and serves as a basis for assessing neighborhood impacts. Refer to Appendix A for a detailed description of existing conditions.

Map B.1: Redevelopment Area Neighborhood Associations



PLANNING
DEPARTMENT
PARTNER OF PLACE
Map Created: April 16, 2020

**Active Homeowner Associations &
Neighborhood Associations
Greater Frenchtown/Southside CRA**

Note: This product has been compiled from the most accurate source data from Leon County, the City of Tallahassee, and the Leon County Property Appraiser's Office. However, this product is for reference purposes only and is not to be construed as a legal document or survey instrument. Any reliance on the information contained within is at the user's own risk. Leon County, the City of Tallahassee, and the Leon County Property Appraiser's Office assume no responsibility for any use of the information contained herein or any loss resulting therefrom.

School Impact

Demographic data shows an increase in the school age population between 2000 and 2019. As shown in Table A.3, the population aged five to 17 in Greater Frenchtown increased from 480 to 524, while the overall population grew from 4,861 to 5,767. The population aged five to 17 in Southside increased from 671 to 1,490, while the overall population increased from 4,090 to 7,470. The large increase in the Southside is primarily due to the four expansion areas included as part of the Redevelopment Area in 2016 and 2018. The Redevelopment Area has seen significant improvements along the south side of Gaines Street from student-oriented housing. These improvements have not resulted in an increase in K-12 student population. The Redevelopment Area will most likely see a significant increase in tax revenues for the school system, without a significant increase in the student population. The remainder of this section provides information on the schools serving the Redevelopment Area.

Of the 13 public schools serving the Redevelopment Area three - Riley Elementary, Griffin Middle and Leon High - are over-capacity in enrollment. Ruediger Elementary and Rickards High are currently near or at capacity, with 99 and 100 percent, respectively. Pineview Elementary and Nims Middle schools have the most excess capacity, as illustrated in Table B.1.

Leon County School Board policies and City ordinances affect school capacity. The Leon County School Board maintains a Five-Year Physical Plan Survey that identifies needed capacity projects. To address current capacity problems, the School Board's "controlled open enrollment" policy allows parents to request the transfer of a student from a school that is near or at capacity to a school that has capacity. City Growth Management ordinances require coordination with the School Board to determine the impacts of new development on school capacity. These school concurrency regulations help to mitigate the impacts on schools over capacity.

Table B.1 . Leon County Schools Zoned for Redevelopment Area Students

| School | 2010 Enrollment | 2019 Enrollment | 2019 Permanent Capacity | Enrollment as % of 2019 Permanent Capacity | School Capacity Status | Greater Frenchtown /Southside Students |
|-------------------|-----------------|-----------------|-------------------------|--|------------------------|--|
| Elementary | | | | | | |
| Bond | 647 | 597 | 790 | 76% | Under | Southside |
| Hartsfield | 592 | 445 | 615 | 72% | Under | Southside |
| Pineview | 611 | 391 | 667 | 59% | Under | Southside |
| Riley | 623 | 617 | 591 | 104% | Over | Both |
| Ruediger | 647 | 546 | 553 | 99% | Under | Gr. Frenchtown |
| Sullivan | 932 | 747 | 823 | 91% | Under | Gr. Frenchtown |
| Total | 4052 | 3343 | | | | |
| | | | | | | |
| Middle | | | | | | |
| Cobb | 841 | 795 | 918 | 87% | Under | Both |
| Griffin | 615 | 664 | 589 | 113% | Over | Gr. Frenchtown |
| Nims | 548 | 508 | 933 | 54% | Under | Southside |
| Raa | 943 | 928 | 1023 | 91% | Under | Gr. Frenchtown |
| Total | 2947 | 2895 | | | | |
| | | | | | | |
| High | | | | | | |
| Godby | 1326 | 1377 | 1678 | 82% | Under | Both |
| Rickards | 1323 | 1558 | 1562 | 100% | At | Southside |
| Leon | 1947 | 2000 | 1720 | 116% | Over | Both |
| Total | 4596 | 4935 | | | | |

Source: Leon County Schools, July 2020

Relocation Impact

The Greater Frenchtown/Southside Redevelopment Area includes approximately 6,752 dwelling units, some of which are considered low to moderate-income units. There are privately owned and managed housing developments specifically designated for low to moderate income families located within the boundaries of the Redevelopment Area, as well as a variety of landlords who accept Section 8 housing vouchers.

To date, redevelopment within the CRA District has occurred in areas that did not contain a significant residential population (e.g., Gaines Street) and has therefore not resulted in significant relocation of residents. The Redevelopment Plan identifies existing residential areas that should be preserved and enhanced. To that end, the Greater Frenchtown/Southside Investment and Strategic Plan includes funds to be used for affordable housing rehabilitation and construction.

If relocation of residents is required, the Agency will follow the City's Temporary Relocation Policy and provide supportive services and equitable financial treatment to any individuals, families and businesses subject to relocation.

Traffic Circulation Impact

The Redevelopment Area is within the City's Multimodal Transportation District (MMTD) overlay zone. The MMTD is intended to promote all forms of mobility, including walking, transit and cycling. As such, an analysis of the impacts of increased traffic must consider all forms of transportation. The City has several strategies for promoting alternate forms of transportation:

- Development within the MMTD is intended to be transit and pedestrian friendly, with a mix of land uses and walkable streets. As development occurs within the Redevelopment Area, this pattern of development will help reduce demand for cars and the resultant congestion.
- Funds that become available for transportation improvements within the MMTD, either through impact fee or Blueprint sales tax projects, will be used primarily to promote transit, walking and cycling. Proposed mobility projects specific to each sub-area are described in the Redevelopment Plan. Larger scale projects that are underway are as follows:
 - Bicycling: The Leon County Bicycle Route Network will provide a highly connected bicycle network in the Redevelopment Area. Implementation is occurring as funds become available.
 - Transit: Improvements to system and increased headway.

Parking Impact

A combination of private off-street parking supplemented by on-street parking currently provides parking for development within the Redevelopment Area and is expected to continue to do so. (See Map A.8., Existing Parking Conditions). As the Redevelopment

Area continues to grow, the provision of adequate parking will increasingly become an issue.

The increased demand for parking in the Redevelopment Area was calculated based on data from a 2016 market study.⁸ The increased demand is shown in Table B.2.

| | Office | | Retail | | Hotel | Multifamily | | Total | |
|--------------------|--------|--------|--------|------|-------|-------------|------|-------|-------|
| | Low* | High** | Low | High | | Low | High | Low | High |
| Greater Frenchtown | 2 | 17 | 5 | 41 | 0 | 302 | 598 | 309 | 656 |
| Southside | 1 | 13 | 5 | 41 | 248 | 186 | 1320 | 440 | 1,622 |

Sources: Market Analysis-Frenchtown/Southside and Downtown CRAs, Nov 2016 and Tallahassee Land Development Code

*- Low demand projection

** - High demand projection

Notes:

Analysis is based on increase in development in each land use category. Parking standards for office and retail development vary within the CRA District based on zoning district. Since it is not possible to predict where individual developments may occur, the parking analysis uses the highest parking ratio (i.e., projects the greatest possible number of spaces required).

Table B.2 shows that the greatest demand for parking will result from new multifamily housing. Recent housing developments within the Gaines Street corridor have provided parking on-site. Design standards within the Gaines Street corridor are intended to allow for structured parking while creating active uses along street fronts.

While it is not possible to predict where future development will occur on a site-specific basis, three sub-areas have experienced a heightened need for parking facilities, or are likely to be the location of future development and as a result, experience a heightened need for parking facilities. These three sub-areas are:

FAMU Way/ Lake Bradford Road Sub-Area: As Gaines Street fulfills its role of becoming a cultural destination and subsequently pushes closer to both FAMU and FSU, pressure to provide sufficient parking for patrons, neighborhood residents and students has become more intense. Currently, the Gaines Street corridor is experiencing parking pressure. The Community Redevelopment Agency has been working with local businesses in the corridor to identify all possible parking locations and to better advise the public of parking locations through brochures and wayfinding signs.

⁸ City of Tallahassee Market Analysis – Frenchtown/Southside and Downtown Districts, November 2016

Frenchtown Sub-Area: Urban in-fill, the encroachment of student housing, nighttime entertainment options on Tennessee Street and the increase in residential and commercial development within the Frenchtown neighborhood will intensify the parking problems on the streets north of Tennessee Street.

South Monroe/South Adams Corridor Sub-Area: The Capital Cascades Trail, urban infill projects and the FAMU Way extension will promote the development of additional living spaces and the activities that support the residences within this sub-area. Specifically, South Adams, South Monroe and Bronough Streets and the FAMU neighborhood areas should address the growing need to accommodate the increase in vehicles.

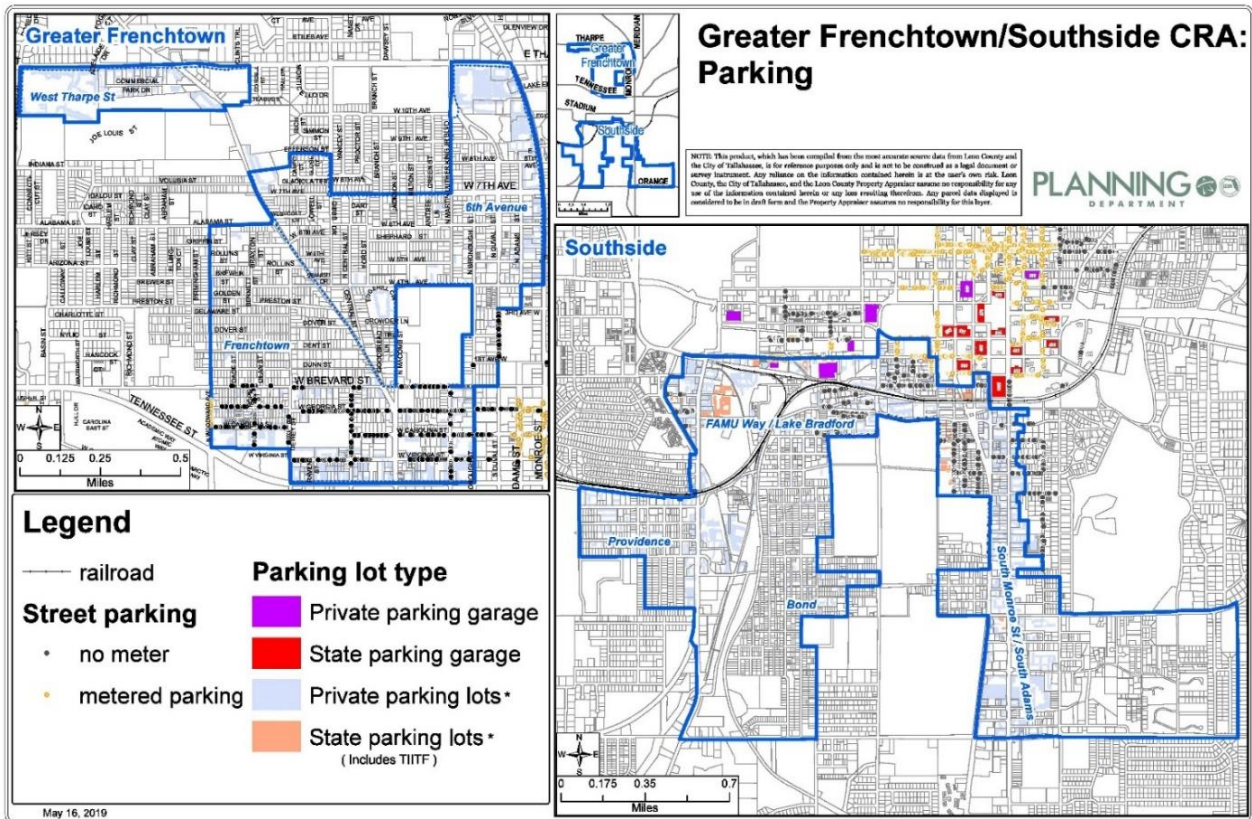
As noted in Appendix A, a review of existing parking conditions shows the following:

- Parking for residential and commercial uses include both on-street and off-street parking.
- The amount of on-street parking allowed within the Redevelopment Area is very limited.
- The existence of parking garages is limited throughout the Redevelopment Area with only one government owned garage being located at the City of Tallahassee Renaissance Building in the Frenchtown sub-area.

Recommendations for meeting the future parking demand are as follows:

- Continue to promote the use of parking within a short walk of major destinations through signage, brochures and mobile phone applications.
- Continue to promote development that decreases reliance on automobiles by providing goods, services, and employment opportunities in close proximity to housing.
- Continue to support infrastructure for transit, walking, and cycling.
- Evaluate opportunities to increase the amount of on-street parking.
- Encourage the use of shared parking by developments with different “peak parking” demands.

Map B.1: Existing Parking Conditions



Environmental Quality Impact

Water Quality

The development of vacant and/or underutilized sites within the Redevelopment Area may result in minor increases in the amount of stormwater runoff which may contain various types of pollutants, such as those generated by automobiles (gasoline, oil, antifreeze, etc.). If not handled properly, the pollutants in the stormwater runoff could degrade surface and groundwater resources. The City of Tallahassee enforces standards that address the treatment of stormwater and the protection of groundwater. The City also promotes the TAPP (Think About Personal Pollution) Campaign. TAPP helps educate individuals on ways that personal changes in home and yard practices can help keep local lakes, sinks and streams cleaner. The Redevelopment Plan does not include any industrial projects that would negatively affect water quality.

Vegetation and Wildlife

While some loss of vegetation will occur due to redevelopment, the Plan recognizes the value of the mature vegetation that characterizes the older neighborhoods within the Redevelopment Area. Additionally, streetscape projects funded by the Blueprint sales tax will add landscaping to the Redevelopment Area.

The City's approach to stormwater projects in and adjoining the Redevelopment Area has been to create more naturalistic environments that support vegetation and urban wildlife. Projects include the Lake Elberta Crute Regional Stormwater Facility, Carter-Howell-Strong Park, Speed-Spencer-Stephens Park and Cascades Park and Greenway.

Air Quality

The implementation of the Redevelopment Plan does not involve the addition of any anticipated point sources of air pollution that would require State or Federal permits. Construction activities that occur as a part of project development may be a source of airborne dirt and dust, especially during windy conditions; however, these are expected to be minimal, and there are controls the developer can implement to lessen the impact. The primary source of air pollutants in the Redevelopment Area is vehicular traffic. In the absence of redevelopment, and the anticipated increase in housing, commuters will continue to be the major contributor to air pollutants; however, anticipated mixed use development is intended to decrease over time the number of automotive trips that would otherwise be made. Other transportation improvements, including implementation of the Bicycle-Pedestrian Master Plan, should provide long-term benefits for the air quality in the Redevelopment Area by increasing the efficiency of traffic flow and decreasing dependency on the automobile for short trips in town.

Noise

The Redevelopment Plan does not call for the introduction of any activities that would increase current noise levels. In January 2016, the City Commission adopted a noise ordinance. The ordinance establishes one set of permissible sound levels within an area designated the Urban Core District and another in the rest of the City. The following portions of the Redevelopment Area are within the Urban Core District, which allows higher sound levels:

- Greater Frenchtown: Copeland Street to Bronough Street between Tennessee Street and Virginia Street
- Southside: Gaines Street to Martin Luther King, Jr. Boulevard to FAMU Way to the railroad tracks via the west side of Railroad Square, to Lake Bradford Road.

No noise issues have been brought to attention of the CRA. Should such concerns arise, the CRA will work with the City to address concerns.

Brownfields

As noted in Appendix B, a study of potential brownfield contamination in the South Monroe/South Adams sub-area identified a number of sites requiring further assessment. The CRA supports efforts to clean up and reuse contaminated brownfield sites.

Public Utilities Impact

Electric

The existing electrical lines that bring power to the Greater Frenchtown portion of the Redevelopment Area have adequate capacity to provide service to the businesses and residents within the Redevelopment Area. In fact, the existing electrical infrastructure has sufficient capacity to handle up to 25% more development. However, should the Redevelopment Area see 25% growth it is possible that some circuit reconfiguration or upgrades will be required at locations within the Redevelopment Area, but the supporting “trunk” lines that bring power and energy into the Redevelopment Area have available capacity.

There is, however, a capacity constraint at the Bulk Power Station 6 (BP-6) which is related to the Southside portion of the Redevelopment Area. Should added power and energy be required in this area, the amount of additional loading the facility could handle would be constrained. The City of Tallahassee Electric & Gas Utility Department anticipated replacing both switchgears at BP-6 during the spring 2020 reduced load period. However, with COVID-19 and the stay-at-home orders, the work has been postponed until the fall 2020 reduce load period starting in October and ending in January.

Sewer and Water

The sewer infrastructure in the Redevelopment Area consists of pipelines that range from six to 18 inches in diameter. The age of the infrastructure varies. Some pipelines are as old as 70 years and other have recently been replaced. The majority of the sewer pipes are six-inch vitrified clay. No negative impact on the existing sanitary sewer is expected from implementation of the Redevelopment Plan. Sufficient capacity exists to support anticipated development.

The water pipelines range from two to 14 inches in diameter. At this time the infrastructure is able to provide adequate and ample capacity to serve the existing residents and businesses in the Redevelopment Area. No degradation to potable water quality is anticipated from implementation of the Redevelopment Plan.

Stormwater

Frenchtown is within a closed basin; therefore, any new development activities will have to address stormwater management issues. Flooding also occurs in the area of Wahnish Way. Stormwater management improvements will be needed to reduce damages to property in the Redevelopment Area.

The City has made a substantial investment in stormwater draining in the Southside portion of the Redevelopment Area. Currently, most of the stormwater drains to the Lake Elberta Crate Regional Stormwater Facility. Presently, there is sufficient capacity at the facility to handle anticipated development in the Southside; however, if the facility begins to reach capacity, other solutions will be needed. Development of the Capital Cascades Greenway has significantly improved stormwater drainage along Franklin Boulevard and Coal Chute Pond has provided additional capacity along Gaines Street.

The Frenchtown Stormwater Pond in the Redevelopment Area manages the runoff from the Greater Frenchtown portion of the Redevelopment Area. The pond is surrounded by the Carter-Howell-Strong Park, located two blocks north of Tennessee Street and bounded to the East and West by Copeland and Dewey Streets. The facility is actually two ponds, which together total approximately five acres with 7.8 million gallons of floodwater storage. The pond provides both flood control and removal of pollutants from stormwater discharged downstream towards Lake Munson. The pond and associated park are a public amenity within the local neighborhood and serve as a refuge for many birds and other animals. Blueprint IA committed \$10 million towards watershed drainage improvements in Frenchtown.

The Redevelopment Agency will work closely with developers to ensure anticipated new development does not add to existing stormwater problems, or that adequate stormwater continues to be provided concurrent with the development.

Community Facilities Impact

Open Space/Recreational Facilities⁹

Greater Frenchtown contains a mix of parks and community facilities, totaling approximately 26 acres. These facilities are dispersed throughout Greater Frenchtown.

Southside contains approximately 40 acres of open space and recreation facilities, not including the Capital Cascades Trail. Of the 40 acres, the Lake Elberta Crute Regional Stormwater Facility comprises approximately 26 acres and the Walker Ford Community Center comprises approximately 12 acres. The remaining facilities are Coal Chute Park adjoining Railroad Square and the Speed-Spencer-Stephens Park. There are no parks in the Providence or Bond Sectors.

As part of the Priority Area and Goal #4 (Quality of Life), the Redevelopment Plan promotes the availability of, and access to, well-designed and well-maintained green spaces. As part of the redevelopment strategy, the CRA will pursue opportunities for the creation of small neighborhood parks.

Social Services

Implementation of the Redevelopment Plan will not adversely impact the provision of the social services available to low and moderate-income persons living in the Redevelopment Area. The CRA does not directly assist with providing social services. However, Priority Area and Goal #2, Impact on Poverty, calls for the CRA to support various agencies with improvements to their facilities allowing the agencies resources to be used for Redevelopment Area residents.

⁹ Appendix A contains a description of open space and recreational facilities in the Redevelopment Area.

SECTION 10:
APPENDIX C: MARKET ANALYSIS

This analysis provides an overview of residential and retail market conditions; and estimates future demand and growth within the Redevelopment Area. The future demand and growth projections are based on the base analysis, emerging national trends, and CRA participation and investment. The market analysis was conducted by GAI Consultants, Inc. in November 2016. Based on historical capture rates and percentages, the analysis estimates by 2030 the Redevelopment Area will increase its office space square footage by 66,000; hotel rooms on the Southside are estimated to increase by 200 rooms with no demand for hotel rooms in Frenchtown; and retail space is estimated to increase by 92,000 square feet. It should be noted the market analysis covers both the Greater Frenchtown Southside and the Downtown Districts.

City of Tallahassee Community Redevelopment Agency Market Analysis – Greater Frenchtown/Southside and Downtown District CRA's

Prepared For:
City of Tallahassee
Community Redevelopment Agency
GAI Project Number: A151772.00

November 2016- Final Report



Planning | Urban Design
Landscape Architecture
Economics | Real Estate

November 30, 2016
GAI Project No. A151772.00

Mr. Rick McCraw, AICP
Program Director
City of Tallahassee Community Redevelopment Agency
15241 East Oakland Avenue
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Tallahassee, Florida 32301

Final Report
City of Tallahassee Community Redevelopment Agency Market Analysis
Greater Frenchtown/Southside and Downtown District CRA's

Dear Rick:

GAI Consultants, Inc. (GAI) has completed its analysis of supportable levels of development for various land uses within the Greater Frenchtown/ Southside and Downtown District Community Redevelopment Areas (CRA's). The first phase of our study was completed as outlined in our contract with you dated July 26, 2016. The attached report entitled "Market Analysis – Greater Frenchtown/ Southside and Downtown District CRA's" summarizes the results of our analysis.

The report is based on estimates, assumptions, and other information related to the above. Such estimates, assumptions, or other information were developed from prior research, knowledge of the industry, and discussions with you. The sources of information and basis of estimates and assumptions are stated in the report. Since our documentation is based on estimates and assumptions which are inherently subject to uncertainty and variation depending upon evolving events, we do not represent the data as results which would actually be achieved.

The following paragraphs express conditions and limitations which our firm necessarily states with any engagement of this nature. Please call us if you should have questions. Our services did not include legal and regulatory counseling, comments on matters associated with zoning or other state and local government regulations, permits and licenses. Further, no effort was made to determine the possible effects on any specific projects as they may be influenced by present or future federal, state, or local legislation, including any bond restrictions, changes in tax structure or tax law, environmental or ecological matters, or interpretations thereof.

Any conclusions and/or any prospective financial information that is included in our documentation were based on estimates and assumptions from previous studies, information developed from supplemental research, knowledge of the industry, and other sources, including certain information that you have provided. These sources of information and bases of significant estimates and assumptions are stated in our documentation. Some assumptions inevitably will not materialize and unanticipated events and circumstances may occur. Therefore, actual results achieved will vary from any estimates, and the variations may be material.

The terms of this engagement are such that we have no obligation to revise the document to reflect events or conditions, which occur subsequent to the date of the documentation. The report does reflect certain review comments that were received after the date of issuance. *However, the principal data used to draw our conclusions remains as of the report date.*

Our documentation is intended solely for your information, internal planning, potential financial partners, lenders, and presentation to other interested parties. Neither our documentation nor its contents, nor any reference to our firm may be included or quoted in any real estate offering or registration statement, or other agreement or document without our prior permission. Permission will be granted upon meeting certain conditions.

Please contact us if you have any questions about this report. It was a pleasure working with you on this assignment and we look forward to completing the remainder of the analysis as noted in our scope of services and contract.

Sincerely,

**Community Solutions Group,
a GAI Consultants, Inc.
Service Group**

David R. Darsey
Senior Director

Owen M. Beitsch, PhD, FAICP, CRE
Senior Director

Thomas R. Kohler
Senior Director

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1.0 EXECUTIVE SUMMARY

1.1 Introduction

GAI Consultants, Inc. (GAI) was retained by the City of Tallahassee Community Redevelopment Agency (Client) to estimate supportable levels of development for various land uses within the Greater Frenchtown/Southside and Downtown District Community Redevelopment Areas (CRA's). Although the Greater Frenchtown/Southside area is under one CRA, for the purposes of this study we treated it as being separate. Therefore, in some areas of the report, we reference and treat Frenchtown, Southside and the Downtown District as three separate districts, although we recognize there are officially only two CRA's.

Our study is a four-phased effort including the following major tasks:

- ▶ A market study identifying near-term and mid-term opportunities for various land uses city wide and the potential to support them in the districts. The land uses we analyzed included:
 - Office
 - Retail
 - Hotel
 - Multi-Family For-Rent Apartments
 - Multi-Family For-Sale Condominiums
- ▶ A feasibility study testing the market and financial implications for potential development of the above land uses at specific development parcels within the districts.
- ▶ Assistance in the preparation of a Request for Proposal (RFP) should one or more opportunities prove feasible or beneficial.
- ▶ Assistance in the general review and evaluation of information particular to qualified developer proposals which may be received.

This report summarizes the results of the market study noted above as the first phase of our work effort. The second phase feasibility study will be initiated after the Client's review of this report. The remaining phases would occur at later dates when authorized by the Client.

1.2 Principal Work Steps of Market Study

The principal work steps within our market study included:

- ▶ Meetings in Tallahassee with the Client, City of Tallahassee staff, community leaders, organizations such as Visit Tallahassee and the Office of Economic Vitality, local real estate professionals, property managers and developers.
- ▶ Toured the area, focusing on the Frenchtown, Southside and Downtown Districts.
- ▶ Analyzed demographic data and trends.
- ▶ Profiled development and absorption trends for the land uses noted above in Leon County, the City of Tallahassee and the Frenchtown, Southside and Downtown Districts.

- ▶ Identified proposed projects via interviews with appropriate planning agencies and local real estate industry professionals.
- ▶ Prepared estimates of market support and timing for office, retail, hotel, multi-family for-rent apartments and multi-family for-sale condominiums in Leon County and the potential capture of this future development within the Frenchtown, Southside and Downtown Districts.

1.3 Methodology

- ▶ Demographic data are compiled from a variety of sources including Environmental Systems Research Institute (ESRI), the U.S. Bureau of Labor Statistics, and the U.S. Census Bureau. Projections and current year data are based on the American Community Survey Census five year estimates.
- ▶ Our analysis made use of several data sources or services to which we subscribe. These are described below. Most of this information speaks to *past or existing* conditions at the time of our original research. Any *planned* additions to the office, retail, multi-family for rent and multi-family for sale supply were obtained from the Tallahassee Office of Economic Vitality. Only planned projects which are actively under construction or have obtained an approval within the last year are included. Projects which have approvals that are more than a year old with no recent activity, projects in "pre-application" and applications "under review" are not included. Projects that meet this methodology have been included based on discussions with the Community Redevelopment Agency, City and the Department of Economic Vitality as of February 10, 2017. Any modifications to these projects or the addition of new projects after this date have not be considered in this analysis.
- ▶ Office and Retail data are compiled from CoStar and the Leon County Tax Roll. CoStar was founded in 1987 and is considered one of the country's leading providers of information, analytics and marketing services to the commercial real estate industry. Its service offerings principally include office, industrial and retail uses, with supplementary data available on the hospitality and multifamily apartment industry. All of the CoStar data is presented for the most recent complete year at the time this report was written, which was year-end 2015. CoStar does not set a minimum square footage threshold for reporting, however the data is broker reported and therefore smaller spaces may be reported less frequently.
- ▶ Hotel operating data was obtained from Smith Travel Research (STR). STR was founded in 1985 and is a principal data source for the lodging industry, providing global data benchmarking, analytics and marketplace insights. Each month the company collects performance data from over 46,000 hotels representing more than 5.3 million rooms globally.
- ▶ Apartment data and analysis are conducted based on data obtained from MyRentComps.com. MyRentComps was founded in 2005 and provides performance data to the apartment industry, principally through market surveys conducted by their participants. The company currently has over 100,000 properties in their database. Data in the MyRentComps system is currently limited to reporting on multi-family for rent apartments of 100 units or more. Although there are certainly projects that have been developed in the Tallahassee market that are under 100 units in size, we believe it is likely that most future projects will be greater than this number to

capitalize on the economies of scale that larger projects can achieve. In our opinion, the development sites we would analyze during the next phase of work would be large enough that apartment projects would need to be over 100 units in size.

- ▶ The terms of this engagement are such that we have no obligation to revise the document to reflect events or conditions, which occur subsequent to the date of the report, which was November 30, 2016. The report does reflect certain review comments that were received after the date of issuance. However, the principal data used to draw our conclusions remains as of the report date.

1.4 Key Findings

The existing amount of inventory for each selected land use and geography is summarized in Table 1.1.

Table 1.1
Summary of Existing Inventory – Leon County, Frenchtown, Southside and Downtown Districts

| Area | Office SF | Retail SF | Hotel Units | For-Rent | | For-Sale |
|---------------------|------------------|----------------|-------------|---------------------|-------------------|------------|
| | | | | Apartment Units (1) | Condominium Units | |
| Leon County | 20,706,118 | 20,213,751 | 5,592 | 20,567 | | 4,316 |
| Frenchtown District | 382,968 | 577,224 | 164 | 364 | | 47 |
| Southside District | 231,946 | 905,312 | 0 | 414 | | 104 |
| Downtown District | <u>3,083,583</u> | <u>478,907</u> | <u>698</u> | <u>684</u> | | <u>576</u> |
| Total All Districts | 3,698,497 | 1,961,443 | 862 | 1,462 | | 727 |

Source: CoStar; Leon County Tax Roll; Smith Travel Research; MyRentComps; GAI

- ▶ The Downtown District by far has the most office square footage of all the districts at almost 10 times higher than the Frenchtown District, which is the next largest area. The Downtown District has captured about 15% of the total office space in the County.
- ▶ The Southside District has the highest amount of retail square footage among the districts. It has captured about 4.4% of the total retail space in the County.
- ▶ The Downtown District has the largest inventory of hotel rooms of all the districts. The Downtown District has captured about 12.5% of the total hotel units in the County. There are no existing hotel rooms tracked by Smith Travel Research in the Southside District. However, a Hampton Inn is under construction in the Southside District. The one hotel property in the Frenchtown District was built prior to 1970.
- ▶ There are 364, 414, and 684 rental apartment units in the Frenchtown, Southside and Downtown Districts, respectively. Most of the product within the Frenchtown District was built from 1996-2005. Much of the product in the Downtown District is older and was built prior to 1986. All of the rental apartment complexes of 100 units or more in the Southside District were built from 2011-2016. The units added in the Southside District are generally grouped with a larger complex called Stadium Centre that is managed by one company. Additionally, there are three proposed apartment projects in the Southside District. The Downtown District has one

apartment project under construction. All the new units either under construction or planned in the districts are student oriented.

- ▶ According to data obtained from the Leon County Property Appraiser, for-sale condominium units total approximately 47, 104 and 576 in the Frenchtown, Southside and Downtown Districts, respectively. The Downtown District has captured about 13.3% of the total condominium units in the County.

Tables 1.2 and 1.3 summarize the capture rate of pertinent development activity within the County in the Frenchtown, Southside and Downtown Districts.

Table 1.2
Summary of County Capture Rates - Frenchtown, Southside and Downtown Districts

| Year Built | Office SF | Retail SF | Condominium Units | Hotel Rooms |
|---|-----------|-----------|-------------------|-------------|
| <u>Frenchtown District</u> | | | | |
| Prior to 1970 | 6.6% | 7.4% | 0.0% | 33.9% |
| 1970-1979 | 0.7% | 1.6% | 0.0% | 0.0% |
| 1980-1989 | 0.6% | 0.3% | 7.9% | 0.0% |
| 1990-1999 | 0.2% | 2.8% | 0.0% | 0.0% |
| 2000-2009 | 1.1% | 3.5% | 0.4% | 0.0% |
| 2010-2015 | 0.0% | 0.0% | 0.0% | 0.0% |
| Unknown | 16.8% | 0.9% | NA | 0.0% |
| Total | 1.8% | 2.9% | 1.1% | 2.9% |
| <u>Southside District</u> | | | | |
| Prior to 1970 | 6.4% | 13.1% | 4.3% | 0.0% |
| 1970-1979 | 0.0% | 4.9% | 0.0% | 0.0% |
| 1980-1989 | 0.1% | 1.4% | 0.0% | 0.0% |
| 1990-1999 | 0.3% | 0.9% | 0.0% | 0.0% |
| 2000-2009 | 0.4% | 1.6% | 3.1% | 0.0% |
| 2010-2015 | 0.0% | 0.0% | 1.6% | 0.0% |
| Unknown | 3.1% | 6.9% | NA | 0.0% |
| Total | 1.1% | 4.5% | 2.4% | 0.0% |
| <u>Downtown District</u> | | | | |
| Prior to 1970 | 34.2% | 6.4% | 19.3% | 0.0% |
| 1970-1979 | 14.6% | 1.3% | 5.6% | 31.4% |
| 1980-1989 | 17.6% | 0.8% | 0.0% | 13.1% |
| 1990-1999 | 10.6% | 0.2% | 44.4% | 0.0% |
| 2000-2009 | 2.5% | 2.4% | 16.7% | 19.0% |
| 2010-2015 | 8.5% | 5.3% | 0.0% | 0.0% |
| Unknown | 1.8% | 3.3% | NA | 0.0% |
| Total | 14.9% | 2.4% | 13.3% | 12.5% |
| Source: CoStar; Leon County Tax Rolls; Smith Travel Research; GAI | | | | |

Table 1.3
Summary of County Capture Rates - Frenchtown, Southside and Downtown Districts

| Year Built | Apartment Units |
|---------------------------------|-----------------|
| <u>Frenchtown District</u> | |
| Prior to 1986 | 1.5% |
| 1986-1995 | 0.0% |
| 1996-2005 | 4.2% |
| 2006-2010 | 0.0% |
| 2011-2016 | 0.0% |
| Total | 1.8% |
| <u>Southside District</u> | |
| Prior to 1986 | 0.0% |
| 1986-1995 | 0.0% |
| 1996-2005 | 0.0% |
| 2006-2010 | 0.0% |
| 2011-2016 | 40.9% |
| Total | 2.0% |
| <u>Downtown District</u> | |
| Prior to 1986 | 4.6% |
| 1986-1995 | 0.0% |
| 1996-2005 | 0.0% |
| 2006-2010 | 0.0% |
| 2011-2016 | 34.5% |
| Total | 3.3% |
| <i>Source: MyRentComps; GAI</i> | |

The Downtown District has generally dominated capture rates of the County's development of pertinent land uses with the exception of retail. The Frenchtown District has captured a greater amount of office space and hotel rooms, but the Southside District has captured a higher percentage of retail space and condominium units. In recent years the Downtown and Southside District have captured a significant percentage of the County's overall apartment development in complexes with 100 units or more.

Table 1.4 on the following page summarizes our estimates of future office and retail square footage and hotel, apartment and for-sale condominium units in Leon County through 2030. Estimated square feet or units per capita for each land use was derived using historic information from Leon County. In effect, the low to high estimates represent a range of possible outcomes for each land use. In particular, timing can be impacted by construction delays, permitting issues and the like. What we believe is important is that we expect a particular land use to fall within this range.

**Table 1.4
 Leon County's Projected Office, Hotel, Retail, Apartment and Condominium Demand, 2015-2030**

| | Per Capita SF | Total County SF | | | Avg Annual Growth Rates | | | Avg Annual County SF Absorption | | |
|----------------------|------------------|-----------------|------------|------------|-------------------------|----------|------|---------------------------------|----------|---------|
| | | Low | Midpoint | High | Low | Midpoint | High | Low | Midpoint | High |
| Office: | | | | | | | | | | |
| 2015 | 72 | 20,706,118 | 20,706,118 | 20,706,118 | | | | | | |
| 2020 | 72 | 20,715,376 | 21,742,465 | 22,769,555 | 0.0% | 1.0% | 1.9% | 1,852 | 207,269 | 412,687 |
| 2025 | 72 | 20,946,833 | 22,722,540 | 24,498,247 | 0.2% | 0.9% | 1.5% | 46,291 | 196,015 | 345,738 |
| 2030 | 72 | 21,134,892 | 23,651,983 | 26,169,075 | 0.2% | 0.8% | 1.3% | 37,612 | 185,889 | 334,166 |
| Hotel: | | | | | | | | | | |
| 2015 | 0.02 | 5,592 | 5,592 | 5,592 | | | | | | |
| 2020 | 0.02 | 5,871 | 6,162 | 6,453 | 1.0% | 2.0% | 2.9% | 56 | 114 | 172 |
| 2025 | 0.02 | 6,082 | 6,597 | 7,113 | 0.7% | 1.4% | 2.0% | 42 | 87 | 132 |
| 2030 | 0.02 | 6,282 | 7,031 | 7,779 | 0.7% | 1.3% | 1.8% | 40 | 87 | 133 |
| Retail: | | | | | | | | | | |
| 2015 | 71 | 20,213,751 | 20,213,751 | 20,213,751 | | | | | | |
| 2020 | 71 | 20,222,789 | 21,225,455 | 22,228,122 | 0.0% | 1.0% | 1.9% | 1,808 | 202,341 | 402,874 |
| 2025 | 71 | 20,561,600 | 22,304,650 | 24,047,700 | 0.3% | 1.0% | 1.6% | 67,762 | 215,839 | 363,916 |
| 2030 | 71 | 20,819,250 | 23,298,750 | 25,778,250 | 0.2% | 0.9% | 1.4% | 51,530 | 198,820 | 346,110 |
| Apartments: | | | | | | | | | | |
| 2015 | 0.10 | 19,902 | 19,902 | 19,902 | | | | | | |
| 2020 | 0.10 | 20,218 | 21,221 | 22,223 | 0.3% | 1.3% | 2.2% | 63 | 264 | 464 |
| 2025 | 0.10 | 20,543 | 22,285 | 24,026 | 0.3% | 1.0% | 1.6% | 65 | 213 | 361 |
| 2030 | 0.10 | 20,728 | 23,196 | 25,665 | 0.2% | 0.8% | 1.3% | 37 | 182 | 328 |
| Condominiums: | | | | | | | | | | |
| 2015 | 0.02 | 4,316 | 4,316 | 4,316 | | | | | | |
| 2020 | 0.02 | 4,318 | 4,532 | 4,746 | 0.0% | 1.0% | 1.9% | 0 | 43 | 86 |
| 2025 | 0.02 | 4,366 | 4,736 | 5,106 | 0.2% | 0.9% | 1.5% | 10 | 41 | 72 |
| 2030 | 0.02 | 4,405 | 4,930 | 5,455 | 0.2% | 0.8% | 1.3% | 8 | 39 | 70 |

Source: GAI

Based upon the County-wide projections noted above, we subsequently evaluated each district's ability to capture or support a part of this future potential market demand based their historical capture rates. The capture rates applied in this analysis stem largely from observations and interpretations of the actual experience in each district, prior development patterns in the County, and our own understanding about the competitive framework in the region. As noted earlier, the low to high estimates represent a range of possible outcomes for each land use.

The following series of tables (Tables 1.5, 1.6, 1.7, 1.8, and 1.9) summarize our estimates of potential future market demand within each district based on site capture percentages of the County's growth in supply for each land use. These tables summarize each land use for the districts separately and in total.

**Table 1.5
 Projected Office Demand within Each District, 2015-2030**

| District | District Capture % | District Cumulative Total SF | | | District Cumulative New SF | | | District Avg Annual SF Absorption | | |
|-----------------------------|--------------------|------------------------------|-----------|-----------|----------------------------|----------|---------|-----------------------------------|----------|--------|
| | | Low | Midpoint | High | Low | Midpoint | High | Low | Midpoint | High |
| Frenchtown District: | | | | | | | | | | |
| 2015 | | 382,968 | 382,968 | 382,968 | | | | | | |
| 2020 | 1.0% | 383,061 | 393,331 | 403,602 | 93 | 10,363 | 20,634 | 19 | 2,073 | 4,127 |
| 2025 | 1.3% | 385,954 | 405,582 | 425,211 | 2,986 | 22,614 | 42,243 | 579 | 2,450 | 4,322 |
| 2030 | 1.5% | 388,775 | 419,524 | 450,273 | 5,807 | 36,556 | 67,305 | 564 | 2,788 | 5,012 |
| Southside District: | | | | | | | | | | |
| 2015 | | 231,946 | 231,946 | 231,946 | | | | | | |
| 2020 | 0.7% | 232,011 | 239,200 | 246,390 | 65 | 7,254 | 14,444 | 13 | 1,451 | 2,889 |
| 2025 | 1.0% | 234,325 | 249,001 | 263,677 | 2,379 | 17,055 | 31,731 | 463 | 1,960 | 3,457 |
| 2030 | 1.3% | 236,770 | 261,084 | 285,398 | 4,824 | 29,138 | 53,452 | 489 | 2,417 | 4,344 |
| Downtown District: | | | | | | | | | | |
| 2015 | | 3,083,583 | 3,083,583 | 3,083,583 | | | | | | |
| 2020 | 8.0% | 3,084,324 | 3,166,491 | 3,248,658 | 741 | 82,908 | 165,075 | 148 | 16,582 | 33,015 |
| 2025 | 12.0% | 3,112,098 | 3,284,100 | 3,456,101 | 28,515 | 200,517 | 372,518 | 5,555 | 23,522 | 41,489 |
| 2030 | 15.0% | 3,140,307 | 3,423,516 | 3,706,725 | 56,724 | 339,933 | 623,142 | 5,642 | 27,883 | 50,125 |
| Total All Districts: | | | | | | | | | | |
| 2015 | | 3,698,497 | 3,698,497 | 3,698,497 | | | | | | |
| 2020 | 9.7% | 3,699,395 | 3,799,023 | 3,898,650 | 898 | 100,526 | 200,153 | 180 | 20,105 | 40,031 |
| 2025 | 14.3% | 3,732,378 | 3,938,683 | 4,144,989 | 33,881 | 240,186 | 446,492 | 6,597 | 27,932 | 49,268 |
| 2030 | 17.8% | 3,765,852 | 4,104,124 | 4,442,396 | 67,355 | 405,627 | 743,899 | 6,695 | 33,088 | 59,481 |

Source: GAI

**Table 1.6
 Projected Hotel Demand within Each District, 2015-2030**

| District | District Capture % | District Cumulative Total Units | | | District Cumulative New Units | | | District Avg Annual Units Absorption | | |
|-----------------------------|--------------------|---------------------------------|----------|-------|-------------------------------|----------|------|--------------------------------------|----------|------|
| | | Low | Midpoint | High | Low | Midpoint | High | Low | Midpoint | High |
| Frenchtown District: | | | | | | | | | | |
| 2015 | | 164 | 164 | 164 | | | | | | |
| 2020 | 0.0% | 164 | 164 | 164 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2025 | 0.0% | 164 | 164 | 164 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2030 | 0.0% | 164 | 164 | 164 | 0 | 0 | 0 | 0 | 0 | 0 |
| Southside District: | | | | | | | | | | |
| 2015 | | 0 | 0 | 0 | | | | | | |
| 2020 | 15.0% | 42 | 86 | 129 | 42 | 86 | 129 | 8 | 17 | 26 |
| 2025 | 12.0% | 67 | 138 | 208 | 67 | 138 | 208 | 5 | 10 | 16 |
| 2030 | 0.0% | 67 | 138 | 208 | 67 | 138 | 208 | 0 | 0 | 0 |
| Downtown District: | | | | | | | | | | |
| 2015 | | 698 | 698 | 698 | | | | | | |
| 2020 | 25.0% | 768 | 841 | 913 | 70 | 143 | 215 | 14 | 29 | 43 |
| 2025 | 25.0% | 820 | 949 | 1,078 | 122 | 251 | 380 | 11 | 22 | 33 |
| 2030 | 30.0% | 881 | 1,079 | 1,278 | 183 | 381 | 580 | 12 | 26 | 40 |
| Total All Districts: | | | | | | | | | | |
| 2015 | | 862 | 862 | 862 | | | | | | |
| 2020 | 40.0% | 974 | 1,090 | 1,207 | 112 | 228 | 345 | 22 | 46 | 69 |
| 2025 | 37.0% | 1,052 | 1,251 | 1,451 | 190 | 389 | 589 | 16 | 32 | 49 |
| 2030 | 30.0% | 1,112 | 1,381 | 1,650 | 250 | 519 | 788 | 12 | 26 | 40 |

Source: GAI



Table 1.7
Projected Retail Demand within Each District, 2015-2030

| | District Capture % | District Cumulative Total SF | | | District Cumulative New SF | | | District Avg Annual SF Absorption | | |
|-----------------------------|--------------------|------------------------------|-----------|-----------|----------------------------|----------|---------|-----------------------------------|----------|--------|
| | | Low | Midpoint | High | Low | Midpoint | High | Low | Midpoint | High |
| Frenchtown District: | | | | | | | | | | |
| 2015 | | 577,224 | 577,224 | 577,224 | | | | | | |
| 2020 | 2.0% | 577,405 | 597,458 | 617,511 | 181 | 20,234 | 40,287 | 36 | 4,047 | 8,057 |
| 2025 | 3.0% | 587,569 | 629,834 | 672,099 | 10,345 | 52,610 | 94,875 | 2,033 | 6,475 | 10,917 |
| 2030 | 4.0% | 597,875 | 669,598 | 741,321 | 20,651 | 92,374 | 164,097 | 2,061 | 7,953 | 13,844 |
| Southside District: | | | | | | | | | | |
| 2015 | | 905,312 | 905,312 | 905,312 | | | | | | |
| 2020 | 2.0% | 905,493 | 925,546 | 945,599 | 181 | 20,234 | 40,287 | 36 | 4,047 | 8,057 |
| 2025 | 3.0% | 915,657 | 957,922 | 1,000,187 | 10,345 | 52,610 | 94,875 | 2,033 | 6,475 | 10,917 |
| 2030 | 4.0% | 925,963 | 997,686 | 1,069,409 | 20,651 | 92,374 | 164,097 | 2,061 | 7,953 | 13,844 |
| Downtown District: | | | | | | | | | | |
| 2015 | | 478,907 | 478,907 | 478,907 | | | | | | |
| 2020 | 2.0% | 479,088 | 499,141 | 519,194 | 181 | 20,234 | 40,287 | 36 | 4,047 | 8,057 |
| 2025 | 4.0% | 492,640 | 542,309 | 591,978 | 13,733 | 63,402 | 113,071 | 2,710 | 8,634 | 14,557 |
| 2030 | 5.0% | 505,523 | 592,014 | 678,505 | 26,616 | 113,107 | 199,598 | 2,577 | 9,941 | 17,306 |
| Total All Districts: | | | | | | | | | | |
| 2015 | | 1,961,443 | 1,961,443 | 1,961,443 | | | | | | |
| 2020 | 6.0% | 1,961,985 | 2,022,145 | 2,082,305 | 542 | 60,702 | 120,862 | 108 | 12,140 | 24,172 |
| 2025 | 10.0% | 1,995,866 | 2,130,065 | 2,264,263 | 34,423 | 168,622 | 302,820 | 6,776 | 21,584 | 36,392 |
| 2030 | 13.0% | 2,029,361 | 2,259,298 | 2,489,235 | 67,918 | 297,855 | 527,792 | 6,699 | 25,847 | 44,994 |

Source: GAI

Table 1.8
Projected Rental Apartment Demand within Each District, 2015-2030

| | District Capture % | District Cumulative Total Units | | | District Cumulative New Units | | | District Avg Annual Units Absorption | | |
|-----------------------------|--------------------|---------------------------------|----------|-------|-------------------------------|----------|-------|--------------------------------------|----------|------|
| | | Low | Midpoint | High | Low | Midpoint | High | Low | Midpoint | High |
| Frenchtown District: | | | | | | | | | | |
| 2015 | | 364 | 364 | 364 | | | | | | |
| 2020 | 6.0% | 383 | 443 | 503 | 19 | 79 | 139 | 4 | 16 | 28 |
| 2025 | 7.0% | 406 | 518 | 629 | 42 | 154 | 265 | 5 | 15 | 25 |
| 2030 | 8.0% | 420 | 591 | 761 | 56 | 227 | 397 | 3 | 15 | 26 |
| Southside District: | | | | | | | | | | |
| 2015 | | 335 | 335 | 335 | | | | | | |
| 2020 | 11.0% | 370 | 480 | 590 | 35 | 145 | 255 | 7 | 29 | 51 |
| 2025 | 12.0% | 409 | 608 | 807 | 74 | 273 | 472 | 8 | 26 | 43 |
| 2030 | 13.0% | 433 | 726 | 1,020 | 98 | 391 | 685 | 5 | 24 | 43 |
| Downtown District: | | | | | | | | | | |
| 2015 | | 465 | 465 | 465 | | | | | | |
| 2020 | 11.0% | 500 | 610 | 720 | 35 | 145 | 255 | 7 | 29 | 51 |
| 2025 | 12.0% | 539 | 738 | 937 | 74 | 273 | 472 | 8 | 26 | 43 |
| 2030 | 13.0% | 563 | 856 | 1,150 | 98 | 391 | 685 | 5 | 24 | 43 |
| Total All Districts: | | | | | | | | | | |
| 2015 | | 1,164 | 1,164 | 1,164 | | | | | | |
| 2020 | 28.0% | 1,253 | 1,533 | 1,814 | 89 | 369 | 650 | 18 | 74 | 130 |
| 2025 | 31.0% | 1,353 | 1,863 | 2,373 | 189 | 699 | 1,209 | 20 | 66 | 112 |
| 2030 | 34.0% | 1,416 | 2,173 | 2,930 | 252 | 1,009 | 1,766 | 13 | 62 | 111 |

Source: GAI



**Table 1.9
 Projected For-Sale Condominium Demand within Each District, 2015-2030**

| | District Capture % | District Cumulative Total Units | | | District Cumulative New Units | | | District Avg Annual Units Absorption | | |
|-----------------------------|--------------------|---------------------------------|----------|-------|-------------------------------|----------|------|--------------------------------------|----------|------|
| | | Low | Midpoint | High | Low | Midpoint | High | Low | Midpoint | High |
| Frenchtown District: | | | | | | | | | | |
| 2015 | 0.0% | 47 | 47 | 47 | | | | | | |
| 2020 | 0.0% | 47 | 47 | 47 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2025 | 2.0% | 48 | 51 | 54 | 1 | 4 | 7 | 0 | 1 | 1 |
| 2030 | 3.0% | 49 | 57 | 65 | 2 | 10 | 18 | 0 | 1 | 2 |
| Southside District: | | | | | | | | | | |
| 2015 | 0.0% | 104 | 104 | 104 | | | | | | |
| 2020 | 2.0% | 104 | 108 | 113 | 0 | 4 | 9 | 0 | 1 | 2 |
| 2025 | 3.0% | 105 | 114 | 123 | 1 | 10 | 19 | 0 | 1 | 2 |
| 2030 | 4.0% | 107 | 122 | 137 | 3 | 18 | 33 | 0 | 2 | 3 |
| Downtown District: | | | | | | | | | | |
| 2015 | 0.0% | 576 | 576 | 576 | | | | | | |
| 2020 | 20.0% | 576 | 619 | 662 | 0 | 43 | 86 | 0 | 9 | 17 |
| 2025 | 25.0% | 588 | 670 | 752 | 12 | 94 | 176 | 2 | 10 | 18 |
| 2030 | 30.0% | 600 | 728 | 857 | 24 | 152 | 281 | 2 | 12 | 21 |
| Total All Districts: | | | | | | | | | | |
| 2015 | | 727 | 727 | 727 | | | | | | |
| 2020 | 22.0% | 727 | 775 | 822 | 0 | 48 | 95 | 0 | 10 | 19 |
| 2025 | 30.0% | 742 | 836 | 930 | 15 | 109 | 203 | 3 | 12 | 22 |
| 2030 | 37.0% | 756 | 907 | 1,059 | 29 | 180 | 332 | 3 | 14 | 26 |

Source: GAI

As can be seen in the above series of tables (Tables 1.5, 1.6, 1.7, 1.8, and 1.9), the site capture percentages for each land use vary between each district based on their historical capture percentages. However, the reader needs to keep in mind that the districts are so physically close to each other that the development we are projecting above may not necessarily fall entirely within the respective district. Developers will look for sites that best suit their vision and will not be restricted by district boundaries. In other words, it may be beneficial to think of the projections for all three districts as a whole rather than three separate areas, as development shown in one district could potentially be shifted to an adjoining district based on other factors. Other factors that could influence the distribution of future inventory among each district could include the price structure of land and its decreasing (or increasing) availability. For example, as development sites in the Downtown area become scarcer, it is possible that some of the space shown above within the Downtown District could shift to either the Frenchtown District or the Southside District, most likely in the areas closest to the Downtown District. This is already happening to some degree with both hotel (Hampton Inn under construction in the Southside District) and for-rent apartment (Domain at Tallahassee apartment complex under construction in the Frenchtown District) development. Further, demand for some uses could occur in any of the districts depending on the timing and opportunity created by land owners and developers. That said, opportunities are not the same as actual demand.

1.5 Next Steps

Our analysis has attempted to place parameters on the potential development opportunities within each district. The projections noted above for each district will be used as a starting point in the next phase of our study, which will focus on market demand opportunities in specific development sites

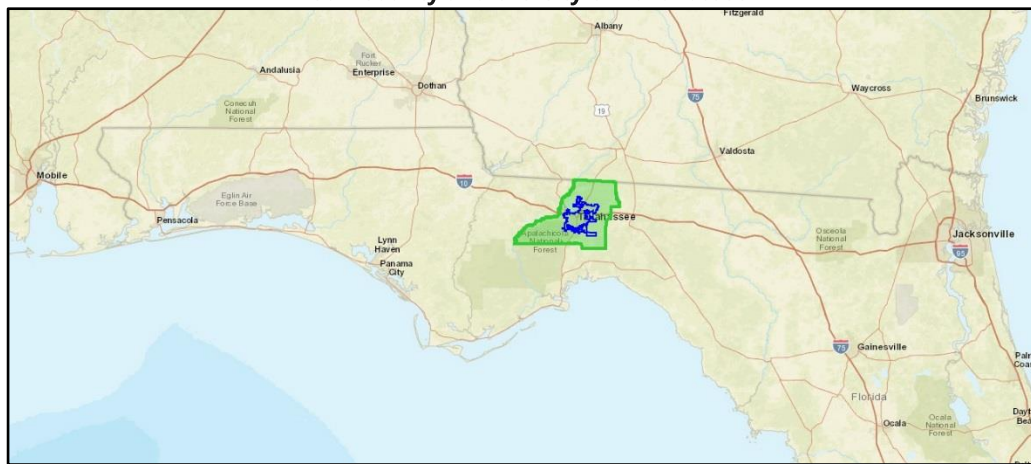
identified by the Community Redevelopment Agency or the community within the districts. Specific development sites would capture a portion of the district demand noted earlier. A separate report will be issued on that analysis.

2.0 LEON COUNTY, CITY OF TALLAHASSEE AND DOWNTOWN AREA

2.1 Location and Area Overview

Leon County is located in in north Florida and shares its northern border with the State of Georgia. Leon County is approximately 702 square miles in size and is bisected by Interstate 10, which passes through the City of Tallahassee. Tallahassee is the state capital, county seat and the only incorporated city within Leon County. The map below depicts the location of Leon County within north Florida and the location of the City of Tallahassee within Leon County.

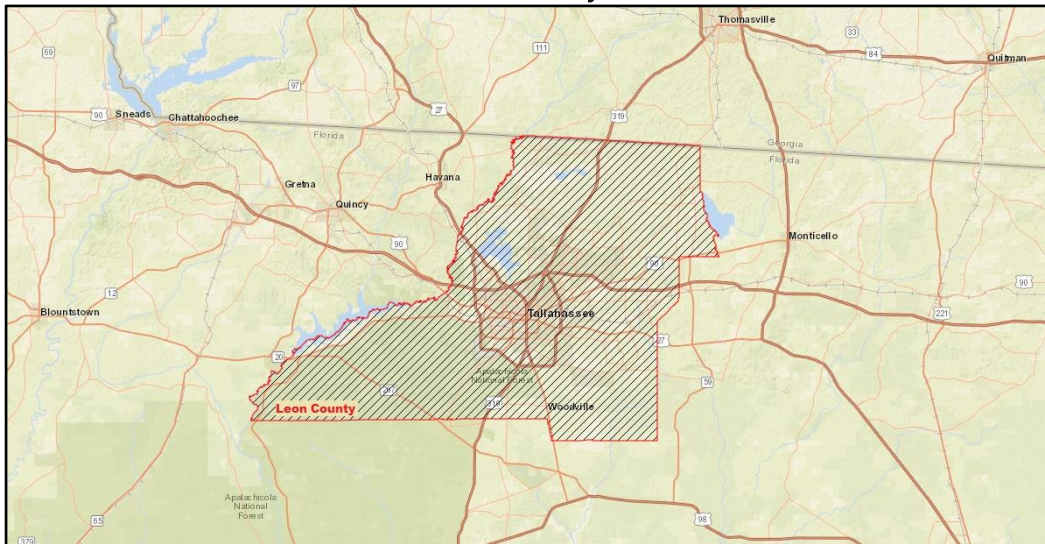
Figure 1.0
Leon County and the City of Tallahassee



Source: ESRI; GAI

Leon County and the City of Tallahassee are home to two of Florida's public universities, Florida State University and Florida A&M University. The primary campus of Florida State University is located on a 1,400 acre site in Tallahassee, and had enrollment of approximately 42,000 for the 2016 Fall Semester. The Florida A&M University campus occupies 420 acres in Tallahassee and is the only public historically black university in Florida. Florida A&M University has a student body of roughly 10,000. With the addition of the over 20,000 students of Tallahassee Community College, the City of Tallahassee boasts a student population exceeding 70,000.

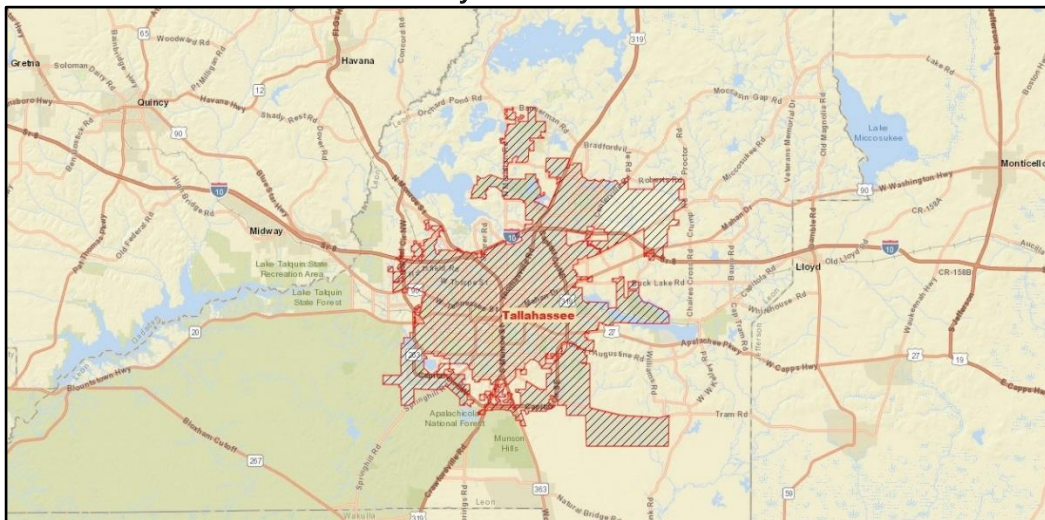
**Figure 2.0
Leon County**



Source: ESRI; GAI

The City of Tallahassee is home to the Florida State Capitol, Supreme Court of Florida, Florida Governor's Mansion, and nearly 30 state agency headquarters. The city is also known for its large number of law firms, lobbying organizations, trade associations and professional associations, including the Florida Bar and the Florida Chamber of Commerce.

**Figure 3.0
City of Tallahassee**

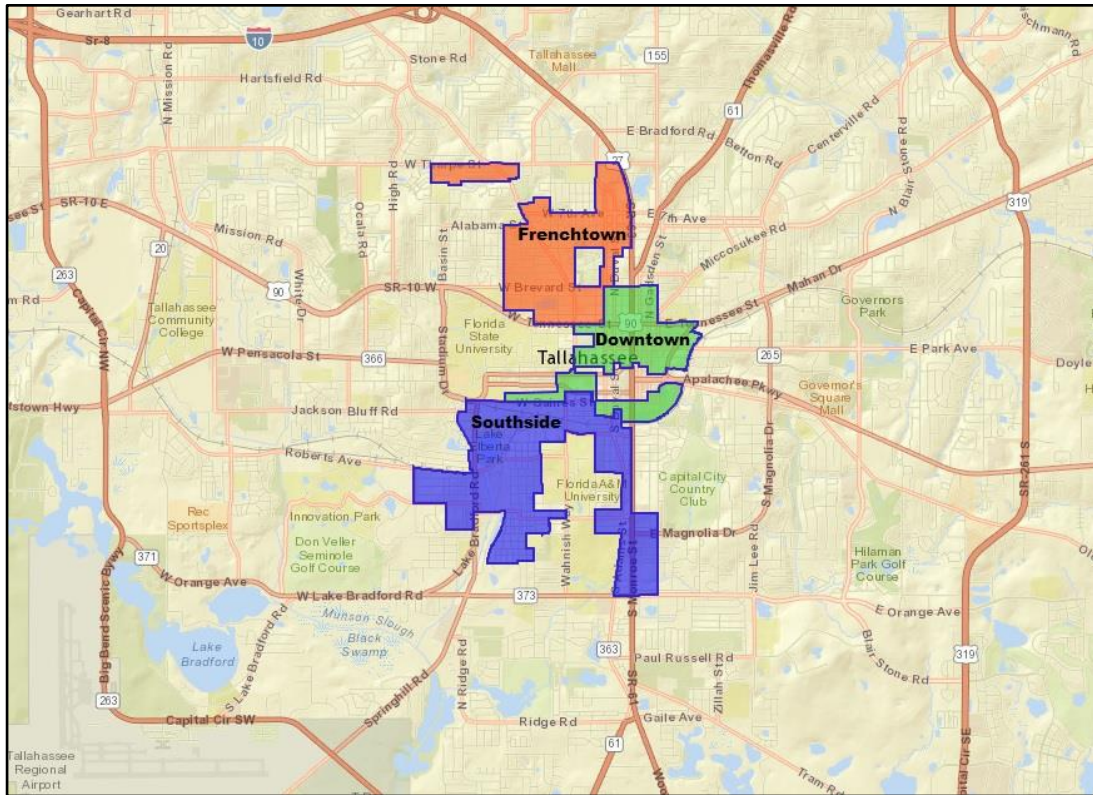


Source: ESRI; GAI

Within the City of Tallahassee Community Redevelopment Agency there are two CRA's, the Downtown District CRA and the Greater Frenchtown/Southside CRA. As shown in Figure 4.0 on the following page, the Greater Frenchtown/Southside CRA is separated by the Downtown District CRA. Due to the geographic layout of the Greater Frenchtown/Southside CRA, and for the purpose of this report, GAI

has separated the Greater Frenchtown/Southside CRA into two separate and unique areas. For the purposes of data collection and analysis, the Frenchtown District and Southside District will be analyzed independently.

Figure 4.0
Frenchtown, Southside and Downtown Districts



Source: ESRI; GAI

2.2 Access and Context

With connectivity to I-10 via US Hwy 27, US Hwy 319 and US Hwy 90, which run directly through the city core, Tallahassee’s major road network is a mature system of interstate, state and local highway systems. US Hwy 27 is labeled Monroe Street through Tallahassee, US Hwy 319 is labeled Capital Circle SE though Tallahassee, and US Hwy 90 is labeled Tennessee Street through Tallahassee.

Traffic counts on the major roadways reflect greater traffic within the Downtown District than within the Frenchtown or Southside Districts.

- ▶ US Hwy 27 (Monroe Street)
 - Park – Tennessee: 30,724 (4/26/2016) (Downtown District)
 - Tennessee - Tharpe: 28,347 (4/26/2016) (Frenchtown District)
 - Magnolia – Gaines: 20,484 (4/27/2016) (Southside District)

- ▶ US Hwy 90 (Tennessee Street)
 - Macomb – Monroe: 35,426 (5/11/2016) (Downtown District)
 - Monroe – Meridian: 29,318 (5/10/2016) (Downtown District)
- ▶ US Hwy 319 (Capital Circle SE)
 - Park – Apalachee: 35,990 (4/5/2016) (outside of district boundaries)
 - Apalachee – Old St Augustine: 24,040 (4/5/2016) (outside of district boundaries)
- ▶ Gaines Street
 - Lake Bradford – Wahnish: 24,409 (4/12/2016) (north side in Downtown District, south side in Southside District)
- ▶ Macomb Street
 - Tennessee – Brevard: 17,902 (4/20/2016) (Frenchtown District)
- ▶ Old Bainbridge Road
 - Brevard – Alabama: 13,975 (4/27/2016) (Frenchtown District)

2.3 Implications

Leon County is well positioned within central north Florida for easy access and connectivity. The mature roadway network, with direct access to Interstate 10, as well as Interstate 75 about 75-90 miles east of the City, provides for effective access to the other areas of the state and region.

Home to the state capital as well as two major universities (Florida State and Florida A&M), Leon County's population increases significantly when the schools and the legislature are in session. Home football games in the fall also generate significant visitation to the area. Additionally, the county has connectivity to the Apalachicola National Forest which draws additional visitors to the area.

3.0 SOCIO-ECONOMIC TRENDS

3.1 Population

The City of Tallahassee is the only incorporated municipality within Leon County, and captures roughly 66% of the total population of the County. With Tallahassee representing such a large percent of the total population of Leon County, many other population related statistics show similarities. Specifically, the racial mix, age distribution and educational attainment of the total population are very similar between the City and County. However, a comparison of the districts show significant difference from the City and County.

Population growth within the County, City and Downtown District are very similar, and are projected to continue on an annual average growth rate of 0.6%. However, the Frenchtown District and Southside District are both seeing slightly slower population growth.

One factor that is very similar across the geographies profiled is the population under the age of 34. All of the geographies profiled show over 55% of the population under the age of 34. Table 3.1 on the following page shows the current and historical population and characteristics of the profiled geographies as well as population projections for 2021.

Table 3.1
Population by Selected Geography

| | Leon County | City of Tallahassee | Frenchtown District | Southside District | Downtown District |
|--------------------------------------|----------------|------------------------|------------------------|-----------------------|----------------------|
| Population: | | | | | |
| 2000 Census | 239,452 | 155,966 | 4,516 | 3,785 | 1,590 |
| 2010 Census | 275,487 | 181,433 | 5,603 | 3,883 | 1,619 |
| 2016 Estimate | 285,432 | 188,588 | 5,670 | 3,928 | 1,677 |
| 2021 Projection | 293,910 | 194,446 | 5,747 | 3,993 | 1,724 |
| Avg Annual Growth % (2000 - 2010) | 1.4% | 1.5% | 2.2% | 0.3% | 0.2% |
| Avg Annual Growth % (2010 - 2016) | 0.6% | 0.6% | 0.2% | 0.2% | 0.6% |
| Avg Annual Growth % (2016 - 2021) | 0.6% | 0.6% | 0.3% | 0.3% | 0.6% |
| 2016 Population by Race: | | | | | |
| White | 64.4% | 59.6% | 38.4% | 9.0% | 85.7% |
| Black | 33.7% | 38.5% | 59.8% | 89.9% | 13.1% |
| Am. Indian & Alaskan | 0.3% | 0.3% | 0.5% | 0.3% | 0.6% |
| Hawaiian & Pacific Island | 0.1% | 0.1% | 0.1% | 0.1% | 0.0% |
| Other | 1.5% | 1.6% | 1.2% | 0.8% | 0.6% |
| 2016 Population by Age: | | | | | |
| Age 0 - 19 | 24.9% | 24.8% | 17.9% | 30.2% | 8.5% |
| Age 20 - 34 | 30.7% | 37.3% | 39.4% | 37.8% | 58.4% |
| Age 35 - 54 | 21.6% | 18.9% | 23.4% | 17.5% | 14.8% |
| Age 55 - 74 | 18.3% | 14.9% | 15.2% | 11.7% | 12.8% |
| Age 75 + | 4.4% | 4.1% | 4.1% | 2.8% | 5.5% |
| 2016 Population by Education: | | | | | |
| Some High School No Diploma | 5.5% | 5.2% | 14.6% | 15.0% | 0.8% |
| High School Graduate | 16.2% | 14.4% | 21.0% | 34.0% | 20.8% |
| Some College no Degree | 20.3% | 19.7% | 28.9% | 21.3% | 9.8% |
| Associate Degree | 9.9% | 10.4% | 14.1% | 9.9% | 6.6% |
| Bachelor Degree | 27.4% | 28.4% | 10.0% | 12.5% | 31.9% |
| Advanced Degree | 20.7% | 21.9% | 11.4% | 7.4% | 30.1% |
| <i>Source: ESRI; GAI</i> | | | | | |

3.2 Housing

As shown in Table 3.2, below, the City of Tallahassee captures approximately 68% of the total households within Leon County, while the districts combined only represent about 7% of the total households within the City of Tallahassee. Total households in Leon County and Tallahassee have been growing steadily over the past 15 years and are projected to continue that growth pattern through

2021. Household growth has not been as consistent within the districts. The Southside District experienced a decline in total households from 2000 to 2010 and the Frenchtown District saw nearly no growth in total households between 2010 and 2016. Housing tenure is an area that is changing in Leon County. Since 2000, renter-occupied households have been steadily increasing within Leon County and now represents the majority of households within the county. The percentage of renter-occupied households has been increasing within all of the profiled geographies, and renter-occupied households dominate the districts. This trend is projected to continue through 2021, with renter-occupied households accounting for over 80% the households within the districts, over 60% within the City of Tallahassee, and over 50% within Leon County.

Table 3.2
Housing by Selected Geography

| | Leon County | City of Tallahassee | Frenchtown District | Southside District | Downtown District |
|-----------------------------------|----------------|------------------------|------------------------|-----------------------|----------------------|
| Households: | | | | | |
| 2000 Census | 96,521 | 65,318 | 2,156 | 1,918 | 1,132 |
| 2010 Census | 110,945 | 74,841 | 2,367 | 1,734 | 1,180 |
| 2016 Estimate | 113,493 | 76,756 | 2,369 | 1,742 | 1,222 |
| 2021 Projection | 116,423 | 78,859 | 2,397 | 1,768 | 1,260 |
| Avg Annual Growth % (2000 - 2010) | 1.4% | 1.4% | 0.9% | -1.0% | 0.4% |
| Avg Annual Growth % (2010 - 2016) | 0.4% | 0.4% | 0.0% | 0.1% | 0.6% |
| Avg Annual Growth % (2016 - 2021) | 0.5% | 0.5% | 0.2% | 0.3% | 0.6% |
| Owner Occupied HH (2000) | 55,006 | 29,434 | 554 | 502 | 117 |
| Renter Occupied HH (2000) | 41,515 | 35,884 | 1,602 | 1,416 | 1,016 |
| Owner Occupied % (2000) | 57.0% | 45.1% | 25.7% | 26.2% | 10.3% |
| Renter Occupied % (2000) | 43.0% | 54.9% | 74.3% | 73.8% | 89.8% |
| Owner Occupied HH (2010) | 60,393 | 31,001 | 524 | 362 | 167 |
| Renter Occupied HH (2010) | 50,552 | 43,840 | 1,843 | 1,372 | 1,013 |
| Owner Occupied % (2010) | 54.4% | 41.4% | 22.1% | 20.9% | 14.2% |
| Renter Occupied % (2010) | 45.6% | 58.6% | 77.9% | 79.1% | 85.8% |
| Owner Occupied HH (2016) | 55,934 | 28,394 | 418 | 289 | 135 |
| Renter Occupied HH (2016) | 57,559 | 48,362 | 1,950 | 1,453 | 1,088 |
| Owner Occupied % (2016) | 49.3% | 37.0% | 17.6% | 16.6% | 11.0% |
| Renter Occupied % (2016) | 50.7% | 63.0% | 82.3% | 83.4% | 89.0% |
| Owner Occupied HH (2021) | 56,828 | 28,770 | 415 | 291 | 140 |
| Renter Occupied HH (2021) | 59,595 | 50,089 | 1,982 | 1,477 | 1,120 |
| Owner Occupied % (2021) | 48.8% | 36.5% | 17.3% | 16.5% | 11.1% |
| Renter Occupied % (2021) | 51.2% | 63.5% | 82.7% | 83.5% | 88.9% |

Source: ESRI; GAI

3.3 Income

As shown in Table 3.3 below, average household incomes are projected to increase through 2021 in all geographies, however median household incomes are projected to decrease between 2016 and 2021 within the Frenchtown District by roughly 3.5% and the Southside District by roughly 5.4%. This disparity can be partially explained in that average household income is usually more affected by the relatively unequal distribution of income which tilts towards the top, meaning that the concentration of wealth among relatively few households affects average household incomes while it has little impact on median household incomes.

Household incomes are higher in Leon County than within the City of Tallahassee. The average household income in Leon County is approximately 13% higher than that of the City of Tallahassee for 2016, and is projected to remain 13% higher through 2021. The median household income in Leon County is approximately 20% higher than that of the City of Tallahassee, and is projected to increase to 25.5% higher than Tallahassee by 2021.

Table 3.3
Average and Median Household Income

| | Leon County | City of Tallahassee | Frenchtown District | Southside District | Downtown District |
|------------------------------|-------------|---------------------|---------------------|--------------------|-------------------|
| Avg Household Income: | | | | | |
| 2016 | \$68,069 | \$60,271 | \$36,284 | \$33,385 | \$33,830 |
| 2021 | \$73,578 | \$65,012 | \$38,578 | \$35,235 | \$37,879 |
| Med Household Income: | | | | | |
| 2016 | \$46,419 | \$38,701 | \$22,192 | \$20,186 | \$16,812 |
| 2021 | \$52,918 | \$42,165 | \$21,398 | \$19,094 | \$17,087 |
| <i>Source: ESRI; GAI</i> | | | | | |

Table 3.4
Household Income by Selected Geography (2016)

| 2016 | Leon County | City of Tallahassee | Frenchtown District | Southside District | Downtown District |
|--------------------------|-------------|---------------------|---------------------|--------------------|-------------------|
| < \$15,000 | 18.4% | 23.1% | 44.6% | 38.8% | 46.5% |
| \$15,000 - \$25,000 | 10.9% | 12.2% | 15.6% | 17.9% | 13.9% |
| \$25,000 - \$50,000 | 10.0% | 10.7% | 13.8% | 10.4% | 9.8% |
| \$50,000 - \$75,000 | 13.2% | 13.2% | 9.8% | 13.0% | 7.8% |
| \$75,000 - \$100,000 | 15.3% | 14.3% | 7.4% | 9.2% | 7.2% |
| \$100,000 - \$125,000 | 11.0% | 9.5% | 4.8% | 5.7% | 10.1% |
| \$125,000 - \$150,000 | 12.8% | 10.1% | 2.9% | 3.6% | 2.3% |
| \$150,000 - \$200,000 | 4.5% | 3.7% | 0.6% | 0.7% | 1.5% |
| \$200,000+ | 3.9% | 3.4% | 0.5% | 0.6% | 0.8% |
| Total Households | 113,492 | 76,755 | 2,366 | 1,744 | 1,223 |
| <i>Source: ESRI; GAI</i> | | | | | |

Table 3.5
Household Income by Selected Geography (2021)

| 2021 | Leon County | City of Tallahassee | Frenchtown District | Southside District | Downtown District |
|--------------------------|-------------|---------------------|---------------------|--------------------|-------------------|
| < \$15,000 | 18.4% | 23.1% | 44.5% | 39.3% | 45.2% |
| \$15,000 - \$25,000 | 12.6% | 14.1% | 17.4% | 20.4% | 16.4% |
| \$25,000 - \$50,000 | 6.7% | 7.4% | 10.6% | 7.0% | 6.6% |
| \$50,000 - \$75,000 | 9.6% | 9.8% | 9.8% | 10.9% | 5.0% |
| \$75,000 - \$100,000 | 16.4% | 15.4% | 7.4% | 10.5% | 7.8% |
| \$100,000 - \$125,000 | 12.2% | 10.6% | 5.8% | 6.5% | 13.1% |
| \$125,000 - \$150,000 | 14.7% | 11.7% | 3.3% | 3.8% | 3.0% |
| \$150,000 - \$200,000 | 5.3% | 4.4% | 0.8% | 1.0% | 1.9% |
| \$200,000+ | 4.1% | 3.5% | 0.5% | 0.6% | 1.0% |
| Total Households | 116,422 | 78,858 | 2,396 | 1,768 | 1,260 |
| <i>Source: ESRI; GAI</i> | | | | | |

3.4 Employment

Within Leon County and the City of Tallahassee, the largest percentage of employees are employed in the Office/Administrative Support category. As shown in Table 3.6 on the following page, more than 15% of employees within the County and City are employed within said category. The next highest employment category within the City and County is Sales/Sales Related which represents more than 10% of employees.

The Frenchtown and Southside District are similar in their largest employment category, with both having more than 16% of employees in the Food Preparation/Service Related category. The next highest category within the Frenchtown District is Sales/Sales Related with 13.1% of the total

employees, while the second highest category in the Southside District is Transportation/Material Moving at 16.1%.

The Downtown District is unique with the highest employee category being Arts/Design/Entertainment/Sports/Media at 11.2%. This is unique as less than 3% of employees fall into this category within each of the other geographies. Within the Downtown District, the second highest category is Food Preparation/Service Related with 10.6% of employees.

Table 3.6
Employment by Selected Geography

| | Leon County | City of Tallahassee | Frenchtown District | Southside District | Downtown District |
|--|----------------|------------------------|------------------------|-----------------------|----------------------|
| 2016 Employees by Type of Employment: | | | | | |
| Management of Companies | 9.5% | 8.4% | 6.1% | 5.4% | 7.0% |
| Business/Financial | 7.2% | 6.8% | 4.1% | 3.2% | 4.8% |
| Computer/Mathematical | 4.3% | 4.3% | 2.1% | 0.6% | 9.9% |
| Architecture/Engineering | 1.4% | 1.2% | 0.0% | 2.3% | 0.0% |
| Life/Physical/Social Sciences | 1.8% | 1.8% | 3.1% | 0.4% | 2.5% |
| Community/Social Service | 2.3% | 2.3% | 0.5% | 0.3% | 6.2% |
| Legal | 2.6% | 2.6% | 1.4% | 1.3% | 2.5% |
| Education/Training/Library | 8.4% | 9.2% | 8.3% | 2.6% | 9.1% |
| Arts/Design/Entertainment/Sports/Media | 2.5% | 2.9% | 1.3% | 0.4% | 11.2% |
| Healthcare Practitioner/Technician | 4.9% | 4.7% | 1.3% | 0.8% | 2.9% |
| Healthcare Support | 1.6% | 1.6% | 2.5% | 2.3% | 0.1% |
| Protective Service | 2.5% | 2.2% | 1.8% | 1.2% | 9.1% |
| Food Preparation/Serving Related | 7.1% | 9.0% | 16.4% | 16.9% | 10.6% |
| Building/Grounds Cleaning/Maintenance | 3.2% | 2.9% | 11.0% | 7.5% | 0.0% |
| Personal Care/Service | 3.9% | 4.0% | 4.6% | 4.7% | 1.2% |
| Sales and Sales Related | 10.2% | 10.7% | 13.1% | 13.7% | 7.7% |
| Office/Administrative Support | 15.4% | 15.1% | 9.3% | 12.8% | 8.7% |
| Farming/Fishing/Forestry | 0.2% | 0.1% | 0.0% | 0.0% | 0.0% |
| Construction/Extraction | 3.2% | 2.8% | 3.4% | 2.1% | 0.4% |
| Installation/Maintenance/Repair | 2.4% | 1.9% | 2.2% | 4.6% | 3.0% |
| Production | 2.0% | 1.7% | 1.6% | 0.9% | 0.0% |
| Transportation/Material Moving | 3.5% | 3.6% | 5.4% | 16.1% | 3.0% |
| Total | 100.0% | 100.0% | 100.0% | 100.0% | 100.0% |
| Jobs Per Capita | 0.478 | 0.472 | 0.353 | 0.403 | 0.411 |
| <i>Source: ESRI; Bureau of Labor Statistics; GAI</i> | | | | | |

3.5 Implications

Leon County and the City of Tallahassee have seen steady growth in population, housing, and household income. The districts have also experienced steady growth in these areas, with the exception of household income, where the Frenchtown and Southside Districts are projected to decline over the next five years. However, overall the strong socio-economic climate of the County and City as a whole is

beneficial to re-investment and continued growth within the region. While the Downtown District displays a similarly strong socio-economic picture, the Frenchtown and Southside Districts are experiencing a more complex condition which at least partially stems from a lack of higher wage employment opportunities and high renter-occupied housing percentages.

4.0 MARKET CHARACTERISTICS OF THE LEON COUNTY OFFICE, LODGING, RETAIL, MULTI-FAMILY RENTAL AND FOR-SALE MARKETS

4.1 Office

Table 4.1 below summarizes the office development activity occurring in Leon County and the City of Tallahassee over various time periods. Square footage, in which year built data is not available, are summarized in the year built category as “unknown.”

Table 4.1
Summary of Office Market - Leon County and City of Tallahassee

| Year Built | Absorption | Cumulative Total | Avg. Annual Absorption | Avg. Annual Growth | % of Total | % Capture of County SF | % Capture of City SF |
|----------------------------|----------------|------------------|------------------------|--------------------|-------------|------------------------|----------------------|
| <u>Leon County</u> | | | | | | | |
| Prior to 1970 | 2,935,819 | 2,935,819 | NA | NA | 14.2% | 100.0% | NA |
| 1970-1979 | 3,685,381 | 6,621,200 | 368,538 | 8.5% | 17.8% | 100.0% | NA |
| 1980-1989 | 5,372,132 | 11,993,332 | 537,213 | 6.1% | 25.9% | 100.0% | NA |
| 1990-1999 | 4,071,258 | 16,064,590 | 407,126 | 3.0% | 19.7% | 100.0% | NA |
| 2000-2009 | 3,320,752 | 19,385,342 | 332,075 | 1.9% | 16.0% | 100.0% | NA |
| 2010-2015 | 831,158 | 20,216,500 | 138,526 | 0.7% | 4.0% | 100.0% | NA |
| Unknown | <u>489,618</u> | 20,706,118 | NA | NA | <u>2.4%</u> | <u>100.0%</u> | NA |
| Total | 20,706,118 | | | | 100.0% | 100.0% | NA |
| <u>City of Tallahassee</u> | | | | | | | |
| Prior to 1970 | 2,933,810 | 2,933,810 | NA | NA | 14.2% | 99.9% | 100.0% |
| 1970-1979 | 3,685,381 | 6,619,191 | 368,538 | 8.5% | 17.8% | 100.0% | 100.0% |
| 1980-1989 | 5,371,300 | 11,990,491 | 537,130 | 6.1% | 25.9% | 100.0% | 100.0% |
| 1990-1999 | 4,071,258 | 16,061,749 | 407,126 | 3.0% | 19.7% | 100.0% | 100.0% |
| 2000-2009 | 3,319,363 | 19,381,112 | 331,936 | 1.9% | 16.0% | 100.0% | 100.0% |
| 2010-2015 | 831,158 | 20,212,270 | 138,526 | 0.7% | 4.0% | 100.0% | 100.0% |
| Unknown | <u>486,785</u> | 20,699,055 | NA | NA | <u>2.4%</u> | 99.4% | 100.0% |
| Total | 20,699,055 | | | | 100.0% | 100.0% | 100.0% |

Source: CoStar; GAI

The office market as tracked by CoStar totals approximately 20,706,000 square feet in Leon County. About 40% of the County’s inventory was added since 1990. Annual absorption of space within the County has generally ranged from about 325,000 to 537,000 square feet. However, additions in more recent years have been closer to 140,000 square feet annually. Almost all of the office square footage in Leon County is also in the City of Tallahassee, so the City’s absorption and growth patterns mirror those of the County.

Major planned additions to office supply in the districts that we are aware of include:

- ▶ Florida Power and Light (Downtown District)
 - Planned 3 story 15,500 square foot office building
- ▶ Care Point Health & Wellness Center (Southside District)
 - Under construction, estimated completion in Fall 2017
 - 27,202 square foot primary care clinic with associated services (not traditional office space, but specialized medical use)
- ▶ 201 East Park (Downtown District)
 - Under construction, estimated completion Winter 2017
 - 7,100 square feet restaurant/retail and 55,100 square feet office

Community Redevelopment Agency staff has requested the proposed “Washington Square” project listed below be included within this analysis and factored into the demand projections. Though this project does not meet the criteria for inclusion in the demand projections based on the methodology in Section 1.3, staff has indicated that they have adequately vetted the project for inclusion in the demand projections:

- ▶ Washington Square (Downtown District)
 - Under Review
 - 57,561 square feet office, 4 restaurants totaling 658 seats, 33 condominium units, and a 260 room hotel.

Additionally, there is a potential project in planning that does not meet the criteria for inclusion in the demand projections based on the methodology established in Section 1.3. However, staff have requested that it be referenced as it is a possible future project on the horizon, though it is not included in the projections. Also, we understand the program is still in development and could change from what is shown below:

- ▶ Firestone/Bloxham Site (Downtown District)
 - Developer responded to a Community Redevelopment Agency RFP for the site, no formal development review application at this time.
 - Proposed 251 apartment units, 18,340 square feet office, 14,300 square feet retail, 15,750 square feet restaurants.

Table 4.2 below summarizes the office development activity occurring in the Frenchtown, Southside and Downtown Districts over various time periods.

Table 4.2
Summary of Office Market - Frenchtown, Southside and Downtown District

| Year Built | Absorption | Cumulative Total | Avg. Annual Absorption | Avg. Annual Growth | % of Total | % Capture of County SF | % Capture of City SF |
|----------------------------|---------------|------------------|------------------------|--------------------|--------------|------------------------|----------------------|
| Frenchtown District | | | | | | | |
| Prior to 1970 | 194,091 | 194,091 | NA | NA | 50.7% | 6.6% | 6.6% |
| 1970-1979 | 27,543 | 221,634 | 2,754 | 1.3% | 7.2% | 0.7% | 0.7% |
| 1980-1989 | 33,263 | 254,897 | 3,326 | 1.4% | 8.7% | 0.6% | 0.6% |
| 1990-1999 | 10,134 | 265,031 | 1,013 | 0.4% | 2.6% | 0.2% | 0.2% |
| 2000-2009 | 35,829 | 300,860 | 3,583 | 1.3% | 9.4% | 1.1% | 1.1% |
| 2010-2015 | 0 | 300,860 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| Unknown | <u>82,108</u> | 382,968 | NA | NA | <u>21.4%</u> | 16.8% | 16.9% |
| Total | 382,968 | | | | 100.0% | 1.8% | 1.9% |
| Southside District | | | | | | | |
| Prior to 1970 | 189,196 | 189,196 | NA | NA | 81.6% | 6.4% | 6.4% |
| 1970-1979 | 0 | 189,196 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| 1980-1989 | 4,415 | 193,611 | 442 | 0.2% | 1.9% | 0.1% | 0.1% |
| 1990-1999 | 11,267 | 204,878 | 1,127 | 0.6% | 4.9% | 0.3% | 0.3% |
| 2000-2009 | 11,883 | 216,761 | 1,188 | 0.6% | 5.1% | 0.4% | 0.4% |
| 2010-2015 | 0 | 216,761 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| Unknown | <u>15,185</u> | 231,946 | NA | NA | <u>6.5%</u> | 3.1% | 3.1% |
| Total | 231,946 | | | | 100.0% | 1.1% | 1.1% |
| Downtown District | | | | | | | |
| Prior to 1970 | 1,004,563 | 1,004,563 | NA | NA | 32.6% | 34.2% | 34.2% |
| 1970-1979 | 539,666 | 1,544,229 | 53,967 | 4.4% | 17.5% | 14.6% | 14.6% |
| 1980-1989 | 945,167 | 2,489,396 | 94,517 | 4.9% | 30.7% | 17.6% | 17.6% |
| 1990-1999 | 433,009 | 2,922,405 | 43,301 | 1.6% | 14.0% | 10.6% | 10.6% |
| 2000-2009 | 81,882 | 3,004,287 | 8,188 | 0.3% | 2.7% | 2.5% | 2.5% |
| 2010-2015 | 70,582 | 3,074,869 | 11,764 | 0.4% | 2.3% | 8.5% | 8.5% |
| Unknown | <u>8,714</u> | 3,083,583 | NA | NA | <u>0.3%</u> | 1.8% | 1.8% |
| Total | 3,083,583 | | | | 100.0% | 14.9% | 14.9% |

Source: CoStar; GAI

The office market totals approximately 382,000, 231,000 and 3,084,000 square feet in the Frenchtown, Southside and Downtown Districts, respectively. Major observations on office trends include:

- ▶ In the Frenchtown District, over 50% of office space was added prior to 1970. Average annual absorption of new office space has ranged from about 1,000 to 3,600 square feet, with no space added from 2010-2015. The Frenchtown District has captured about 1.8% of the total office space in the County. The highest percentage capture of space was 6.6% of the County's total prior to 1970, though the capture percentage has dropped to 1.0% or less in more recent years.
- ▶ In the Southside District, over 80% of office space was added prior to 1970. The Southside District had an average annual absorption of new office space ranging from about 400 to 1,200 square feet, with no space added from 2010-2015. The Southside District has captured about 1.1% of the total office space in the County. The highest percentage capture of space was 6.4% of the County's total prior to 1970, though the capture percentage has ranged from 0.0% to 0.4% in more recent years.

- ▶ The Downtown District by far has the most office square footage of all the districts at almost 10 times higher than the Frenchtown District, which is the next largest area. During the decades between 1970 and 1999, the Downtown District had an average annual absorption of new office space ranging from about 43,000 to 95,000 square feet. Annual absorption of new space dropped off significantly after 2000, ranging from about 8,000 to 12,000 square feet. The Downtown District has captured about 15% of the total office space in the County. The highest percentage capture of space was 34.2% of the County's total prior to 1970. However, in more recent years, the Downtown District captured about 2.0% to 10.0% of the total office growth in the County.

The office market occupancy and lease rate trends from 2010 through 2015 for all the geographies noted earlier are summarized in Table 4.3 below.

**Table 4.3
 Summary of Office Market Occupancy and Average Lease Rates**

| | Leon County | | Tallahassee | | Frenchtown District | | Southside District | | Downtown District | |
|-----------------------|-------------|----------|-------------|----------|---------------------|----------|--------------------|----------|-------------------|----------|
| | Amount | Growth % | Amount | Growth % | Amount | Growth % | Amount | Growth % | Amount | Growth % |
| Occupancy % | | | | | | | | | | |
| 2010 | 92.3% | NA | 92.3% | NA | 95.9% | NA | 96.5% | NA | 93.4% | NA |
| 2011 | 92.4% | 0.1% | 92.4% | 0.1% | 97.6% | 1.8% | 96.6% | 0.1% | 92.8% | -0.6% |
| 2012 | 92.3% | -0.1% | 92.3% | -0.1% | 98.1% | 0.5% | 99.8% | 3.3% | 93.0% | 0.2% |
| 2013 | 91.6% | -0.8% | 91.6% | -0.8% | 96.1% | -2.0% | 99.5% | -0.3% | 91.2% | -1.9% |
| 2014 | 92.3% | 0.8% | 92.3% | 0.8% | 98.1% | 2.1% | 96.8% | -2.7% | 92.3% | 1.2% |
| 2015 | 91.4% | -1.0% | 91.4% | -1.0% | 96.0% | -2.1% | 96.3% | -0.5% | 91.3% | -1.1% |
| Avg Lease Rate | | | | | | | | | | |
| 2010 | \$16.06 | NA | \$16.06 | NA | \$11.82 | NA | \$15.60 | NA | \$20.25 | NA |
| 2011 | \$15.40 | -4.1% | \$15.40 | -4.1% | \$11.38 | -3.7% | \$10.29 | -34.0% | \$18.59 | -8.2% |
| 2012 | \$15.55 | 1.0% | \$15.55 | 1.0% | \$9.86 | -13.4% | \$12.00 | 16.6% | \$18.01 | -3.1% |
| 2013 | \$15.29 | -1.7% | \$15.29 | -1.7% | \$12.00 | 21.7% | NA | NA | \$17.02 | -5.5% |
| 2014 | \$14.94 | -2.3% | \$14.94 | -2.3% | \$9.29 | -22.6% | \$12.00 | NA | \$17.74 | 4.2% |
| 2015 | \$14.41 | -3.5% | \$14.41 | -3.5% | \$9.77 | 5.2% | \$10.80 | -10.0% | \$16.44 | -7.3% |

Source: CoStar; GAI

Office market occupancies have generally been in the low 90% range over the past six years in Leon County, the City of Tallahassee and the Downtown District. Occupancy rates are higher in the Frenchtown and Southside Districts, though the amount of office inventory is much smaller in those areas. Lease rates have generally been trending downward since 2010 and are currently between \$14.00 and \$15.00 per square foot in the County and City. The Downtown District has the highest average lease rate at about \$16.44 per square foot, with the Frenchtown District and the Southside District ranging from about \$10.00 to \$11.00 per square foot. The older office stock in the Frenchtown District and the Southside District are contributing to the comparatively low lease rates in those areas.

4.2 Lodging

Table 4.4 on the following page summarizes the hotel development activity occurring in Leon County and the City of Tallahassee over various time periods. Please note that these properties only include those tracked by Smith Travel Research, but it does represent the majority of the hotel product in the

County. Hotel units, in which year built data is not available, are summarized in the year built category as "unknown."

Table 4.4
Summary of Hotel Market - Leon County and City of Tallahassee

| Year Built | Room Absorption | Room Cumulative Total | Avg. Annual Absorption | Avg. Annual Growth | % of Total | % Capture of County SF | % Capture of City SF |
|----------------------------|-----------------|-----------------------|------------------------|--------------------|-------------|------------------------|----------------------|
| <u>Leon County</u> | | | | | | | |
| Prior to 1970 | 484 | 484 | NA | NA | 8.7% | 100.0% | NA |
| 1970-1979 | 775 | 1,259 | 78 | 10.0% | 13.9% | 100.0% | NA |
| 1980-1989 | 1,207 | 2,466 | 121 | 7.0% | 21.6% | 100.0% | NA |
| 1990-1999 | 961 | 3,427 | 96 | 3.3% | 17.2% | 100.0% | NA |
| 2000-2009 | 1,561 | 4,988 | 156 | 3.8% | 27.9% | 100.0% | NA |
| 2010-2015 | 343 | 5,331 | 57 | 1.1% | 6.1% | 100.0% | NA |
| Unknown | <u>261</u> | 5,592 | NA | NA | <u>4.7%</u> | 100.0% | NA |
| Total | 5,592 | | | | 100.0% | 100.0% | NA |
| <u>City of Tallahassee</u> | | | | | | | |
| Prior to 1970 | 484 | 484 | NA | NA | 8.7% | 100.0% | 100.0% |
| 1970-1979 | 775 | 1,259 | 78 | 10.0% | 13.9% | 100.0% | 100.0% |
| 1980-1989 | 1,207 | 2,466 | 121 | 7.0% | 21.6% | 100.0% | 100.0% |
| 1990-1999 | 961 | 3,427 | 96 | 3.3% | 17.2% | 100.0% | 100.0% |
| 2000-2009 | 1,561 | 4,988 | 156 | 3.8% | 27.9% | 100.0% | 100.0% |
| 2010-2015 | 343 | 5,331 | 57 | 1.1% | 6.1% | 100.0% | 100.0% |
| Unknown | <u>261</u> | 5,592 | NA | NA | <u>4.7%</u> | 100.0% | 100.0% |
| Total | 5,592 | | | | 100.0% | 100.0% | 100.0% |

Source: Smith Travel Research; GAI

According to data obtained from Smith Travel Research, there are approximately 5,600 hotel rooms in Leon County, and all are in the City of Tallahassee. About 51% of the County's inventory was added since 1990, and much of that product came on-line from 2000 on. Annual absorption of new hotel units within the County has generally ranged from about 60 to 155 units. This means that on average the County is adding about one new hotel a year.

Major planned additions to the hotel lodging supply in the districts include:

- ▶ Hampton Inn & Suites (Southside District)
 - Site work started
 - 6 stories, 124 rooms

Community Redevelopment Agency staff have requested the proposed "Washington Square" project listed below be included within this analysis and factored into the demand projections. Though this project does not meet the criteria for inclusion in the demand projections based on the methodology in Section 1.3, staff have indicated that they have adequately vetted the project for inclusion in the demand projections:

- ▶ Washington Square (Downtown District)
 - Under Review
 - 57,561 square feet office, 4 restaurants totaling 658 seats, 33 condominium units, and a 260 room hotel.

Outside of the districts, there are two planned hotel projects. The Hyatt Place Hotel planned near the Downtown District, would total approximately 145 rooms; and another hotel that is not yet named but planned on Apalachee Parkway, would total approximately 90 rooms.

The following Table 4.5 below summarizes the hotel development activity occurring in the Frenchtown, Southside and Downtown Districts over various time periods. Again please note that these properties only include those tracked by Smith Travel Research.

Table 4.5
Summary of Hotel Market - Frenchtown, Southside and Downtown District

| Year Built | Room Absorption | Room Cumulative Total | Avg. Annual Absorption | Avg. Annual Growth | % of Total | % Capture of County SF | % Capture of City SF |
|----------------------------|-----------------|-----------------------|------------------------|--------------------|---------------|------------------------|----------------------|
| Frenchtown District | | | | | | | |
| Prior to 1970 | 164 | 164 | NA | NA | 100.0% | 33.9% | 33.9% |
| 1970-1979 | 0 | 164 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| 1980-1989 | 0 | 164 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| 1990-1999 | 0 | 164 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| 2000-2009 | 0 | 164 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| 2010-2015 | 0 | 164 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| Unknown | 0 | 164 | NA | NA | 0.0% | 0.0% | 0.0% |
| Total | 164 | | | | 100.0% | 2.9% | 2.9% |
| Southside District | | | | | | | |
| Prior to 1970 | 0 | 0 | NA | NA | NA | 0.0% | 0.0% |
| 1970-1979 | 0 | 0 | 0 | NA | NA | 0.0% | 0.0% |
| 1980-1989 | 0 | 0 | 0 | NA | NA | 0.0% | 0.0% |
| 1990-1999 | 0 | 0 | 0 | NA | NA | 0.0% | 0.0% |
| 2000-2009 | 0 | 0 | 0 | NA | NA | 0.0% | 0.0% |
| 2010-2015 | 0 | 0 | 0 | NA | NA | 0.0% | 0.0% |
| Unknown | 0 | 0 | NA | NA | NA | 0.0% | 0.0% |
| Total | 0 | | | | NA | 0.0% | 0.0% |
| Downtown District | | | | | | | |
| Prior to 1970 | 0 | 0 | NA | NA | 0.0% | 0.0% | 0.0% |
| 1970-1979 | 243 | 243 | 24 | NA | 34.8% | 31.4% | 31.4% |
| 1980-1989 | 158 | 401 | 16 | 5.1% | 22.6% | 13.1% | 13.1% |
| 1990-1999 | 0 | 401 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| 2000-2009 | 297 | 698 | 30 | 5.7% | 42.6% | 19.0% | 19.0% |
| 2010-2015 | 0 | 698 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| Unknown | 0 | 698 | NA | NA | 0.0% | 0.0% | 0.0% |
| Total | 698 | | | | 100.0% | 12.5% | 12.5% |

Source: Smith Travel Research; GAI

Hotel rooms total approximately 164 and 698 in the Frenchtown and Downtown Districts, respectively. There are no existing hotel rooms tracked by Smith Travel Research in the Southside District. However,

as noted earlier, the Hampton Inn is under construction in the Southside District. The one hotel property in the Frenchtown District was built prior to 1970. In the Downtown District, most of the hotel development activity occurred from 2000-2009. Other major observations on hotel development trends include:

- ▶ The Frenchtown District has captured about 2.9% of the total hotel rooms in the County tracked by Smith Travel Research. However, the Frenchtown District has not captured any of the County’s hotel development since 1970.
- ▶ The Downtown District had an average annual absorption of new hotel units ranging from about 16 to 30 units during those time periods when development occurred. No hotel development occurred from 1990-1999 and from 2010-2015. The Downtown District has captured about 12.5% of the total hotel units in the County. The highest percentage capture of space was 31.4% of the County’s total from 1970-1979.

Due to confidentiality restrictions we could not obtain occupancy and rate data for each individual district and instead had to use an aggregate grouping of hotels to represent the downtown area. The properties noted below are not all in the Downtown District but were chosen based on their data availability and their location near the downtown area. These properties include:

Table 4.6
Hotels Included in Downtown Area

| Hotel | Year Open | Rooms | Class (1) |
|---|-----------|------------|----------------------|
| aloft Hotel | 2009 | 162 | Upscale Class |
| Autograph Collection Hotel Duval | 1986 | 117 | Upper Upscale Class |
| Doubletree by Hilton | 1971 | 243 | Upscale Class |
| Four Points by Sheraton | 1960 | 164 | Upscale Class |
| Comfort Suites | 1999 | 64 | Upper Midscale Class |
| Residence Inn Universities @ The Capitol | 2006 | <u>135</u> | Upscale Class |
| | | 885 | |
| (1) As defined by Smith Travel Research. | | | |
| <i>Source: Smith Travel Research; GAI</i> | | | |

The Governor’s Inn was not included because that property does not report data to Smith Travel Research. The Comfort Suites had to be added to the group due to limits by Smith Travel Research on the number of properties in a group managed by a single company. Marriott manages a number of downtown properties, which was the reason for the restriction.

The hotel annual occupancy and average daily rate trends from 2010 through year to date 2016 for Leon County and the Downtown area are summarized in Table 4.7.

Table 4.7
Summary of Hotel Annual Occupancy and Average Daily Rates

| | Leon County | | Downtown Area | |
|-----------------------|-------------|----------|---------------|----------|
| | Amount | Growth % | Amount | Growth % |
| Occupancy % | | | | |
| 2010 | 54.7% | NA | 63.8% | NA |
| 2011 | 54.8% | 0.3% | 67.7% | 6.1% |
| 2012 | 56.1% | 2.3% | 67.9% | 0.3% |
| 2013 | 59.7% | 6.4% | 69.1% | 1.7% |
| 2014 | 60.7% | 1.7% | 70.8% | 2.5% |
| 2015 | 61.7% | 1.7% | 72.4% | 2.2% |
| 2016 YTD | 64.8% | 5.0% | 71.6% | -1.0% |
| Avg Daily Rate | | | | |
| 2010 | \$73.81 | NA | \$108.51 | NA |
| 2011 | \$78.27 | 6.0% | \$113.46 | 4.6% |
| 2012 | \$79.03 | 1.0% | \$113.45 | 0.0% |
| 2013 | \$82.68 | 4.6% | \$118.08 | 4.1% |
| 2014 | \$89.69 | 8.5% | \$125.91 | 6.6% |
| 2015 | \$94.92 | 5.8% | \$135.14 | 7.3% |
| 2016 YTD | \$93.24 | -1.8% | \$130.59 | -3.4% |

Source: Smith Travel Research; GAI

Hotel occupancy rates and average daily rates for Leon County and the Downtown area properties have been rising since 2010. Data for 2016 is through September so occupancy and average daily rates for that time period cannot be easily compared to the remainder of the table. The Downtown area outperformed Leon County for all the periods presented.

4.3 Retail

Table 4.8 below summarizes the retail development activity occurring in Leon County and the City of Tallahassee over various time periods. Square footage, in which year built data is not available, are summarized in the year built category as "unknown."

Table 4.8
Summary of Retail Market - Leon County and City of Tallahassee

| Year Built | Absorption | Cumulative Total | Avg. Annual Absorption | Avg. Annual Growth | % of Total | % Capture of County SF | % Capture of City SF |
|----------------------------|----------------|------------------|------------------------|--------------------|-------------|------------------------|----------------------|
| Leon County | | | | | | | |
| Prior to 1970 | 3,758,830 | 3,758,830 | NA | NA | 18.6% | 100.0% | NA |
| 1970-1979 | 4,319,036 | 8,077,866 | 431,904 | 8.0% | 21.4% | 100.0% | NA |
| 1980-1989 | 4,068,006 | 12,145,872 | 406,801 | 4.2% | 20.1% | 100.0% | NA |
| 1990-1999 | 3,099,913 | 15,245,785 | 309,991 | 2.3% | 15.3% | 100.0% | NA |
| 2000-2009 | 3,482,903 | 18,728,688 | 348,290 | 2.1% | 17.2% | 100.0% | NA |
| 2010-2015 | 573,559 | 19,302,247 | 95,593 | 0.5% | 2.8% | 100.0% | NA |
| Unknown | <u>911,504</u> | 20,213,751 | NA | NA | <u>4.5%</u> | 100.0% | NA |
| Total | 20,213,751 | | | | 100.0% | 100.0% | NA |
| City of Tallahassee | | | | | | | |
| Prior to 1970 | 3,752,505 | 3,752,505 | NA | NA | 18.6% | 99.8% | 100.0% |
| 1970-1979 | 4,319,036 | 8,071,541 | 431,904 | 8.0% | 21.4% | 100.0% | 100.0% |
| 1980-1989 | 4,064,886 | 12,136,427 | 406,489 | 4.2% | 20.1% | 99.9% | 100.0% |
| 1990-1999 | 3,099,913 | 15,236,340 | 309,991 | 2.3% | 15.4% | 100.0% | 100.0% |
| 2000-2009 | 3,482,903 | 18,719,243 | 348,290 | 2.1% | 17.3% | 100.0% | 100.0% |
| 2010-2015 | 564,187 | 19,283,430 | 94,031 | 0.5% | 2.8% | 98.4% | 100.0% |
| Unknown | <u>893,849</u> | 20,177,279 | NA | NA | <u>4.4%</u> | 98.1% | 100.0% |
| Total | 20,177,279 | | | | 100.0% | 99.8% | 100.0% |

Source: CoStar; GAI

The retail market as tracked by CoStar totals approximately 19,302,000 square feet in Leon County. About 37% of the County's inventory was added since 1990. Annual absorption of space within the County has generally ranged from about 300,000 to 430,000 square feet. However, additions in more recent years have been closer to 100,000 square feet annually. Almost all of the retail square footage in Leon County is also in the City of Tallahassee, so the City's absorption and growth patterns generally mirror those of the County.

Major planned additions to retail supply in the district that we are aware of include:

- ▶ Gaines Street Publix (Southside District)
 - Planned 29,010 square foot grocery store
- ▶ 201 East Park (Downtown District)
 - Under construction, estimated completion Winter 2017
 - 7,100 square feet restaurant/retail and 55,100 square feet office
- ▶ CollegeTown Mixed Use Phase III (Downtown District)
 - Planned 159 unit, 330 bed apartment with 3,551 square feet of ground floor retail.

Community Redevelopment Agency staff have requested the proposed "Washington Square" project listed below be included within this analysis and factored into the demand projections. Though this project does not meet the criteria for inclusion in the demand projections based on the methodology in Section 1.3, staff have indicated that they have adequately vetted the project for inclusion in the demand projections:

- ▶ Washington Square (Downtown District)
 - Under Review
 - 57,561 square feet office, 4 restaurants totaling 658 seats, 33 condominium units, and a 260 room hotel.

As noted earlier, there is a potential project in planning that does not meet the criteria for inclusion in the demand projections based on the methodology established in Section 1.3. However, staff have requested that it be referenced as it is a possible future project on the horizon, though it is not included in the projections. Also, we understand the program is still in development and could change from what is shown below:

- ▶ Firestone/Bloxham Site (Downtown District)
 - Developer responded to a Community Redevelopment Agency RFP for the site, no formal development review application at this time.
 - Proposed 251 apartment units, 18,340 square feet office, 14,300 square feet retail, 15,750 square feet restaurants.

There are two major retail centers within Tallahassee that are located outside of the districts that were considered during the analysis. One is the Governor's Square Mall which is located near the Downtown District. The other is The Centre of Tallahassee (formerly the Tallahassee Mall) which is currently being renovated and converted into an open concept mall including an amphitheater. The Centre of Tallahassee has remained open during the first phase of renovations which has included improved access, enhanced public space and new tenant space. Future renovation plans include additional restaurants and a hotel. .

Table 4.9 below summarizes the retail development activity occurring in the Frenchtown, Southside and Downtown Districts over various time periods.

Table 4.9
Summary of Retail Market - Frenchtown, Southside and Downtown Districts

| Year Built | Absorption | Cumulative Total | Avg. Annual Absorption | Avg. Annual Growth | % of Total | % Capture of County SF | % Capture of City SF |
|----------------------------|---------------|------------------|------------------------|--------------------|-------------|------------------------|----------------------|
| Frenchtown District | | | | | | | |
| Prior to 1970 | 276,562 | 276,562 | NA | NA | 47.9% | 7.4% | 7.4% |
| 1970-1979 | 70,144 | 346,706 | 7,014 | 2.3% | 12.2% | 1.6% | 1.6% |
| 1980-1989 | 12,947 | 359,653 | 1,295 | 0.4% | 2.2% | 0.3% | 0.3% |
| 1990-1999 | 86,400 | 446,053 | 8,640 | 2.2% | 15.0% | 2.8% | 2.8% |
| 2000-2009 | 122,970 | 569,023 | 12,297 | 2.5% | 21.3% | 3.5% | 3.5% |
| 2010-2015 | 0 | 569,023 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| Unknown | <u>8,201</u> | 577,224 | NA | NA | <u>1.4%</u> | 0.9% | 0.9% |
| Total | 577,224 | | | | 100.0% | 2.9% | 2.9% |
| Southside District | | | | | | | |
| Prior to 1970 | 491,546 | 491,546 | NA | NA | 54.3% | 13.1% | 13.1% |
| 1970-1979 | 210,091 | 701,637 | 21,009 | 3.6% | 23.2% | 4.9% | 4.9% |
| 1980-1989 | 57,097 | 758,734 | 5,710 | 0.8% | 6.3% | 1.4% | 1.4% |
| 1990-1999 | 28,841 | 787,575 | 2,884 | 0.4% | 3.2% | 0.9% | 0.9% |
| 2000-2009 | 54,652 | 842,227 | 5,465 | 0.7% | 6.0% | 1.6% | 1.6% |
| 2010-2015 | 0 | 842,227 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| Unknown | <u>63,085</u> | 905,312 | NA | NA | <u>7.0%</u> | 6.9% | 7.1% |
| Total | 905,312 | | | | 100.0% | 4.5% | 4.5% |
| Downtown District | | | | | | | |
| Prior to 1970 | 240,835 | 240,835 | NA | NA | 50.3% | 6.4% | 6.4% |
| 1970-1979 | 57,051 | 297,886 | 5,705 | 2.1% | 11.9% | 1.3% | 1.3% |
| 1980-1989 | 31,114 | 329,000 | 3,111 | 1.0% | 6.5% | 0.8% | 0.8% |
| 1990-1999 | 5,280 | 334,280 | 528 | 0.2% | 1.1% | 0.2% | 0.2% |
| 2000-2009 | 83,996 | 418,276 | 8,400 | 2.3% | 17.5% | 2.4% | 2.4% |
| 2010-2015 | 30,241 | 448,517 | 5,040 | 1.2% | 6.3% | 5.3% | 5.4% |
| Unknown | <u>30,390</u> | 478,907 | NA | NA | <u>6.3%</u> | 3.3% | 3.4% |
| Total | 478,907 | | | | 100.0% | 2.4% | 2.4% |

Source: CoStar; GAI

The retail market totals approximately 569,000, 842,000 and 449,000 square feet in the Frenchtown, Southside and Downtown Districts, respectively. Most of the retail space is older in all of the districts, with much of the square footage built prior to 1970. Other major observations on retail trends include:

- ▶ In the Frenchtown District, average annual absorption of new retail space has ranged from about 1,300 to 12,300 square feet, with no space added from 2010-2015. The Frenchtown District has captured about 3.0% of the total retail space in the County and City. The highest percentage capture of space built after 1970 was 3.5% of the County's total from 2000-2009.
- ▶ The Southside District had an average annual absorption of new retail space ranging from about 5,500 to 21,000 square feet, with no space added from 2010-2015. The Southside District has captured about 4.4% of the total retail space in the County and City. The highest percentage capture of space was 13.1% of the County's total prior to 1970.

- ▶ The Downtown District had an average annual absorption of new retail space ranging from about 500 to 8,400 square feet. The Downtown District has captured about 2.3% of the total retail space in the County and City. The highest percentage capture of space was 6.4% of the County’s total prior to 1970. However, during the 2010-2015 period, the Downtown District did capture about 5.3% of the total retail growth in the County.

The retail market occupancy and lease rate trends from 2010 through 2015 for all the geographies noted earlier are summarized in the following Table 4.10.

Table 4.10
Summary of Retail Market Occupancy and Average Lease Rates

| | Leon County | | Tallahassee | | Frenchtown District | | Southside District | | Downtown District | |
|-----------------------|-------------|----------|-------------|----------|---------------------|----------|--------------------|----------|-------------------|----------|
| | Amount | Growth % | Amount | Growth % | Amount | Growth % | Amount | Growth % | Amount | Growth % |
| Occupancy % | | | | | | | | | | |
| 2010 | 94.5% | NA | 94.5% | NA | 95.3% | NA | 93.3% | NA | 98.3% | NA |
| 2011 | 94.4% | -0.1% | 94.4% | -0.1% | 94.8% | -0.5% | 91.8% | -1.6% | 98.7% | 0.4% |
| 2012 | 94.7% | 0.3% | 94.7% | 0.3% | 95.9% | 1.2% | 93.0% | 1.3% | 99.1% | 0.4% |
| 2013 | 93.6% | -1.2% | 93.6% | -1.2% | 95.9% | 0.0% | 98.0% | 5.4% | 99.0% | -0.1% |
| 2014 | 94.9% | 1.4% | 94.9% | 1.4% | 93.4% | -2.6% | 94.8% | -3.3% | 96.1% | -2.9% |
| 2015 | 95.4% | 0.5% | 95.4% | 0.5% | 96.1% | 2.9% | 94.6% | -0.2% | 94.9% | -1.2% |
| Avg Lease Rate | | | | | | | | | | |
| 2010 | \$13.59 | NA | \$13.59 | NA | \$13.80 | NA | \$12.38 | - | \$19.18 | NA |
| 2011 | \$12.31 | -9.4% | \$12.31 | -9.4% | \$14.90 | 8.0% | \$10.75 | -13.2% | \$19.18 | 0.0% |
| 2012 | \$13.85 | 12.5% | \$13.85 | 12.5% | \$11.78 | -20.9% | \$12.31 | 14.5% | NA | NA |
| 2013 | \$15.04 | 8.6% | \$15.04 | 8.6% | \$16.50 | 40.1% | \$16.30 | 32.4% | \$15.15 | NA |
| 2014 | \$14.49 | -3.7% | \$14.49 | -3.7% | \$16.97 | 2.8% | \$12.45 | -23.6% | \$16.95 | 11.9% |
| 2015 | \$14.18 | -2.1% | \$14.18 | -2.1% | \$14.50 | -14.6% | \$11.02 | -11.5% | \$19.93 | 17.6% |

Source: CoStar, GAI

Retail market occupancies have generally been in the mid 90% range over the past six years in Leon County, the City of Tallahassee, Frenchtown and the Southside District. Occupancy rates have generally been higher in the Downtown District, though most recent data shows a drop in occupancy to around 95%. Lease rates have fluctuated over the last six years but are generally higher than 2010 rates in Leon County, the City of Tallahassee and the Frenchtown and Downtown Districts. Average lease rates are lower in 2015 than in 2010 in the Southside District. The Southside District’s average lease rate is significantly lower than the other geographies.

4.4 Multi-Family For Rent Apartments

Table 4.11 below summarizes the for rent apartment development activity occurring in Leon County over various time periods. Only apartment complexes with 100 units or more are included. As noted earlier, although there are certainly projects that have been developed in the Tallahassee market that are under 100 units in size, we believe it is likely that most future projects will be greater than this number to capitalize on the economies of scale that larger projects can achieve. In our opinion, the development sites we would analyze during the next phase of work would be large enough that apartment projects would need to be over 100 units in size.

Table 4.11
Summary of Apartment Market - Leon County

| Year Built | Unit Absorption | Unit Cumulative Total | Avg. Annual Absorption | Annual Growth | % of Total | % of County Total |
|---------------------------------|-----------------|-----------------------|------------------------|---------------|--------------|-------------------|
| <u>Leon County-Total</u> | | | | | | |
| Prior to 1986 | 7,233 | 7,233 | NA | NA | 35.2% | 100.0% |
| 1986-1995 | 4,532 | 11,765 | 453 | 5.0% | 22.0% | 100.0% |
| 1996-2005 | 5,978 | 17,743 | 598 | 4.2% | 29.1% | 100.0% |
| 2006-2010 | 1,813 | 19,556 | 363 | 2.0% | 8.8% | 100.0% |
| 2011-2016 | <u>1,011</u> | 20,567 | 202 | 1.6% | <u>4.9%</u> | 100.0% |
| Total | 20,567 | | | | 100.0% | 100.0% |
| <u>Leon County-Market Rate</u> | | | | | | |
| Prior to 1986 | 5,270 | 5,270 | NA | NA | 46.9% | 72.9% |
| 1986-1995 | 2,681 | 7,951 | 268 | 4.2% | 23.9% | 59.2% |
| 1996-2005 | 2,440 | 10,391 | 244 | 2.7% | 21.7% | 40.8% |
| 2006-2010 | 846 | 11,237 | 169 | 1.6% | 7.5% | 46.7% |
| 2011-2016 | <u>0</u> | 11,237 | 0 | 0.0% | <u>0.0%</u> | 0.0% |
| Total | 11,237 | | | | 100.0% | 54.6% |
| <u>Leon County-Student</u> | | | | | | |
| Prior to 1986 | 1,595 | 1,595 | NA | NA | 23.0% | 22.1% |
| 1986-1995 | 994 | 2,589 | 99 | 5.0% | 14.4% | 21.9% |
| 1996-2005 | 2,668 | 5,257 | 267 | 7.3% | 38.5% | 44.6% |
| 2006-2010 | 656 | 5,913 | 131 | 2.4% | 9.5% | 36.2% |
| 2011-2016 | <u>1,011</u> | 6,924 | 202 | 4.3% | <u>14.6%</u> | 100.0% |
| Total | 6,924 | | | | 100.0% | 33.7% |
| <u>Leon County-Other</u> | | | | | | |
| Prior to 1986 | 368 | 368 | NA | NA | 15.3% | 5.1% |
| 1986-1995 | 857 | 1,225 | 86 | 12.8% | 35.6% | 18.9% |
| 1996-2005 | 870 | 2,095 | 87 | 5.5% | 36.2% | 14.6% |
| 2006-2010 | 311 | 2,406 | 62 | 2.8% | 12.9% | 17.2% |
| 2011-2016 | <u>0</u> | 2,406 | 0 | 0.0% | <u>0.0%</u> | 0.0% |
| Total | 2,406 | | | | 100.0% | 11.7% |
| <i>Source: MyRentComps; GAI</i> | | | | | | |

There are over 20,000 apartment rental units in complexes of 100 units or more in Leon County. About 54% of the units are considered market rate rentals, with another 34% in student (by the bedroom) units and 12% in all other categories. For the purposes of this analysis, only "student by the bedroom" rental units are included in the student category. Properties that allow students but do not rent by the bedroom are included in the market rate category.

About 35% of the County's rental apartment supply was built prior to 1986. The periods from 1986-1995 and 1996-2005 also saw significant development. Market rate rental product followed the same

development patterns as the overall supply, but much of the student rentals by the bedroom product was added from 1996-2005.

Table 4.12 summarizes rental apartments of 100 units or more within the Frenchtown, Southside and Downtown Districts over various time periods.

Table 4.12
Summary of Apartment Market - Frenchtown, Southside and Downtown District

| Year Built | Unit Absorption | Unit Cumulative Total | Avg. Annual Absorption | Annual Growth | % of Total | % of County Total |
|---------------------------------|-----------------|-----------------------|------------------------|---------------|---------------|-------------------|
| <u>Frenchtown District</u> | | | | | | |
| Prior to 1986 | 112 | 112 | NA | NA | 30.8% | 1.5% |
| 1986-1995 | 0 | 112 | 0 | 0.0% | 0.0% | 0.0% |
| 1996-2005 | 252 | 364 | 25 | 12.5% | 69.2% | 4.2% |
| 2006-2010 | 0 | 364 | 0 | 0.0% | 0.0% | 0.0% |
| 2011-2016 | <u>0</u> | 364 | 0 | 0.0% | <u>0.0%</u> | 0.0% |
| Total | 364 | | | | 100.0% | 1.8% |
| <u>Southside District</u> | | | | | | |
| Prior to 1986 | 0 | 0 | NA | NA | 0.0% | 0.0% |
| 1986-1995 | 0 | 0 | 0 | 0.0% | 0.0% | 0.0% |
| 1996-2005 | 0 | 0 | 0 | 0.0% | 0.0% | 0.0% |
| 2006-2010 | 0 | 0 | 0 | 0.0% | 0.0% | 0.0% |
| 2011-2016 | <u>414</u> | 414 | 83 | 0.0% | <u>100.0%</u> | 40.9% |
| Total | 414 | | | | 100.0% | 2.0% |
| <u>Downtown District</u> | | | | | | |
| Prior to 1986 | 335 | 335 | NA | NA | 49.0% | 4.6% |
| 1986-1995 | 0 | 335 | 0 | 0.0% | 0.0% | 0.0% |
| 1996-2005 | 0 | 335 | 0 | 0.0% | 0.0% | 0.0% |
| 2006-2010 | 0 | 335 | 0 | 0.0% | 0.0% | 0.0% |
| 2011-2016 | <u>349</u> | 684 | 70 | NA | <u>51.0%</u> | 34.5% |
| Total | 684 | | | | 100.0% | 3.3% |
| <i>Source: MyRentComps; GAI</i> | | | | | | |

There are 364, 414 and 684 rental units in the Frenchtown, Southside and Downtown Districts, respectively. Most of the product within the Frenchtown District was built from 1996-2005. About half of the product in the Downtown District is older and was built prior to 1986 with the remainder built from 2011-2016. All of the rental apartment complexes of 100 units or more in the Southside District were built from 2011-2016. The units added in the Southside District are generally grouped with a larger complex called Stadium Centre that is managed by one company. The Axis, which totals approximately 32 units, was excluded since that building is located outside the Southside district.

The Frenchtown, Southside and Downtown Districts have captured approximately 1.8%, 2.0% and 3.3% of the County's development of apartment projects with 100 units or more. The Southside and

Downtown District both captured a significant amount (40.9% and 34.5%, respectively) of the units built within the County from 2011-2016.

Table 4.13 summarizes rental apartments of 100 units or more by type of property within the Frenchtown, Southside and Downtown Districts over various time periods.

Table 4.13
Summary of Apartment Market by Property Type - Frenchtown, Southside and Downtown District

| Year Built | Market Rate | Type of Property | | | % of Total |
|---------------------------------|-------------|------------------|-------|--------|------------|
| | | Student | Other | Total | |
| <u>Frenchtown District</u> | | | | | |
| Prior to 1986 | 0 | 0 | 112 | 112 | 30.8% |
| 1986-1995 | 0 | 0 | 0 | 0 | 0.0% |
| 1996-2005 | 0 | 252 | 0 | 252 | 69.2% |
| 2006-2010 | 0 | 0 | 0 | 0 | 0.0% |
| 2011-2016 | 0 | 0 | 0 | 0 | 0.0% |
| Total | 0 | 252 | 112 | 364 | 100.0% |
| % of Total | 0.0% | 69.2% | 30.8% | 100.0% | |
| <u>Southside District</u> | | | | | |
| Prior to 1986 | 0 | 0 | 0 | 0 | 0.0% |
| 1986-1995 | 0 | 0 | 0 | 0 | 0.0% |
| 1996-2005 | 0 | 0 | 0 | 0 | 0.0% |
| 2006-2010 | 0 | 0 | 0 | 0 | 0.0% |
| 2011-2016 | 0 | 414 | 0 | 414 | 100.0% |
| Total | 0 | 414 | 0 | 414 | 100.0% |
| % of Total | 0.0% | 0.0% | 0.0% | 0.0% | |
| <u>Downtown District</u> | | | | | |
| Prior to 1986 | 186 | 0 | 149 | 335 | 49.0% |
| 1986-1995 | 0 | 0 | 0 | 0 | 0.0% |
| 1996-2005 | 0 | 0 | 0 | 0 | 0.0% |
| 2006-2010 | 0 | 0 | 0 | 0 | 0.0% |
| 2011-2016 | 0 | 349 | 0 | 349 | 51.0% |
| Total | 186 | 349 | 149 | 684 | 100.0% |
| % of Total | 27.2% | 51.0% | 21.8% | 100.0% | |
| <i>Source: MyRentComps; GAI</i> | | | | | |

Over two-thirds of the rental supply in the Frenchtown District in complexes of 100 units or more is student by the bedroom product. There are no market rate complexes of 100 or more units in the Frenchtown District. All of the product of 100 units or more in Frenchtown is student by the bedroom. In the Downtown District, about 27% of the supply is market rate and 51% is student by the bedroom.

Table 4.14 summarizes various operating characteristics of the rental supply in Leon County and the Frenchtown, Southside and Downtown Districts.

Table 4.14
Summary of Apartment Market Characteristics –
Leon County, Frenchtown, Southside and Downtown District

| Year Built | % Occupied | Average Square Feet/Unit | Average Base Market Rent/Unit | Average Base Market Rent/SF |
|---------------------------------|------------|--------------------------|-------------------------------|-----------------------------|
| <u>Leon County</u> | | | | |
| Prior to 1980 | 95.9% | 898 | \$839 | \$0.93 |
| 1980-1989 | 97.7% | 961 | \$876 | \$0.91 |
| 1990-1999 | 97.6% | 1,033 | \$1,018 | \$0.99 |
| 2000 and After | 95.8% | 1,237 | \$1,325 | \$1.07 |
| Total | 96.6% | 1,051 | \$1,047 | \$1.00 |
| <u>Frenchtown District</u> | | | | |
| Prior to 1980 | NA | NA | NA | NA |
| 1980-1989 | 100.0% | 600 | \$673 | \$1.12 |
| 1990-1999 | 100.0% | 935 | \$1,176 | \$1.26 |
| 2000 and After | NA | NA | NA | NA |
| Total | 100.0% | 832 | \$1,021 | \$1.23 |
| <u>Southside District</u> | | | | |
| Prior to 1980 | NA | NA | NA | NA |
| 1980-1989 | NA | NA | NA | NA |
| 1990-1999 | NA | NA | NA | NA |
| 2000 and After | 99.8% | 852 | \$1,764 | \$2.07 |
| Total | 99.8% | 852 | \$1,764 | \$2.07 |
| <u>Downtown District</u> | | | | |
| Prior to 1980 | 97.8% | 545 | \$626 | \$1.15 |
| 1980-1989 | NA | NA | NA | NA |
| 1990-1999 | NA | NA | NA | NA |
| 2000 and After | 94.0% | 921 | \$2,246 | \$2.44 |
| Total | 95.3% | 790 | \$1,683 | \$2.13 |
| <i>Source: MyRentComps; GAI</i> | | | | |

Rental apartment complexes are generally very highly occupied. Leon County apartment complexes of 100 units or more average about 96.6% occupied. The Frenchtown and Southside District units are even more highly occupied than the County averages. On a per unit basis, the Frenchtown District has slightly lower rents than the County averages, but rents are higher on a per square foot basis due to the smaller units on average in the Frenchtown District. The Southside and Downtown Districts have higher rents than the County averages on both per unit and per square foot basis.

Major planned additions to for-rent apartment supply in the districts include:

- ▶ The Domain at Tallahassee (Frenchtown District)
 - Under construction, student oriented complex
 - 125 units, 434 beds

- ▶ 1119 West Gaines Street (Southside District)
 - Planned, student oriented complex
 - 115 units, 388 beds
- ▶ Stadium Enclave (Southside District)
 - Planned, student oriented complex
 - 184 units, 600 beds
- ▶ The Station (Southside District)
 - Planned, student oriented complex
 - 160 units, 562 beds
- ▶ CollegeTown Mixed Use Phase III (Downtown District)
 - Planned
 - 159 unit, 330 bed apartment with 3,551 square feet of ground floor retail.
- ▶ Casanas Village of Frenchtown Square (Frenchtown District)
 - Planned, affordable rental apartments
 - 88 units, 5 stories
- ▶ The Lumberyard (Downtown District)
 - Site work underway, student oriented complex
 - 112 units, 414 beds

There are two potential projects that do not meet the criteria for inclusion in the demand projections based on the methodology established in Section 1.3. However, Community Redevelopment Agency staff have requested that they be referenced as they are possible future projects on the horizon, though they are not included in the projections:

- ▶ Firestone/Bloxham Site (Downtown District)
 - Developer responded to Community Redevelopment Agency RFP for the site, no formal development review application at this time.
 - Proposed 251 apartment units, 18,340 square feet office, 14,300 square feet retail, 15,750 square feet restaurants. The program is still in development and could change from what is shown here.
- ▶ The Standard at Tallahassee (Frenchtown District)
 - Pre-application under review, student oriented apartment complex
 - 265 units, 915 beds

There are several for-rent apartment projects planned throughout the County but outside the districts however there are only three that are not student oriented. Two are located in Leon County, Apalachee Point Villas (under construction, 200 units), and Arbor Landing at Lake Jackson (planned, 120 units); and one is located in Tallahassee but outside the districts, Evergreen at Southwood (under construction, 288 units).

4.5 Multi-Family Residential For Sale

Table 4.15 below summarizes the for-sale residential condominium development activity occurring in Leon County and the City of Tallahassee over various time periods.

Table 4.15
Summary of For-Sale Residential Condominium Market - Leon County and City of Tallahassee

| Year Built | Unit Absorption | Unit Cumulative Total | Avg. Annual Absorption | Avg. Annual Growth | % of Total | % Capture of County | % Capture of City |
|----------------------------|-----------------|-----------------------|------------------------|--------------------|-------------|---------------------|-------------------|
| <u>Leon County</u> | | | | | | | |
| Prior to 1970 | 654 | 654 | NA | NA | 15.2% | 100.0% | NA |
| 1970-1979 | 554 | 1,208 | 55 | 6.3% | 12.8% | 100.0% | NA |
| 1980-1989 | 470 | 1,678 | 47 | 3.3% | 10.9% | 100.0% | NA |
| 1990-1999 | 72 | 1,750 | 7 | 0.4% | 1.7% | 100.0% | NA |
| 2000-2009 | 2,322 | 4,072 | 232 | 8.8% | 53.8% | 100.0% | NA |
| 2010-2015 | <u>244</u> | 4,316 | 41 | 1.0% | <u>5.7%</u> | 100.0% | NA |
| Total | 4,316 | | | | 100.0% | 100.0% | NA |
| <u>City of Tallahassee</u> | | | | | | | |
| Prior to 1970 | 316 | 316 | NA | NA | 14.4% | 48.3% | 100.0% |
| 1970-1979 | 320 | 636 | 32 | 7.2% | 14.5% | 57.8% | 100.0% |
| 1980-1989 | 184 | 820 | 18 | 2.6% | 8.4% | 39.1% | 100.0% |
| 1990-1999 | 47 | 867 | 5 | 0.6% | 2.1% | 65.3% | 100.0% |
| 2000-2009 | 1,197 | 2,064 | 120 | 9.1% | 54.4% | 51.6% | 100.0% |
| 2010-2015 | <u>136</u> | 2,200 | 23 | 1.1% | <u>6.2%</u> | 55.7% | 100.0% |
| Total | 2,200 | | | | 100.0% | 51.0% | 100.0% |

Source: Leon County Tax Roll; GAI

According to data obtained from the Leon County Property Appraiser, there are approximately 4,300 residential condominium units in Leon County, with 2,200 of those units in the City of Tallahassee. About 54% of the County's inventory was added from 2000 to 2009, meaning much of the inventory is newer. This bump in construction activity during the first decade of the century corresponds to the boom period of residential construction that occurred nationwide during that time period. Annual absorption of residential condominium units within the County has generally ranged from about 40 to 55 units, with the exception of the spike in 2000 to 2009 when about 230 units were added annually. However, additions in more recent years have been closer to 40 units annually. The City's absorption and growth patterns generally mirror those of the County.

Major planned additions to for-sale residential condominium supply in the County include:

- ▶ Cottage at Oak Commons (Tallahassee)
 - Planned, 54 Units
- ▶ The Dwellings (Leon County)
 - Planned, 130 units

- ▶ University Green (Tallahassee)
 - Under construction, 226 units complete as of July 2016
 - 404 total units planned

Community Redevelopment Agency staff have requested the proposed “Washington Square” project listed below be included within this analysis and factored into the demand projections. Though this project does not meet the criteria for inclusion in the demand projections based on the methodology in Section 1.3, staff have indicated that they have adequately vetted the project for inclusion in the demand projections:

- ▶ Washington Square (Downtown District)
 - Under Review
 - 57,561 square feet office, 4 restaurants totaling 658 seats, 33 condominium units, and a 260 room hotel.

Table 4.16 below summarizes the for-sale residential condominium development activity occurring in the Frenchtown, Southside and Downtown Districts over various time periods.

**Table 4.16
 Summary of For-Sale Residential Condominium Market - Frenchtown, Southside and Downtown District**

| Year Built | Unit Absorption | Unit Cumulative Total | Unit Avg. Annual Absorption | Avg. Annual Growth | % of Total | % Capture of County | % Capture of City |
|----------------------------|-----------------|-----------------------|-----------------------------|--------------------|---------------|---------------------|-------------------|
| Frenchtown District | | | | | | | |
| Prior to 1970 | 0 | 0 | NA | NA | 0.0% | 0.0% | 0.0% |
| 1970-1979 | 0 | 0 | 0 | NA | 0.0% | 0.0% | 0.0% |
| 1980-1989 | 37 | 37 | 4 | NA | 78.7% | 7.9% | 20.1% |
| 1990-1999 | 0 | 37 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| 2000-2009 | 10 | 47 | 1 | 2.4% | 21.3% | 0.4% | 0.8% |
| 2010-2015 | 0 | 47 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| Total | 47 | | | | 100.0% | 1.1% | 2.1% |
| Southside District | | | | | | | |
| Prior to 1970 | 28 | 28 | NA | NA | 26.9% | 4.3% | 8.9% |
| 1970-1979 | 0 | 28 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| 1980-1989 | 0 | 28 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| 1990-1999 | 0 | 28 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| 2000-2009 | 72 | 100 | 7 | 13.6% | 69.2% | 3.1% | 6.0% |
| 2010-2015 | 4 | 104 | 1 | 0.7% | 3.8% | 1.6% | 2.9% |
| Total | 104 | | | | 100.0% | 2.4% | 4.7% |
| Downtown District | | | | | | | |
| Prior to 1970 | 126 | 126 | NA | NA | 21.9% | 19.3% | 39.9% |
| 1970-1979 | 31 | 157 | 3 | 2.2% | 5.4% | 5.6% | 9.7% |
| 1980-1989 | 0 | 157 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| 1990-1999 | 32 | 189 | 3 | 1.9% | 5.6% | 44.4% | 68.1% |
| 2000-2009 | 387 | 576 | 39 | 11.8% | 67.2% | 16.7% | 32.3% |
| 2010-2015 | 0 | 576 | 0 | 0.0% | 0.0% | 0.0% | 0.0% |
| Total | 576 | | | | 100.0% | 13.3% | 26.2% |

Source: Leon County Tax Roll; GAI

For-sale residential condominium units total approximately 47, 104 and 576 in the Frenchtown, Southside and Downtown Districts, respectively. Most of the residential condominium product is older in the Frenchtown District with a significant amount of units built from 1980-1989. In the Southside and Downtown Districts, a significant amount of residential condominium construction occurred from 2000-2009, which again matches the residential boom that occurred nationwide in that time frame. Other major observations on for-sale residential condominium trends include:

- ▶ In the Frenchtown District, average annual absorption of new for-sale residential condominium units has ranged from 0 to 4 units. Residential condominium development only occurred during the 1980-1989 and 2000-2009 time periods. The Frenchtown District has captured about 1.1% of the total residential condominium units in the County. The highest percentage capture of units was 7.9% of the County's total from 1980-1989.
- ▶ The Southside District had an average annual absorption of new residential condominium units ranging from 0 to 7 units. No residential condominium development occurred from 1970-1999. The Southside District has captured about 2.4% of the total residential condominium units in the County. The highest percentage capture of units was 4.3% of the County's total prior to 1970.
- ▶ The Downtown District had an average annual absorption of new residential condominium units ranging from 0 to 39 units. No residential condominium development occurred from 1980-1989 and from 2010-2015. The Downtown District has captured about 13.3% of the total residential condominium units in the County. The highest percentage capture of space was 44.4% of the County's total from 1990-1999.
- ▶ In addition to the for-sale residential condominium product noted earlier, there were approximately 39, 61 and 14 townhouse units built in the Frenchtown, Southside and Downtown Districts, respectively. Townhouse units are considered single family attached product, which is why they are not included in the earlier tables. The exclusion of townhouse units from the for-sale residential condominium inventory does not impact the for-sale residential condominium demand projections.

For-sale residential condominium units that were sold in 2000, 2005 and 2010 to 2015 are summarized in Table 4.17 below for Leon County and the City of Tallahassee. This includes all units sold irrespective of year built.

Table 4.17
Summary of For-Sale Condominiums by Year Sold - Leon County and City of Tallahassee

| Year Sold | # of Units | % of Total | % Capture of County | % Capture of City | Average SF | Average Price | Average Price SF |
|--|------------|--------------|---------------------|-------------------|------------|---------------|------------------|
| <u>Leon County</u> | | | | | | | |
| 2000 | 10 | 1.2% | 100.0% | N/A | 1,212 | \$63,840 | \$52.67 |
| 2005 | 164 | 20.2% | 100.0% | N/A | 1,338 | \$147,651 | \$110.35 |
| 2010 | 69 | 8.5% | 100.0% | N/A | 1,169 | \$91,644 | \$78.40 |
| 2011 | 58 | 7.2% | 100.0% | N/A | 1,295 | \$112,510 | \$86.88 |
| 2012 | 61 | 7.5% | 100.0% | N/A | 1,239 | \$96,372 | \$77.78 |
| 2013 | 107 | 13.2% | 100.0% | N/A | 1,416 | \$111,676 | \$78.87 |
| 2014 | 170 | 21.0% | 100.0% | N/A | 1,454 | \$123,306 | \$84.80 |
| 2015 | <u>171</u> | <u>21.1%</u> | 100.0% | N/A | 1,287 | \$120,511 | \$93.64 |
| Total/Avg | 810 | 100.0% | 100.0% | | 1,301 | \$108,439 | \$83.35 |
| <u>City of Tallahassee</u> | | | | | | | |
| 2000 | 5 | 1.2% | 50.0% | 100.0% | 1,054 | \$64,700 | \$61.39 |
| 2005 | 55 | 13.1% | 33.5% | 100.0% | 1,313 | \$135,383 | \$103.11 |
| 2010 | 48 | 11.4% | 69.6% | 100.0% | 1,127 | \$86,075 | \$76.38 |
| 2011 | 28 | 6.7% | 48.3% | 100.0% | 1,170 | \$133,914 | \$114.46 |
| 2012 | 38 | 9.0% | 62.3% | 100.0% | 1,116 | \$93,673 | \$83.94 |
| 2013 | 55 | 13.1% | 51.4% | 100.0% | 1,203 | \$120,178 | \$99.90 |
| 2014 | 92 | 21.9% | 54.1% | 100.0% | 1,211 | \$139,252 | \$114.99 |
| 2015 | <u>99</u> | <u>23.6%</u> | 57.9% | 100.0% | 1,134 | \$136,289 | \$120.18 |
| Total/Avg | 420 | 100.0% | 51.9% | 100.0% | 1,166 | \$113,683 | \$97.50 |
| <i>Source: Leon County Tax Roll; GAI</i> | | | | | | | |

The number of for-sale residential condominium units sold dropped off in the years after the recession but have picked up significantly from 2013 to 2015 in both the County and City. The number of units sold in 2014 and 2015 are higher than any other time frame analyzed. In more recent years sales prices have ranged from about \$85 to \$94 per square foot in the County but are much higher in the City at about \$115 to \$120 per square foot.

For-sale residential condominium units that were sold in 2000, 2005 and 2010 to 2015 are summarized in Table 4.18 below for the Frenchtown, Southside and Downtown Districts. Again please note that this is all units sold irrespective of year built.

Table 4.18
Summary of For-Sale Residential Condominiums by Year Sold - Frenchtown, Southside and Downtown District

| Year Sold | # of Units | % of Total | % Capture of County | % Capture of City | Average SF | Average Price | Average Price SF |
|-----------------------------------|------------|------------|---------------------|-------------------|------------|---------------|------------------|
| <u>Frenchtown District</u> | | | | | | | |
| 2000 | 1 | 4.0% | 10.0% | 20.0% | 1,368 | 67,000 | \$48.98 |
| 2005 | 2 | 8.0% | 1.2% | 3.6% | 1,368 | 115,000 | \$84.06 |
| 2010 | 1 | 4.0% | 1.4% | 2.1% | 1,368 | \$90,400 | \$66.08 |
| 2011 | 1 | 4.0% | 1.7% | 3.6% | 1,368 | \$110,000 | \$80.41 |
| 2012 | 3 | 12.0% | 4.9% | 7.9% | 1,479 | \$115,000 | \$77.76 |
| 2013 | 9 | 36.0% | 8.4% | 16.4% | 1,391 | \$116,700 | \$83.90 |
| 2014 | 6 | 24.0% | 3.5% | 6.5% | 1,423 | \$157,500 | \$110.68 |
| 2015 | 2 | 8.0% | 1.2% | 2.0% | 1,368 | \$99,000 | \$72.37 |
| Total/Avg | 25 | 100.0% | 3.1% | 6.0% | 1,392 | \$108,825 | \$78.18 |
| <u>Southside District</u> | | | | | | | |
| 2000 | 0 | 0.0% | 0.0% | 0.0% | - | - | - |
| 2005 | 0 | 0.0% | 0.0% | 0.0% | - | - | - |
| 2010 | 25 | 37.9% | 36.2% | 52.1% | 875 | \$37,156 | \$42.46 |
| 2011 | 11 | 16.7% | 19.0% | 39.3% | 919 | \$56,971 | \$61.99 |
| 2012 | 8 | 12.1% | 13.1% | 21.1% | 1,282 | \$83,500 | \$65.13 |
| 2013 | 10 | 15.2% | 9.3% | 18.2% | 1,715 | \$199,642 | \$116.41 |
| 2014 | 6 | 9.1% | 3.5% | 6.5% | 1,316 | \$161,783 | \$122.94 |
| 2015 | 6 | 9.1% | 3.5% | 6.1% | 1,315 | \$203,750 | \$154.94 |
| Total/Avg | 66 | 100.0% | 8.1% | 15.7% | 1,237 | \$123,800 | \$100.08 |
| <u>Downtown District</u> | | | | | | | |
| 2000 | 0 | 0.0% | 0.0% | 0.0% | - | - | - |
| 2005 | 0 | 0.0% | 0.0% | 0.0% | - | - | - |
| 2010 | 11 | 6.0% | 15.9% | 22.9% | 759 | \$80,537 | \$106.11 |
| 2011 | 19 | 10.4% | 32.8% | 67.9% | 907 | \$123,873 | \$136.57 |
| 2012 | 29 | 15.9% | 47.5% | 76.3% | 605 | \$167,045 | \$276.11 |
| 2013 | 30 | 16.5% | 28.0% | 54.5% | 660 | \$179,988 | \$272.71 |
| 2014 | 62 | 34.1% | 36.5% | 67.4% | 1,070 | \$188,394 | \$176.07 |
| 2015 | 31 | 17.0% | 18.1% | 31.3% | 633 | \$229,922 | \$363.23 |
| Total/Avg | 182 | 100.0% | 22.5% | 43.3% | 772 | \$161,627 | \$209.36 |
| Source: Leon County Tax Roll; GAI | | | | | | | |

Residential condominium units that sold in the above time frames totaled approximately 25, 66 and 182 in the Frenchtown, Southside and Downtown Districts, respectively. Other major observations on residential condominiums sold in these years include:

- ▶ In the Frenchtown District, units sold were higher in 2013 and 2014 (6-9 units) than other years, but declined in 2015 (2 units). Sales prices in more recent years averaged approximately \$72-\$111 per square foot. The Frenchtown District has captured about 3.1% of the total residential condominium units sold in the County during the time periods analyzed. The highest percentage capture of units sold was 10.0% of the County's total in 2000.

- ▶ In the Southside District, units sold were highest in 2010 (25 units), but declined in 2014 and 2015 (6 units). Sales prices in more recent years averaged approximately \$123-\$155 per square foot. The Southside District has captured about 8.1% of the total residential condominium units sold in the County during the time periods analyzed. The highest percentage capture of units sold was 36.2% of the County's total in 2010.
- ▶ In the Downtown District, units sold were highest in 2014 (62 units), but declined in 2015 (31 units). Sales prices in more recent years averaged approximately \$176-\$363 per square foot. The Downtown District has captured about 22.5% of the total residential condominium units sold in the County during the time periods analyzed. The highest percentage capture of units sold was 47.5% of the County's total in 2012.

4.6 Implications

Through the end of 2015, Leon County had approximately 20,706,000 square feet of office space, 20,214,000 square feet of retail space, 19,900 rental apartment units (in complexes greater than 100 units) 4,300 residential condominium units and 5,600 hotel rooms. Since the City of Tallahassee dominates the County, development trends tend to be similar in both geographies.

The following tables (Tables 4.19 and 4.20) summarize the capture rate of pertinent development activity within the County in the Frenchtown, Southside and Downtown Districts. The capture percentages noted here will be used as a starting point for estimating each Districts capture of future development within the County. These estimates are discussed in Section 5.0 of the report, the Long Term Outlook.

Table 4.19
Summary of County Capture Rates - Frenchtown, Southside and Downtown Districts

| Year Built | Office SF | Retail SF | Condominium Units | Hotel Rooms |
|--|-----------|-----------|-------------------|-------------|
| <u>Frenchtown District</u> | | | | |
| Prior to 1970 | 6.6% | 7.4% | 0.0% | 33.9% |
| 1970-1979 | 0.7% | 1.6% | 0.0% | 0.0% |
| 1980-1989 | 0.6% | 0.3% | 7.9% | 0.0% |
| 1990-1999 | 0.2% | 2.8% | 0.0% | 0.0% |
| 2000-2009 | 1.1% | 3.5% | 0.4% | 0.0% |
| 2010-2015 | 0.0% | 0.0% | 0.0% | 0.0% |
| Unknown | 16.8% | 0.9% | NA | 0.0% |
| Total | 1.8% | 2.9% | 1.1% | 2.9% |
| <u>Southside District</u> | | | | |
| Prior to 1970 | 6.4% | 13.1% | 4.3% | 0.0% |
| 1970-1979 | 0.0% | 4.9% | 0.0% | 0.0% |
| 1980-1989 | 0.1% | 1.4% | 0.0% | 0.0% |
| 1990-1999 | 0.3% | 0.9% | 0.0% | 0.0% |
| 2000-2009 | 0.4% | 1.6% | 3.1% | 0.0% |
| 2010-2015 | 0.0% | 0.0% | 1.6% | 0.0% |
| Unknown | 3.1% | 6.9% | NA | 0.0% |
| Total | 1.1% | 4.5% | 2.4% | 0.0% |
| <u>Downtown District</u> | | | | |
| Prior to 1970 | 34.2% | 6.4% | 19.3% | 0.0% |
| 1970-1979 | 14.6% | 1.3% | 5.6% | 31.4% |
| 1980-1989 | 17.6% | 0.8% | 0.0% | 13.1% |
| 1990-1999 | 10.6% | 0.2% | 44.4% | 0.0% |
| 2000-2009 | 2.5% | 2.4% | 16.7% | 19.0% |
| 2010-2015 | 8.5% | 5.3% | 0.0% | 0.0% |
| Unknown | 1.8% | 3.3% | NA | 0.0% |
| Total | 14.9% | 2.4% | 13.3% | 12.5% |
| <i>Source: CoStar; Leon County Tax Rolls; Smith Travel Research; GAI</i> | | | | |

Table 4.20
Summary of County Capture Rates - Frenchtown, Southside and Downtown District

| Year Built | Apartment Units |
|---------------------------------|------------------------|
| <u>Frenchtown District</u> | |
| Prior to 1986 | 1.5% |
| 1986-1995 | 0.0% |
| 1996-2005 | 4.2% |
| 2006-2010 | 0.0% |
| 2011-2016 | 0.0% |
| Total | 1.8% |
| <u>Southside District</u> | |
| Prior to 1986 | 0.0% |
| 1986-1995 | 0.0% |
| 1996-2005 | 0.0% |
| 2006-2010 | 0.0% |
| 2011-2016 | 40.9% |
| Total | 2.0% |
| <u>Downtown District</u> | |
| Prior to 1986 | 4.6% |
| 1986-1995 | 0.0% |
| 1996-2005 | 0.0% |
| 2006-2010 | 0.0% |
| 2011-2016 | 34.5% |
| Total | 3.3% |
| <i>Source: MyRentComps; GAI</i> | |

The Downtown District has generally dominated capture rates of the County's development of pertinent land uses with the exception of retail. The Frenchtown District has captured a greater amount of office space and hotel rooms, but the Southside District has captured a higher percentage of retail space and condominium units. In recent years the Downtown and Southside District have captured a significant percentage of the County's overall apartment development in complexes with 100 units or more.

5.0 LONG TERM OUTLOOK

Our analysis included a number of different land uses, but their mix and timing will depend upon several factors connected to long term market outlooks (e.g., the national and regional economy), the availability of developable sites, and the willing exchanges between buyers and sellers as opportunities arise.

Toward quantifying those uses, we prepared a series of population projections for Leon County extending through 2030 and then estimated the commensurate space needs linked to those long term projections. The projections were based on per capita square feet estimates based on the current situation in Leon County compared to other counties that may have already experienced growth as their markets matured. Per capita is calculated for each county by dividing the supply of product within each land use type by the population of the county.

Table 5.1 below shows varying relationships among other counties in Florida that are also home to large public universities. In many cases these counties are larger in size and population to Leon County. The data links the period’s estimated population and the actual square footage of the various uses listed.

Table 5.1
Per Capita SF/Units for Selected Land Uses, 1990-2015

| County | Retail | | | | Office | | | | Lodging | | | | Apartments | | | | Condominiums | | | |
|--------------|--------|------|------|------|--------|------|------|------|---------|------|------|------|------------|------|------|------|--------------|------|------|------|
| | 1990 | 2000 | 2010 | 2015 | 1990 | 2000 | 2010 | 2015 | 1990 | 2000 | 2010 | 2015 | 1990 | 2000 | 2010 | 2015 | 1990 | 2000 | 2010 | 2015 |
| Leon | 67 | 67 | 71 | 71 | 67 | 69 | 72 | 72 | 0.02 | 0.02 | 0.02 | 0.02 | 0.07 | 0.09 | 0.10 | 0.10 | 0.01 | 0.01 | 0.01 | 0.02 |
| Alachua | 47 | 49 | 51 | 64 | 28 | 32 | 36 | 33 | 0.02 | 0.02 | 0.02 | 0.02 | 0.08 | 0.11 | 0.12 | 0.12 | 0.01 | 0.01 | 0.02 | 0.02 |
| Hillsborough | 45 | 53 | 53 | 51 | 57 | 63 | 61 | 48 | 0.02 | 0.02 | 0.02 | 0.02 | 0.08 | 0.09 | 0.08 | 0.08 | 0.01 | 0.01 | 0.02 | 0.02 |
| Orange | 45 | 52 | 57 | 55 | 53 | 54 | 58 | 48 | 0.07 | 0.08 | 0.08 | 0.07 | 0.08 | 0.10 | 0.10 | 0.10 | 0.01 | 0.01 | 0.02 | 0.02 |
| Duval | 47 | 51 | 61 | 67 | 57 | 67 | 70 | 59 | 0.02 | 0.02 | 0.02 | 0.02 | 0.08 | 0.09 | 0.09 | 0.09 | 0.01 | 0.01 | 0.02 | 0.02 |
| Escambia | 65 | 71 | 83 | 70 | 31 | 34 | 40 | 39 | 0.02 | 0.02 | 0.02 | 0.02 | 0.03 | 0.04 | 0.05 | 0.05 | 0.01 | 0.01 | 0.02 | 0.01 |

Source: CoStar; University of Florida Bureau of Economic & Business Research; US Census Bureau; GAI

5.1 Leon County Population and Space Projections

We used three sets of population projections reflecting low, medium and high estimates that tie our projections of population and demand for future space utilization patterns together. The highest figures generally assume the most aggressive growth scenarios for both the region and the county, increasing population gains in the county relative to nearby counties which will have fewer land options as the region matures, and patterns of space needs which demonstrate increasing concentrations of space relative to the resident population and diversity in the employment mix. In effect, the low to high estimates represent a range of possible outcomes for each land use. In particular, timing can be impacted by construction delays, permitting issues and the like. What we believe is important is that we expect a particular land use to fall within this range.

Table 5.2 on the following page summarizes our estimates of future office and retail square footage and hotel, apartment and for-sale residential condominium units in Leon County through 2030. Estimated square feet or units per capita for each land use was derived using historic information from Leon County. Projections of the future supply of product for each land use within the County were calculated by multiplying the per capita estimates by the low, medium and high population estimates.

Table 5.2

Leon County's Projected Office, Hotel, Retail, Apartment and Residential Condominium Demand, 2015-2030

| | Per Capita SF | Total County SF | | | Avg Annual Growth Rates | | | Avg Annual County SF Absorption | | |
|----------------------|---------------|-----------------|------------|------------|-------------------------|----------|------|---------------------------------|----------|---------|
| | | Low | Midpoint | High | Low | Midpoint | High | Low | Midpoint | High |
| Office: | | | | | | | | | | |
| 2015 | 72 | 20,706,118 | 20,706,118 | 20,706,118 | | | | | | |
| 2020 | 72 | 20,715,376 | 21,742,465 | 22,769,555 | 0.0% | 1.0% | 1.9% | 1,852 | 207,269 | 412,687 |
| 2025 | 72 | 20,946,833 | 22,722,540 | 24,498,247 | 0.2% | 0.9% | 1.5% | 46,291 | 196,015 | 345,738 |
| 2030 | 72 | 21,134,892 | 23,651,983 | 26,169,075 | 0.2% | 0.8% | 1.3% | 37,612 | 185,889 | 334,166 |
| Hotel: | | | | | | | | | | |
| 2015 | 0.02 | 5,592 | 5,592 | 5,592 | | | | | | |
| 2020 | 0.02 | 5,871 | 6,162 | 6,453 | 1.0% | 2.0% | 2.9% | 56 | 114 | 172 |
| 2025 | 0.02 | 6,082 | 6,597 | 7,113 | 0.7% | 1.4% | 2.0% | 42 | 87 | 132 |
| 2030 | 0.02 | 6,282 | 7,031 | 7,779 | 0.7% | 1.3% | 1.8% | 40 | 87 | 133 |
| Retail: | | | | | | | | | | |
| 2015 | 71 | 20,213,751 | 20,213,751 | 20,213,751 | | | | | | |
| 2020 | 71 | 20,222,789 | 21,225,455 | 22,228,122 | 0.0% | 1.0% | 1.9% | 1,808 | 202,341 | 402,874 |
| 2025 | 71 | 20,561,600 | 22,304,650 | 24,047,700 | 0.3% | 1.0% | 1.6% | 67,762 | 215,839 | 363,916 |
| 2030 | 71 | 20,819,250 | 23,298,750 | 25,778,250 | 0.2% | 0.9% | 1.4% | 51,530 | 198,820 | 346,110 |
| Apartments: | | | | | | | | | | |
| 2015 | 0.10 | 19,902 | 19,902 | 19,902 | | | | | | |
| 2020 | 0.10 | 20,218 | 21,221 | 22,223 | 0.3% | 1.3% | 2.2% | 63 | 264 | 464 |
| 2025 | 0.10 | 20,543 | 22,285 | 24,026 | 0.3% | 1.0% | 1.6% | 65 | 213 | 361 |
| 2030 | 0.10 | 20,728 | 23,196 | 25,665 | 0.2% | 0.8% | 1.3% | 37 | 182 | 328 |
| Condominiums: | | | | | | | | | | |
| 2015 | 0.02 | 4,316 | 4,316 | 4,316 | | | | | | |
| 2020 | 0.02 | 4,318 | 4,532 | 4,746 | 0.0% | 1.0% | 1.9% | 0 | 43 | 86 |
| 2025 | 0.02 | 4,366 | 4,736 | 5,106 | 0.2% | 0.9% | 1.5% | 10 | 41 | 72 |
| 2030 | 0.02 | 4,405 | 4,930 | 5,455 | 0.2% | 0.8% | 1.3% | 8 | 39 | 70 |

Source: GAI

5.2 District Capture of Future Market Demand

Based upon the County-wide projections noted above, we subsequently evaluated each district's ability to capture or support a part of this future potential market demand based on their historical capture rates noted in an earlier section. However, local preferences or policies could advance or delay certain uses, as well as the availability of developable sites within each district. Also, in both the long and short term there are other emerging and established areas in Leon County that will remain major competitors to future development within each district. Even as some of these reach maturity, others will be redeveloped to take advantage of, or to secure, their locations.

The capture rates applied in this analysis stem largely from observations and interpretations of the actual experience in each district, prior development patterns in the County, and our own understanding about the competitive framework in the region. The District capture percentages represent the percentage of the County's projected future development that we believe will be developed within the District. As noted earlier, the low to high estimates represent a range of possible outcomes for each land use.

Our projections are meant to be viewed as a potential outcome for future development within the combined districts. The reader needs to keep in mind that the districts are so physically close to each

other than the development we are projecting may not necessarily fall entirely within the respective district. Developers will look for sites that best suit their vision and will not be restricted by district boundaries. In other words, it may be beneficial to think of the projections for all three districts as a whole rather than three separate areas, as development shown in one district could potentially be shifted to an adjoining district based on other factors. Other factors that could influence the distribution of future inventory among each district could include the price structure of land and its decreasing (or increasing) availability. For example, as development sites in the Downtown area become scarcer, it is possible that some of the space projected within the Downtown District could shift to either the Frenchtown District or the Southside District, most likely in the areas closest to the Downtown District. Further, demand for some uses could occur in any of the districts depending on the timing and opportunity created by land owners and developers.

The following series of tables summarize our estimates of potential future market demand within each district based on site capture percentages of the County’s growth in supply for each land use. The first series of tables (Tables 5.3, 5.4, 5.5, 5.6, and 5.7) summarize each land use for the districts separately and in total.

**Table 5.3
 Projected Office Demand within Each District, 2015-2030**

| District | District Capture % | District Cumulative Total SF | | | District Cumulative New SF | | | District Avg Annual SF Absorption | | |
|-----------------------------|--------------------|------------------------------|-----------|-----------|----------------------------|----------|---------|-----------------------------------|----------|--------|
| | | Low | Midpoint | High | Low | Midpoint | High | Low | Midpoint | High |
| Frenchtown District: | | | | | | | | | | |
| 2015 | | 382,968 | 382,968 | 382,968 | | | | | | |
| 2020 | 1.0% | 383,061 | 393,331 | 403,602 | 93 | 10,363 | 20,634 | 19 | 2,073 | 4,127 |
| 2025 | 1.3% | 385,954 | 405,582 | 425,211 | 2,986 | 22,614 | 42,243 | 579 | 2,450 | 4,322 |
| 2030 | 1.5% | 388,775 | 419,524 | 450,273 | 5,807 | 36,556 | 67,305 | 564 | 2,788 | 5,012 |
| Southside District: | | | | | | | | | | |
| 2015 | | 231,946 | 231,946 | 231,946 | | | | | | |
| 2020 | 0.7% | 232,011 | 239,200 | 246,390 | 65 | 7,254 | 14,444 | 13 | 1,451 | 2,889 |
| 2025 | 1.0% | 234,325 | 249,001 | 263,677 | 2,379 | 17,055 | 31,731 | 463 | 1,960 | 3,457 |
| 2030 | 1.3% | 236,770 | 261,084 | 285,398 | 4,824 | 29,138 | 53,452 | 489 | 2,417 | 4,344 |
| Downtown District: | | | | | | | | | | |
| 2015 | | 3,083,583 | 3,083,583 | 3,083,583 | | | | | | |
| 2020 | 8.0% | 3,084,324 | 3,166,491 | 3,248,658 | 741 | 82,908 | 165,075 | 148 | 16,582 | 33,015 |
| 2025 | 12.0% | 3,112,098 | 3,284,100 | 3,456,101 | 28,515 | 200,517 | 372,518 | 5,555 | 23,522 | 41,489 |
| 2030 | 15.0% | 3,140,307 | 3,423,516 | 3,706,725 | 56,724 | 339,933 | 623,142 | 5,642 | 27,883 | 50,125 |
| Total All Districts: | | | | | | | | | | |
| 2015 | | 3,698,497 | 3,698,497 | 3,698,497 | | | | | | |
| 2020 | 9.7% | 3,699,395 | 3,799,023 | 3,898,650 | 898 | 100,526 | 200,153 | 180 | 20,105 | 40,031 |
| 2025 | 14.3% | 3,732,378 | 3,938,683 | 4,144,989 | 33,881 | 240,186 | 446,492 | 6,597 | 27,932 | 49,268 |
| 2030 | 17.8% | 3,765,852 | 4,104,124 | 4,442,396 | 67,355 | 405,627 | 743,899 | 6,695 | 33,088 | 59,481 |

Source: GAI

As can be seen in the above Table 5.3, the site capture percentages for the office market vary between each district based on their historical capture percentages discussed in an earlier section. By 2030 in the midpoint scenario, the Frenchtown District could add about 37,000 square feet of office space, the Southside District about 29,000 square feet and the Downtown District approximately 340,000 square feet. All the districts combined could add up to approximately 744,000 square feet of new office space

on the high end. These office projections focus on traditional office space. Specialized uses, such as medical/institutional health care would not be included.

There are other factors that could influence the distribution of space among each district, such as the availability and price of development sites. As development sites in the Downtown area become scarcer, it is possible that space shown above within the Downtown District could shift to either the Frenchtown or the Southside District, most likely in the areas closest to the Downtown District.

**Table 5.4
 Projected Hotel Demand within Each District, 2015-2030**

| District | District Capture % | District Cumulative Total Units | | | District Cumulative New Units | | | District Avg Annual Units Absorption | | |
|----------------------|--------------------|---------------------------------|----------|-------|-------------------------------|----------|------|--------------------------------------|----------|------|
| | | Low | Midpoint | High | Low | Midpoint | High | Low | Midpoint | High |
| Frenchtown District: | | | | | | | | | | |
| 2015 | | 164 | 164 | 164 | | | | | | |
| 2020 | 0.0% | 164 | 164 | 164 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2025 | 0.0% | 164 | 164 | 164 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2030 | 0.0% | 164 | 164 | 164 | 0 | 0 | 0 | 0 | 0 | 0 |
| Southside District: | | | | | | | | | | |
| 2015 | | 0 | 0 | 0 | | | | | | |
| 2020 | 15.0% | 42 | 86 | 129 | 42 | 86 | 129 | 8 | 17 | 26 |
| 2025 | 12.0% | 67 | 138 | 208 | 67 | 138 | 208 | 5 | 10 | 16 |
| 2030 | 0.0% | 67 | 138 | 208 | 67 | 138 | 208 | 0 | 0 | 0 |
| Downtown District: | | | | | | | | | | |
| 2015 | | 698 | 698 | 698 | | | | | | |
| 2020 | 25.0% | 768 | 841 | 913 | 70 | 143 | 215 | 14 | 29 | 43 |
| 2025 | 25.0% | 820 | 949 | 1,078 | 122 | 251 | 380 | 11 | 22 | 33 |
| 2030 | 30.0% | 881 | 1,079 | 1,278 | 183 | 381 | 580 | 12 | 26 | 40 |
| Total All Districts: | | | | | | | | | | |
| 2015 | | 862 | 862 | 862 | | | | | | |
| 2020 | 40.0% | 974 | 1,090 | 1,207 | 112 | 228 | 345 | 22 | 46 | 69 |
| 2025 | 37.0% | 1,052 | 1,251 | 1,451 | 190 | 389 | 589 | 16 | 32 | 49 |
| 2030 | 30.0% | 1,112 | 1,381 | 1,650 | 250 | 519 | 788 | 12 | 26 | 40 |

Source: GAI

By 2030 the Southside could add about 200 hotel rooms in the high scenario. The 124 room Hampton Inn is currently under construction. Downtown could add just under 600 hotel rooms in the high scenario by 2030. We have not projected demand for any new hotels in the Frenchtown District. However, as noted earlier, as development sites in the Downtown area become scarcer, it is possible that space shown above within the Downtown District could shift to either the Frenchtown or the Southside District, most likely in the areas closest to the Downtown District. All the districts combined could add up to just under 800 hotel rooms on the high end.

**Table 5.5
 Projected Retail Demand within Each District, 2015-2030**

| | District Capture % | District Cumulative Total SF | | | District Cumulative New SF | | | District Avg Annual SF Absorption | | |
|-----------------------------|--------------------|------------------------------|-----------|-----------|----------------------------|----------|---------|-----------------------------------|----------|--------|
| | | Low | Midpoint | High | Low | Midpoint | High | Low | Midpoint | High |
| Frenchtown District: | | | | | | | | | | |
| 2015 | | 577,224 | 577,224 | 577,224 | | | | | | |
| 2020 | 2.0% | 577,405 | 597,458 | 617,511 | 181 | 20,234 | 40,287 | 36 | 4,047 | 8,057 |
| 2025 | 3.0% | 587,569 | 629,834 | 672,099 | 10,345 | 52,610 | 94,875 | 2,033 | 6,475 | 10,917 |
| 2030 | 4.0% | 597,875 | 669,598 | 741,321 | 20,651 | 92,374 | 164,097 | 2,061 | 7,953 | 13,844 |
| Southside District: | | | | | | | | | | |
| 2015 | | 905,312 | 905,312 | 905,312 | | | | | | |
| 2020 | 2.0% | 905,493 | 925,546 | 945,599 | 181 | 20,234 | 40,287 | 36 | 4,047 | 8,057 |
| 2025 | 3.0% | 915,657 | 957,922 | 1,000,187 | 10,345 | 52,610 | 94,875 | 2,033 | 6,475 | 10,917 |
| 2030 | 4.0% | 925,963 | 997,686 | 1,069,409 | 20,651 | 92,374 | 164,097 | 2,061 | 7,953 | 13,844 |
| Downtown District: | | | | | | | | | | |
| 2015 | | 478,907 | 478,907 | 478,907 | | | | | | |
| 2020 | 2.0% | 479,088 | 499,141 | 519,194 | 181 | 20,234 | 40,287 | 36 | 4,047 | 8,057 |
| 2025 | 4.0% | 492,640 | 542,309 | 591,978 | 13,733 | 63,402 | 113,071 | 2,710 | 8,634 | 14,557 |
| 2030 | 5.0% | 505,523 | 592,014 | 678,505 | 26,616 | 113,107 | 199,598 | 2,577 | 9,941 | 17,306 |
| Total All Districts: | | | | | | | | | | |
| 2015 | | 1,961,443 | 1,961,443 | 1,961,443 | | | | | | |
| 2020 | 6.0% | 1,961,985 | 2,022,145 | 2,082,305 | 542 | 60,702 | 120,862 | 108 | 12,140 | 24,172 |
| 2025 | 10.0% | 1,995,866 | 2,130,065 | 2,264,263 | 34,423 | 168,622 | 302,820 | 6,776 | 21,584 | 36,392 |
| 2030 | 13.0% | 2,029,361 | 2,259,298 | 2,489,235 | 67,918 | 297,855 | 527,792 | 6,699 | 25,847 | 44,994 |

Source: GAI

As can be seen in the above Table 5.5, the site capture percentages for the retail market produce average annual absorption levels similar to what has occurred in the past within each district. Projected new retail space added is the same in the Frenchtown and the Southside District and slightly higher in the Downtown District. By 2030 in the midpoint scenario, the Frenchtown and the Southside District could add about 92,000 square feet of retail space, and the Downtown District add approximately 113,000 square feet. All the districts combined could add up to approximately 528,000 square feet of new retail space on the high end.

Table 5.6
Projected Rental Apartment Demand within Each District, 2015-2030

| District | District Capture % | District Cumulative Total Units | | | District Cumulative New Units | | | District Avg Annual Units Absorption | | |
|----------------------|--------------------|---------------------------------|----------|-------|-------------------------------|----------|-------|--------------------------------------|----------|------|
| | | Low | Midpoint | High | Low | Midpoint | High | Low | Midpoint | High |
| Frenchtown District: | | | | | | | | | | |
| 2015 | | 364 | 364 | 364 | | | | | | |
| 2020 | 6.0% | 383 | 443 | 503 | 19 | 79 | 139 | 4 | 16 | 28 |
| 2025 | 7.0% | 406 | 518 | 629 | 42 | 154 | 265 | 5 | 15 | 25 |
| 2030 | 8.0% | 420 | 591 | 761 | 56 | 227 | 397 | 3 | 15 | 26 |
| Southside District: | | | | | | | | | | |
| 2015 | | 335 | 335 | 335 | | | | | | |
| 2020 | 11.0% | 370 | 480 | 590 | 35 | 145 | 255 | 7 | 29 | 51 |
| 2025 | 12.0% | 409 | 608 | 807 | 74 | 273 | 472 | 8 | 26 | 43 |
| 2030 | 13.0% | 433 | 726 | 1,020 | 98 | 391 | 685 | 5 | 24 | 43 |
| Downtown District: | | | | | | | | | | |
| 2015 | | 465 | 465 | 465 | | | | | | |
| 2020 | 11.0% | 500 | 610 | 720 | 35 | 145 | 255 | 7 | 29 | 51 |
| 2025 | 12.0% | 539 | 738 | 937 | 74 | 273 | 472 | 8 | 26 | 43 |
| 2030 | 13.0% | 563 | 856 | 1,150 | 98 | 391 | 685 | 5 | 24 | 43 |
| Total All Districts: | | | | | | | | | | |
| 2015 | | 1,164 | 1,164 | 1,164 | | | | | | |
| 2020 | 28.0% | 1,253 | 1,533 | 1,814 | 89 | 369 | 650 | 18 | 74 | 130 |
| 2025 | 31.0% | 1,353 | 1,863 | 2,373 | 189 | 699 | 1,209 | 20 | 66 | 112 |
| 2030 | 34.0% | 1,416 | 2,173 | 2,930 | 252 | 1,009 | 1,766 | 13 | 62 | 111 |

Source: GAI

As noted earlier, the Domain at Tallahassee student-oriented apartment complex is under construction in the Frenchtown District. Those 125 units would be included in the range of potential new supply for the 2015-2020 time period.

In the Southside District there are three projects in planning that would add a total of 459 units if built as planned. That total would be between the midpoint and high scenario by 2025 in the Southside District.

The Downtown District's capture percentage of the County's new apartment development ranges between 11% and 13%. In the most recent five year period, the Downtown District captured approximately 35% of the new 100 unit or more apartment complex development, so the estimated capture percentages seem attainable.

In total the combined districts are projected to capture from 28% to about 34% of the total County new apartment development. That is a significant amount of the County's total. However, we believe that urban or near urban living will continue to be a popular option, particularly given the presence of the two universities and the concentration of downtown employment. All the districts combined could add just under 1,800 apartment units on the high end.

Most of the apartment projects that are either under construction or planned in the districts are student oriented housing. It is likely that the demand for that type of product will continue, though it is possible market rate properties could gain an increasing share of future development in later years.

**Table 5.7
 Projected For-Sale Residential Condominium Demand within Each District, 2015-2030**

| | District Capture % | District Cumulative Total Units | | | District Cumulative New Units | | | District Avg Annual Units Absorption | | |
|-----------------------------|--------------------|---------------------------------|----------|-------|-------------------------------|----------|------|--------------------------------------|----------|------|
| | | Low | Midpoint | High | Low | Midpoint | High | Low | Midpoint | High |
| Frenchtown District: | | | | | | | | | | |
| 2015 | 0.0% | 47 | 47 | 47 | | | | | | |
| 2020 | 0.0% | 47 | 47 | 47 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2025 | 2.0% | 48 | 51 | 54 | 1 | 4 | 7 | 0 | 1 | 1 |
| 2030 | 3.0% | 49 | 57 | 65 | 2 | 10 | 18 | 0 | 1 | 2 |
| Southside District: | | | | | | | | | | |
| 2015 | 0.0% | 104 | 104 | 104 | | | | | | |
| 2020 | 2.0% | 104 | 108 | 113 | 0 | 4 | 9 | 0 | 1 | 2 |
| 2025 | 3.0% | 105 | 114 | 123 | 1 | 10 | 19 | 0 | 1 | 2 |
| 2030 | 4.0% | 107 | 122 | 137 | 3 | 18 | 33 | 0 | 2 | 3 |
| Downtown District: | | | | | | | | | | |
| 2015 | 0.0% | 576 | 576 | 576 | | | | | | |
| 2020 | 20.0% | 576 | 619 | 662 | 0 | 43 | 86 | 0 | 9 | 17 |
| 2025 | 25.0% | 588 | 670 | 752 | 12 | 94 | 176 | 2 | 10 | 18 |
| 2030 | 30.0% | 600 | 728 | 857 | 24 | 152 | 281 | 2 | 12 | 21 |
| Total All Districts: | | | | | | | | | | |
| 2015 | | 727 | 727 | 727 | | | | | | |
| 2020 | 22.0% | 727 | 775 | 822 | 0 | 48 | 95 | 0 | 10 | 19 |
| 2025 | 30.0% | 742 | 836 | 930 | 15 | 109 | 203 | 3 | 12 | 22 |
| 2030 | 37.0% | 756 | 907 | 1,059 | 29 | 180 | 332 | 3 | 14 | 26 |

Source: GAI

The for-sale residential condominium market is limited in both the Frenchtown and the Southside District. Although the relationship between renter occupied and owner occupied residential units could change in the future, both areas are much more oriented towards renter occupied housing. As noted earlier, we believe there could be opportunities for new rental housing in the Frenchtown and the Southside District, but only a limited amount of for-sale residential condominium product. The Downtown District may be able to add about 150 units by 2030 in the midpoint scenario. However, as noted earlier, as development sites in the Downtown area become scarcer, it is possible that space shown above within the Downtown District could shift to either the Frenchtown or the Southside District, most likely in the areas closest to the Downtown District. All the districts combined could add about 330 condominium units on the high end.

The next series of tables (Tables 5.8, 5.9, and 5.10) summarize each district's potential demand for new product. The data is the same as noted above but summarizes each district separately.

Table 5.8
Frenchtown District Projected Office, Hotel, Retail, Apartment and Residential Condominium Demand,
2015-2030

| | District Capture % | District Cumulative Total SF/Units | | | District Cumulative New SF/Units | | | District Avg Annual SF/Units Absorption | | |
|----------------------|--------------------|------------------------------------|----------|---------|----------------------------------|----------|---------|---|----------|--------|
| | | Low | Midpoint | High | Low | Midpoint | High | Low | Midpoint | High |
| Office: | | | | | | | | | | |
| 2015 | | 382,968 | 382,968 | 382,968 | | | | | | |
| 2020 | 1.0% | 383,061 | 393,331 | 403,602 | 93 | 10,363 | 20,634 | 19 | 2,073 | 4,127 |
| 2025 | 1.3% | 385,954 | 405,582 | 425,211 | 2,986 | 22,614 | 42,243 | 579 | 2,450 | 4,322 |
| 2030 | 1.5% | 388,775 | 419,524 | 450,273 | 5,807 | 36,556 | 67,305 | 564 | 2,788 | 5,012 |
| Hotel: | | | | | | | | | | |
| 2015 | | 164 | 164 | 164 | | | | | | |
| 2020 | 0.0% | 164 | 164 | 164 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2025 | 0.0% | 164 | 164 | 164 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2030 | 0.0% | 164 | 164 | 164 | 0 | 0 | 0 | 0 | 0 | 0 |
| Retail: | | | | | | | | | | |
| 2015 | | 577,224 | 577,224 | 577,224 | | | | | | |
| 2020 | 2.0% | 577,405 | 597,458 | 617,511 | 181 | 20,234 | 40,287 | 36 | 4,047 | 8,057 |
| 2025 | 3.0% | 587,569 | 629,834 | 672,099 | 10,345 | 52,610 | 94,875 | 2,033 | 6,475 | 10,917 |
| 2030 | 4.0% | 597,875 | 669,598 | 741,321 | 20,651 | 92,374 | 164,097 | 2,061 | 7,953 | 13,844 |
| Apartments: | | | | | | | | | | |
| 2015 | | 364 | 364 | 364 | | | | | | |
| 2020 | 6.0% | 383 | 443 | 503 | 19 | 79 | 139 | 4 | 16 | 28 |
| 2025 | 7.0% | 406 | 518 | 629 | 42 | 154 | 265 | 5 | 15 | 25 |
| 2030 | 8.0% | 420 | 591 | 761 | 56 | 227 | 397 | 3 | 15 | 26 |
| Condominiums: | | | | | | | | | | |
| 2015 | | 47 | 47 | 47 | | | | | | |
| 2020 | 0.0% | 47 | 47 | 47 | 0 | 0 | 0 | 0 | 0 | 0 |
| 2025 | 2.0% | 48 | 51 | 54 | 1 | 4 | 7 | 0 | 1 | 1 |
| 2030 | 3.0% | 49 | 57 | 65 | 2 | 10 | 18 | 0 | 1 | 2 |

Source: GAI

**Table 5.9
 Southside District Projected Office, Hotel, Retail, Apartment and Residential Condominium Demand,
 2015-2030**

| | District Capture % | District Cumulative Total SF/Units | | | District Cumulative New SF/Units | | | District Avg Annual SF/Units Absorption | | |
|----------------------|--------------------|------------------------------------|----------|-----------|----------------------------------|----------|---------|---|----------|--------|
| | | Low | Midpoint | High | Low | Midpoint | High | Low | Midpoint | High |
| Office: | | | | | | | | | | |
| 2015 | | 231,946 | 231,946 | 231,946 | | | | | | |
| 2020 | 0.7% | 232,011 | 239,200 | 246,390 | 65 | 7,254 | 14,444 | 13 | 1,451 | 2,889 |
| 2025 | 1.0% | 234,325 | 249,001 | 263,677 | 2,379 | 17,055 | 31,731 | 463 | 1,960 | 3,457 |
| 2030 | 1.3% | 236,770 | 261,084 | 285,398 | 4,824 | 29,138 | 53,452 | 489 | 2,417 | 4,344 |
| Hotel: | | | | | | | | | | |
| 2015 | | 0 | 0 | 0 | | | | | | |
| 2020 | 15.0% | 42 | 86 | 129 | 42 | 86 | 129 | 8 | 17 | 26 |
| 2025 | 12.0% | 67 | 138 | 208 | 67 | 138 | 208 | 5 | 10 | 16 |
| 2030 | 0.0% | 67 | 138 | 208 | 67 | 138 | 208 | 0 | 0 | 0 |
| Retail: | | | | | | | | | | |
| 2015 | | 905,312 | 905,312 | 905,312 | | | | | | |
| 2020 | 2.0% | 905,493 | 925,546 | 945,599 | 181 | 20,234 | 40,287 | 36 | 4,047 | 8,057 |
| 2025 | 3.0% | 915,657 | 957,922 | 1,000,187 | 10,345 | 52,610 | 94,875 | 2,033 | 6,475 | 10,917 |
| 2030 | 4.0% | 925,963 | 997,686 | 1,069,409 | 20,651 | 92,374 | 164,097 | 2,061 | 7,953 | 13,844 |
| Apartments: | | | | | | | | | | |
| 2015 | | 335 | 335 | 335 | | | | | | |
| 2020 | 11.0% | 370 | 480 | 590 | 35 | 145 | 255 | 7 | 29 | 51 |
| 2025 | 12.0% | 409 | 608 | 807 | 74 | 273 | 472 | 8 | 26 | 43 |
| 2030 | 13.0% | 433 | 726 | 1,020 | 98 | 391 | 685 | 5 | 24 | 43 |
| Condominiums: | | | | | | | | | | |
| 2015 | | 104 | 104 | 104 | | | | | | |
| 2020 | 2.0% | 104 | 108 | 113 | 0 | 4 | 9 | 0 | 1 | 2 |
| 2025 | 3.0% | 105 | 114 | 123 | 1 | 10 | 19 | 0 | 1 | 2 |
| 2030 | 4.0% | 107 | 122 | 137 | 3 | 18 | 33 | 0 | 2 | 3 |

Source: GAI

**Table 5.10
 Downtown District Projected Office, Hotel, Retail, Apartment and Residential Condominium Demand,
 2015-2030**

| | District Capture % | District Cumulative Total SF/Units | | | District Cumulative New SF/Units | | | District Avg Annual SF/Units Absorption | | |
|----------------------|--------------------|------------------------------------|-----------|-----------|----------------------------------|----------|---------|---|----------|--------|
| | | Low | Midpoint | High | Low | Midpoint | High | Low | Midpoint | High |
| Office: | | | | | | | | | | |
| 2015 | | 3,083,583 | 3,083,583 | 3,083,583 | | | | | | |
| 2020 | 8.0% | 3,084,324 | 3,166,491 | 3,248,658 | 741 | 82,908 | 165,075 | 148 | 16,582 | 33,015 |
| 2025 | 12.0% | 3,112,098 | 3,284,100 | 3,456,101 | 28,515 | 200,517 | 372,518 | 5,555 | 23,522 | 41,489 |
| 2030 | 15.0% | 3,140,307 | 3,423,516 | 3,706,725 | 56,724 | 339,933 | 623,142 | 5,642 | 27,883 | 50,125 |
| Hotel: | | | | | | | | | | |
| 2015 | | 698 | 698 | 698 | | | | | | |
| 2020 | 25.0% | 768 | 841 | 913 | 70 | 143 | 215 | 14 | 29 | 43 |
| 2025 | 25.0% | 820 | 949 | 1,078 | 122 | 251 | 380 | 11 | 22 | 33 |
| 2030 | 30.0% | 881 | 1,079 | 1,278 | 183 | 381 | 580 | 12 | 26 | 40 |
| Retail: | | | | | | | | | | |
| 2015 | | 478,907 | 478,907 | 478,907 | | | | | | |
| 2020 | 2.0% | 479,088 | 499,141 | 519,194 | 181 | 20,234 | 40,287 | 36 | 4,047 | 8,057 |
| 2025 | 4.0% | 492,640 | 542,309 | 591,978 | 13,733 | 63,402 | 113,071 | 2,710 | 8,634 | 14,557 |
| 2030 | 5.0% | 505,523 | 592,014 | 678,505 | 26,616 | 113,107 | 199,598 | 2,577 | 9,941 | 17,306 |
| Apartments: | | | | | | | | | | |
| 2015 | | 465 | 465 | 465 | | | | | | |
| 2020 | 11.0% | 500 | 610 | 720 | 35 | 145 | 255 | 7 | 29 | 51 |
| 2025 | 12.0% | 539 | 738 | 937 | 74 | 273 | 472 | 8 | 26 | 43 |
| 2030 | 13.0% | 563 | 856 | 1,150 | 98 | 391 | 685 | 5 | 24 | 43 |
| Condominiums: | | | | | | | | | | |
| 2015 | | 576 | 576 | 576 | | | | | | |
| 2020 | 20.0% | 576 | 619 | 662 | 0 | 43 | 86 | 0 | 9 | 17 |
| 2025 | 25.0% | 588 | 670 | 752 | 12 | 94 | 176 | 2 | 10 | 18 |
| 2030 | 30.0% | 600 | 728 | 857 | 24 | 152 | 281 | 2 | 12 | 21 |

Source: GAI

5.3 Implications and Next Steps

Our analysis has attempted to place parameters on the potential development opportunities within each district. Because of past development patterns, the Downtown District has captured the lion's share of new development among the three areas. However, as development sites in the Downtown area become scarcer, it is possible that space demand allocated to the Downtown District could shift to either the Frenchtown or the Southside District, most likely initially in the areas closest to the Downtown District, and in future years extending out to more distant locations. Please keep in mind that our projections are as of the date of the report. New information or data that becomes available after that time could significantly alter the results of this analysis.

The next phase of our study will focus on market demand opportunities in specific development sites identified by the City or the community within the districts. A separate report will be issued on that analysis.

SECTION 11: **APPENDIX D: PUBLIC WORKSHOPS**

This section contains the meeting dates and purpose of the public workshops held to determine the goals and vision for the Redevelopment Area that were incorporated into the updated Redevelopment Plan.

January 24, 2008

First Public Workshop – Conceptual Plan Amendment

The purpose of this Frenchtown workshop was to gather comments from residents and business owners located within the Greater Frenchtown/Southside Community Redevelopment Area, as well as from interested persons outside the Redevelopment Area, on the vision of the current redevelopment plan.

February 12, 2008

Second Public Workshop – Conceptual Plan Amendment

The purpose of this second workshop, held on the Southside, was to gather additional comments from residents and business owners located within the Greater Frenchtown/Southside Community Redevelopment Area, as well as from interested persons outside the Redevelopment Area, on the vision of the current redevelopment plan.

March 13, 2008

Third Public Workshop – Conceptual Plan Amendment

The purpose of this Frenchtown workshop was to focus on refining the various public comments from the first two workshops into an updated vision for the Redevelopment Area as well as get feedback on the draft of the updated Community Vision. Comments were gathered from residents and business owners located within the Greater Frenchtown/Southside Community Redevelopment Area, as well as from interested persons outside the Redevelopment Area.

A draft plan was completed in 2010 based on comments from the three workshops held in 2008. Before adoption, a legal interpretation was sought to determine whether the Redevelopment Area's beginning date (June 2000) started over with the adoption of the updated plan. Once the interpretation was received, the CRA decided additional workshops were needed given the amount of time that had passed.

November 13, 2014

First of Four Public Workshops – GFS Plan Amendment

The purpose of this Southside workshop was to gather sufficient community input from residents and business owners located within the Greater Frenchtown/Southside Community Redevelopment Area to develop definable and measurable goals for the update to the Redevelopment Plan.

November 17, 2014

Second of Four Public Workshops – GFS Plan Amendment

The purpose of this Frenchtown workshop was to gather sufficient community input from residents and business owners located within the Greater Frenchtown/Southside Community Redevelopment Area to develop definable and measurable goals for the update to the Redevelopment Plan.

July 28, 2015

Third of Four Public Workshops – GFS Plan Amendment

The purpose of this Southside workshop was to gather additional community input from residents and business owners located within the Greater Frenchtown/Southside Community Redevelopment Area to develop definable and measurable goals for the update to the Redevelopment Plan.

July 30, 2015

Fourth of Four Public Workshops – GFS Plan Amendment

The purpose of this Frenchtown workshop was to gather additional community input from residents and business owners located within the Greater Frenchtown/Southside Community Redevelopment Area to develop definable and measurable goals for the update to the Redevelopment Plan.

Between 2016 and 2018, the boundary of the Redevelopment Area was expanded twice. In October 2016, 26 parcels located on the eastside of South Monroe Street between Van Buren and Perkins Streets were added to the Redevelopment Area. The second expansion was approved in May 2018 expanding the boundaries to include three areas in the Southside portion of the Redevelopment Area. With the expansion areas approved, additional community input was needed to ensure all Redevelopment Area residents and business owners had an opportunity to provide comments and prioritize the goals and vision for the updated Redevelopment Plan.

June 3, 2019

Southside Public Workshop – GFS Plan Amendment

The purpose of this Southside workshop was to have residents and business owners located within the Greater Frenchtown/Southside Community Redevelopment Area provide additional comments and prioritize their goals and vision for the updated Redevelopment Plan, especially those from the newly expanded areas.

June 4, 2019

Southside Public Workshop – GFS Plan Amendment

The purpose of this Frenchtown workshop was to have residents and business owners located within the Greater Frenchtown/Southside Community Redevelopment Area provide additional comments and prioritize their goals and vision for the updated Redevelopment Plan, especially those from the newly expanded areas.

SECTION 12

APPENDIX E: LEGAL DESCRIPTION

The following section contains the legal description of the Greater Frenchtown/Southside Community Redevelopment Area.

BOUNDARIES OF THE GREATER FRENCHTOWN/SOUTHSIDE COMMUNITY REDEVELOPMENT AREA ARE AS FOLLOWS:

THE WEST THARPE STREET AREA:

BEGIN at the centerline intersection of Colorado Street and West Tharpe Street; thence Easterly along the centerline of West Tharpe Street to the intersection with the northerly extension of the westerly boundary line of Green Acres, a subdivision recorded in Plat Book 3, Page 189 of the Public Records of Leon County, Florida; thence Southerly along said westerly boundary and its extension to the northeast corner of that property described in Official Record Book 294, Page 339 (Tax I.D. 21-26-20-003-0000) of said Public Records; thence Westerly along the northerly boundary line of said described property to the northwest corner of said described property; thence Southerly along the westerly boundary line of said described property to an intersection with the northerly boundary line of Greenwood Cemetery, a map or plat recorded in Plat Book 2, Page 113 of said Public Records; thence Westerly along said northerly boundary line and its extension thereof to an intersection with the centerline of Old Bainbridge Road; thence Southerly along said centerline to an intersection with the easterly extension of the southerly boundary line of that property described in Official Record Book 1512, Page 1428 (Tax I.D. 21-26-20-019-0000) of said Public Records; thence Westerly along said southerly boundary line and its extension thereof and along the southerly boundary line of that parcel described in Official Record Book 1645, Page 572 (Tax I.D. 21-26-20-089-0000) of said Public Records, and along the southerly boundary line and a westerly extension thereof of that parcel described in Official Record Book 2054, Page 1099 (Tax I.D. 21-26-20-224-0000), of said Public Records, to an intersection with the centerline of Colorado Street; thence Northerly along said centerline to the **POINT OF BEGINNING**.

Containing 65 acres more or less.

THE AREA NORTH OF TENNESSEE ST. AND EAST OF WOODWARD AVE.:

BEGIN at the centerline intersection of West Tharpe Street and North Monroe Street; thence Southerly along the centerline of North Monroe Street to an intersection with the centerline of East Fourth Avenue; thence Westerly along said centerline to an intersection with the centerline of North Adams Street; thence Southerly along said centerline to an intersection with the centerline of West Third Avenue; thence Westerly along said centerline to an intersection with the centerline of North Duval Street; thence Southerly along said centerline to an intersection with the centerline of West Brevard Street; thence Westerly along said centerline to an intersection with the centerline of North Bronough Street; thence Southerly along said centerline to an intersection with the centerline of West Tennessee Street; thence Westerly along said centerline to an intersection with the centerline of Dewey Street; thence Northerly along said centerline to an intersection with

the centerline of West Virginia Street; thence Westerly along said centerline to an intersection with the centerline of North Woodward Avenue; thence Northerly along said centerline to an intersection with the centerline of Alabama Street; thence Easterly along said centerline to an intersection with the centerline of Old Bainbridge Road; thence Northwesterly along said centerline to an intersection with a southwesterly extension of the northerly boundary line of that property described in Official Record Book 1756, Page 502 (Tax I.D. 21-26-20-083-0000) of said Public Records; thence Northeasterly along said northerly boundary line and said extension to an intersection with the westerly boundary line of Gibbs Terrace, a subdivision recorded in Plat Book 4, Page 95 of said Public Records; thence Northerly along said westerly boundary line and the westerly boundary line of Gore Subdivision, a subdivision recorded in Plat Book 3, Page 141 of said Public Records, to an intersection with the westerly extension of the centerline of Efferson Street; thence Easterly along said centerline extension and said centerline to an intersection with the centerline of Gibbs Drive; thence Southerly along said centerline to an intersection with the centerline of West Seventh Avenue; thence Easterly along said centerline to an intersection with the centerline of North Martin Luther King Boulevard.; thence Northerly along said centerline to an intersection with the centerline of West Tarpe Street; thence Easterly along said centerline to the **POINT OF BEGINNING**; Less and Except Oakland Cemetery and it's Additions 1, 2, and 3 as shown on the plats recorded in Plat Books 1, Page 7; Plat Book 2, Page 99; Plat Book 2, Page 123 and Plat Book 12, Page 7, all of said Public Records and those properties described in the following: Deed Book 198, Page 223 Tax I.D. 21-25-20-851-0000); Official Record Book 580, Page 810 (Tax I.D. 21-25-20-804-0000) and Official Record Book 2135, Page 1735 (Tax I.D. 21-25-20-601-0000), all of the Public Records of Leon County, Florida.

Containing 540 acres more or less.

THE AREA GENERALLY SOUTH OF GAINES STREET:

BEGIN at the intersection of the southerly extension of the westerly boundary line of that parcel described in Official Record Book 1811, Page 105 (Tax ID 21-35-51-000-1100) of the Public Records of Leon County, Florida, with the centerline of Jackson Bluff Road; thence Northerly along the west boundary line of said parcel to an intersection with centerline of relocated Stadium Drive; thence Easterly along said centerline and along the centerline of West Gaines Street to an intersection with the centerline of Railroad Avenue; thence North along the centerline of Railroad Avenue to an intersection with the centerline transition of St. Augustine Road into Madison Street; thence Southeasterly along said centerline transition and along the centerline of Madison Street to an intersection with the westerly right-of-way boundary of Boulevard Street; thence South along said westerly right-of-way to an intersection with the centerline of West Gaines Street; thence east along said centerline to an intersection with the centerline of the easternmost north/south roadway of Boulevard Street; thence South along said centerline to an intersection with the centerline of All Saints Street; thence East along said centerline to an intersection with the centerline of Duval Street; thence North along said centerline to an intersection with the centerline of West Bloxham Street; thence Easterly along said centerline to an intersection with the centerline of South Adams Street; thence South along the centerline of South Adams Street to an intersection with the centerline of West Van Buren Street; thence East along said centerline to a point north

of the northeast corner of that property described as Tax parcel #41-01-20-024-0000; thence South to the southeast corner of said property; thence Westerly, along said properties south boundary, to the northwest corner of that property described as Tax parcel #41-01-20-026-0000; thence Southerly to the northeast corner of that property described as Tax parcel #41-01-20-025-0000; thence Southerly, along the easterly boundary of said property to its southeast corner; thence Southeasterly, crossing Oakland Avenue, to the northeast corner of that property described as Tax parcel #41-01-20-034-0001; thence Southerly to the southeast corner of said property; thence Westerly, along the south boundary of said property to the northeast corner of that property described as Tax parcel #41-01-20-034-0000; thence Southerly, along the easterly boundary of said property and that property described as Tax parcel #41-01-20-030-0000, to the southeast corner of last referenced property lying on the northerly boundary of East Harrison Street; thence Southeasterly to the northeast corner of that property described as Tax parcel #41-01-20-057-0000; thence Southerly to the southeast corner of that property described as Tax parcel #41-01-20-056-0000; thence Westerly, along the southerly boundary of last referenced property to the northeast corner of that property described as Tax parcel #41-01-20-028-0000; thence Southerly to the southeast corner of last referenced property; thence Southwesterly, crossing East Pershing Street, to the northeast corner of that property described as Tax parcel #41-01-20-068-0000; thence Southerly, along the easterly boundaries of those properties described as Tax parcel #41-01-20-068-0000; Tax parcel #41-01-20-133-0000; Tax parcel #41-01-20-137-0000 and Tax parcel #41-01-20-138-0000, to the southeast corner of that property described as Tax parcel #41-01-20-138-0000; thence Easterly, along that property described as Tax parcel #41-01-20-067-0000 to the northeast corner of last referenced property; thence Southerly, along the easterly boundary of last referenced property to an intersection with the northerly boundary of that property described as Tax parcel #41-01-20-066-0000; thence Easterly, along said northerly boundary, to the northeast corner of last referenced property; thence Southerly to the southeast corner of last referenced property; thence Southeasterly, crossing East Jennings Street, to the northeast corner of that property described as Tax parcel #41-01-20-086-0000; thence Southerly to the southeast corner of last referenced property; thence Southwesterly, crossing Palmer Avenue East, to the northeast corner of that property described as Tax parcel #41-01-20-412-0000; thence Southerly to the southeast corner of last referenced property; thence Easterly, along the northerly boundary of that property described as Tax parcel #41-01-20-413-0000, to the northeast corner of last referenced property; thence Southerly, along the easterly boundaries of those properties described as Tax parcel #41-01-20-413-0000; Tax parcel #41-01-20-414-0000 to the southeast corner of said property described as Tax parcel #41-01-20-414-0000; thence Easterly, along the northerly boundary of that property described as Tax parcel #41-01-20-477-0000, to the northeast corner of last referenced property; thence Southerly, along the easterly boundaries of those properties described as Tax parcel #41-01-20-477-0000; Tax parcel #41-01-20-427-0000 to the southeast corner of said property described as Tax parcel #41-01-20-427-0000; thence Westerly, along the southerly boundary of that property described as Tax parcel #41-01-20-427-0000, to the northeast corner of that property described as Tax parcel #41-01-20-485-0000; thence Southerly, along the easterly boundaries of those properties described as Tax parcel #41-01-20-485-0000; Tax parcel #41-01-20-487-0000; Tax parcel #41-01-20-484-0000 to a

point on the northerly boundary of that property described as Tax parcel #41-01-20-484-0000; thence Easterly, along said northerly boundary, to an intersection with the westerly boundary of South Gadsden Street; thence Southerly, along said westerly boundary and a part of the easterly boundary of last referenced property and that property described as Tax parcel #41-01-20-851-0000, to the southeast corner of said property described as Tax parcel #41-01-20-851-0000; thence Westerly, along the southerly boundary of last referenced property, to the northeast corner of that property described as Tax parcel #41-01-50 L0040; thence Southerly to the southeast corner of last referenced property; thence Southerly to an intersection with the centerline of Perkins Street; thence East along said centerline to an intersection with the centerline of South Meridian Street; thence Southerly along the centerline of South Meridian Street to the intersection with the Westerly extension of the Northerly right of way of East Magnolia Drive; thence Easterly along said Northerly right of way to the intersection of the Northerly extension of the Westerly boundary of Indian Head Acres, a subdivision recorded in Plat Book 3, Page 30 of the Public Records of Leon County, Florida, thence Southerly along said Westerly boundary to the Southwest corner of Lot 16, Block N of said Indian Head Acres (parcel #310550 N0160), also being the Northwest corner of Lot 1 of Lehigh Subdivision, a subdivision recorded in Plat Book 3, Page 230 of the Public Records of Leon County, Florida (Parcel #31-07-70-000-0010) thence Southerly along the Westerly boundary of said Lehigh Subdivision and an extension thereof to the intersection with the Southerly right of way of Orange Avenue, thence Westerly along said Southerly right of way and an extension thereof to the intersection with the centerline of South Meridian Street, thence Northerly along said centerline to an intersection with the centerline of Orange Avenue; thence West along said centerline to an intersection with the centerline of South Adams Street; thence Northerly along said centerline to an intersection with the centerline of Palmetto Street; thence West along said centerline to an intersection with the centerline of South Martin Luther King Jr. Boulevard; thence North along said centerline to an intersection with the centerline of Young Street; thence east along said centerline to an intersection with the centerline of South Adams Street; thence North along said centerline to an intersection with the centerline of Palmer Avenue West; thence West along said centerline to an intersection with the centerline of South Martin Luther King Jr. Boulevard; thence Northerly along said centerline to an intersection with the centerline of Famu Way; thence Westerly and Northwesterly along said centerline to an intersection with the centerline of Wahnish Way; thence South along said centerline to an intersection with the centerline of Eugenia Street; thence Westerly along said centerline to an intersection with the centerline of Perry Street; thence South along said centerline to an intersection with the centerline of Nassau Street; thence West along said centerline to an intersection with the centerline of Pasco Street; thence South along said centerline to an intersection with the centerline of Kissimmee Street; thence east along said centerline to an intersection with the centerline of Wahnish Way; thence South along said centerline to an intersection with the centerline of Osceola Street; thence West along said centerline to an intersection with the centerline of Main Street; thence South along said centerline to an intersection with the centerline of Campbell Street; thence West along said centerline to an intersection with the centerline of Saxon Street; thence South along said centerline to an intersection with the centerline of Tucker Street; thence East along said centerline to an intersection with the centerline of Pasco Street; thence Southerly along the centerline

of said Pasco Street to an intersection with the Southerly right of way of Orange Avenue, thence Westerly along the Southerly right of way of said Orange Avenue to an intersection with the Westerly right of way of Springhill Road, thence Northerly along the Westerly right of way of said Springhill Road to an intersection with the Westerly right of way transition into Lake Bradford Road, thence continue Northerly along the Westerly right of way of said Lake Bradford Road to an intersection with the centerline of Hutchinson Avenue; thence West along said centerline to an intersection with the centerline of Hillsborough Street; thence North along said centerline to an intersection with Levy Avenue; thence West along said centerline to an intersection with the centerline of Iamonia Street; thence North along said centerline to an intersection with the southerly right-of-way boundary of the Seaboard Air line Railroad (now known as CSX Railroad); thence Easterly along said southerly right-of-way boundary to an intersection with the westerly right-of-way boundary of Lake Bradford Road; thence North along said right-of-way boundary to an intersection with the southerly boundary of Lot 90, Block A of Elberta Empire, a subdivision as per plat thereof, recorded in Plat Book 2, Page 110 of the Public Records of Leon County, Florida; thence Westerly along the southerly boundary of said Lot 90 to the southwest corner of said Lot 90; thence Northerly along the westerly boundary of said Lot 90 and Lots 89, 88, and 87, Block A of said Elberta Empire to the southerly right-of-way boundary of Elberta Drive; thence, crossing said Elberta Drive to the northerly right-of-way boundary of said Elberta Drive at the southwest corner of Lot 1, Block C of said Elberta Empire subdivision; thence Northerly along the westerly boundary of Lots 1 thru 8, of said Block C to the southerly right-of-way boundary of Hernando Drive; thence. Crossing Hernando Drive to the northerly right-of-way boundary of said Hernando Drive at the southwest corner of Lot 1, Block A of said Elberta Empire subdivision; thence Northerly along the westerly boundary of Lots 1 thru 4, Block A of said Elberta Empire subdivision to the northwest corner of Lot 4, Block A of said Elberta Empire subdivision; thence Easterly along the north boundary of said Lot 4, Block A to an intersection with the westerly boundary of Lot 3, Block F, Elberta Empire Addition Unit 1, a subdivision as per plat thereof, recorded in Plat Book 3, Page 67 of said Public Records; thence North along the westerly boundary of Lots 3, 2, 1 of said Block F, crossing Pepper Drive to the southwest corner of Lot 3, Block E of said Elberta Empire Addition Unit 1 to an intersection with the north boundary of said subdivision last referenced; thence East along the north boundary of said subdivision last referenced to an intersection with the westerly right-of-way boundary of Lake Bradford Road; thence North along said westerly right-of-way boundary to an intersection with the westerly boundary of Lake Bradford Road, a subdivision as per plat thereof, recorded in Plat Book 3, Page 57 of said Public Record; thence Northwesterly, Northerly and Northeasterly along the westerly boundary of said Lake Bradford Road subdivision to an intersection with the southerly right-of-way boundary of Jackson Bluff Road; thence east along said southerly right-of-way boundary to an intersection with the southerly extension of the westerly boundary line of that parcel described in Official Record Book 1811, Page 105 (Tax ID 21-35-51-000-1100) of the Public Records of Leon County, Florida, thence North along said southerly extension to the POINT OF BEGINNING. **Containing 1253 acres, more or less.**

The above areas contain in the aggregate **1858 acres**, more or less.

Revised: 05/2018