

Overview of Regional Growth

Orange and Osceola Counties and the Orlando Region

For the District Board of Trustees
Facilities Strategy Workshop
January 27, 2014

Overview of Regional Growth

Orange and Osceola Counties, and the Orlando Region
November, 2013

EXECUTIVE SUMMARY

The purpose of this overview is to examine the Orlando Region to analyze growth trends and identify regional growth centers in order to anticipate future facility needs for Valencia College.

The 2001 Regional Overview

The 2013 Regional Overview is an update to the *Long-Range District Facilities Strategic Plan* prepared by Glatting Jackson in October 2001. The conclusion in the 2001 report was that Southwest Orange County and Southeast Orlando were the future growth areas of the Orlando Region:

- Southeast Orlando – quicker and ultimately smaller,
- Southwest Orange County – slower but ultimately larger.

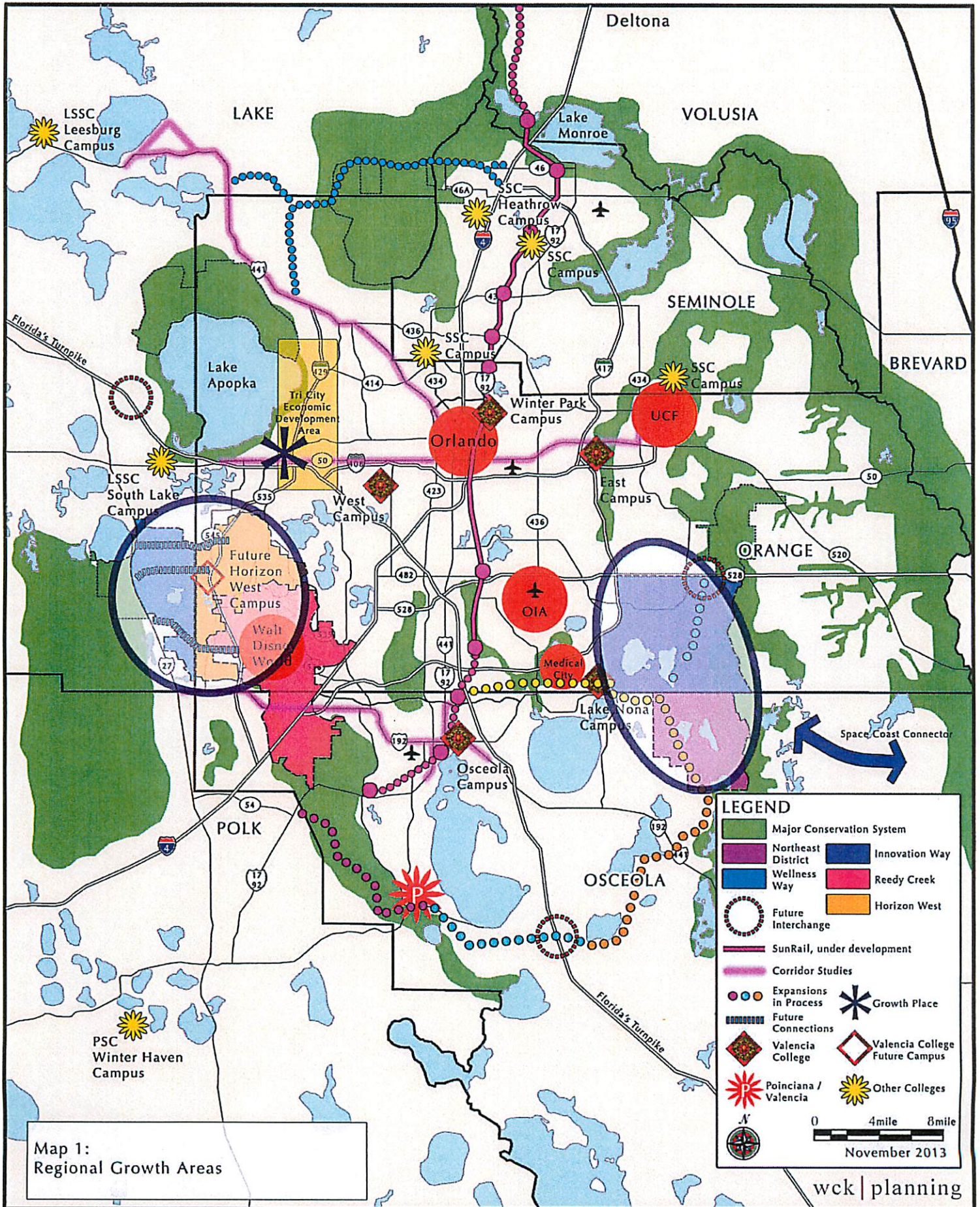
The 2013 Regional Overview Update, Summary

- **Regional Growth:** Growth is now returning to the Orlando Region with more focus on the established urban area. Additionally, job growth continues to happen in Southeast Orlando along with residential growth while west and southwest Orange County continues to experience residential growth along SR 459 from Winter Garden southward to Fowler Groves and the New Independence Parkway/SR 429 interchange.
- **Population Growth continues** in Orange and Osceola Counties grew from 1,068,837 in 2000 to 1,489,650 in 2012, about 3% annually. The five-county population [Orange, Osceola, Lake, Polk and Seminole Counties] grew from 2,128,485 people in 2000 to 2,839,832 people in 2012, also about 3% per annum.
- **Regional Transportation Systems:** Major improvements to the regional transportation system are more prominent than ever with SunRail, Interstate 4 improvements, Wekiva Parkway and the Osceola County expressways; plus the announced expansion plans for Orlando International Airport, Port Canaveral and All Aboard Florida's proposed train to Miami.
- **Regional Growth Centers:** The two areas of the Orlando Region identified as growth areas in 2001 appear to still be the areas of future growth and development: Southwest Orange County and Southeast Orlando.
- **Southwest Orange County, now with South Lake County,** is still a growth area:
 - **Horizon West in Southwest Orange County** has growth-oriented entitlements and a regional road system that is emerging, but water and sewer utilities are still in the early stages of development. Developers are starting to acquire land from the initial owners who were land sellers, not developers.
 - **Lake County recently adopted the Wellness Way** Specific Area Plan which provides land development entitlements and identifies regional roads that will connect US 27 to SR 429 in Orange County. The City of Clermont has water and sewer capacity to support initial growth in the northern portion of this area.

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- **The SR 50 Corridor in Winter Garden and Ocoee** along the northern edge of this area is also promising. The City governments are willing hosts to growth; land is suitable for new development, land development entitlements exist and infrastructure is available.
- **Southeast Orlando, now with Northeast Osceola County**, has job-creating large employers, new regional roads, large land parcels in the hands of developers and development-oriented local governments.
 - **Innovation Way in Orange County** has large land holdings with entitlements. Annexation into the City of Orlando is beginning to happen which brings more development-oriented processes. Regional road extensions are planned, utilities are generally available.
 - **The Northeast Osceola County Sector Plan** was recently adopted by Osceola County. Future land use designations for land development are in place. Plans are emerging but roadways and utilities are yet to be provided.
 - **Growth may happen more expansively than anticipated in 2001; and it will be job-based.** It was anticipated in 2001 that the southeast area would grow more quickly but ultimately to a lesser extent than Southwest Orange County. Southeast Orlando now appears to be the primary growth area in the Region with Medical City, Orlando International Airport, Innovation Way and Osceola County's growth interests in their Northeast District. Land is available for development and the ambitious plans for the new expressways are important additions to the regional road system.
- **The Interstate 4 Urban Core from Lake Mary to Poinciana** will continue to grow with infill development and redevelopment. High schools and hospitals are located in the I-4 Corridor and tend to be good indicators of urban growth. SunRail and the Ultimate Interstate 4 improvements will support this growth as will the many job centers along the corridor including the two downtown hospitals, the Orlando Central Business District, the International Drive Tourist Area and the traditional Winter Park to Lake Mary areas.
 - **South Central Orange and Osceola Counties** are well served by the West Campus and the Osceola Campus. The area includes the tourist and defense job centers along International Drive and the residential areas of Meadow Woods, BVL and Hunters Creek.
 - **Maitland and Winter Park** are served by the Winter Park campus although many of these resident students attend the East and West campuses.
 - **Apopka** students predominantly attend the West Campus.
 - **Downtown Orlando** students attend East and West campus and probably benefit from access using SR 408.
 - **"Focus on Developed Area"** was the advice from the real estate experts assembled in December 2012 to address the question of college growth. Their comments reflected a feeling that growth in the areas "outside the beltway" are still speculative and far in the future.



Map 1:
Regional Growth Areas

LEGEND

| | | | |
|--|----------------------------|--|--------------------------------|
| | Major Conservation System | | Innovation Way |
| | Northeast District | | Reedy Creek |
| | Wellness Way | | Horizon West |
| | Future Interchange | | Growth Place |
| | SunRail, under development | | Poinciana / Valencia |
| | Corridor Studies | | Other Colleges |
| | Expansions in Process | | |
| | Future Connections | | Valencia College Future Campus |
| | Valencia College | | |

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South/Central Osceola County
Infill Locations
Regional Transportation System Improvements

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OVERVIEW of REGIONAL GROWTH Orange and Osceola Counties, and the Orlando Region

INTRODUCTION.

The purpose of this Regional Overview is to report current growth trends, to anticipate the continued growth of established regional centers and to identify potential new ones. Local and regional comprehensive planners and transportation planners have been interviewed for this Overview.

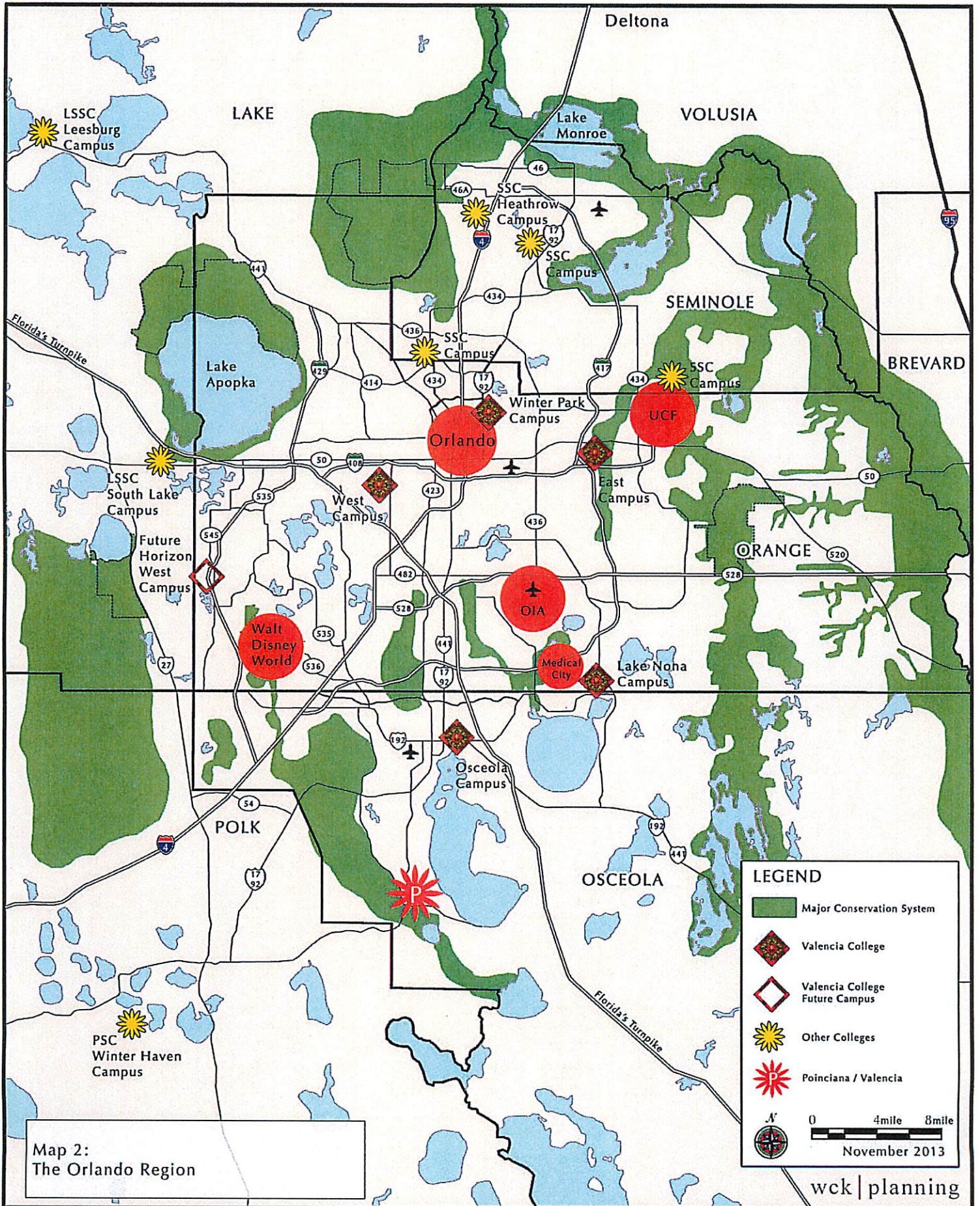
Regional Growth Centers have been identified along with the location of existing Valencia College campuses. Growth centers are being planned by local governments through specific area plans. Transportation planners are designing the transportation system to support these areas. This Overview presents a clear picture of future growth trends in the Orlando Region.

From a population perspective, the two-county Valencia College service area, Orange and Osceola Counties, has grown dramatically, as have the adjacent counties:

- The population in Valencia's two county district has grown over 3.3% annually for 32 years from 1980 to 2012. The total population has grown from ½ million to nearly 1 ½ million since 1980. Valencia's student population [FTE] has grown at nearly 5% annually over the same period.
- Since 2000, the Valencia territory population has grown by over 420,000 people; or 35,000 people per year.
- The six county Orlando Region's population has grown by 2 million people since 1980.

| POPULATION | | | | | |
|---|-------------|-------------|-------------|-------------|-------------|
| Orange and Osceola Counties, and the Orlando Region | | | | | |
| 1980 – 2012 | | | | | |
| <u>County</u> | <u>1980</u> | <u>1990</u> | <u>2000</u> | <u>2010</u> | <u>2012</u> |
| Orange | 470,865 | 677,491 | 896,344 | 1,145,956 | 1,202,234 |
| Osceola | 49,287 | 107,728 | 172,494 | 268,685 | 287,416 |
| Valencia District | 520,152 | 785,219 | 1,068,837 | 1,414,641 | 1,489,650 |
| Lake | 104,870 | 152,104 | 210,528 | 297,052 | 303,186 |
| Polk | 321,652 | 405,382 | 483,924 | 602,095 | 616,158 |
| Seminole | 179,752 | 287,529 | 365,196 | 422,718 | 430,838 |
| The Orlando Region | 1,399,385 | 2,029,212 | 2,604,715 | 3,279,878 | 3,387,139 |
| Valencia Students, FTE | 6,556 | 11,217 | 18,014 | 30,256 | 31,060 |

Source: U.S. Bureau of the Census
Valencia College



Map 2:
The Orlando Region

LEGEND

- Major Conservation System
- Valencia College
- Valencia College Future Campus
- Other Colleges
- Poinciana / Valencia

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REGIONAL GROWTH TRENDS.

The directions and magnitude of urban development in Orange and Osceola Counties have been established over the past decade. Orange, Osceola and Lake Counties have prepared growth plans for several small areas [see Map 3, Small Area Planning Study Boundaries]. Based on the geophysical setting of the Orlando Region and its transportation system, the growth areas that can accommodate additional growth are:

- Southwest Orange County/South Lake County,
- West SR 50 from Orlando to Clermont, including the Winter Garden, Ocoee and Apopka Economic District,
- North US 441 Corridor from Apopka to Leesburg,
- Southeast Orange County/Northeast Osceola County, and
- South/Central Osceola County.

Only two of these areas have the potential for large scale growth: the Southwest Orange County Area with a special sub-area in Winter Garden/Ocoee; and the Southeast Orlando Area.

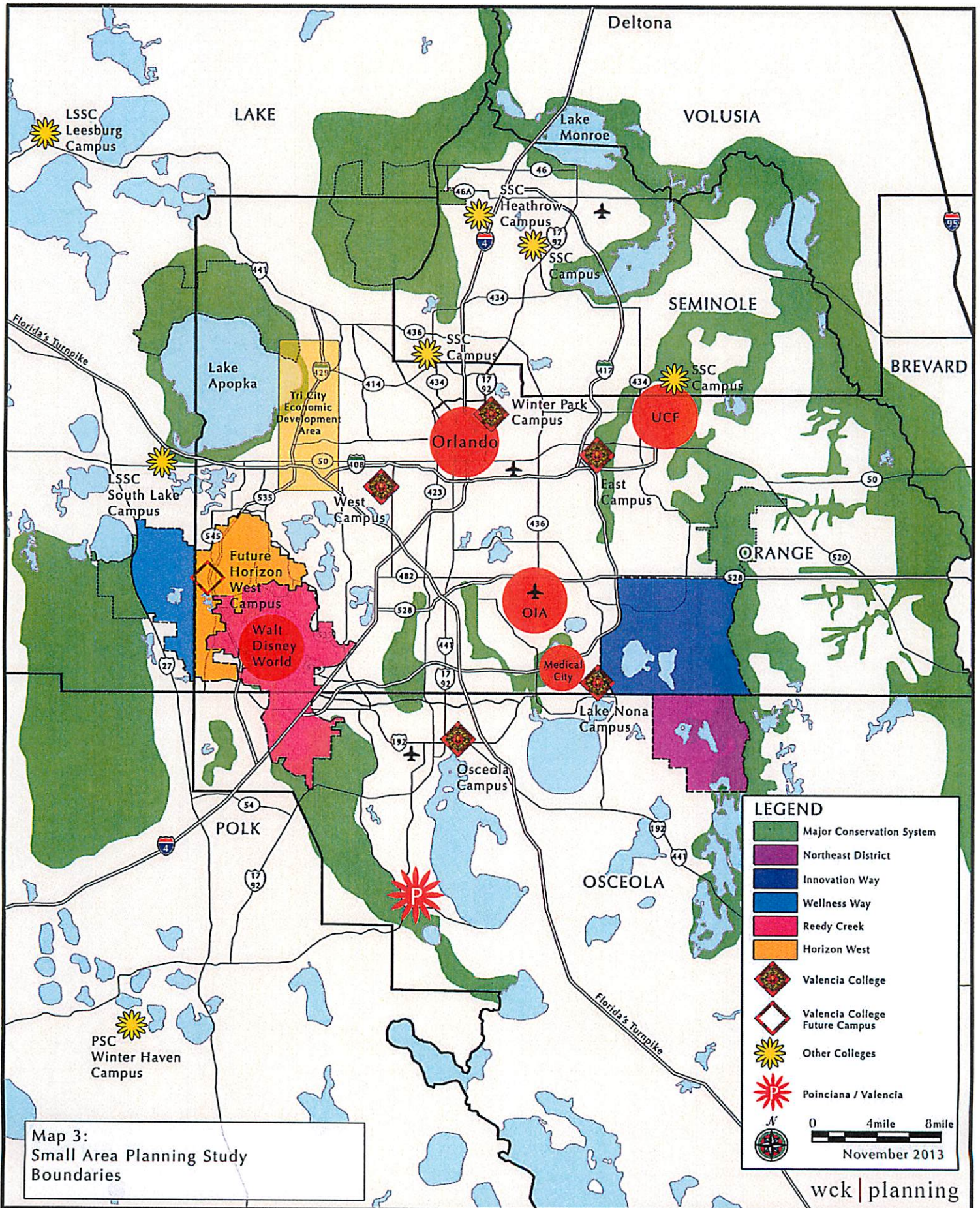
Additionally, there are still major infill locations within the Orlando Region. The areas within the Region that are large and still experiencing some growth are: the International Drive employment district; the Winter Park/Maitland area; and the Hunters Creek area of south Orange County.

Other indicators of regional growth centers are the locations of high schools [Map 4], regional shopping malls and hospitals [Map 5]. Each of these facilities draws from a broad population and each is generally found in a location convenient to a regional population.

SOUTHWEST ORANGE COUNTY/SOUTH LAKE COUNTY.

Trends: There are two significant planning efforts being enacted and developed in this area: Horizon West in Southwest Orange County and the South Lake Sector Plan. Today, this area of the Orlando Region is sparsely populated with the exception of the Fowler Grove and Stoneybrook West developments in south Winter Garden. Together they include about 40,000 acres of land and have a projected long-term build-out population of some 150,000 people. This is one of the two major growth areas in the Region; the other being Southeast Orange County/Northeast Osceola County.

- **Horizon West Specific Area Plan** is the result of an active Orange County planning program that was initiated in the early 1990s. Horizon West is a census designated place and reported a population of 14,000 people in 2010. The growth of the Fowler Groves interchange area along with the Stoneybrook West residential community has created a strong presence. Florida Hospital has committed to a “free-standing” emergency room facility at Fowler Groves.



Deltona

LAKE

VOLUSIA

SEMINOLE

BREVARD

ORANGE

POLK

OSCEOLA

LSSC
Leesburg
Campus

LSSC
South Lake
Campus

PSC
Winter Haven
Campus

Future
Horizon
West
Campus

Walt
Disney
World

Orlando

OIA

Medical
City

Osceola
Campus

Lake Nona
Campus

Winter Park
Campus

UCF

SSC
Heathrow
Campus

SSC
Campus

SSC
Campus

SSC
Campus

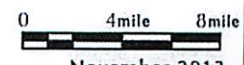
Tri City
Economic
Development
Area

West
Campus?

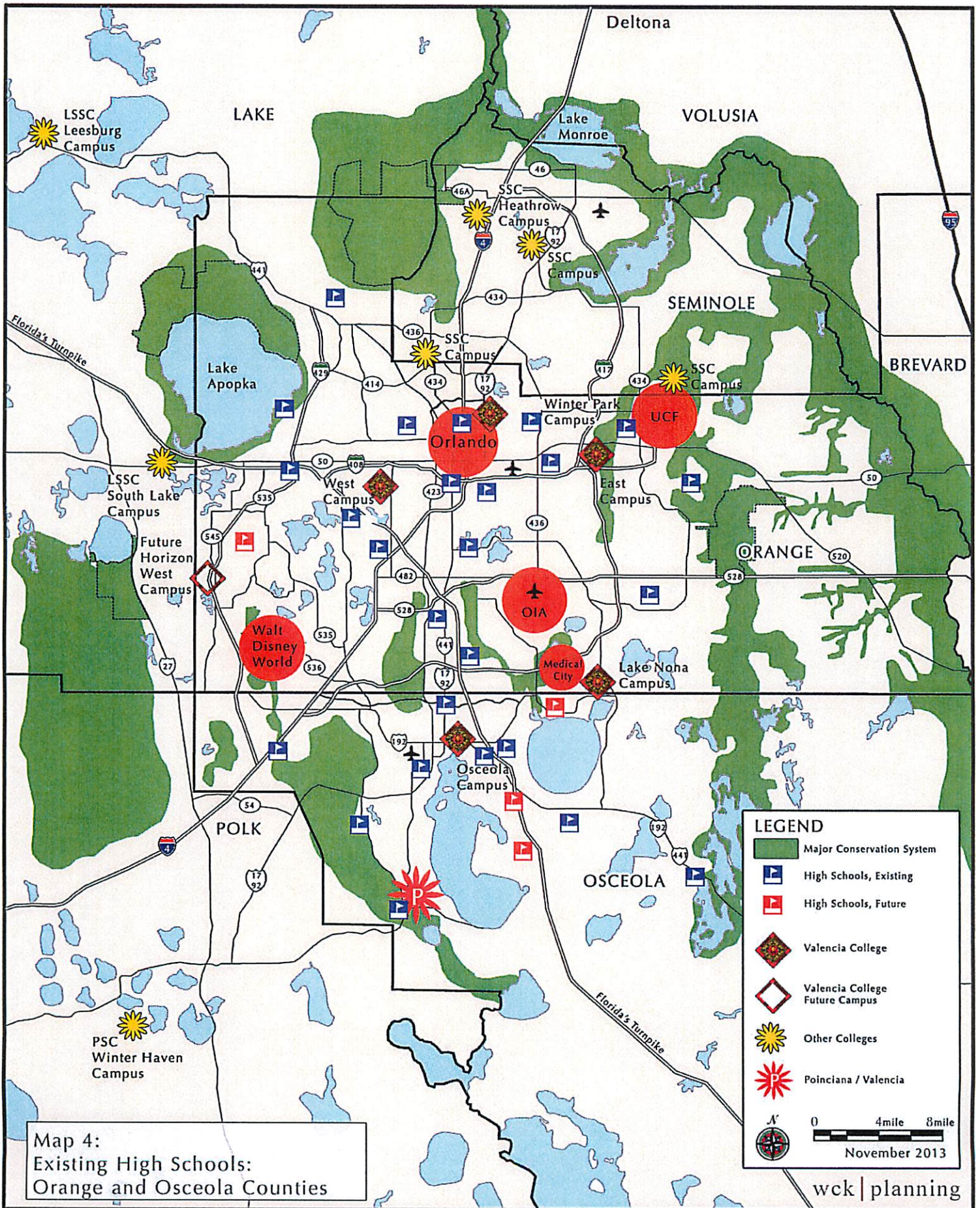
East
Campus

Florida's Turnpike

Florida's Turnpike



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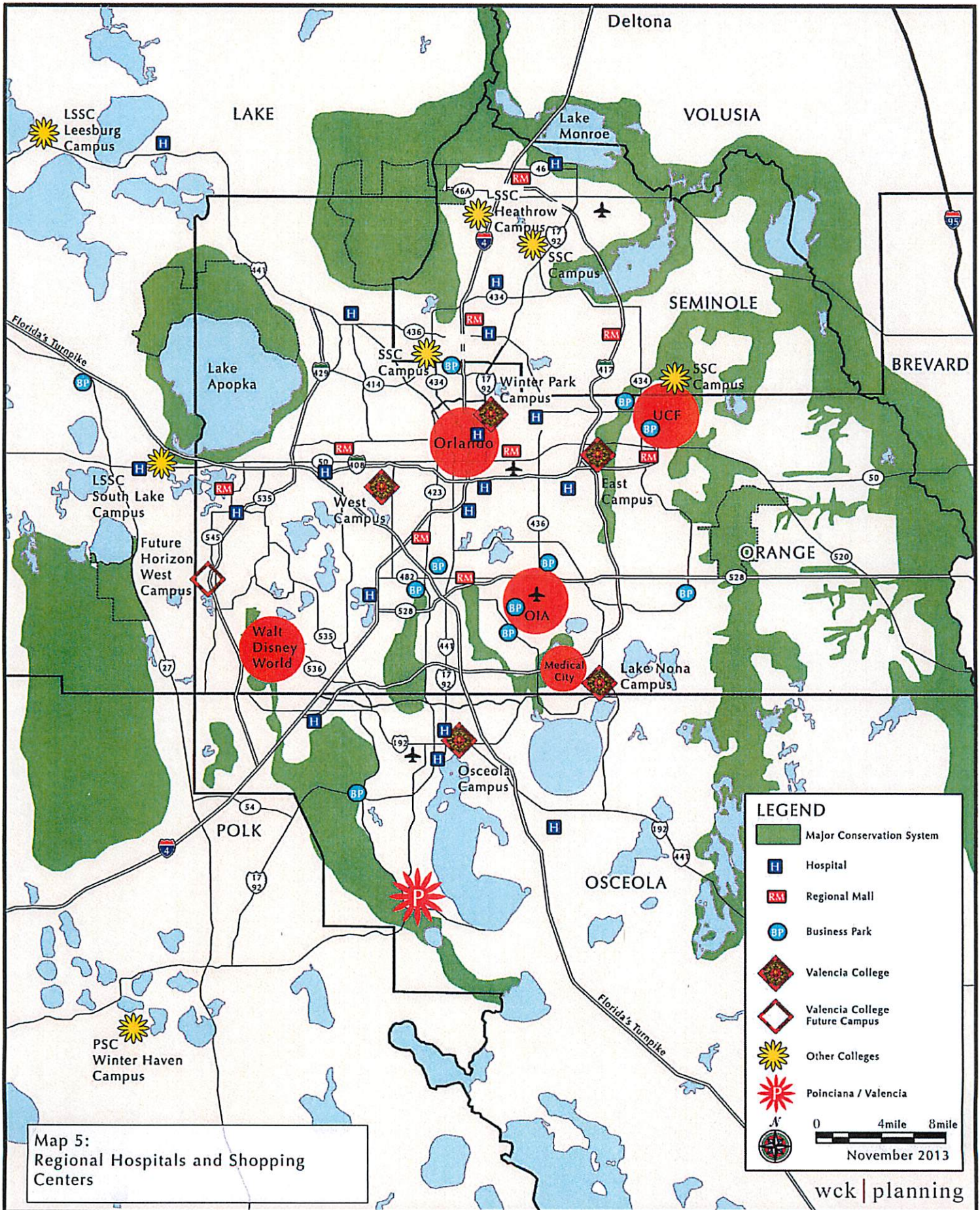


LEGEND

- Major Conservation System
- High Schools, Existing
- High Schools, Future
- Valencia College
- Valencia College Future Campus
- Other Colleges
- Poinciana / Valencia

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Map 4:
Existing High Schools:
Orange and Osceola Counties



LEGEND

- Major Conservation System
- Hospital
- Regional Mall
- Business Park
- Valencia College
- Valencia College Future Campus
- Other Colleges
- Poinciana / Valencia

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Map 5:
Regional Hospitals and Shopping
Centers

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- Horizon West includes about 21,000 acres with a projected build-out population of around 100,000 people. Both Horizon West and Wellness Way have extensive acres of land devoted to wastewater effluent disposal areas known as Rapid Infiltration Basins [RIBS]. Other than consuming land in inconvenient locations, there are no detrimental features of the RIBS.
- The New Independence Parkway interchange to the south in the Town Center Specific Planning Area is now beginning to produce housing. Orlando Health [Health Central] has an 80 acre site in the New Independence Parkway area.
- **Wellness Way, also referred to as the South Lake Sector Plan**, is a sector planning program initiated by Lake County government last year. Future land uses include residential, commercial and employment center nodes and natural lands. The final proposed report was recently posted on their website; adoption is anticipated mid-2014. The area covered is about 16,200 acres with a build-out population of some 50,000 people.
- **The transportation system** in the Horizon West growth area consists of four east-west roads that will connect US 27 in South Lake County with SR 429 in Southwest Orange County. In addition, SR 545, the north-south roadway, is planned for expansion in the 2030 Transportation Plan. The four cross-connectors are planned for:
 - New Independence Parkway; this is the first anticipated connector and an FDOT grant [to be decided by December 2013] is being sought to develop this roadway in the next few years,
 - Schofield Road with the new SR 429 Interchange funded in the MPO's plan for 2016; the site of Valencia College's 180 acre property,
 - Seidel Road, and
 - Western Way and the Disney western entrance.
- **The major employment center** in the area of the Region is Disney World with about 66,000 employees. The regional transportation system enables employees to commute to job centers in Downtown Orlando and south Orlando.
- **High schools** in the area include the new high school location in west Orange County that is currently the subject of an intense community debate. Both alternative sites being considered are south of Stoneybrook West between Windermere and the Hamlin PD.

Conclusions: This area of Southwest Orange County and South Lake County will continue to grow, moderately.

- Growth will be constrained by:
 - Lack of infrastructure and the expense of its provision,
 - Continued control of much of the land by original owners and speculators with a growing trend towards land acquisition by end users - developers and builders, and
 - The distance to jobs.

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- The Orange County land is closer to the metro area and Disney World; however, the Lake County lands in Wellness Way may be less expensive to buy and easier to develop. Clermont has a large utility system available to serve the South Lake Area; while funding initial infrastructure has always been an inhibiting factor in Horizon West.
- Competitive areas of the Orlando Region play into the picture for Southwest Orange County. Southeast Orange County and the Infill Sectors are the major areas currently attracting jobs and infrastructure investments.

WEST SR 50: ORLANDO TO CLERMONT.

Trends: The westerly SR 50 corridor, including the SR 408/Turnpike expressways, has provided great regional access for the cities of Winter Garden and Ocoee. Even Clermont is more accessible to the metro jobs and transportation systems. The collective population of the two cities has grown from some 23,000 people in 1990 to over 75,000 in 2012. Redevelopment and new residential districts have contributed to this growth.

- **The Tri-City Economic Development** consortium consists of the cities of Winter Garden, Ocoee and Apopka. Results of their first economic development plan will begin to appear in early 2014. It is expected the recommendations will include a focus on selected industries that will need education and other services to support recruiting efforts.
- **Clermont** continues to base-build and prepare for being the dominant city in the vicinity based on its utility system and the regional roads system that converges at SR 50 and US 27. The intersection of Hancock Road and SR 50 is the location of the Lake Sumter State College campus, South Lake Regional Medical Center and the National Triathlon Training Center. The City is in a strategically strong location with development to the north at the new Turnpike Interchange in central Lake County, development to the west with Groveland and Mascotte and development to the south with Wellness Way.
- **High schools** in the area are: Ocoee High School north of the City of Ocoee and West Orange High School to the south. Currently, OCPS is trying to locate a new high school to the south of SR 50 between Windermere and the Hamlin PD.

Conclusions:

- The Winter Garden/Ocoee area has great access to the regional transportation system, a significant hospital, regional shopping, available land and modest residential growth. Along the major roads, Ocoee is about 9 miles from Valencia's West Campus; Winter Garden is just over 7 miles from Lake-Sumter College. The two-city population is 75,000 people.
- The Tri-City population, including the surrounding County area, is estimated to be 180,000 residents and 60,000 jobs.

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NORTH US 441 CORRIDOR: APOPKA TO LEESBURG.

Trends:

- An FDOT corridor study is currently underway to evaluate the US 441 corridor from Apopka to Mount Dora/Tavares/Eustis, along with the Central Florida Railroad line. This rail line is being shown on MPO transit maps alongside the SunRail commuter train system.
- Inhibiting factors along US 441 are the existing land use patterns which reflect rural settlements north of Apopka, the Eco-Tourism land designation of the north shore of Lake Apopka and the geographic extent of the Wekiva Springs Reserve. Large land holdings available for development do not exist along this corridor.
- To the east of US 441 is the new Wekiva Parkway. The one development opportunity at the Wekiva Parkway interchange in the northern part of the City of Apopka is the recently approved Kelly Park Crossing DRI. In addition, the City of Apopka has annexed extensive areas of land north of the City along Rock Springs Road to the Lake County line.
- Lake County has two regional roads in this area: SR 46 and Wolf Branch Road. Both roads have lands designated for low density residential development. High schools: No new high schools are planned by OCPS.

Conclusions:

- The land area available for large scale development is limited to the DRI on the Wekiva Parkway.
- The US 441 corridor, including the rail line, would seem to serve as the transportation facilities to enable residents of Mount Dora, Tavares and Eustis to travel to the Orlando area.
- Downtown Apopka is about 5 miles west of the Seminole State College Altamonte Campus.

SOUTHEAST ORLANDO/NORTHEAST OSCEOLA COUNTY.

Trends: This area of the Orlando Region is becoming the primary area for regional growth. The area hosts the **University of Central Florida** in its northern extreme. Although included in the Innovation Way Corridor, it is some distance from Internal Corporate Park [ICP] on the Beachline. ICP is functionally the northern terminus for Innovation Way. That said, UCF has a tremendous influence on this area's growth.

- **Innovation Way** is the major planning program of Orange County to anticipate and accommodate growth. The planning area includes about 32,000 acres of land west of the Econ River. Developments of Regional Impact in this area are ICP, Innovation Way East, Eagle Creek and Innovation Place. Annexations by the City of Orlando may accelerate growth in this area.
- **The Northeast Area Plan in Osceola County** is a major planning initiative of Osceola County to accommodate growth anticipated in the area as a result of Medical City and its related employment growth. The Northeast Area Plan covers 6,500 acres and can accommodate 40,000 jobs and 30,000 dwelling units by 2040. Phase One will include the western third of the land area parallel to Narcoossee Road. All land in the Northeast Area is owned by affiliates of the Mormon Ranch.

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- **Lake Nona** is a 9,000 acre DRI between Innovation Way and Orlando International Airport. It hosts a significant residential community and **Medical City** with:
 - Sanford-Burnham Institute
 - Orlando VA Medical Center
 - Nemours Children’s Hospital
 - University of Central Florida’s College of Medicine
 - Burnett School of Biomedical Sciences
 - University of Florida Research & Academic Center
 - M.D. Anderson Cancer Center
- **Orlando International Airport** is the 13th largest airport in the United States. The Greater Orlando Aviation Authority [GOAA] employs about 16,000 people. GOAA recently announced a \$1.1 billion expansion at OIA. In addition, the airport is the planned terminus for the SunRail commuter train and All Aboard Florida, a rail line to connect Orlando and Miami through Brevard County. Siemens Wind Turbine Training Center and JetBlue’s Training Center are located at OIA.
- **East Osceola/Mormon Ranch “conceptual” sector plan** is a planning effort anticipated to cover the 130,000 acres the Mormons own in Osceola County. The process is just being formulated, anticipating:
 - A 50 – 100 year time horizon; sequentially, development will come after 2040 when the Northeast Area Plan is expected to be fulfilled,
 - The purpose of the conceptual plan is to get the state agencies to put the long term needs of the Ranch in their thinking for transportation and water resource planning:
 - € They have two more water reservoirs planned, and
 - € They anticipate the “Wekiva Parkway-like” committee to connect the SR 417 to the Pineda Causeway in Brevard County at I-95 [the Spaceport Connector].
 - Much of the land will be dedicated to agriculture and natural lands.
- **Regional Transportation** assets in this area will continue to grow and expand, including:
 - Poinciana Parkway,
 - The Southport Connector Expressway:
 - € Phase 1 from Poinciana to Interstate 4 has a selected Right-of-Way and will commence in the next couple of years, and
 - € Other phases of the Expressway from Poinciana eastward will be developed later and connected to the re-aligned Innovation Way Corridor that will become a more north-south road that connects northward to the Beachline at/near ICP.
 - The Northeast Connector Expressway,
 - The Osceola Parkway Extension intended to intersect with the Northeast Connector,
 - All Aboard Florida, and
 - SunRail Extension to OIA.

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- **High Schools:** High schools in the area include the new Lake Nona High School and the planned Osceola County high school on Boggy Creek Road west of Narcoossee Road.

Conclusions: The Southeast Orange County/Northeast Osceola County area is the primary growth area of the Orlando Region.

- Employment exists in the area and more employment growth is anticipated.
- Infrastructure exists.
- The regional transportation system is excellent and expanding.
- Residential development is extensive with momentum for additional residential growth.
- Land is available for large scale development, mostly in the ownership of end-users or sellers to end-users.
- Local government plans have been approved anticipating new development.

SOUTH/CENTRAL OSCEOLA COUNTY.

Trends: Three other active planning areas in the southern portion of the Osceola County urban area are:

- Poinciana,
- The East Shore of West Lake Toho, and
- The South Shore of West Lake Toho.

Conclusions:

- **Poinciana** is a planned community that has been developing since the early 1970s. It currently has a population of some 60,000 residents with a small hospital, two high schools and many other community amenities. The about-to-be constructed expressway connector to Interstate 4 will greatly increase this community's access to the regional transportation system.
- **East [Shore of West] Lake Toho, ELT 1: Development Program:** The DR Horton development known as Toho Preserve is the first to become active. The four other DRIs previously approved on the east shore of the west lake are: Tohoqua, Edgewater, Bella Tara and Green Island. Green Island is immediately east of SLT 1, described next.
- **South Lake Toho, SLT 1: Development Program:** The area south of West Lake Toho is the subject of a specific area plan completed by Osceola County. The plan anticipates a variety of housing types with support retail and services. The plan is dependent on the Southport Connector Expressway which enters the MPO funding cycle in 2015/16.
- **High Schools:** The Osceola Public School System has long range plans for two new high schools in the south Osceola County and St. Cloud areas, but none are anticipated for construction in the next five years.

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INFILL LOCATIONS.

Trends: The growth areas discussed above are the areas of the Orlando Region “on the edge” of the urban area, available for substantial new growth. Infill sectors are those places within the urban area that are substantial population or employment centers not within five [5] miles of a Valencia Campus. A look at the following map with five-mile radius circles centered on each existing Valencia Campus shows a few areas without “coverage”.

- **Downtown Orlando** was mentioned at the December 2012 workshop of real estate experts as a potential location for a campus.
- **I-Drive, South** is a large employment sector with over 30,000 employees. North I-Drive employees [Universal has about 16,500 jobs] have good access to Valencia’s west campus. South I-Drive employees have a longer trip, in excess of five miles with considerable traffic.
- **The Winter Park/Maitland** area is served by Valencia’s Winter Park Campus. Other options are Seminole State’s campuses in Altamonte Springs and Lake Mary, both campuses are removed from the immediate vicinity. This area will remain the center for a large population with gradual infill and redevelopment.
- **Conway/South Orlando [SR 436/Hoffner]** is a large area fully developed with no immediate access to a Valencia campus. A location near the intersection of SR 436 and Hoffner Avenue would be central to this area and perhaps a reliever to the East Campus.
- **Kissimmee and the Osceola Campus** may benefit from the US 192 Transit Study; the City seems ready to help improve access in any way they can.

Conclusions: Infill locations are less about growth and more about serving by-passed populations. Infill sites can also serve as relievers to existing crowded campuses. While locations are harder to find, consideration of new and expanded campus opportunities within the urban area may be productive.

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TRANSPORTATION SYSTEMS, ALL MODES, EXISTING AND PLANNED.

Trends: The major transportation projects in the implementation or final planning stages are presented on Map 6, Regional Transportation Improvements. The specific improvements are:

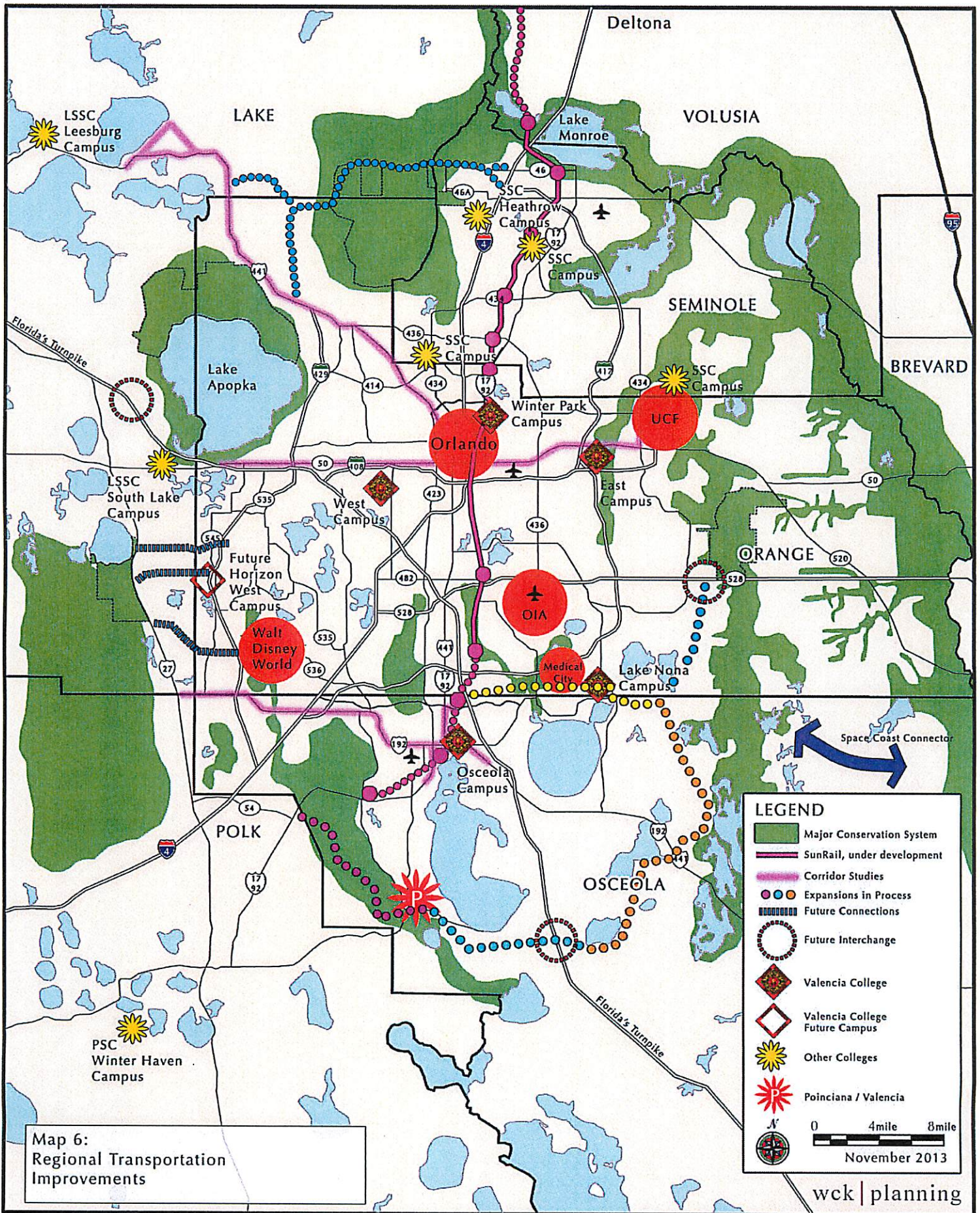
- SunRail, Commuter Rail, DeBary to Kissimmee operational 2014 [Phase 2, 2016-2017],
- All Aboard Florida, Regional Rail, Orlando to Miami,
- SR 50 LYNX Transit Corridor Study, Underway, Oakland to UCF,
- US 192 Transit Corridor Study, Underway, US 27 to Florida's Turnpike,
- Wekiva Parkway, Toll Road, Interstate 4 to US 441 in Apopka,
- The Alafaya Corridor from SR 50 to Oviedo is being studied by Orange County,
- Innovation Way Re-orientation and Connection to Southport Expressway, early planning,
- Osceola Parkway Extension, Florida's Turnpike to Narcoossee Road and eastward,
- Osceola Expressways:
 - Poinciana Parkway, Toll Road, Poinciana west to Interstate 4,
 - Southport Connector Expressway, Toll Road, Poinciana east to Florida's Turnpike,
 - Northeast Connector Expressway, Toll Road, Florida's Turnpike to Orange County line,
- US 27 – SR 429 Connectors:
 - New Independence Parkway, scheduled to be the first connector pending FDOT grant,
 - Schofield Road, not scheduled although the SR 429 Interchange is budgeted for 2016,
 - Seidel Road and Western Way, not scheduled.
- SR 417 – Pineda Causeway Connector, Early Planning, OOCEA,
- Interstate 4, Ultimate Improvement, Phase 1, Longwood to Kirkman Road, 2014 – 2021, and
- Orlando International Airport Expansion.

The 2040 Update to the MPO's regional plan is now beginning. Data from Valencia on student and faculty/staff populations by campus may be useful as they do their transportation modeling.

Specific Roadway Improvements in the 5-Year TIP of Interest to Valencia College

| | | | |
|-------------------------|-------|------------------------|-------------------|
| • Poinciana Parkway | \$20M | New Road | 2013/14 |
| • Valencia College Lane | \$24M | Widen to 4 Lanes | 2013/14 - 2017/18 |
| • SR 429/Wekiva Parkway | \$TBD | New Expressway | 2012/13 – 2016/17 |
| • SR 429/Schofield Road | \$10M | New Interchange | 2014/15 – 2015/16 |
| • SouthPort Connector | \$5M+ | New Limited Access Rd. | 2015/16 – TBD |

Source: Transportation Improvement Plan [TIP], Metroplan Orlando, September 2013.



Deltona

VOLUSIA

SEMINOLE

BREVARD

ORANGE

OSCEOLA

LAKE

POLK

LSSC
Leesburg
Campus

LSSC
South Lake
Campus

PSC
Winter Haven
Campus

Future
Horizon
West
Campus

Walt
Disney
World

Orlando

OIA

Medical
City

Osceola
Campus

Lake
Monroe

Lake
Apopka

Lake Naha
Campus

Winter Park
Campus

UCF

West
Campus

East
Campus

Space Coast Connector

Florida's Turnpike

Florida's Turnpike

Florida's Turnpike

Map 6:
Regional Transportation
Improvements

LEGEND

- Major Conservation System
- SunRail, under development
- Corridor Studies
- Expansions in Process
- Future Connections
- Future Interchange
- Valencia College
- Valencia College Future Campus
- Other Colleges
- Poinciana / Valencia

0 4mile 8mile
November 2013

wck | planning

Overview of Regional Growth

Orange and Osceola Counties, and the Orlando Region
November, 2013

Conclusions:

- Southwest Orange County's access has been greatly improved with SR 429.
 - Growth will be prompted by the first major connector if the FDOT grant is approved in this building cycle to construct a limited access roadway connecting the SR 429/New Independence Parkway with US 27 in south Lake County. Without the grant, growth will proceed at a modest pace.
 - The Schofield Road/SR 429 Interchange, scheduled for construction in FDOT fiscal years 2014/15 and 2015/16, will greatly improve access to the Valencia property. Schofield Road is one of the roads identified as a future connector between SR 429 to US 27.
- The Southeast Orlando/Northeast Osceola County road network will continue to expand.
 - Narcoossee Road will be the main north-south corridor for the foreseeable future.
 - Growth east of Narcoossee Road will proceed at a modest pace with Innovation Place PD and other smaller developments. There are plans for a new roadway corridor connecting Florida's Turnpike south of St. Cloud to the Beachline near ICP, but no detailed planning and design or funding exists.
 - Discussions of a major roadway connector from SR 417 in Osceola County to the Pineda Causeway in Brevard County are taking place; the actual improvement, sometimes referred to as the Spaceport Connector, is in the distant future.
- The Mount Dora area will become more accessible to Apopka and Orlando with completion of the Wekiva Parkway but no significant land holdings are available for large-scale development.
- The new Florida's Turnpike Interchange north of Clermont will make central Lake County residential developments more accessible to the Orlando Region job market.

END

Overview of Regional Growth

Orange and Osceola Counties, and the Orlando Region
November, 2013

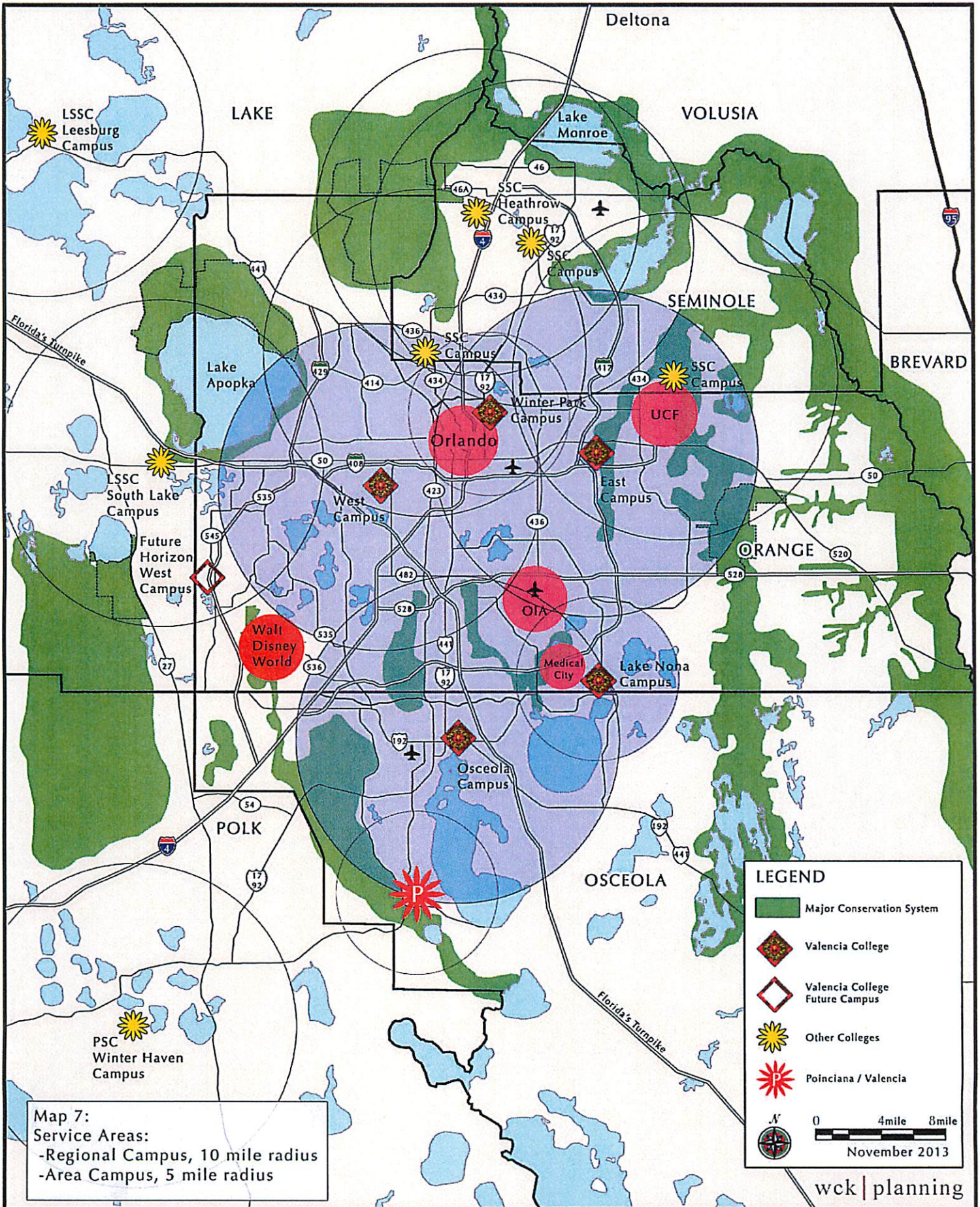
Appendix A Student Population Distribution by Campus

Students generally gravitate to one of Valencia's campus although many students take classes in two or more campus locations. The following map [See Map 7, Campus Service Areas] shows the area within a ten mile radius of each Valencia College campus in the shaded area. Circles are shown around campuses of Seminole State College, Lake Sumter State College and Polk State College.

Maps 8, 9 and 10 present student distributions centered on each of the three regional campuses: West, East and Osceola. Each dot represents a student by the place of their residence. While there is a concentration of students around the selected campus, the maps indicate many students travel long distances to attend class. To a large extent this is due to campus-based program offerings. For example, theater and dance programs are only offered on East Campus; engineering and nursing are only offered on West Campus.

In summary:

- West Campus draws from a wide area with specific concentrations in the south-central Orange County area of Hunters Creek and Meadow Woods; and the Apopka area.
- East Campus, in addition to close-in areas, draws from south Seminole County.
- Osceola Campus students are pretty focused in Osceola County, but many students live in the Poinciana area.
- The Area Campuses of Winter Park and Lake Nona draw students from broad areas.

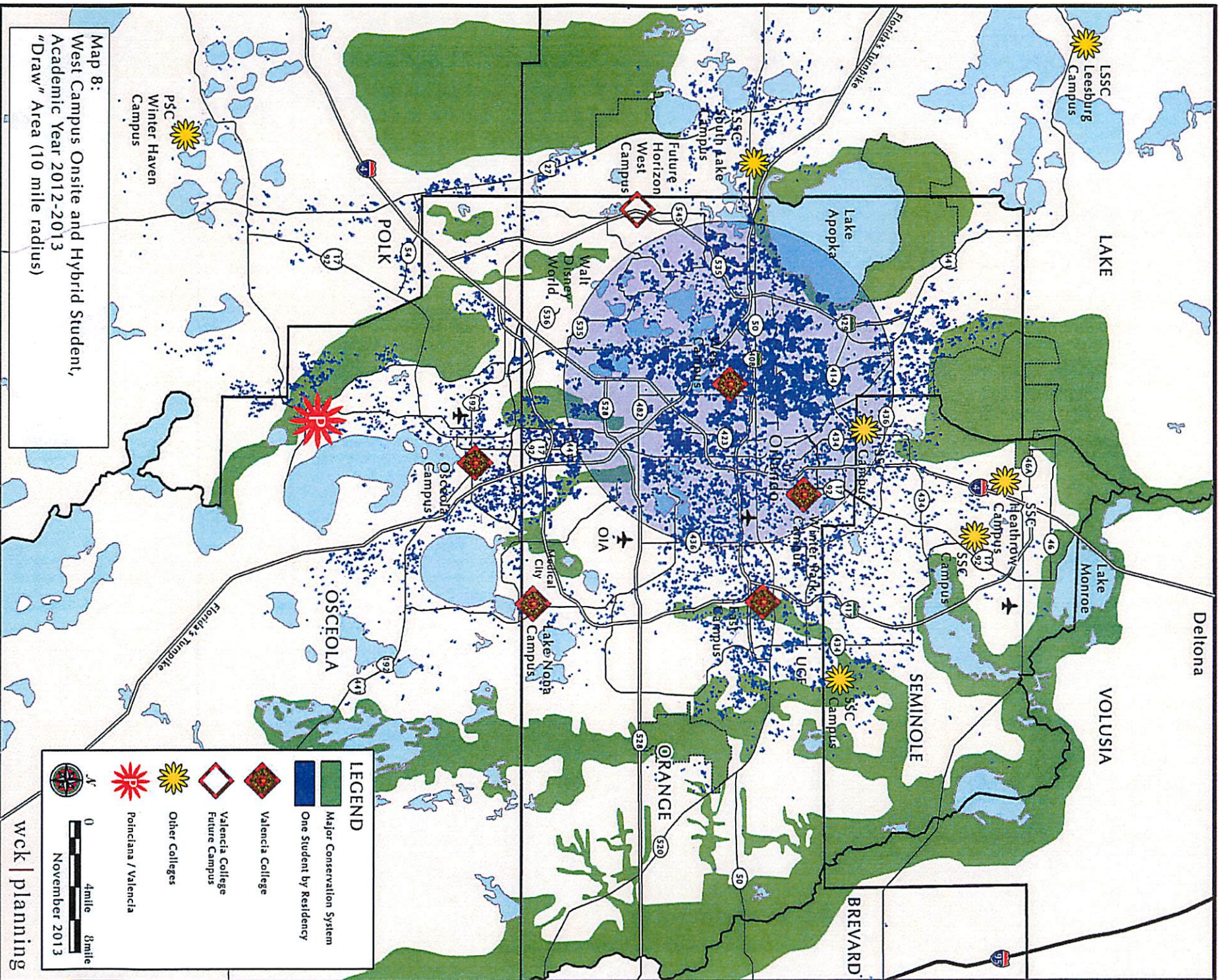


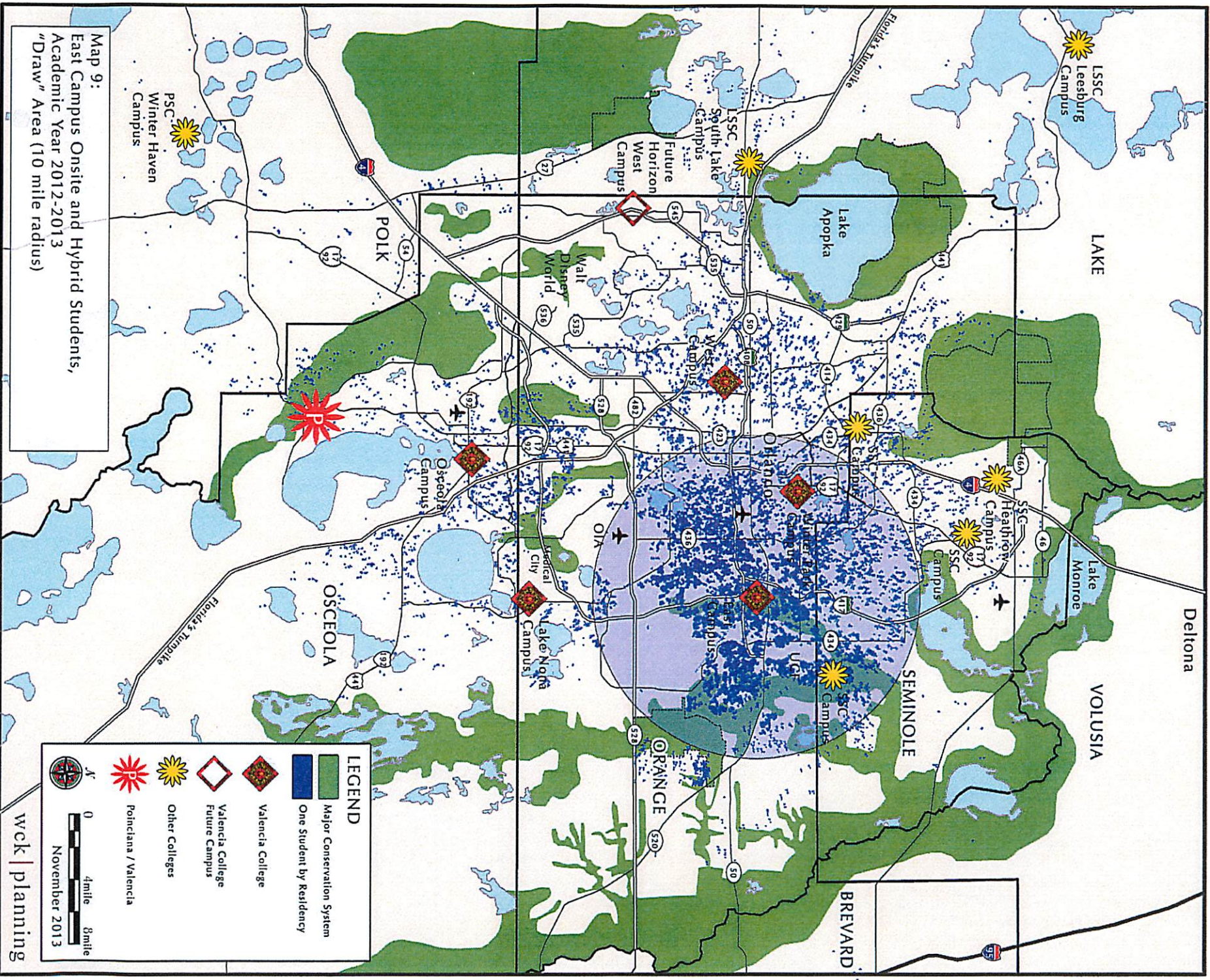
Map 7:
 Service Areas:
 -Regional Campus, 10 mile radius
 -Area Campus, 5 mile radius

LEGEND

- Major Conservation System
- Valencia College
- Valencia College Future Campus
- Other Colleges
- Poinciana / Valencia

Scale: 0 4 mile 8 mile
 November 2013



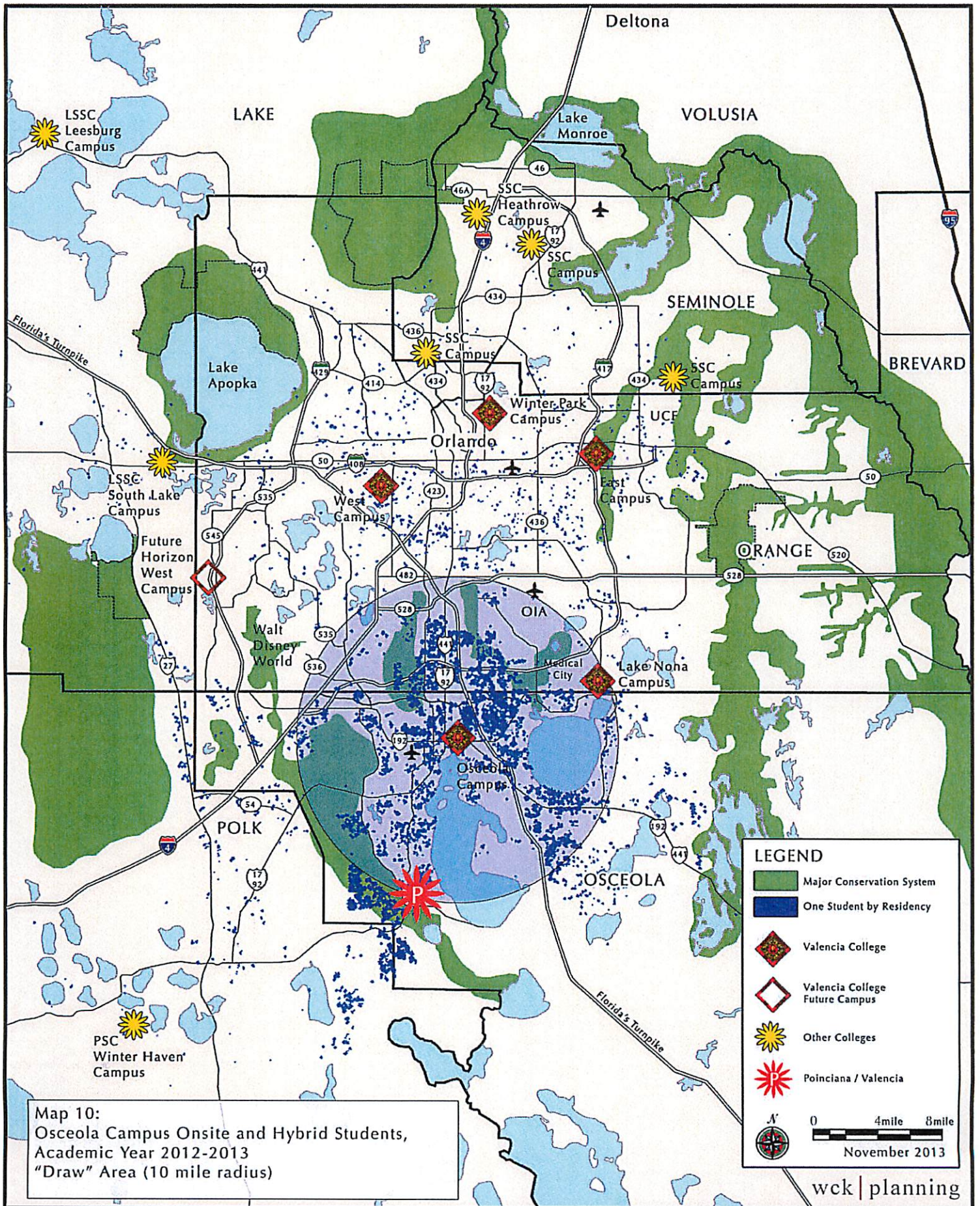


Map 9:
 East Campus Onsite and Hybrid Students,
 Academic Year 2012-2013
 "Draw" Area (10 mile radius)

LEGEND

- Major Conservation System
- One Student by Residency
- Valencia College
- Valencia College Future Campus
- Other Colleges
- Poinciana / Valencia

0 4mile 8mile
 November 2013



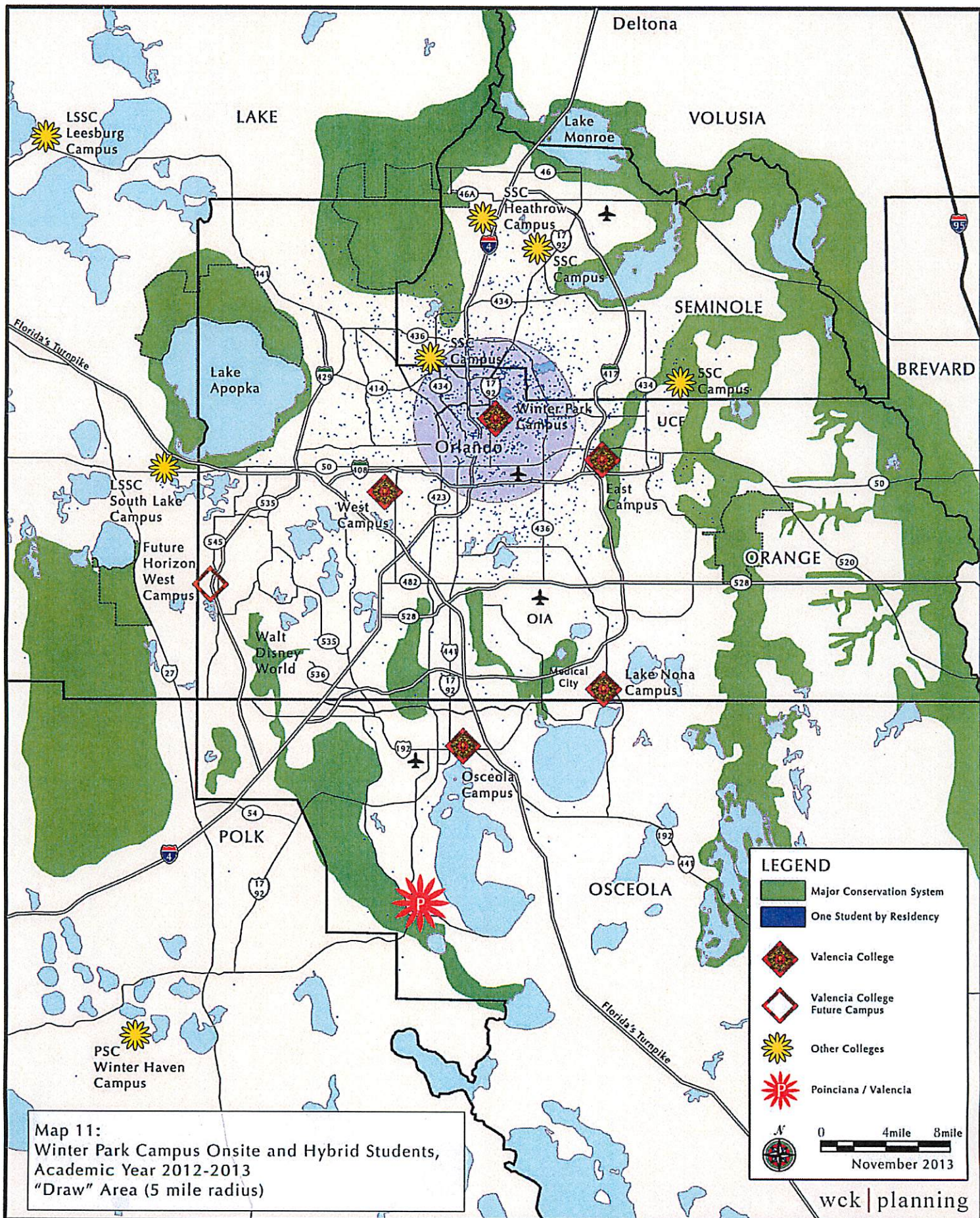
Map 10:
 Osceola Campus Onsite and Hybrid Students,
 Academic Year 2012-2013
 "Draw" Area (10 mile radius)

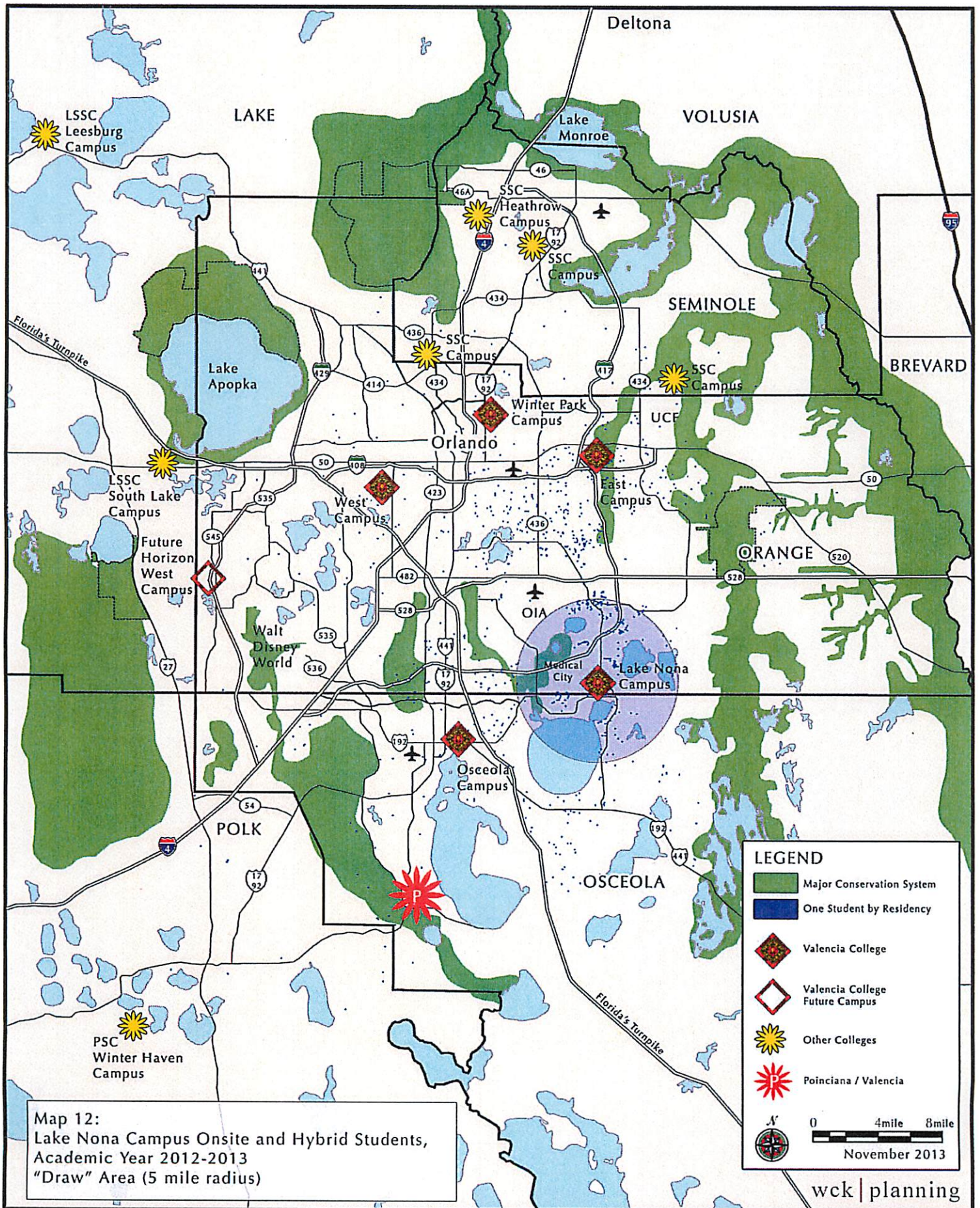
LEGEND

- Major Conservation System
- One Student by Residency
- Valencia College
- Valencia College Future Campus
- Other Colleges
- Poinciana / Valencia

Scale: 0, 4 mile, 8 mile
 November 2013

wck | planning





Map 12:
 Lake Nona Campus Onsite and Hybrid Students,
 Academic Year 2012-2013
 "Draw" Area (5 mile radius)

LEGEND

- Major Conservation System
- One Student by Residency
- Valencia College
- Valencia College Future Campus
- Other Colleges
- Poinciana / Valencia

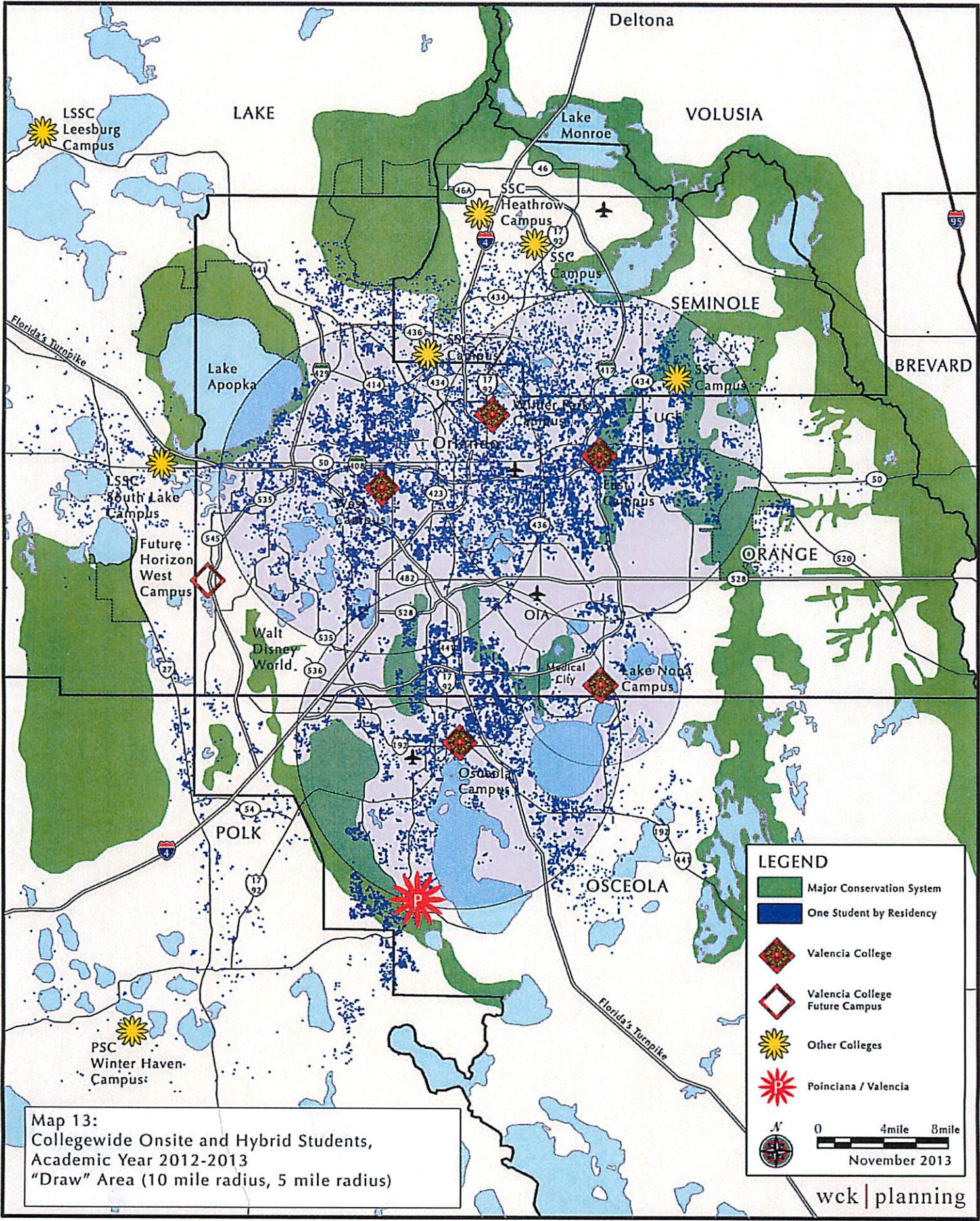
0 4 mile 8 mile
 November 2013

Overview of Regional Growth

Orange and Osceola Counties, and the Orlando Region
November, 2013

Appendix B

College-Wide Student Distribution and FTE Enrollment Information



Map 13:
 Collegewide Onsite and Hybrid Students,
 Academic Year 2012-2013
 "Draw" Area (10 mile radius, 5 mile radius)

LEGEND

- Major Conservation System
- One Student by Residency
- Valencia College
- Valencia College Future Campus
- Other Colleges
- Poinciana / Valencia

0
4 mile
8 mile
 November 2013

Valencia College
Annual Enrollment
Credit, Educator Preparation Institute, Postsecondary Adult Vocational,
Continuing Workforce Education, and Continuing Education
1967/1968 - 2012/2013

| Collegewide | | | | | | | | | | | | |
|--------------------|---------------|--------------|------------|--------------|------------|---------------|----------------|--------------|----------------------|---------------|----------------------------|--------------|
| Reporting Year | Credit | | EPI | | PSAV | | CWE (CJI & VE) | | Continuing Education | | *Total Students Enrollment | |
| | Nbr. | % Change | Nbr. | % Change | Nbr. | % Change | Nbr. | % Change | Nbr. | % Change | Nbr. | % Change |
| 2012/2013 | 59,958 | -1.3% | 244 | 10.4% | 224 | -10.0% | 3,592 | -2.2% | 4,639 | -11.7% | 68,657 | -2.2% |
| 2011/2012 | 60,770 | 3.0% | 221 | -3.1% | 249 | -15.6% | 3,672 | -38.9% | 5,254 | -2.3% | 70,166 | -1.1% |
| 2010/2011 | 59,014 | 6.7% | 228 | -24.0% | 295 | 10.5% | 6,006 | -11.0% | 5,375 | 24.0% | 70,918 | 5.9% |
| 2009/2010 | 55,302 | 10.0% | 300 | 2.0% | 267 | -33.9% | 6,749 | -6.9% | 4,333 | -12.6% | 66,951 | 6.0% |
| 2008/2009 | 50,255 | 8.8% | 294 | 45.5% | 404 | -6.9% | 7,249 | -4.1% | 4,957 | 4.5% | 63,159 | 6.8% |
| 2007/2008 | 46,180 | 7.6% | 202 | 77.2% | 434 | -13.4% | 7,555 | -4.2% | 4,743 | 8.4% | 59,114 | 6.0% |
| 2006/2007 | 42,913 | 2.6% | 114 | NA | 501 | -1.4% | 7,887 | 4.3% | 4,376 | 11.7% | 55,791 | 3.7% |
| 2005/2006 | 41,820 | -0.5% | | | 508 | 61.3% | 7,562 | 3.7% | 3,916 | NA | 53,806 | 8.4% |
| 2004/2005 | 42,039 | -1.9% | | | 315 | -18.2% | 7,294 | -33.2% | | | 49,648 | -8.3% |
| 2003/2004 | 42,847 | -0.7% | | | 385 | 5.8% | 10,924 | -3.1% | | | 54,156 | -1.1% |
| 2002/2003 | 43,128 | -0.7% | | | 364 | -2.7% | 11,277 | 5.6% | | | 54,769 | 0.5% |
| 2001/2002 | 43,440 | 7.5% | | | 374 | 1.9% | 10,674 | -2.0% | | | 54,488 | 5.5% |
| 2000/2001 | 40,397 | 3.0% | | | 367 | 9.9% | 10,889 | -0.5% | | | 51,653 | 2.2% |
| 1999/2000 | 39,234 | 6.1% | | | 334 | 17.2% | 10,949 | -5.6% | | | 50,517 | 3.3% |
| 1998/1999 | 36,995 | 0.5% | | | 285 | 24.5% | 11,601 | 1.3% | | | 48,881 | 0.8% |
| 1997/1998 | 36,817 | -0.1% | | | 229 | NA | 11,457 | 5.7% | | | 48,503 | 1.7% |
| 1996/1997 | 36,843 | 1.0% | | | | | 10,844 | 1.1% | | | 47,687 | 1.0% |
| 1995/1996 | 36,486 | 3.0% | | | | | 10,726 | 30.2% | | | 47,212 | 8.1% |
| 1994/1995 | 35,416 | 0.3% | | | | | 8,240 | 7.4% | | | 43,656 | 1.6% |
| 1993/1994 | 35,307 | -1.5% | | | | | 7,670 | -17.6% | | | 42,977 | -4.8% |
| 1992/1993 | 35,841 | 5.9% | | | | | 9,308 | -40.1% | | | 45,149 | -8.6% |
| 1991/1992 | 33,842 | 9.9% | | | | | 15,549 | -28.3% | | | 49,391 | -5.9% |
| 1990/1991 | 30,800 | 12.8% | | | | | 21,692 | -23.9% | | | 52,492 | -6.0% |
| 1989/1990 | 27,297 | 9.7% | | | | | 28,519 | 8.5% | | | 55,816 | 9.1% |
| 1988/1989 | 24,872 | 9.4% | | | | | 26,276 | -17.3% | | | 51,148 | -6.2% |
| 1987/1988 | 22,739 | 9.1% | | | | | 31,776 | -7.0% | | | 54,515 | -0.9% |
| 1986/1987 | 20,836 | 6.4% | | | | | 34,175 | 15.7% | | | 55,011 | 12.0% |
| 1985/1986 | 19,575 | 11.0% | | | | | 29,536 | 37.1% | | | 49,111 | 25.3% |
| 1984/1985 | 17,631 | -0.8% | | | | | 21,550 | -15.6% | | | 39,181 | -9.5% |
| 1983/1984 | 17,780 | 5.1% | | | | | 25,532 | 8.8% | | | 43,312 | 7.3% |
| 1982/1983 | 16,915 | -1.6% | | | | | 23,457 | 17.4% | | | 40,372 | 8.6% |
| 1981/1982 | 17,194 | 7.6% | | | | | 19,988 | -2.9% | | | 37,182 | 1.7% |
| 1980/1981 | 15,976 | 9.1% | | | | | 20,582 | 17.0% | | | 36,558 | 13.4% |
| 1979/1980 | 14,646 | 0.7% | | | | | 17,590 | 41.1% | | | 32,236 | 19.3% |
| 1978/1979 | 14,545 | 16.2% | | | | | 12,468 | 4.2% | | | 27,013 | 10.3% |
| 1977/1978 | 12,519 | 5.9% | | | | | 11,964 | NA | | | 24,483 | 107.0% |
| 1976/1977 | 11,825 | 23.3% | | | | | | | | | 11,825 | 23.3% |
| 1975/1976 | 9,593 | -14.5% | | | | | | | | | 9,593 | -14.5% |
| 1974/1975 | 11,221 | 27.9% | | | | | | | | | 11,221 | 27.9% |
| 1973/1974 | 8,774 | 10.8% | | | | | | | | | 8,774 | 10.8% |
| 1972/1973 | 7,918 | 37.6% | | | | | | | | | 7,918 | 37.6% |
| 1971/1972 | 5,754 | 10.5% | | | | | | | | | 5,754 | 10.5% |
| 1970/1971 | 5,206 | 32.3% | | | | | | | | | 5,206 | 32.3% |
| 1969/1970 | 3,935 | 25.9% | | | | | | | | | 3,935 | 25.9% |
| 1968/1969 | 3,125 | 451.1% | | | | | | | | | 3,125 | 451.1% |
| 1967/1968 | 567 | NA | | | | | | | | | 567 | NA |

Note: 1. Totals are duplicated across instructional categories (student could be in more than one category)
2. Prior to 1997/1998, PSAV was included in CWE; CWE only includes data reported for state funding (support)

Source: 1. Banner STU4, Student Data Base, Banner Academic History Tables, and IR Datamart Tables.
2. Continuing Education (VE) provided its own data for open enrollment courses

Valencia College
Annual FTE
Credit, Educator Preparation Institute, Postsecondary Adult Vocational,
and Continuing Workforce Education
1967/1968 - 2012/2013

| Reporting Year | Collegewide | | West | | East | | McCoy | | Winter Park | |
|------------------|---------------------------|--------------|---------------------------|--------------|---------------------------|--------------|---------------------------|-----------|---------------------------|-------------|
| | Total Students - FTE Nbr. | % Change | Total Students - FTE Nbr. | % Change | Total Students - FTE Nbr. | % Change | Total Students - FTE Nbr. | % Change | Total Students - FTE Nbr. | % Change |
| 2012/2013 | 30,077 | -3.2% | 10,527 | -6.9% | 11,994 | -2.0% | 0 | NA | 1,213 | 1.6% |
| 2011/2012 | 31,060 | -1.7% | 11,308 | -0.4% | 12,238 | -4.0% | 0 | NA | 1,194 | -7.2% |
| 2010/2011 | 31,601 | 4.4% | 11,349 | 1.3% | 12,753 | 3.8% | 0 | NA | 1,286 | 4.0% |
| 2009/2010 | 30,256 | 12.9% | 11,208 | 10.8% | 12,287 | 11.8% | 0 | NA | 1,236 | 18.9% |
| 2008/2009 | 26,801 | 11.4% | 10,112 | 9.6% | 10,987 | 9.7% | 0 | NA | 1,039 | 6.4% |
| 2007/2008 | 24,049 | 11.8% | 9,224 | 11.3% | 10,015 | 9.6% | 0 | NA | 977 | 17.4% |
| 2006/2007 | 21,501 | 5.1% | 8,288 | 3.7% | 9,140 | 4.6% | 0 | NA | 832 | 2.1% |
| 2005/2006 | 20,461 | -0.4% | 7,990 | -2.4% | 8,736 | 0.3% | 0 | NA | 815 | -0.1% |
| 2004/2005 | 20,541 | 0.1% | 8,185 | -0.3% | 8,711 | -1.1% | 0 | NA | 816 | 8.5% |
| 2003/2004 | 20,518 | -1.2% | 8,209 | -0.1% | 8,813 | -4.4% | 0.17 | NA | 752 | -1.4% |
| 2002/2003 | 20,776 | 0.6% | 8,217 | 4.4% | 9,217 | 0.6% | 0 | NA | 763 | -29.2% |
| 2001/2002 | 20,662 | 10.3% | 7,874 | 8.8% | 9,166 | 9.9% | 0.28 | NA | 1,077 | 0.6% |
| 2000/2001 | 18,737 | 4.0% | 7,240 | 2.6% | 8,339 | 1.0% | | | 1,071 | 1.3% |
| 1999/2000 | 18,014 | 5.1% | 7,058 | 2.5% | 8,256 | 5.9% | | | 1,057 | 0.6% |
| 1998/1999 | 17,144 | 2.7% | 6,888 | -1.3% | 7,794 | 5.0% | | | 1,050 | 1.6% |
| 1997/1998 | 16,686 | 3.7% | 6,980 | 1.7% | 7,422 | 5.6% | | | 1,034 | -2.4% |
| 1996/1997 | 16,085 | 3.7% | 6,862 | 1.6% | 7,027 | 5.3% | | | 1,059 | -1.5% |
| 1995/1996 | 15,513 | 3.2% | 6,756 | -1.0% | 6,675 | 8.0% | | | 1,076 | 0.9% |
| 1994/1995 | 15,036 | 2.2% | 6,827 | -2.1% | 6,180 | 6.6% | | | 1,066 | 1.9% |
| 1993/1994 | 14,712 | -0.2% | 6,973 | -2.8% | 5,796 | 1.9% | | | 1,046 | -0.1% |
| 1992/1993 | 14,738 | 2.8% | 7,171 | 0.9% | 5,686 | 8.2% | | | 1,047 | -5.4% |
| 1991/1992 | 14,337 | 11.2% | 7,105 | 10.7% | 5,255 | 10.3% | | | 1,107 | 30.1% |
| 1990/1991 | 12,890 | 14.9% | 6,417 | 12.6% | 4,764 | 11.9% | | | 850 | 491.4% |
| 1989/1990 | 11,217 | 13.7% | 5,701 | 13.3% | 4,256 | 10.4% | | | 144 | NA |
| 1988/1989 | 9,865 | 13.0% | 5,033 | 10.1% | 3,855 | 15.7% | | | | |
| 1987/1988 | 8,733 | 11.5% | 4,572 | 4.7% | 3,333 | 14.4% | | | | |
| 1986/1987 | 7,835 | 7.3% | 4,366 | 1.7% | 2,913 | 15.1% | | | | |
| 1985/1986 | 7,304 | 4.0% | 4,291 | 0.2% | 2,530 | 8.7% | | | | |
| 1984/1985 | 7,021 | 0.0% | 4,282 | -1.3% | 2,327 | 0.4% | | | | |
| 1983/1984 | 7,019 | -4.1% | 4,340 | -5.5% | 2,318 | -2.2% | | | | |
| 1982/1983 | 7,323 | -1.8% | 4,592 | -6.3% | 2,369 | 7.8% | | | | |
| 1981/1982 | 7,455 | 3.1% | 4,903 | -1.3% | 2,198 | 11.6% | | | | |
| 1980/1981 | 7,232 | 10.3% | 4,970 | 7.1% | 1,969 | 17.9% | | | | |
| 1979/1980 | 6,556 | 3.6% | 4,640 | 2.6% | 1,670 | 11.5% | | | | |
| 1978/1979 | 6,331 | 2.8% | 4,522 | -1.6% | 1,497 | 12.6% | | | | |
| 1977/1978 | 6,159 | 14.6% | 4,596 | 3.9% | 1,329 | 73.1% | | | | |
| 1976/1977 | 5,373 | 39.4% | 4,425 | 14.8% | 768 | 191900.0% | | | | |
| 1975/1976 | 3,855 | -6.4% | 3,854 | -6.4% | 0.4 | NA | | | | |
| 1974/1975 | 4,118 | 30.6% | 4,118 | 30.6% | | | | | | |
| 1973/1974 | 3,154 | 13.7% | 3,154 | 13.7% | | | | | | |
| 1972/1973 | 2,775 | 8.3% | 2,775 | 8.3% | | | | | | |
| 1971/1972 | 2,561 | 6.2% | 2,561 | 6.2% | | | | | | |
| 1970/1971 | 2,410 | 27.7% | 2,410 | 27.7% | | | | | | |
| 1969/1970 | 1,888 | 57.0% | 1,888 | 57.0% | | | | | | |
| 1968/1969 | 1,202 | 162.7% | 1,202 | 162.7% | | | | | | |
| 1967/1968 | 458 | NA | 458 | NA | | | | | | |

Note: 1. Totals are duplicated across instructional categories (student could be in more than one category)
2. Prior to 1997/1998, PSAV was included in CWE; CWE only includes data reported for state funding (support)

Source: 1. Banner STU4, Student Data Base, Banner Academic History Tables, and IR Datamart Tables.
2. Continuing Education (VE) is not included in the FTE analysis.

Valencia College
Annual FTE
Credit, Educator Preparation Institute, Postsecondary Adult Vocational,
and Continuing Workforce Education
1967/1968 - 2012/2013

| Reporting Year | Osceola | | Lake Nona | | Missing | |
|----------------|----------------------|----------|----------------------|----------|----------------------|----------|
| | Total Students - FTE | | Total Students - FTE | | Total Students - FTE | |
| | Nbr. | % Change | Nbr. | % Change | Nbr. | % Change |
| 2012/2013 | 5,671 | -4.4% | 669 | 74.0% | 3 | 126.7% |
| 2011/2012 | 5,935 | -0.9% | 384 | 70.3% | 2 | |
| 2010/2011 | 5,987 | 8.3% | 226 | NA | 0 | |
| 2009/2010 | 5,526 | 18.5% | | | 0 | |
| 2008/2009 | 4,663 | 21.7% | | | 0 | |
| 2007/2008 | 3,831 | 18.2% | | | 2 | |
| 2006/2007 | 3,241 | 11.0% | | | 0 | |
| 2005/2006 | 2,920 | 3.4% | | | 0 | |
| 2004/2005 | 2,826 | 3.0% | | | 3 | 73.4% |
| 2003/2004 | 2,743 | 6.5% | | | 2 | -58.1% |
| 2002/2003 | 2,574 | 1.7% | | | 4 | -66.7% |
| 2001/2002 | 2,532 | 21.3% | | | 12 | NA |
| 2000/2001 | 2,087 | 27.0% | | | | |
| 1999/2000 | 1,643 | 16.4% | | | | |
| 1998/1999 | 1,412 | 12.9% | | | | |
| 1997/1998 | 1,250 | 10.0% | | | | |
| 1996/1997 | 1,137 | 13.1% | | | | |
| 1995/1996 | 1,006 | 4.3% | | | | |
| 1994/1995 | 964 | 7.5% | | | | |
| 1993/1994 | 897 | 7.4% | | | | |
| 1992/1993 | 835 | -4.1% | | | | |
| 1991/1992 | 871 | 1.4% | | | | |
| 1990/1991 | 859 | -23.0% | | | | |
| 1989/1990 | 1,116 | 14.3% | | | | |
| 1988/1989 | 977 | 17.9% | | | | |
| 1987/1988 | 828 | 49.0% | | | | |
| 1986/1987 | 556 | 15.2% | | | | |
| 1985/1986 | 483 | 17.5% | | | | |
| 1984/1985 | 411 | 13.6% | | | | |
| 1983/1984 | 362 | 0.0% | | | | |
| 1982/1983 | 362 | 2.2% | | | | |
| 1981/1982 | 354 | 21.0% | | | | |
| 1980/1981 | 293 | 18.6% | | | | |
| 1979/1980 | 247 | -20.8% | | | | |
| 1978/1979 | 312 | 33.1% | | | | |
| 1977/1978 | 234 | 30.3% | | | | |
| 1976/1977 | 180 | 33856.6% | | | | |
| 1975/1976 | 1 | NA | | | | |
| 1974/1975 | | | | | | |
| 1973/1974 | | | | | | |
| 1972/1973 | | | | | | |
| 1971/1972 | | | | | | |
| 1970/1971 | | | | | | |
| 1969/1970 | | | | | | |
| 1968/1969 | | | | | | |
| 1967/1968 | | | | | | |

- Note:
1. Totals are duplicated across instructional categories (student could be in more than one category)
 2. Prior to 1997/1998, PSAV was included in CWE; CWE only includes data reported for state funding
- Source:
1. Banner STU4, Student Data Base, Banner Academic History Tables, and IR Datamart Tables.
 2. Continuing Education (VE) is not included in the FTE analysis.

Overview of Regional Growth

Orange and Osceola Counties, and the Orlando Region
November, 2013

Appendix C

“Preliminary College-wide Guidelines for Siting New Campuses”

Valencia College expects continued enrollment growth. Some of the new student population can be absorbed on existing campuses, some will be accommodated with on-line learning and hybrid class offerings but some of the growing student population may necessitate new campus locations in the Orange-Osceola County area.

The real estate experts assembled in the December 2012 workshop suggested that Valencia College develop “investment and partnering guidelines.” These “Preliminary Guidelines for Siting New Campuses” may be expanded, as suggested below, to include investment and partnering ideas.

As new campuses are located in the metropolitan area, the guidelines used to evaluate new sites are:

1. **Parcel Requirements:** Regularly shaped, developable sites of 20 to 25 acres for Area Campuses and 100 to 120 acres for Regional Campuses.
2. **Student Population Locations:** Identified sources of students, residential areas or employment centers, high schools and other centers of learning and training.
3. **Regional Access:** Reasonable distances, mileage and travel time, from existing Valencia and other college campuses including ready access to the regional transportation system, including transit service.
4. **Site Access:** Frontage on an arterial road with four lanes and multiple access points to the campus and its parking areas, pedestrian and bicycle access, and transit stops.
5. **Adjacent Uses and Activities:** A surrounding mix of active uses, buildings, businesses and services compatible with student populations.
6. **Partnering Opportunities:** Partnering with land owners, businesses proximate to the campuses, businesses with programmatic relationships with Valencia, local governments and special districts; plus, of course, others who share the Valencia mission and desire a partnering relationship.
7. **Investment Value:** Include future real estate value when considering new land acquisitions for campuses used for education purposes by anticipating surplus lands adjacent to existing campuses or surplus lands created by future abandonment of an existing campus.

Overview of Regional Growth

Orange and Osceola Counties, and the Orlando Region
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Appendix D Workshop Notes and Commentary - Summary December 3, 2012

The Task Force met at the Valencia Downtown Center from 2:00 to about 4:30 PM on Monday the 3rd. Attendees: Sandy, Keith, Helene, Kathy, Marie, Patty, Roger, Don, Paul, Jim, Karl, David and Bill. The Task Force discussed a wide range of topics summarized below:

1. The three interests of Valencia

- a) Student aspirations
 - Diverse
- b) Contributions to the regional economy
 - Current metro talent pool is C-/D+ by world standards
 - Target C+/B- in foreseeable future
- c) Contributions to the community
 - Leverage Valencia investments to advance community building

2. Implications and Challenges

- a) Need for capital
 - Scarcity of funds means there is no room for mistakes
- b) Need for operating funds
 - Valencia is funded for generalists
 1. Some disciplines require special facilities, e.g., nursing
 - Need specialists
 - Even if building can be built, staffing is tough to fund.
- c) Future financing options
 - State and federal money is declining
 - Student fees and tuition are becoming main stays
 - Other revenue sources are important
 1. Real estate
 2. Bond issues paid with sales tax or property tax
 3. Philanthropy
- d) Capacity to grow student seats
 - Maybe a 3+1 will replace the current 2+2
 - More joint facilities with UCF
 - Colleges and universities have always been about volume rather than quality; we are trying to do quality.
 - Medical City is UCF's growth area; main campus is full.
- e) Need authority to control pricing, tuition, especially

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- to offer lower tuition for specific conditions
- to create new revenue streams for uniquely designed course offerings
- f) Education delivery system thoughts
 - Today 20% of courses are provided on-line; the future may be 24%
 - Nursing students will travel to any campus; they all get jobs
 - Minimum campus size for necessary efficiencies: 1200 students to open a new campus/facility; 2500 student minimum to continue operations; best size for core wo/specialties is 5,500 +/- students.

3. Existing Campuses

- a) Two types of Valencia Campuses:
 - Regional: 100+ acres
 - Areawide: 20 – 25 acres; 2 to 3 buildings of 80,000 SF.
- b) Two are mature; reaching capacity of seats and access.
 - East - full, land and access
 - West - some land capacity
 1. Determine future use of the “Kirkman” parcels
- c) Osceola limited by access
- d) Lake Nona: first Areawide Campus; 7500 – 8000 students, 25 acres [3xRollins]
- e) Winter Park, too small

4. Potential New Campuses:

- a) Horizon West – 153 acres
- b) Poinciana – 12 acres.
- c) Apopka – two sites offered.
- d) Ocoee – recent entry into the picture, not discussed by Task Force.
- e) Downtown: Population does not meet Valencia student profile; Creative Village has some interesting possibilities, depends on UCF.
- f) Sandy’s question – Where should we build next? Answer through discussion:
 - Maybe nowhere,
 - Infill, do not go to the edge where there are long distances to only a few people, go where the people are today,
 1. Orlando/Winter Park:
 2. Poinciana and Apopka are tough markets:
- g) Two propositions on urban growth:
 - Everyone wants to be closer to the places they use, visit, need; pay attention to the densification of the urban area.
 - 80% of people still want to live in the suburbs.

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5. Guidelines for Investments

- a) No more land purchases.
- b) Free land is “nothing” in the total picture of building and staffing a new campus.
- c) Essential to have strong, local partner.
- d) Be a part of a community center with non-education services and amenities within walking distance.
- e) The college is a destination; association with other “urban” destination uses is good.
- f) Locations are getting closer in, not farther out; increasingly, people want to be close to everything.

6. Questions from the Task Force

- a) Is there a real estate asset management plan? Need for campuses?
- b) Real estate strategies implement core business strategies; what is the education delivery system trying to be implemented?
- c) **Case Studies:** Where else has this model been successful.
- d) **Faculty**
 - Full time faculty members are easy to recruit; adjuncts are harder.
 - With need for specialists and declining funding situation, is funding faculty an issue?
 - A nice building and nice places to eat make a difference.
 - Is it harder to attract faculty to “remote” sites such as Poinciana?
 - Is an active environment accessible from a campus more attractive to faculty? Yes.
- e) **What can a private partner get from Valencia**
- f) **Do you know your customer?** Students, faculty and staff? Surveys?
 - Who will be the students 10 – 20 years from now and what do they want?
- g) **Housing**
 - With 60,000 students on west Campus, how do you not have housing?
 - Specialty housing for international students; students with special needs.
 - Housing does not mean owned and operated by Valencia; perhaps affiliated in some way.
 - Proposition: Full time students make college housing work and we don’t have that many.
- h) **Use of Capital**
 - Horizon West is capital sitting dormant. Optional actions?
 - Kirkman Properties are the same.
- i) **The questions warrant thorough study and a Plan**
 1. What does the enterprise need?
 2. Who are the users, customers?
 3. What is the plan to grow the enterprise?
 4. How will real estate help implement the plan to grow the enterprise?

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7. Conclusions

- a) **Solidify a theory of the education delivery system** for the Orlando Region over the next decade or two.
 - Acknowledge the enduring qualities of the existing model of regional and areawide campuses,
 - Define the needs of students, the state of technology and the needs of employers in the future in a manner that enables a facility plan response,
 - Develop a system of facilities that best meets this projected need:
 1. Central Regional Campuses – permanent,
 2. Dispersed Areawide Campuses – some permanent, some not,
 3. On-Site Campuses for Industry – temporary.
 - Compute impact of 24% on-line course offerings.
- b) **Develop a series of Investment and Partnering Guidelines**
- c) **Overview of Specific Locations:**
 - **Do not go west to Horizon West or Hamlin:**
 - **Poinciana and Apopka too tough, do not pursue:**
 - **Existing Campuses:**
 1. Continue to improve, enhance and infill.
 2. The cost of parking decks may be less expensive than initiating a new campus.
 - **West Campus Kirkman parcels:**
 1. Are we sure there is no need for this in the future?
 2. Do not be a developer.
 3. If you are never going to use it, and you want to sell, be proactive, hire a real estate professional, do not wait for unsolicited offers.
 - **Orlando-Winter Park:**
 1. Infill, do not go to the edge where there are long distances to serve only a few people over a long time horizon, go where the people are.
 2. Many people live in Maitland, Winter Park, Baldwin Park, College Park and Orlando; far from existing campuses.
 3. If the Winter Park Campus is too small, fix it; sell or trade the site and build a better sized Areawide Campus in the central urban area.
 4. Florida Hospital site has many advantages even for a general curriculum campus.
 5. An infill campus may be better for recruiting specialty faculty.

Prepared by: **Bill Kercher**
December 4, 2012

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Appendix E COLLEGES AND UNIVERSITIES, ORLANDO Public and Private

10.7.13

1. Adventist University of Health Sciences, Main Campus, [Orlando]
2. Belhaven University- Orlando, 5200 Vineland Road #100, [Orlando, FL, United States]
3. Capella University, www.capella.edu, on-line.
4. Collegium Augustinianum, Graduate School of Philosophy and Theology, 2816 E. Robinson St., [Orlando]
5. Columbia College, 2600 Technology Drive [Orlando]
6. DeVry University Orlando Campus, 4000 Millenia Boulevard, [Orlando, FL, United States]
7. Eastern Florida State College
8. Everest University South Orlando, 9200 Southpark Center Loop, [Orlando, FL, United States]
9. Everglades University, www.everglades-edu, 887 East Altamonte Drive, [Altamonte Springs]
10. Full Sail University [Winter Park]
11. Hindu College of America [Econ Trail, Orlando]
12. Johnson University Florida, fka, Florida Christian College [Kissimmee]
13. Keiser University, www.keiser-education.com, 5600 Lake Underhill Rd, [Orlando]
14. Lake Sumter State College
15. National University - Orlando, 3201 East Colonial Drive, [Orlando, FL]
16. Orlando Culinary Academy, OCP, 8511 Commodity Circle, [Orlando]
17. Palm Beach Atlantic University-Orlando, 4700 Millenia Boulevard #100, [Orlando, FL]
18. Polk State College
19. Prince of Prestige Academy, School of Digital Motion Picture Production [Maitland]
20. Reformed Theological Seminary [Oviedo]
21. Rollins College [Winter Park]
22. Seminole State College of Florida
23. Strayer University Orlando East, 2200 North Alafaya Trail #500, [Orlando, FL]
24. University of Central Florida
25. University of Phoenix - South Orlando Learning Center, 8325 South Park Circle, [Orlando, FL, United States]
26. Valencia College

Source: wck | planning based on web research, October 2013.

Conclusions: Of the 19 private colleges, 18 have addresses. They are located, generally, as follows:

- Seven in South Orlando near the John Young Parkway corridor,
- Four are located in Winter Park, Maitland, Altamonte Springs,
- Four are located in or near Downtown Orlando,
- Three are located in the UCF area.

