INTRODUCTION:
The University of Florida is one of America’s preeminent universities. Strong leadership and wise stewardship have positioned the University to capitalize on anticipated future growth to further enhance its stature among the United States’ elite universities. The purpose of this Strategic Development Plan is to contemplate, at the most conceptual level, the next fifty years for the University and its critical partnership with the City of Gainesville and Alachua County. The impetus for this comprehensive planning process springs from a realization that preeminence can only be attained by relentless pursuit of a clear vision.

In February 2016, the University established a large Steering Committee comprised of leaders from the University, the City and the County and retained a consultant team comprised of Elkus Manfredi Architects and DumontJanks to embark on a nine month study to posit transformative ideas that would drive the University’s mission for the next five decades. The assignment is divided into three Phases: Analysis and Visioning, Strategies and Objectives, and Implementation and Branding. This Phase 1 Summary Report documents the activities this team completed during the first three months of this assignment.

PHASE 1 OVERVIEW:
This phase focused on data gathering, early stakeholder meetings and interviews, and parsing reams of data into stories and illustrations that document trends and provide insights. The team analyzed data from myriad local sources and other peer universities to establish relevant benchmarks in a variety of categories. Over 2,000 students, faculty, staff and residents of the city and county participated in an open online survey, called Co-Map, which generated visual maps of their experiences and preferences on the campus and in the community. The phase concluded with the team assimilating all of this data to formulate a menu of “Big Ideas” for further study and refinement in Phase 2.

DATA AND ANALYSIS:
The team collected data on ecology, demographics, historic growth patterns, transportation, land use, building use, and campus infrastructure. We gathered community input by first hand interviews, two public meetings, and the Co-Map survey. We polled various stakeholders about the concept of a preeminent University and what that meant to them. Perhaps one of the most cogent responses came from President Kent Fuchs, who said “I want to do things that others will want to emulate.”

Our analysis pointed to several aspects of the University and community that would benefit from further study. Among these were a more vibrant central Gainesville that would attract a diversity of residents including faculty, young professionals, and empty nesters to live and work within the city; a greater engagement between the University and the City in planning and economic development; a desire for more social equity; and an evolving emphasis on sustainable ecology. Data also showed that the westward expansion of the University and the City toward Interstate 75 had diluted the vibrancy and quality of the campus and the city, leaving many central areas with vacant or underutilized buildings and lots. The Co-Map survey revealed that the places that people most enjoy in Gainesville are predominantly connected to its natural landscape and amenities.
ESTABLISHING BENCHMARKS:
The design team benchmarked the University of Florida against the 2016 U.S. News and World Report’s top 20 public national universities and top 10 (private) national universities along a variety of metrics including student body composition, class size, faculty ratio, endowment and research funding. We then identified five “vectors”, or quality categories, that define leading universities: research, teaching, allied entities (“Plus Ones”), cultural quality, and a fifth vector that we entitled the “New American City”, which attempts to measure the quality of life for the community, both on and off campus.

The University ranks well compared to its peers in both research and teaching, but lacks the allied entities such as an adjacent university, a state capital, a fortune 500 company headquarters, an adjacent governmental research institution, or similar “Plus Ones”. It does however benefit from a strong community college in Santa Fe and a significant medical school and research hospital in the UF Health Medical Center. Both data and stakeholder interviews suggest that the University suffers from a lack of interdisciplinary initiatives on campus, which might be a function of the funding structure and possibly the physical separation of the schools. Florida has one of the least dense campuses (building area / land area) of all of its peers. Other areas of strength include an active technology transfer program that produces an outsized number of startup companies, a nationally recognized athletic program, and a loyal alumni network.

Areas of concern include large economic disparity, evident geographical racial segregation, high vacancy rates in retail tenancies, and a lack of necessary varieties of commercial and residential opportunities required to create a vibrant walkable environment in the city of Gainesville. From a student life perspective, the University has the lowest percentage of students living on campus (or the highest percentage of students living off campus) of any of the other 29 universities except one.

PRELIMINARY VISIONING:
Phase 1 concluded in May 2016 with a series of “Big Ideas” that will be developed and refined in the remaining phases of the study. Conceptually, the design team presented a menu of possible directions along with a strategic framework that would better connect the University to the community, attract more investment to the University, the City, and the County, bring the world closer to Gainesville through international outreach efforts, create sustainable living opportunities, and enhance scholarship. Physically, the plan will look at creating a more vibrant campus and city by focusing growth over the next 50 years into the eastern third of the campus and within five precincts of Gainesville. Focusing the physical growth and development of the University and the City in these core areas will better facilitate the strategic goals and create value for the entire region, allowing the University of Florida to “do things that others will want to emulate.”

This initial conceptualizing sets the stage for further development in Phase 2 of a clear vision that charts a path forward for accommodating growth, promoting physical proximity to foster collaboration, increasing economic vitality, and enhancing the quality of life for all constituents.
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- WHO HAS BEEN INVOLVED?
- BIBLIOGRAPHY
The University of Florida seeks to become a top ten public University. This Strategic Development Plan will provide a roadmap for achieving that goal and position the University and Gainesville for continued growth and prosperity for the next fifty years. This transformative plan will integrate with current campus master planning efforts and prepare the University and the community for the future by identifying optimal trends for growth, density, economic viability, and livability to support the University’s preeminent status.
ASCERTAIN OPPORTUNITIES FOR LEVERAGING PREEMINENCE

DETERMINE OPTIMAL SYNERGY BETWEEN THE UNIVERSITY AND THE CITY

INTEGRATE WITH ONGOING CAMPUS MASTER PLANNING INITIATIVES

ENHANCE THE QUALITY OF THE BUILT ENVIRONMENT

FOSTER STRONG PHYSICAL CONNECTIONS BETWEEN THE CAMPUS AND THE COMMUNITY

IDENTIFY AND ADDRESS WEAKNESSES IN INFRASTRUCTURE

COMMUNICATE A COMPREHENSIVE VISION THAT ENGAGES THE ENTIRE COMMUNITY

WHAT ARE OUR OBJECTIVES?
INTRODUCTION

Draft Project Schedule

<table>
<thead>
<tr>
<th>Phase 1: Analysis and Visioning</th>
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<tbody>
<tr>
<td>Stakeholder Interviews</td>
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<tr>
<td>Analysis</td>
</tr>
<tr>
<td>- Preeminent Research University Community Analysis</td>
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<tr>
<td>- Built Environment Analysis</td>
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<tr>
<td>- Economic Development Analysis</td>
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<tr>
<td>- Visioning</td>
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<tr>
<td>- Preliminary Visioning</td>
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<tr>
<td>- Development of large menu of directions</td>
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<td>- &quot;Big Idea&quot; Formation</td>
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<table>
<thead>
<tr>
<th>Phase 2: Strategies and Objectives</th>
</tr>
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<tbody>
<tr>
<td>Develop strategies + objectives to pursue recommendations</td>
</tr>
<tr>
<td>Key stakeholder discussions</td>
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<td>Summary of Strategies</td>
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<td>Strategy and Planning Refinements</td>
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<td>Preliminary communication tools for Campus and Community</td>
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<td>Presentation of Communication Strategy</td>
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<thead>
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<th>Phase 3: Implementation and Branding</th>
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<tbody>
<tr>
<td>Finalize strategic development plan</td>
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<tr>
<td>Synthesis and Presentation</td>
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<td>Communication Tools</td>
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<td>Finalize Branding / Communications Plan</td>
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<td>Action Plan</td>
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<td>On-Campus Meetings</td>
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<table>
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<th>Meeting Dates</th>
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<td>1 February 15-16</td>
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<tr>
<td>2 March 10-11</td>
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<td>3 March 28-29</td>
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<td>4 May 2-4</td>
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<td>5 June 6-7</td>
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<td>7 June 29-30</td>
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<td>8 July 27-28</td>
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<td>9 August 24-25</td>
</tr>
<tr>
<td>10 September 29-30</td>
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<tr>
<td>11 October 26-27</td>
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</table>

WHERE ARE WE IN THE PROCESS?

THIS SUMMARY REPORT DOCUMENTS OUR WORK IN PHASE ONE OF THE STRATEGIC DEVELOPMENT PLAN, COVERING THE TIME PERIOD FROM JANUARY TO MAY 2016.

DURING THIS PHASE WE HAVE:

Gathered and analyzed myriad previous planning initiatives by both the University and the City

Studied the current Campus Master Plan 2015-2025 to integrate our work with its imperatives

Analyzed existing conditions of topography, water management, transportation, utilities and other infrastructure systems

Interviewed over 200 stakeholders from all constituencies within the University and the community of Gainesville and Alachua County

Conducted high-level benchmarking studies of relevant peer Universities and cities

Conducted a community wide co-mapping exercise to determine behavior and use patterns for daily activities

Developed an intellectual framework to explore a big menu of transformative ideas
Successful planning includes a rigorous analysis function that supports ongoing visioning and decision making.

Data gathering through one-on-one listening sessions, data mining, and crowd-sourced interactive mapping comprise much of Phase 1 efforts along with subsequent analysis. The results help identify trends, resources, “problem areas”, and strengths.
Gainesville’s natural environment is a wonderful resource to the town and the University.

Alachua County is roughly divided diagonally with more pervious land and better drainage to the southwest. Wetlands and Natural Ecosystems dominate the eastern portion of the county.

Focusing closer in on Gainesville, the importance of watersheds in the region and how ecological areas tend to organize around them becomes apparent.
ALACHUA: AQUIFER VULNERABILITY

This diagram identifies areas that are vulnerable to depletion given current water demand. Water management and aquifer replenishment will be important issues for Alachua County in the next 50 years.
This diagram identifies areas with higher-quality soils suitable for agriculture versus soils that are less drainable and serving as wetlands. Note the similar locations of agriculture and wetland to high and low aquifer vulnerability on the previous diagram.
ALACHUA: ECOLOGICAL SYSTEMS AND HYDROLOGY

Lands supporting environmental conservation occur in the same locations as the areas with lower aquifer vulnerability and poor soils (wetlands). Lakes and preservation areas in these zones feed hydrological patterns.
GAINESVILLE: SOILS AND DRAINAGE PATTERNS

This page indicates how soils quality and drainage patterns relate at the city scale.
The team expects that Gainesville’s natural systems will play an important organizing role in the evolution of the Strategic Development Plan.
Metropolitan Transportation Planning Organization projections for future growth show absolute household and employment growth occurring at the edges of the city rather than at the city center, further promoting urban dispersal.

Demographic data trends generally follow the ecological conditions. For example, higher per capita income and Caucasian populations are more prevalent to the west and lower per capita income and African American populations are more prevalent to the east.

Predictably student housing clusters are found close to campus edges, particularly to the north and east. Faculty and staff are more widely scattered.

**ECOLOGY**

**DEMOGRAPHICS**

**HISTORIC GROWTH**

**TRANSPORTATION AND LAND USE**

**BUILDING USE**

**STAKEHOLDER DISCUSSIONS**

**COMAP**

Source: 2014, Gainesville Area Chamber of Commerce
GAINESVILLE AREA ECONOMIC ENGINES

Higher Education, Healthcare, and Government entities are the largest contributors to the jobs market for the city.
Alachua County
Gainesville
102,850 106,330
51,840 53,038
2015 2020
Households
251,724 259,500
125,563 127,946
2015 2020
Population
Alachua
Gainesville
0.6% annual growth
0.4%
0.7% annual growth
0.5%
Long range growth key:
0.0 – 1.0% = slow growth
1.0 – 2.0% = moderate growth
2.0+ = strong growth
Source: 2015 ESRI

ALACHUA: POPULATION GROWTH BY AGE

ALACHUA AND GAINESVILLE: SLOW AND STEADY GROWTH
Consistent with post-war development patterns, most non-university market rate housing has been constructed outside the Gainesville city limits over the past sixty years. This pattern results in over seventy percent of the people who work in Gainesville living outside of the city limits.
Household growth has developed more westerly of Main Street, spanning I-75. Pockets of residential density appear in certain areas near campus serving the University.

MTPO: The Metropolitan Transportation Planning Organization for the Gainesville Urbanized Area is responsible for the continuing, comprehensive, and cooperative urban transportation planning program for the Gainesville Metropolitan Area.
Projected household growth over the next thirty years is anticipated to occur outside the city limits.
The most dense concentrations of employment in Alachua County occur inside the Gainesville city limits.
Based upon current conditions, employment growth projections for both the county and the city are relatively low.
GAINESVILLE: % CAUCASIAN POPULATION
GAINESVILLE: % AFRICAN AMERICAN POPULATION
This map paired with the previous two show the relationship between race and income level in the Gainesville area, an issue that is found in many of today’s American cities and one broached at stakeholder meetings.
GAINESVILLE: STUDENT + UF EMPLOYEE LOCATIONS

University employee residences are relatively evenly distributed throughout Gainesville and Alachua County. Student residences tend to cluster to the immediate north and east of the historic core of the UF campus.
Gainesville’s importance on the map began with its location as county seat along the railroad route. Further status came with the location of the land-grant university. More modern growth has followed a westerly expansion toward the Interstate, drawing density from the town core.
HISTORIC DEVELOPMENT
HISTORIC DEVELOPMENT

1990-1999

2000-2009

2010-2015

DATA & ANALYSIS
Alachua County is easy to arrive in by highway, lesser so by its small airport with only three direct connection destinations (Atlanta, Charlotte, and Miami).

Growth beyond Gainesville’s city limits proper marks expanding urban clusters. However, much of that population commutes into Gainesville for work at the University or campus related businesses.

Bike path infrastructure is expanding somewhat. City and county discussion regarding public transportation options serving commuters continues.

Current zoning and land use planning allows for higher density and more diverse projects in areas between campus and downtown, however this potential is not yet met.

Many stakeholders discussed how an increase in direct flight destinations from Gainesville Regional Airport would be helpful to University and Gainesville endeavors. A direct flight to Houston for example would help engagement with the Americas. Greater mobility in and out of the city would reduce the perceived distance of UF to the rest of the world and encourage the development of “Plus Ones” by making business travel more efficient.

However the numerous policy considerations on the path to service expansion are complex, particularly when taken in conjunction with economic, political, and legal pressures. They include:
- market opportunity
- metropolitan area unserved by other convenient airports
- level of international traffic and premium business travel
- route profitability
- incentive for airlines
- tax breaks on jet fuel
- landing fee and rent cuts

The image at right shows the geographic location and proximity of airports by hub type.
## US Airport Classifications

<table>
<thead>
<tr>
<th>Hub Type</th>
<th>Percent of Annual Passenger Boardings</th>
<th>Range in MSA Population</th>
<th>Number of Airports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large</td>
<td>1% or more</td>
<td>20 million</td>
<td>990,000</td>
</tr>
<tr>
<td>Medium</td>
<td>0.25 to 1%</td>
<td>13.3 million</td>
<td>163,000</td>
</tr>
<tr>
<td>Small</td>
<td>0.05 to 0.25%</td>
<td>13.3 million</td>
<td>~ 177,000</td>
</tr>
<tr>
<td>Nonhub</td>
<td>&lt; 0.05% but more than 10,000</td>
<td>6 million</td>
<td>~ 63,000</td>
</tr>
</tbody>
</table>

Source: [www.aci.aero/Data-Centre](http://www.aci.aero/Data-Centre)
RAILWAYS, MAJOR ROADS, AND TRAILS
RTS RIDERSHIP BY ROUTES

FY2015 TOTAL PASSENGER VOLUMES
GAINESVILLE BIKE LANES/MULTI-USE PATHS
The City of Gainesville is currently in the process of revising its ordinances to include transect zones, each zone with particular sectional features that a construction project in that area would need to meet. Both the current law and the proposed law allow for considerable height and density in most areas in the urban core. University engagement with the city on the development of these regulations and local investment would lead to coordinated goals, resources, and planning.
1. NE Residential Historic District
   Oldest and best preserved residential areas in Gainesville, with over 200 historic buildings. It reflects the architectural styles prevalent in Florida from the 1870s through 1930s.

2. SE Residential Historic District
   This district has its origins in the 1854 incorporation of the city and has encompassed seven additional subdivisions. The 23-block area seats over 96 contributing structures. The area is comprised of several homes of significant styles such as Queen Anne and period revival styles dating from the 1920’s including several Bungalows.

3. Pleasant Street Historic District
   This district contains the oldest African American residential area in Gainesville. This area has remained a religious, educational and social center for the African American community for over a century. African Americans built many of the 255 contributing structures during the post Civil War era.

4. University Heights Historic District – North
5. University Heights Historic District - South
   University Heights districts, separated by University Ave, have an outstanding collection of buildings and structures of nationally recognized styles of the 1920’s and 1940’s. Particularly noteworthy are the districts’ Colonial Revival, Tudor Revival and Craftsman architecture. The Craftsman influences are pronounced and some of the best examples of this style in Gainesville.

6. University of Florida Campus Historic District
   In 1988, the UF Campus Historic District (20 buildings) was added to the National Register of Historic Places. Many historic UF buildings are in the Collegiate Gothic style.

Source: City of Gainesville, Planning & Development Services, December 2000
Campus and town growth both followed a pattern of the development of a historic core with nearby growth followed by more dramatic growth to the southwest in the last several decades.

One impact of that campus expansion is the notable distance between departments and sometimes within departments.

Similarly, city activity has spread outward throughout Gainesville and Alachua county lessening the vitality of the downtown core.
HEATMAP: GOVERNMENT INSTITUTIONS

Downtown Gainesville is home to a good number of city, county, and statewide offices that provide a core population for daytime activities.
**HEATMAP: HOSPITALS, MEDICAL CENTERS, NURSING HOMES**

Although distributed throughout the city, medical facilities have a larger concentration south of Archer Road near the University as well as near I-75.
Gainesville has been a deeply religious community throughout the past two centuries. The faith community provides a social structure that can be leveraged to address both social and economic issues.
HEATMAP: STAY (HOTELS, MOTELS, B&Bs)

Hospitality uses are clustered at major entry portals (I-75, Archer Road, and along Main Street/441) to the campus and the city.
Greater numbers of private and better performing public schools are located in west Gainesville where higher percentages of Caucasian and per capita income populations live.
HEATMAP: BANKS AND PAYDAY LENDERS

Banking options are limited in the quadrant of the city south of University Avenue and east of West 13th Street. Payday lenders form a higher percentage of all bank options east of W 13th than west.
Automobile dependent, Celebration Point and Butler Plaza along I-75 form two large retail clusters. University Avenue, North W13th, W6th and Main streets serve as neighborhood retail spines.
Restaurants are located in three clusters: Downtown, Butler Plaza, and Celebration Point. East Gainesville is mostly served by fast food businesses.
HEAT MAP: GROCERY AND CONVENIENCE STORES

The east Gainesville area has poor access to fresh produce. Few options are located east of Main Street, and Grocers shown on this map between W 13th and E 11th and south of University tend to be small or limited.
Retirement communities are located along I-75 and the western parts of the city, closer to the interstate and in more affluent areas. These exist as gated, automobile dependent communities.
Downtown forms the main core for cultural venues, while the southwest corner of UF diverts some of the attractions.
ART AND CULTURAL EVENTS IN GAINESVILLE

Gainesville has a few well attended arts and entertainment festivals as well as several smaller events that are geared toward a wide range of interests. While not every festival or event that might occur in the area is shown here (such as the Halloween oriented Florida Bat Festival or September’s ButterflyFest), the chart does indicate that summer is a festival off-season. Whether due to climate or coordinated with the school year, an event calendar with more depth in those months might contribute to the culture available for year-round citizens.
LOCATION: OPEN SPACES
A detailed inventory was performed of the retail and restaurants spaces located along major commercial arteries between campus and downtown. Each space was visually inspected, photographed and categorized by retail typology.
The 36% vacancy rate is too high to sustain a healthy retail environment. Vibrant districts usually have vacancy rates of less than 10%. This suggests there might be a disconnect between tenant and landlord assessments of the value of these spaces. We might also explore alternative uses of these spaces in future phases of this study.
We then asked, “How many households are needed to bring current retail vacancy to a healthy number, 10%?”

Assuming no growth in UF population and daytime employment and current household spending patterns, the downtown core will need 6,700 additional households to support existing retail space with a healthy vacancy rate.

The current number of households is 6,600.
491,400 sf of leasable retail space

Gainesville has no appreciable upper level retail space.
RETAIL SUPPLY - TECH STARTUP LOCATIONS
• The market has a **very high level of vacancy** at 36%. This indicates a poorly performing market as healthy levels typically fall in the range of 10-15%.

• The market has a **low percentage of personal care services and stores** (i.e. pharmacy, salon, and other personal health services) in relation to comparable college town retail environments. There may be opportunities to grow this segment.

• The area studied has also has a **low percentage of grocery, clothing, and other discretionary** (i.e. wireless, furniture, hardware stores) categories that are largely met by shopping centers in the Butler Plaza area.

• Vacancies are located primarily in the **downtown blocks southwest of the W. University Ave and S. Main intersection**, which is a potentially high value location immediately proximate to the downtown core.

• The retail zones along W. University Ave immediately north and east of campus are **healthy** and primarily driven by restaurant tenants.
Multifamily units represent a significant portion of residential permits but much of them are student oriented apartments located outside of the downtown core.
The sweet spot for single-family homes is below $400,000.

The sweet spot for condominiums is below $150,000.

The ‘high end’ condo market is very much in its infancy.
Many of the higher priced single-family homes are located in communities west of I-75 such as Haile Plantation and Jonesville.
The majority of new construction single-family product is located in areas west of I-75 and north of SR 222.
Regents Park is probably the best example of an urban condominium development that leverages Downtown amenities. Our research shows there is likely more demand for this style of product.
Newell Drive and University Avenue form the employment armature for this portion of Gainesville.

Source: US Census LEHD
Gainesville has a reputation as a place graduates would like to live, either having never left or returned after living ‘abroad’. Many former students have noted that housing choices of the types desired by alumni, for young professionals or empty nesters for example, are in short supply downtown.
### Gainesville Residential Demand by Age and Income

<table>
<thead>
<tr>
<th>Household Income</th>
<th>Home Price</th>
<th>&lt;25</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-64</th>
<th>65-74</th>
<th>75+</th>
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<tr>
<td>$50-$75k</td>
<td>$150-$225k</td>
<td>2%</td>
<td>7%</td>
<td>4%</td>
<td>-1%</td>
<td>2%</td>
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<td>$100-$150k</td>
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<td>2%</td>
<td>4%</td>
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<td>2%</td>
<td>6%</td>
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<td>1%</td>
<td>0%</td>
<td>1%</td>
<td>3%</td>
<td>1%</td>
</tr>
</tbody>
</table>

- Highest Demand
- High Demand
- Moderate Demand
- Lower Demand
- Lowest Demand

Housing demand is noticeably higher for those in the young professional and empty nester/retiree age groups.
RESIDENTIAL MARKET - INITIAL TAKEAWAYS

- Gainesville has good ‘bones’ in its downtown core but needs more community amenities and services to attract a critical mass of non-student residents.
- The downtown would benefit from additional cultural venues, an urban grocer or more regular farmers market, and additional programming for residents.
- Downtown suffers for more activity ‘leakage’ to other areas of the city than any of the other case study communities.
- Target Market Audiences: Empty Nesters, UF Alumni – both retirees and recent grads that want to stay in Gainesville.
- More opportunity to target a diverse range of attached product types (condo, townhome, duplex, quads, etc) in the $150 - $300k range.
- Outreach to alumni base could be important to understand preferences.
- Opportunity to work with city to incent more housing production close to core.
The diagram to the left indicates yearly housing unit demand for both single family and multifamily housing types. The two diagrams on this page show the demand per year that might be captured for core downtown areas. The top one assumes a low capture rate and the bottom a higher capture rate.

**LOW CAPTURE**

**Demand for Precinct Areas**

<table>
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<th>Single Family</th>
<th>Multifamily</th>
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<td>11 units</td>
<td>42 units</td>
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<tr>
<td>=55 units</td>
<td>=210 units</td>
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<tr>
<td>5 year demand</td>
<td>5 year demand</td>
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**HIGH CAPTURE**

**Demand for Precinct Areas**

<table>
<thead>
<tr>
<th>Single Family</th>
<th>Multifamily</th>
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<tr>
<td>43 units</td>
<td>63 units</td>
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<tr>
<td>=215 units</td>
<td>=315 units</td>
</tr>
<tr>
<td>5 year demand</td>
<td>5 year demand</td>
</tr>
</tbody>
</table>
There are few hotel options between campus and downtown.
**HOSPITALITY MARKET - DOWNTOWN VERSUS I-75 LOCATIONS**

**DOWNTOWN GNV GROUP**
- Hampton Inn
- Holiday Inn
- Hilton UF
- Quality Inn

**I-75 GROUP**
- TownePlace Suites
- Hilton Garden Inn
- Springhill Suites
- Hampton Inn
- Residence Inn
- Comfort Inn
- Courtyard
- Homewood Suites
- Country Inn & Suites

Source: STR
### Hospitality Market - Downtown Versus I-75 Locations

**Occupancy, Rates, and Revenue**

<table>
<thead>
<tr>
<th>Year</th>
<th>Downtown</th>
<th>I-75</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>59%</td>
<td>65%</td>
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<tr>
<td>2011</td>
<td>64%</td>
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</tr>
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<td>2012</td>
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<td>2013</td>
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<td>2014</td>
<td>68%</td>
<td>77%</td>
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<tr>
<td>2015</td>
<td>75%</td>
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<table>
<thead>
<tr>
<th>Year</th>
<th>Average Daily Rate</th>
<th>Revenue Per Room</th>
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<td>2015</td>
<td>$119</td>
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Source: STR
MONTHLY

2010-2015

OCCUPANCY

I-75 Group

Downtown Group

Source: STR

REVENUE PER ROOM

DOWNTOWN VS. I-75 HOTEL LOCATIONS | Average Monthly Occupancy and RevPAR (2010-2015)

DAILY

2013-2015

OCCUPANCY

I-75 Group

Downtown Group

Source: STR

REVENUE PER ROOM

These 2 diagrams show Average Monthly/Daily Occupancy and RevPAR
HOSPITALITY MARKET - EXISTING HOTELS WITH CONFERENCE SPACE
**HOSPITALITY MARKET - PLANNED HOTEL PROJECTS**

- **THE STANDARD**
  - 144 beds
  - Opening in 2017

- **WEST 38**
  - 130 beds
  - ~ 50,000 sf conference
  - planning stage

- **Hyatt Place**
  - 253 beds
  - Opening in 2020

- **Hotel Indigo**
  - 120 beds
  - Opening in 2016

- **EMBASSY SUITES**
  - 220 beds
  - ~ 30,000 sf conference
  - planning stage

- **Element Gainesville**
  - 123 beds
  - extended stay
  - Opening in 2017

517 beds coming online in the next two years.
350 beds in the planning stages
Two large conference centers in planning stages
How many more rooms will the market absorb?

Model Assumptions:
- **Current Growth Trend**: 6% annual growth in room nights
- **Low Growth Scenario**: 2% annual growth in room nights
- Occupancy held constant at 70%

---

**HOSPITALITY MARKET - HOTEL DEMAND, DOWNTOWN GAINESVILLE**
• Hotel activity is concentrated along Archer Road/I-75 corridor, there are a limited number of quality options in downtown Gainesville
• Downtown hotels are performing better than I-75 hotels in 2015 because of the higher rates and lack of competition
• Conference space is an opportunity – especially in the downtown area. Progress of the two planned conference centers should be monitored with possible University demand for additional options near campus in mind
FEBRUARY 15 & 16 MEETINGS

The Consultant Team met with the following stakeholders to kick-off the Strategic Development Plan: The University’s Project Management Team, the Steering Committee, transportation representatives, technology licensing, The President of the University of Florida, County and City officials and community members, the Executive Committee, campus housing representatives, Athletics, Gainesville Regional Utilities, and the Gainesville Area Chamber of Commerce.

Having reiterated the key goal of preeminence, the attendees discussed their areas of expertise in terms of pros, cons, and possible benchmarks.

City Strengths:
- cost of living
- steady (though slow) growth
- active community
- university town
- good schools

City Weaknesses:
- city feels dispersed – no sense of a sizable town center
- lack of a critical mass of young professions
- public transit is available, but not as well used as it could be
- multi-modal transportation safety in some locations
- airport only connects directly to 3 locations, all southern
- non-diverse housing supply available near campus, downtown
- limited employment market for non-university workers
- limited retail/entertainment/cultural activities
- east/west city separation

UF Strengths:
- large range of respected academic and athletic programs
- great open spaces
- affordable

UF Weaknesses:
- no clear sense of arrival
- no clear intent at campus edges – define and/or connect?
- aging infrastructure
- decreasing state funding as a percentage of overall budget
- students would like higher quality residence halls
- enticing ‘star’ faculty can be difficult

Four series of meetings were held on campus and in Gainesville during Phase 1. A variety of campus and community members joined the meetings to provide input on a wide range of topics while the team presented current analysis and ideas for review and comment.
The Consultant Team took a morning community tour followed by discussions with the following groups: The Executive Committee, Gainesville Regional Airport, student representatives, University Relations, the Alachua County School Board, the Steering Committee, UF and UF Health Deans, the College of Design, Construction + Planning, sustainability interests, and campus Health administrators.

This set of meetings sought out further input on a range of subjects from enrollment to airport service, and from student life to Gainesville’s quality of life.

**Highlights from the meetings include:**

- Out of state enrollment percentage and faculty compensation is limited as a state university.
- UF students’ wish lists included better housing selection on campus and/or more affordable housing nearby off campus, wider variety of healthy food near campus, more activities and shopping between downtown and campus, a Saturday morning market, and power outlets and Wi-Fi for study in green spaces.
- Steering committee discussion centered on community ties, attracting new people and investment, and reaction to the ‘Where do Big Ideas Come from’ Matrix presented by the Consultant Team with 5 categories: Learning, Research, Plus One, Culture, and New American City.
- “What can we do with [the underserved]” rather than “What can we do for them?”
- Alachua County schools see lower performance on the east side with fewer applications for teacher openings. UF’s College of Education is increasingly involved in Gainesville schools. Similarly, the UF Health Deans discussed the notion of providing a larger UF Health presence in east Gainesville as well as further developing interdisciplinary health care delivery.
- At the UF Deans meeting the relationship of density and interdisciplinary teaching sparked interest as well as topics of experiential education, quality of life around campus, and the possibility of UF as a national model for climate change resiliency.
- Representatives of the CDC+P noted the university should be exemplary of its natural and built environment as well as its education environment. Increasing all sorts of diversity and improving alumni outreach were also mentioned.
- “We are too much ‘no, but’ and not enough ‘yes, and.’”
In addition to the Alachua County Emerging Leaders (AECL), the Consultant Team met with the following representatives associated with the University: Campus Master Plan representatives, the Chief Financial Officer, economist David Denslow, the Chief Information Officer, campus arts and culture groups, the Steering Committee, the Infrastructure Council, and the University’s Project Management Team.

The meetings over the course of these 2 days gained input from mostly university representatives, but with wider community involvement from the Steering Committee and the ACEL.

Highlights from the meetings include:

-UF Bond Rating: Moody’s–AA2, Fitch–AA. Colleges are allowed to keep the differences between their allocations and their expenses as a carry-forward. All colleges except one have a positive balance.
-Deferred maintenance could take 100 million.
-84% of all jobs in the past decade have been created by the University. Estimates say that a 4 student growth in enrollment will result in 1 job.
-Gainesville start-ups have had to move away in order to help acquire venture capital where it is more plentiful.
-UF has one of the most robust networks in higher education: 100 gig connection from campus to the world, 200 gig connection on campus, and HiPerGator 1.0 and HiPerGator 2.0 Supercomputers. However they are nearing capacity. Campus IT also remarked about the need for the city to bring high bandwidth IT to everyone, not just campus.
-Undergraduates leave, and some may return. Graduate students tend to stay, but may also be underemployed.
-The young professional demographic looks for a sense of place and meaning.
-Arts: Interior campus spaces seem to be inaccessible to the public. Exterior campus spaces are inaccessible to the students.

“When Smart Cities, Smart Homes, Smart Devices, and consequently, Smart People.”

-When resources are scarce, every expenditure has to accomplish multiple objectives.
-Regarding Start-ups: The startup talent is generally here, but the management talent is elsewhere.
-Student to faculty ratio is a weak point for UF in national student rankings.
-Distance between schools is an impediment to classroom utilization and multidisciplinary engagements for both students and faculty.
At the last Phase 1 meeting on campus the Consultant Team met with the following stakeholders: The University of Florida Foundation, the College of Design, Construction + Planning, faculty members, the Executive Committee, the Steering Committee, and former UF President Bernie Machen. The first day ended with an evening public meeting and the second day featured lunch with East Gainesville representatives.

This series of meetings initiated feedback on fund raising and investment along with much more input on quality of campus and city community life.

**Highlights from the meetings include:**

- The team discussed current and upcoming UF Foundation campaigns, funding, and possible sources for venture capital to catalyze development and vitality.
- Faculty noted difficulty in faculty hiring because prospective employees are looking for a more urban context with stores, shops, restaurants and walking culture.
- They also cite a lack of employment opportunity for spouses.
- Lack of intersection among the faculty, lack a place to ‘bump into one another’.
- How can Gainesville grow from the private sector, not only the University?
- Can the trend of North Florida as a retirement community destination intersect with an enhanced focus on medical services as well as arts and culture?
- Be sure to solicit and encourage involvement with residents from east Gainesville through the SDP process. Representatives from east Gainesville noted a need to focus on partnerships, programs, and outcomes, not just physical construction activity.

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**INITIAL MASTER PLANNING TAKE-AWAYS**

Compiled from interviews with UF Planning, Design and Construction Staff

**“OWNERSHIP” OF BUILDINGS AND OPEN SPACE**

User group interest versus University interest

Project-centric versus plan-centric

**NEED FOR A STRATEGIC DEMOLITION AND/OR REDEVELOPMENT PLAN**

Lack of swing place

Financial challenges

Lining up “dominoes” for future building sites - who pays?

**LONG-TERM VISION VERSUS SHORT-TERM EXPEDIENCY**

Violations of green space and bike / pedestrian connections

Building programs and budgets too small to go tall

Office and research programs want large floor plates for certain uses

Build small or “temp” buildings that consume valuable building footprints

**INFRASTRUCTURE FUNDING**

Transportation systems and open space improvements

Utility capacity, coverage, and age
“CoMap”, a web based crowd-sourced interactive mapping exercise, was available to students, staff, faculty, and community members for approximately 2 weeks.

During that time over 2,000 participants noted where they worked, ate, shopped, and socialized. They mapped where they traveled and how. And they noted places such as where they felt unsafe or happy, along with any special text comments they were inspired to share.

As the strategic development plan begins to explore scenarios, the survey results will be a key source of information, allowing the team to look for ways to capitalize on Gainesville’s strengths as a place to live and work.

ECOLOGY

DEMOGRAPHICS

HISTORIC GROWTH

TRANSPORTATION AND LAND USE

BUILDING USE

STAKEHOLDER DISCUSSIONS

COMAP
Three big themes emerged from the aggregated results:

1. Significant development and activity occurs both east and west of campus, potentially pulling the University in opposite directions, and diluting the vitality that is a necessary ingredient of preeminence.

2. Strengthening connections between the University and downtown offers significant advantages.

3. Gainesville’s outdoor amenities are one of the most important ingredients in what makes it special and unique.
COMAP: WHAT ARE YOUR PRIMARY DRIVING ROUTES?

Typical Drive to and from Work. Have to offset my arrival and leave time to minimize getting caught up in traffic jams.

Traffic on Archer can get very bad. I usually avoid the area because of it, despite the businesses I would usually visit being there. With even more development in the area I think it will only worsen.

scooter to campus
COMAP: WHAT ARE YOUR PRIMARY BUS ROUTES?
COMAP: WHAT ARE YOUR PRIMARY WALKING ROUTES?
Very nice neighborhood. **UF Faculty**

Commute to and from here is a nightmare. **UF Faculty**

I've lived here for 8 years (2 undergrad, 6 grad). For the first four years, I used the Route 20 bus often, and that was a key factor which influenced my decision to live here. **UF Grad**

Transportation is big problem for me. After 07.00 pm the buses are reduced so I cannot stay at campus long time especially at the library. **UF Grad**

Private condo community. Loud student neighbors. **UF Affiliate**

I live on the SE side of town, in the woods, which I love EXCEPT for the fact that we DO NOT have high speed internet access. Have to use hotspot with the phone. No streaming videos. No skype. **UF Faculty**
COMAP: WHERE DO YOU LIVE?

Awesome location, half way between campus and downtown :)  
UF Staff

Wildflower Apartments, mostly students and staff/faculty associated with the hospital system  
UF Staff

I like the area I live in, but wished I lived closer to downtown. In general, there’s not a lot of rental options for people that don’t want to live around students.  
UF Staff

Haile Village Center - wanted to be downtown but this was closest “new urbanism” I could find.  
UF Staff
COMAP: WHERE DO YOU EAT?

Sweet Dreams - Cool selection of unique ice cream flavors and locally owned. Owner is super nice. _UF Undergrad_

Mother's. Best specials in town. _UF Undergrad_

Emiliano's is my fav. I also like the Gelato Company. OAK is just okay._UF Grad_

Reitz Union, good place for lunch. _UF Grad_
COMAP: WHERE DO YOU GO FOR ARTS, MUSIC, CULTURE?
COMAP: WHICH PLACES MAKE GAINESVILLE UNIQUE?

Devil's Millhopper  Community Member

The Gators bring people to Gainesville.  
UF Staff

Lake Alice and the Bat Houses  
UF Graduate

Downtown in general. Often go to movies at the Hippodrome.  
UF Staff

"If I come visit you in Florida, can I see an alligator?" Yes, yes you can.  
UF Faculty, La Chua Trail

Gainesville has an amazing craft beer scene. Not only is it a quality product, but the breweries really care about philanthropy and the environment  
UF Staff
COMAP: WHERE ARE YOUR FAVORITE OUTDOOR PLACES?

- Devil’s Millhopper
- i like biking or running along lake alice
- Sweetwater Wetlands Park - new and awesome! Wish there was a way to get here by bus...
- La Chua trail
- Rock climbing, kayaking, and BBQing at Lake Wauberg
COMAP: WHERE DO YOU SOCIALIZE DURING THE DAY?
I'm 21 so when my friends and I go out we usually go to Midtown to drink and hang out with friends. *UF Undergrad*

The clubs of downtown! So much fun and also the restaurants are really unique. *UF Undergrad*

The Top and downtown watering holes generally (not dance clubs) *UF Faculty*
COMAP: WHERE DO YOU FEEL UNSAFE (PERSONAL SAFETY)?

I have been assaulted in this area of town before. *UF Staff*

At night, the lighting in this region is very poor. Additionally, an old fence covered by overgrown bushes creates poor visibility for pedestrians on the sidewalk, so that it is hard to be fully aware of your surroundings. *UF Undergrad*
COMAP: WHERE DO YOU FEEL UNSAFE (TRAFFIC)?

- The bike lane on the overpass is ALWAYS full of glass. This is a MAJOR hazard to cyclists, as we have to go into the car lane to avoid getting our tires sliced up. 
  *UF Staff*

- The lights don’t correlate so people constantly block the intersections and make it difficult to be a pedestrian, car or biker. 
  *UF Undergrad*

- Driving at Archer road and 34th street in general is horrible. That whole area. So many lanes and so many stop signs where people don’t know when to go. 
  *UF Staff*

- Bus doesn’t pull over into dedicated bus spots and cars and cyclists can’t get around it, but cyclists often speed by on the right and nearly crash into pedestrians entering or leaving buses. 
  *UF Staff*
COMAP: UF ZONE OF INFLUENCE
When asked to map what they thought the scope of the University of Florida’s zone of influence was, most respondents drew perimeters within Gainesville and Alachua County (image at left). However, some noted the institution’s influence extends even beyond the State (image at right). Understanding how the University’s boundaries are not confined to the edges of campus will be useful in expanding its national and international reputation.
Benchmarking establishes global parameters and potential areas of investigation. It is one of several springboards toward understanding potential opportunities specific to the University and its integration with the broader community.

For the purposes of this study, we will compare significant metrics that illustrate achievement in the categories of learning, research, partner institutions, aspects of community culture, and innovative ideas for collaboration with host cities for the top 20 public and the top 10 private institutions in The United States.
TOP 20 PUBLIC INSTITUTIONS
Top 10 Private Institutions

109

Source: U.S. News, 2015 Rankings

Top 20 Public with a “Plus One” in this category
Top 10 (Private) with a “Plus One” in this category
Top 20 Public with no “Plus One” in this category
Top 10 (Private) with no “Plus One” in this category

STRATEGIC DEVELOPMENT PLAN | UNIVERSITY OF FLORIDA | PHASE 1 SUMMARY REPORT
We asked all of the stakeholders we interviewed to offer their definition of preeminence. One that particularly resonated with us was offered by the President of the University, Dr. Kent Fuchs: “Preeminence is doing things that others wish to emulate.”
### WHERE TO LOOK FOR BIG IDEAS

To attain preeminence, the University must surpass its peer institutions. 5 “buckets” or approaches were defined as a way to categorize the various possible paths to improvement or innovation. The next two columns highlight two strategies by which each of 5 approaches may contribute to the University of Florida’s journey to preeminence: (1) Win the game - be the best at what others are doing, or (2) Change the game - offer what no other institution has. The last column notes some of the possible case studies for each of the approach vectors.

<table>
<thead>
<tr>
<th>APPROACH</th>
<th>WIN THE GAME</th>
<th>CHANGE THE GAME</th>
<th>CASE STUDIES</th>
</tr>
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<tbody>
<tr>
<td><strong>LEARNING</strong></td>
<td>attract the best students</td>
<td>change delivery method</td>
<td>Arizona State University, University of North Carolina</td>
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<td><strong>RESEARCH</strong></td>
<td>problem-based, attract star PIs</td>
<td>private partnerships</td>
<td>Georgia Tech, Ohio State, UC Davis</td>
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<td>“PLUS ONE”</td>
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<td>startup</td>
<td>UGA, Clemson, UC Berkeley</td>
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<tr>
<td><strong>CULTURE</strong></td>
<td>food, arts, outdoors</td>
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<td>Austin, Boulder, Charlottesville</td>
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<tr>
<td><strong>NEW AMERICAN CITY</strong></td>
<td>housing mix, schools, open space, retail, transportation</td>
<td>demographics, workforce, climate resilience</td>
<td>Portland, Madison, Philadelphia, Durham</td>
</tr>
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</table>
What does enrollment look like for University of Florida’s peers? The University of Florida is relatively large based on total enrollment. The percentage of international and out-of-state students is comparable to the University of Texas - Austin, University of California - Berkeley, University of North Carolina - Chapel Hill, and Ohio State University - Columbus. The University of Virginia, University of Michigan - Ann Arbor, and University of Wisconsin - Madison have slightly higher combined international and out-of-state enrollment.

These graphs also illustrate that most of our peer institutions are increasing the number of out of state and international students, whereas the University of Florida has limited enrollment from these categories.

How does UF compare to others in terms of space allocation? Campus space per student is shown in a series of pages for a variety of categories of use.

And how does campus density and organization compare to others? The last pages in this Learning section demonstrate how the University’s FAR relates to that of its peers.
Note that the University of Florida’s main campus enrollment is less than the institution’s total enrollment shown here as it does not include the students attending UF at other locations or online.

Information for the following charts indicating enrollment is gathered from the respective Institutional Reporting websites for each university.
### Headcount Enrollment by Residency

<table>
<thead>
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<th>In-state</th>
<th>Enrollment</th>
<th>Out-of-state</th>
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HEADCOUNT ENROLLMENT BY RESIDENCY
UNIVERSITY OF TEXAS, AUSTIN
HEADCOUNT ENROLLMENT BY RESIDENCY
UNIVERSITY OF CALIFORNIA, BERKELEY
HEADCOUNT ENROLLMENT BY RESIDENCY
UNIVERSITY OF NORTH CAROLINA, CHAPEL HILL

enrollment

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<th>Year</th>
<th>1990-2015 Avg.</th>
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<tbody>
<tr>
<td>In-state</td>
<td>75% 74% 76% 77% 77% 78% 77% 77% 76% 77% 75% 74% 73% 73% 73%</td>
</tr>
<tr>
<td>Out-of-state/International</td>
<td>25% 26% 24% 23% 23% 22% 23% 24% 23% 25% 26% 26% 27% 27% 27%</td>
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HEADCOUNT ENROLLMENT BY RESIDENCY
OHIO STATE UNIVERSITY, COLUMBUS

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<tbody>
<tr>
<td>in-state</td>
<td>54,017</td>
<td>54,811</td>
<td>52,117</td>
<td>50,520</td>
<td>49,542</td>
<td>48,676</td>
<td>48,282</td>
<td>48,511</td>
<td>48,003</td>
<td>47,952</td>
<td>48,477</td>
<td>49,676</td>
<td>50,731</td>
<td>50,996</td>
<td>50,504</td>
<td>51,818</td>
<td>52,568</td>
<td>53,715</td>
<td>55,014</td>
<td>56,604</td>
<td>58,867</td>
<td>56,367</td>
<td>57,466</td>
<td>58,322</td>
<td>58,863</td>
</tr>
<tr>
<td>out-of-state</td>
<td>54,017</td>
<td>54,811</td>
<td>52,117</td>
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<td>49,542</td>
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<td>58,863</td>
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78% 78% 78% 78% 78% 78% 78% 78% 78% 78% 78% 78% 78% 78% 78% 78% 78% 78% 78% 78% 78% 78% 78% 78% 78% 78% 78%
HEADCOUNT ENROLLMENT BY RESIDENCY
UNIVERSITY OF MICHIGAN, ANN ARBOR
HEADCOUNT ENROLLMENT BY RESIDENCY
UNIVERSITY OF WISCONSIN, MADISON
The following charts indicate relative campus space per student for different use categories.

Information is gathered from a Consultant database and therefore specific institution names may be confidential and not called out.

ASF: Assignable Square Feet
FTE: Full-Time Equivalent
CAMPUS SPACE PER STUDENT
TOTAL ACADEMIC

STRATEGIC DEVELOPMENT PLAN | UNIVERSITY OF FLORIDA | PHASE 1 SUMMARY REPORT
CAMPUS SPACE PER STUDENT
CLASSROOM
ESTABLISHING BENCHMARKS

CAMPUS SPACE PER STUDENT
LAB

STRATEGIC DEVELOPMENT PLAN | UNIVERSITY OF FLORIDA | PHASE 1 SUMMARY REPORT
CAMPUS SPACE PER STUDENT OFFICE
CAMPUS SPACE PER STUDENT STUDY
CAMPUS SPACE PER STUDENT
SPECIAL USE
CAMPUS SPACE PER STUDENT
GENERAL USE
Source: asg-architects.com/comparing/campuses/
FAR

Floor Area Ratio: The ratio of a building’s total floor area to the size of the parcel of land upon which it is built.

A 10,000 SF building on 1 floor on a 10,000 SF parcel would have an FAR of 1. A 10,000 SF building on 2 floors on a 10,000 SF parcel would still have an FAR of 1.

Porters area house
1269 SF Single Family
5930 SF Parcel
FAR:0.21

Continuum
264,490 SF Apartment
190,790 SF Parcel (4.38 acres)
FAR:1.4

The Standard
750,000 SF Mixed Use (est)
180,000 SF Parcel (est)
FAR:4.2 (est)

HOW IS DENSITY MEASURED?

The term “FAR” will be referenced throughout this Summary Report and is a common design and construction industry method of describing how dense the built environment is.
CAMPUS DENSITY COMPARISONS

The diameter of the circle represents a 10 minute walk or about 2,500 feet. Structures shown in white are academic buildings. Green tones highlight sports or athletic venues, blue tones highlight student recreational centers, and yellow tones highlight off-campus commercial zones. The academic core at OSU has a FAR (density) of 1.83, comprised primarily of four and five story buildings.
Purdue has a core academic FAR (density) of 1.43, comprised primarily of three and four story buildings.
CAMPUS DENSITY COMPARISONS

Florida is far less dense in its academic core than the previous two examples. This suggests that the campus can accommodate future growth without expanding its borders.
The University’s large campus footprint and westward development have not fostered a building fabric that promotes walkability and face-to-face interdisciplinary interaction. Given the size and diversity of programs and the student body, a more closely planned campus will promote more frequent productive “collisions”.

Knowledge City
Vitality attracts the best and brightest
Ohio State has made a decision to focus expansion into the core of the campus and not into the surrounding community.
One of UF’s assets is having a major teaching hospital associated with campus. However as this medical center expanded, rather than growing into campus where it might create more activity and interdisciplinary interaction, the pattern of expansion has been south and west such that core teaching and medical clinical/research space are not in proximity to one another. In contrast, OSU’s medical campus walking radius overlaps with its campus center.
Research expenditures at the University show a consistent pattern of growth. Recent years have held steady when most other institutions have experienced decreased research funding.
Research expenditures are an important component of any Top 30 University, although there is not a strong correlation between these expenditures and institutional prominence.
“Plus Ones” are crucial to a more diverse urban base. They may take the form of a fortune 500 company, a state capital, a governmental partnership, an additional university, or a notable medical center. The University of Florida would benefit by expansion of the number and types of Plus Ones in building urban density, attracting faculty, and retaining a highly skilled work force.
TOP INSTITUTIONS: “PLUS ONE”
CORPORATE (FORTUNE 500 HQ WITHIN 30 MILES)
While the UF area does not have the benefit of a University-Plus One, leveraging partnerships and shared programs with Santa Fe College will help promote economic and educational diversity. Santa Fe College, with an enrollment of roughly 16,000 students, is ranked at the top of the nation’s community colleges.
Florida is one of but a few top 30 Universities that does not benefit from a traditional “Plus One.”
However, Florida does benefit from having a major academic medical center on campus, UFHealth, - an attribute it shares with approximately half of the other top 30 institutions.
Another approach to creating institutional partners or “Plus Ones” might be to grow them from a vibrant ecosystem of startup companies.
This list, covering fiscal years 2001 to 2016, of UF associated startup companies indicates which companies have moved outside Gainesville as well as those that are no longer in business. Out of these 188, 46 are now defunct and 5 acquired. Note also that over one third are located out of state.
In order to improve its relative standing as a great environment for cultural activities, the University will need to bolster its role in supporting the Gainesville arts community. The town has an active music scene and well-attended arts festivals. Building upon those assets to create a vibrant city center is one important component in attracting talent.
WHY DOES DENSITY MATTER?

Innovation, interdisciplinary problem-based research, and study within all disciplines are promoted by a closeness and intensity of people, programs, and activities.

In addition, social innovation, entrepreneurship, and economic development rely on density and proximity.

The low density of the UF campus, and Gainesville as well, can be seen by comparing how entire dense urban areas fit into the same perimeter as campus, or the same distance between Main Street and West 13th Street.

Active college town ‘Main Street’ examples follow showing scale and character. Fixed transit options activate streets and promote walkable cities.
This map shows the relative MSA scale of the Top 20 Public and Top 10 (Private) Universities: The larger the circle, the larger the MSA.
VITALITY ATTRACTS THE BEST+BRIGHTEST
UNIVERSITY OF FLORIDA CAMPUS

The following images illustrate higher densities of built environment within the same area as the University campus footprint by superimposing 3 different city aerials over the UF-Gainesville aerial, all at the same relative scale. While the density of the comparisons may be higher than appropriate for this particular city and campus, one can see just how much future growth may be accommodated while supporting exceptional study/work/live settings. The Boston and Washington DC diagrams in particular also show the scale and organizing power of well-planned green space serving that density.
VITALITY ATTRACTS THE BEST + BRIGHTEST CAMPUS WITH CITY OF BOSTON OVERLAY
VITALITY ATTRACTS THE BEST+BRIGHTEST CAMPUS WITH CAMBRIDGE OVERLAY
VITALITY ATTRACTS THE BEST+BRIGHTEST CAMPUS WITH WASHINGTON, D.C. OVERLAY
This image shows the relative percentage of housing market of some of the University’s peers that is multifamily within the urban core. Gainesville has the smallest portion of that market type in its downtown area.
This image shows relative employed daytime population, within a .75 mile buffer around the downtown core, of some of the University’s peers.
MAIN STREET COMPARISONS
STATE STREET, MADISON

These three case studies illustrate vibrant campus-downtown connecting urban fabric and street life.
State Street connects the Capitol to the University of Wisconsin in a directly visual way. It is a pedestrianized street, with major traffic directed to adjacent roads. The building fabric facing State Street ranges in scale from two story buildings and higher set back with enough space for tree-lined sidewalks on both sides. State Street is received at the edge of campus with university and city social and cultural buildings such as a library, museum, club, book store, and historical society, where it ends at a major campus green space.
MAIN STREET COMPARISONS
FRANKLIN STREET, CHAPEL HILL
Franklin Street is a vehicular main street with developing commercial frontage. The “Main Street” feel is emphasized by two to three story buildings with a historic character created by fenestration scale and rhythm and material texture. Sidewalks have space for awnings and street trees and parallel parking is available on both sides of the street. The campus of the University of North Carolina at Chapel Hill connects directly to Franklin Street with a major green space in addition to built edges. UNC has also worked to catalyze the vitality of this neighborhood through its development of parcels along Franklin street on the northwest edge of campus.
MAIN STREET COMPARISONS
BROAD STREET, ATHENS
Athens has a pedestrian friendly “Main Street” type core at the intersection of College Avenue and Broad Street adjacent to the University of Georgia. Buildings two floors and taller line the city blocks with pleasing fenestration patterns and materials, often historic in quality. Buildings often have awnings, and sidewalks have a combination of street trees, parking (angled and parallel), and special paving materials. College Avenue ends at the edge of campus onto a major green space.
These images show the previous three examples, all with walkable city main streets abutting campus, at the same scale and relative to the University of Florida and Gainesville. Orange highlights campus location and purple highlights the general urban zone adjacent to campus.
## Analysis – Streetcar v. Premium Bus Service

<table>
<thead>
<tr>
<th></th>
<th>Streetcar</th>
<th>Premium Bus Service</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Traffic Impacts</strong></td>
<td>• Operation in mixed traffic would likely result in delays due to passenger loading/unloading</td>
<td>• Operation in mixed traffic would likely result in delays due to passenger loading/unloading</td>
</tr>
<tr>
<td></td>
<td>• There are concerns about power outages causing vehicles to stall, though vehicles with off-wire capabilities would avoid this.</td>
<td></td>
</tr>
<tr>
<td><strong>Lane Width Impacts</strong></td>
<td>• Three standard vehicle widths (7.5ft, 7.9ft, and 8.7ft)</td>
<td>• Typical bus width – 8.5ft</td>
</tr>
<tr>
<td></td>
<td>• Vehicle width can be accommodated within narrower lanes, or require less dedicated ROW for transitway</td>
<td>• Lanes should be at least 11ft wide, typically 12ft.</td>
</tr>
<tr>
<td><strong>Parking Impacts</strong></td>
<td>• Assuming vehicles operate in mixed traffic next to or in the median, on-street parking would not be impacted.</td>
<td>• Assuming vehicles operate in mixed traffic next to or in the median along 3rd Street, 2nd Avenue, Union Road, and Newell Drive, on-street parking would not be impacted.</td>
</tr>
<tr>
<td></td>
<td>• Improperly parked vehicles can impact streetcar operations.</td>
<td>• Buses can depart the lane and navigate around an improperly parked car.</td>
</tr>
<tr>
<td><strong>Biking Impacts</strong></td>
<td>• Assuming vehicles operate in mixed traffic next to or in the median along, bike lanes along outside of street would not be impacted.</td>
<td>• Assuming vehicles operate in mixed traffic next to or in the median, bike lanes along outside of street would not be impacted.</td>
</tr>
<tr>
<td></td>
<td>• Street markings, however, may need to be enhanced to ensure bicyclist safety in streetcar and bicyclist mixing areas.</td>
<td>• Street markings, however, may need to be enhanced to ensure bicyclist safety in bus and bicyclist mixing areas.</td>
</tr>
<tr>
<td><strong>Development Potential</strong></td>
<td>• The permanent nature of a fixed streetcar rail is attractive to retail and property investors.</td>
<td>• Studies of properties in Pittsburgh, PA and Bogotá, Columbia, located by BRT lines indicate that property values increased as proximity to a BRT access point increased.*</td>
</tr>
<tr>
<td></td>
<td>• Presence of rail transit has been shown to increase property values.*</td>
<td></td>
</tr>
<tr>
<td><strong>Capacity</strong></td>
<td>• Varies by vehicle size and model. Sample vehicles have capacities ranging from 115 to 274 (seated + standing).</td>
<td>• 40-ft vehicles have a max capacity of 50-60 passengers.</td>
</tr>
<tr>
<td></td>
<td>• 80-ft vehicles have a max capacity of 110-130 passengers.</td>
<td>• 80-ft vehicles have a max capacity of 110-130 passengers.</td>
</tr>
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<td></td>
<td>(National Bus Rapid Transit Institute, Vehicle Selection for BRT)</td>
<td></td>
</tr>
<tr>
<td><strong>Support Infrastructure</strong></td>
<td>• Overhead electric contact wire system for electrical propulsion of vehicles throughout the streetcar corridor</td>
<td>• Operations and maintenance infrastructure to support articulated buses, if used.</td>
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<tr>
<td></td>
<td>• Utility relocations to avoid crossing utility lines with wire system.</td>
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<td></td>
<td>• Guideway tracks (rails), imbedded in roadway throughout the streetcar corridor. Some streets would need to be re-graded to allow installation of tracks.</td>
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<td></td>
<td>• Traction power substations (TPSS) to convert local power utility into traction power for use by vehicles.</td>
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<tr>
<td></td>
<td>• Operations and maintenance service facility needs to be located near the rail corridor.</td>
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<tr>
<td></td>
<td>• Roadway geometry modifications to allow streetcar maneuvering, including curb modifications, roundabout cut backs, and street reconstructions.</td>
<td></td>
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<tr>
<td><strong>Cost</strong></td>
<td>• Capital cost</td>
<td>• Capital cost</td>
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<tr>
<td></td>
<td>o Vehicles: $3.5 - $4.5 Million</td>
<td>o Vehicles: $1 Million</td>
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<tr>
<td></td>
<td>o Infrastructure: $10 - $50 million per mile</td>
<td>o Infrastructure: $5 - $30 million per mile</td>
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<tr>
<td></td>
<td>o Operational costs (based on peer systems)</td>
<td>o Operational costs (based on peer systems)</td>
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<tr>
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<td>o $91 per revenue hour to $183 per revenue hour</td>
<td>o $85 per revenue hour to $120 per revenue hour</td>
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</table>

The team reviewed and discussed recent Gainesville area transportation studies on Bus Rapid Transit and Streetcar options as well as systems provided in other cities. Successful, fast, easy-to-use transit will be an important component of the New American City and may be used to activate and promote development along targeted avenues as well as connect people, neighborhoods, and the campus. In addition to more ‘traditional’ public transportation, Gainesville and the University should keep an eye on newly emerging technologies such as all-electric propulsion with in-line charging (no overhead lines) and the phasing in of some form of driverless technology.
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<tbody>
<tr>
<td>MAX Light Rail</td>
<td>Portland</td>
<td>1986</td>
<td>2015</td>
<td>632,309</td>
<td>4.739</td>
<td>38,494,500</td>
<td>122,900</td>
<td>2,048</td>
<td>60</td>
<td>97</td>
<td>5</td>
<td>15.3</td>
<td>$214 million ($465 million)</td>
<td>federal (83%)</td>
<td></td>
</tr>
<tr>
<td>Portland Streetcar</td>
<td>Portland</td>
<td>2001</td>
<td>2015</td>
<td>632,309</td>
<td>4.739</td>
<td>4,623,520</td>
<td>15,248</td>
<td>2,723</td>
<td>7.35</td>
<td>76</td>
<td>2</td>
<td>2.4</td>
<td>$57 million ($77 million)</td>
<td>parking bonds, property taxes</td>
<td></td>
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<tr>
<td>TRAX</td>
<td>Salt Lake City</td>
<td>1999</td>
<td>2013</td>
<td>130,128</td>
<td>1,734</td>
<td>19,704,300</td>
<td>67,300</td>
<td>1,502</td>
<td>44.8</td>
<td>37</td>
<td>2</td>
<td>14.9</td>
<td>$312.5 million ($445 million)</td>
<td>sales tax, federal funding</td>
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<tr>
<td>SUN LINK</td>
<td>Tucson</td>
<td>2014</td>
<td>n/a</td>
<td>531,641</td>
<td>2,345</td>
<td>n/a</td>
<td>4,000</td>
<td>1,026</td>
<td>3.9</td>
<td>22</td>
<td>1</td>
<td>3.9</td>
<td>$196 million ($197 million)</td>
<td>federal TIGER grant ($63)</td>
<td>$4.2 million Fares - $1.2 RTA - $2.0 Tuscon General Fund - $0.9 Advertising $0.1</td>
</tr>
<tr>
<td>Gainesville</td>
<td></td>
<td></td>
<td></td>
<td>130,128</td>
<td>2,122</td>
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<td></td>
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Please refer to the Bibliography for the multiple sources referenced for information shown on these facing pages.

**FIXED TRANSIT COMPARISONS**

Portland and Tucson are some of the case studies included here. Portland’s streetcar project was conceived of not strictly as a transportation improvement, but as one part of a downtown redevelopment strategy. To achieve success, route alignment was carefully planned with progressive parking policies, population centers and economic centers, and other growth factors in mind. Portland State University currently has a 5 year advertising contract with the system that provides free ridership for students, faculty, and staff in turn. Tucson’s nascent system has some similar challenges and opportunities to Gainesville. Their system connects the University of Arizona’s medical center and campus with downtown, linking the university to the city and coordinating with the city to catalyze downtown development efforts.
### Fixed Transit Comparisons: Routes

#### Portland
- **MAX Light Rail**:
  - **Year Opened**: 1986
  - **Year Last Expanded**: 2015
  - **Population (2015)**: 632,309
  - **Population/sq mile (2015)**: 4,739
  - **Annual Ridership (2015)**: 38,494,500
  - **Avg. daily weekday boardings (2015)**: 60
  - **Avg. daily boardings/mile (2015)**: 97
  - **System Length in miles**: 15.3
  - **Construction Cost (2016 dollars)**: $214 million
  - **Funding Sources**: Federal (83%)
  - **Operating Costs**: $4.2 million

#### Portland Streetcar
- **Portland Streetcar**:
  - **Year Opened**: 2001
  - **Population (2015)**: 632,309
  - **Population/sq mile (2015)**: 4,739
  - **Annual Ridership (2015)**: 15,248
  - **Avg. daily boardings**: 2,723
  - **Avg. daily boardings/mile**: 7.35
  - **System Length in miles**: 2.4
  - **Construction Cost (2016 dollars)**: $57 million
  - **Funding Sources**: Parking bonds, property taxes
  - **Operating Costs**: $0.1 million

#### Salt Lake City
- **TRAX**:
  - **Year Opened**: 1999
  - **Population (2015)**: 130,128
  - **Population/sq mile (2015)**: 1,734
  - **Annual Ridership (2013)**: 19,704,300
  - **Avg. daily boardings**: 67,300
  - **Avg. daily boardings/mile**: 1,502
  - **System Length in miles**: 44.8
  - **Construction Cost (2016 dollars)**: $312.5 million
  - **Funding Sources**: Sales tax, federal funding
  - **Operating Costs**: $0.9 million

#### Tucson
- **SUN LINK**:
  - **Year Opened**: 2014
  - **Population (2015)**: 531,641
  - **Population/sq mile (2015)**: 2,345
  - **Annual Ridership (2015)**: n/a
  - **Avg. daily boardings**: 4,000
  - **Avg. daily boardings/mile**: 1,026
  - **System Length in miles**: 3.9
  - **Construction Cost (2016 dollars)**: $196 million
  - **Funding Sources**: Federal TIGER grant ($63)
  - **Operating Costs**: $0 million

---

**Fares**
- MAX Light Rail: $1.2
- Portland Streetcar: $2.0
- Salt Lake City: $2.0
- Tucson: $0.9

**Advertising**
- Salt Lake City: $0.1

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**Strategic Development Plan**
- **University of Florida**
- **Phase 1 Summary Report**

---

**Fixed Transit Comparisons: Routes**
At the conclusion of Phase 1 we developed a menu of directions by which the University could plot its course supported by a short list of “big ideas” that will serve as potential catalysts for the University to move ahead in transformational ways.

The core premise of this in-process menu is the notion that density and a sense of center are important to both the University and the city and necessary to unite and sustain the two.

The team identified targeted growth areas for both city and campus, focusing on core zones with an eye on affecting future growth by strategic development at the heart of Gainesville and UF. Next, we identified five Gainesville areas and began to explore and develop their character, activity, growth potential, land uses, and connectivity.
This “Thought Map” explores the possible applications and outcomes when we apply the consolidation/densification thesis along each of the five vectors for preeminence. Issues and strengths identified from stakeholder interviews and data gathering begin to organize themselves into larger categories where policy and development paths can be related to each other as well as the germinating vision’s larger ideas, such as improvement, connection, and sustainability.

The team next looked at specific large-scale moves that would encompass and facilitate most, if not all, of the items in the map above as documented in the following pages that make up the concluding efforts of Phase 1.
The left diagram illustrates three distinct places that today function semi-autonomously: 1. Campus, 2. The Innovation District, and 3. Downtown. The right diagram posits that, if over the next fifty years, the University and the city both focus their collaborative efforts to redevelop and revitalize the area between Gale Lemerand Drive on campus and downtown, the energy, innovation, and economic improvement produced by that focus can be the impetus to revitalize all of greater Gainesville.

The team then developed this notion with the “red box” diagram indicating a potential growth framework in which the closeness of people, resources, agencies, and the built environment might be directed for the greatest benefit.
Determining ‘existing’ floor area ratios (FAR) taken from current built areas in two representative sample zones, historic campus to the north and the medical campus to the south, and applying them to potential developable campus sites highlighted here in transparent orange gives an idea of potential development area available within the “red box” framework. This method will be applied in the next phase to the other red box areas off campus to determine how much similar possible growth, the potential to improve the proximity of people and other resources, is available in the zone between downtown and campus.
Each of the five precincts within the potential growth framework area of Gainesville has a distinct identity and character, which should be preserved and enhanced as growth occurs.

Possible paths to improvement in start-ups, retail vacancy, housing, and hospitality over this zone between campus and downtown that emerged from the earlier market analysis include considering expansion of the program of Innovation Square to include existing buildings downtown in order to activate empty storefronts, as well as partnering with the city to encourage filling these prominent vacancies with new and innovative businesses; studying how UF might catalyze a greater presence of the arts downtown; studying an increase in on-campus residency while evaluating how Innovation Square parcels might include currently unavailable residential market options; and assessing how the growing desire of the University for nearby conference space might add to vitality in the area.
The following 5 sets of pages show existing features on the left page opposite opportunities for improvement on the right, one set for each of the identified 5 precincts. The improvements listed are in service of the visioning on the earlier “thought map”. Greater investment, connections, and neighborhood quality will promote Gainesville as a more vibrant, sustainable, and desirable place to live and work. In phase 2 the ideas initiated in these images will be explored further and with ongoing input from campus and city stakeholders.
UNIVERSITY AVENUE

character

- three zones - midtown; middle; downtown
- high vacancy in retail
- poor public realm
- discontinuity in streetscape experience
University Avenue is the primary connector between campus and downtown, and beyond. However this area is plagued by high vacancy rates and building fronts that are spaced apart or distant from the sidewalk, leading to a discontinuous commercial experience. Strategies to fill and improve existing structures as well as infill gaps, make sidewalks more pedestrian friendly, and understand the possibility of public transit as a connector and development catalyst are shown here in order to create the type of walkable urban core that attracts students, faculty, and local residents of all ages and backgrounds.
character

- predominantly institutional & student housing
- permeable street wall
West 13th Street borders campus along one side of the historic UF core and is a major connector to Gainesville from the south and west. Enhancing the edges of this throughway to promote walkability, campus identity, and connection to the neighbors to the east will create a sense of place and arrival and build upon the street’s institutional-residential quality.
character
- predominantly restaurants & governmental
- relatively high vacancy, especially 2nd floor
- multiple opportunities for infill development
- improved public realm
...AS A SOCIAL AND ARTS DISTRICT

The small, but active, set of downtown blocks around the Hippodrome provide a great foundation on which to expand in order to create a sense of arrival at the city center and of ‘Gainesvilleness’. This area also features well attended arts festivals. In response to discussions about activities residents would like to see available and the desire for a UF arts presence downtown, East 1st Street presents the opportunity to establish an arts district, connecting the new Depot Park to University Avenue.
character

- large development parcels at innovation square with opportunities to create meaningful connecting public realm and purposeful green spaces
- minimal street level activation
- diversity of scale in vertical construction
This precinct extends from just south of commercial University Avenue to the mostly residential neighborhoods south of 4th Avenue. It has several currently underutilized lots, some of which are part of the planned Innovation Square area, and little commercial space or housing market variety. 4th Avenue and 2nd Avenue provide opportunities to foster east/west pedestrian, bike, vehicular, residential, and research connections between campus and downtown. Green spaces can also be expanded here to create further connections as well as provide the type of outdoor amenities that residents identify with Gainesville.
DEPOT AVENUE

character
-exclusively residential
-opportunity for infill and improved housing stock
...AS A RESIDENTIAL DISTRICT

The area north of Depot Avenue has strong residential neighborhoods, but lacks housing choice. This market should diversify by developing underutilized lots while preserving existing cohesive neighborhoods. Planning should include strategies on where to provide student residences, in and out of this precinct, in order to promote other types of housing market supply.
THE HEART OF CAMPUS AND CITY

These five zones with greater vitality connecting Main Street to West 13th street and joined with a more tightly knit eastern campus will function all together as the heart of Gainesville and the University. Students and local residents will have the benefit of enjoying a wide range of collaboration opportunities, activities, resources and services within walkable distances. This vision of smartly planned future growth, development, and community involvement centered on campus and in the city will promote scholarship, research, social and economic development, sustainability, well-being, and the University as an institution that others will want to emulate.
This visioning process will be further expanded, reviewed, and refined in Phase 2, ‘Strategies and Objectives’, as the team works toward a set of strategic development paths and an actionable set of ‘to-dos’, as well as beginning thoughts on tools to communicate those initiatives.
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