



OKALOOSA COUNTY

ORPHAN PARCELS MASTER PLAN

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EXECUTIVE SUMMARY

OVERVIEW

As a result of a 2024 Strategic Plan to explore alternative uses for several orphaned parcels near Eglin Air Force Base (Eglin AFB), Okaloosa County began a visioning phase for identified parcels in March of 2024 leading to the development of this Orphan Parcels Master Plan. Executing this plan will transform eight of the Orphan Parcels into integrated parts of the community, focusing on residential, commercial, and recreational spaces. It emphasizes an economic growth approach that aligns with the community and Eglin AFB's priorities. Collectively referred to as 'Orphan Parcels,' these parcels are part of Eglin Air Force Base, but are physically separated from the main Eglin Installation, requiring additional analysis to determine their usefulness to the Base and their mission.

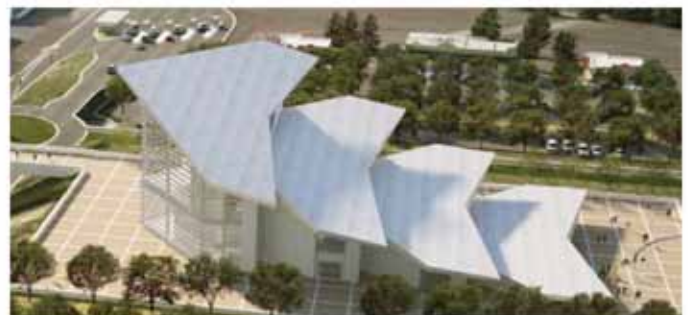


Figure ES-1. Focus Area Map

PLAN HIGHLIGHTS

This plan aims to address the critical need for attainable housing, support economic growth through retail and office development, enhance educational and veteran services, and preserve natural spaces. By strategically integrating these elements, the plan seeks to improve the quality of life for residents, including service members and their families, while fostering long-term economic and community resilience. The highlights below offer just a glimpse into the extensive benefits this plan will bring.

1. Provide **attainable housing** for Okaloosa families.
2. Provide **employment opportunities** through effective development.
3. Offer veterans services to **build long-term community**.
4. Utilize conservation areas to **drive resilience**.
5. Deliver a **signature development as a gateway** to Eglin.



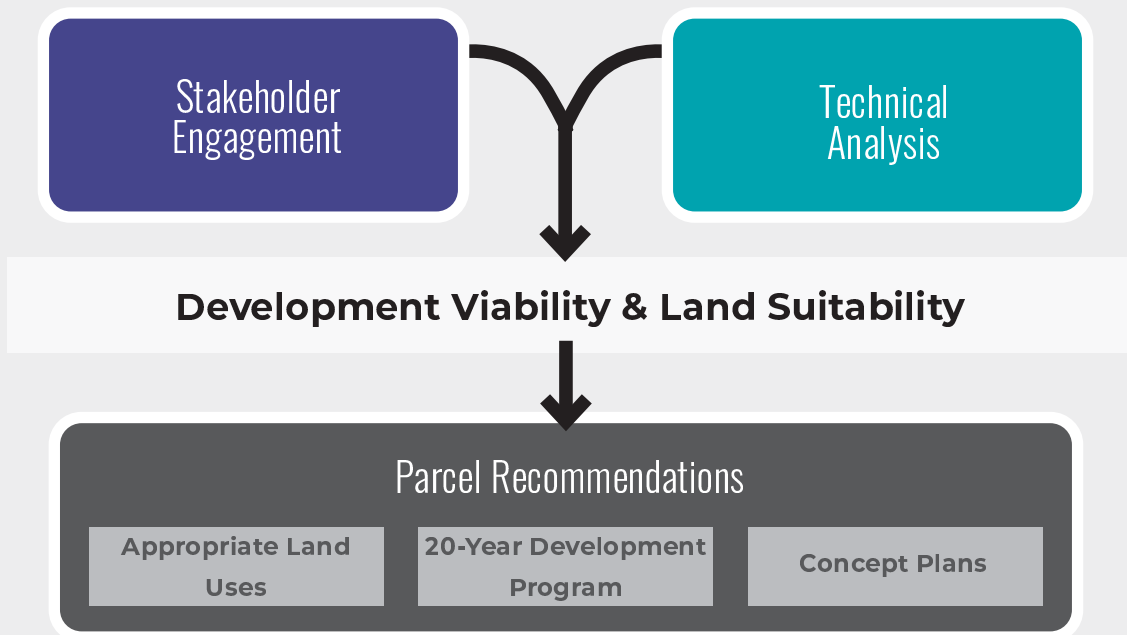
CREATING THE PLAN

The project team implemented the Orphan Parcels Master Plan through technical analysis and stakeholder input. They began with a kick-off meeting with key stakeholders, including the Eglin AFB Real Property team, to align on objectives. The team then conducted a parcel analysis, reviewing the Orphan Parcels Strategic Plan and other documents like the Attainable Workforce Housing Strategic Plan.

A vulnerability and risk assessment was prepared for each parcel, identifying risks from natural and man-made hazards. The team also conducted a site visit and stakeholder roundtable to review

findings and confirm the community's vision. A high-level market analysis was performed to identify potential options for each parcel, using data on household and employment growth, housing demand, and case studies of similar military partnerships.

The project team synthesized a viability matrix and created a recommendation plan for each parcel, presenting concept plans for parcels 1, 2, 5, 9, 10, 11, 13, and 17 based on a 20-year development program. The synthesis of stakeholder input and technical analysis provided insights that informed the final recommendations.



ADDRESSING COMMUNITY NEEDS

Okaloosa County is a collection of thriving communities that are poised for growth in the next 25 years. The County has an opportunity to deliver additional housing options and supporting uses for its residents, veterans, military personnel, and aging population.

RESIDENTIAL OPPORTUNITIES

The median sale price for single-family homes has remained around \$350,000, despite rising borrowing costs. New housing for sale near Eglin is scarce and often priced above \$750,000, making it unaffordable for most working families. Rental housing costs are driven higher by strong local demand, which in turn increases the already high Basic Allowance for Housing (BAH) of over \$2,000 per month. While many veterans in the county benefit from targeted housing developments, this demand also raises costs for the local workforce.

Attainable rental housing is in short supply, and there is very little attached housing available in the county. Over 52% of renters are cost-burdened, according to TPMA. Most affordable housing options are either far from employment centers like the base or are older and in poorer condition. The housing market offers little variation, forcing most households to choose between high-end rental apartments and expensive single-family homes.

To address these issues, there is an opportunity to serve residents earning 50-80% of the Area Median Income (AMI), where the county has identified a gap of 1,095 units. This would support apartments priced up to approximately \$1,900 per month or for-sale homes around \$292,000 for a family of four. Developing nodes of attached or higher-density for-sale housing can naturally enhance affordability. Additionally, providing small-scale retail and services closer to or within residential areas can reduce driving and alleviate congestion in busy corridors.

COMMERCIAL OPPORTUNITIES

During the master planning effort, the planning team engaged with key stakeholders. Their insights, combined with additional market research, provided valuable perspectives on commercial real estate. Eglin will remain the primary employment driver county wide, with any large new employers likely targeting pad-ready sites in the northern part of the county. Economic development officials report that existing companies struggle to recruit and retain talent, citing training and housing as major constraints. Local-serving office and community retail are concentrated along John Sims Parkway, a congested corridor running mainly west-east from Eglin to Bluewater Bay. Medical offices are scattered across the county and in limited supply, particularly near Twin Cities Hospital. Hotels mainly target beach visitors, with the broader county served by a small number of limited-service hotels, none of which offer suitable conference space of any scale. Additionally, there is little to no retail that is walkable to residential developments.

To address these challenges, it is recommended to concentrate medical offices near existing hospitals and housing that is attainable for nurses, technicians, and other medical staff. Identifying development-ready sites for smaller employers that serve Eglin as contractors or that would benefit from proximity to the base is also crucial. Developing a signature gateway to Eglin that combines hospitality, housing, and local-serving restaurants and retail can enhance the area's appeal. Furthermore, leveraging the efforts of Northwest Florida State College to deliver job readiness and training programs, along with other community support, will be beneficial.

PARCEL RECOMMENDATIONS

Based on the land suitability analysis, specific development uses were recommended for each parcel, as indicated in Table ES-2. The recommended uses and development program are projected over a 20-year planning horizon and provide flexibility in order to account for uncertain market conditions. Each parcel plan further showcases how these uses may be distributed throughout the Orphan Parcels and the intensity of development that the County may expect to be supported over the 20-year timeframe. Table ES-1 demonstrate the total development program for all orphan parcels.

Each proposed use will benefit Okaloosa County in various ways. The following outlines the advantages of each:

- **Residential** — An increase in housing diversity will allow Eglin personnel and their families to live closer to the base. This supports the installation mission by reducing commute times to the installation and allowing installation personnel to arrive to work in a timely manner. The community will benefit from residential development as housing will become more affordable and accessible.
- **Neighborhood Retail** — Neighborhood retail acts as an amenity to surrounding population and to Eglin personnel by offering goods and services within a close proximity, often times placed within or alongside residential developments.

Table ES-1. Total Development Program

LAND USE	DEVELOPMENT PROGRAM
Housing	2,200 – 2,800 units
Retail	400,000 – 600,000 SF
Office	320,000 – 480,000 SF
Hotel	200 – 300 Rooms
Recreation + Open Space	650 – 950 acres

- **Community Retail** —Community retail supports the installation personnel and their families by providing necessary resources such as grocery stores. The presence of community retail near residential areas serves as an amenity that benefits Okaloosa County by addressing food deserts via grocery stores and providing services that cater to the wider community.
- **Office/Flex**—The presence of existing residential and medical facilities, proximity to transportation, and population density makes office/flex development suitable for the area. This type of development is mission supportive because it aids in providing jobs for installation personnel’s family members and can create specialized jobs and services that can attract larger employers to the region, increasing the opportunity for higher paying jobs for local residents.

- Hospitality** —The proximity to transportation and the Eglin west gate, along with visibility from SR 85 makes hospitality an appropriate use for the area. The development of hospitality supports the installation mission by providing accommodations for visiting installation officers and personnel, and creating space for larger gatherings and conventions. The surrounding community benefits from hospitality development through stimulation to the local economy via tourism and local job creation.

- Recreation, Conservation, Open Space & Civic Uses** — By leaving areas relatively untouched, the natural environment is preserved. The preservation of the natural environment improves resiliency and can help mitigate environmental threats and hazards such as flooding. Mitigating environmental hazards reduces the threat to installation assets. Similarly, the surrounding community benefits from environmental hazard mitigation because residential and transportation infrastructure will be more resilient.

Table ES-2. Recommended Uses by Parcel Recommended

Potential Use	Parcels							
	1	2	5	9	10	11	13	17
Multi-Family Residential								
Townhomes								
Potential Residential								
Neighborhood Commercial								
Community Commercial								
Educational								
Office/Flex								
Hospitality								
Recreation								
Conservation/Open Space or Future Development								
Civic/Government								

INTRODUCTION

THE MASTER PLAN

Eglin Air Force Base officials identified several parcels of land on the base that are or will become physically separated from the main Eglin reservation, primarily by County and State infrastructure. Thus far, Okaloosa County and Eglin Air Force Base Officials have taken the following steps in preparation for parcel development:

- 1. Orphan Parcel Strategic Plan:** In January 2024, Eglin Air Force Base officials developed a Strategic Plan that assessed each of the parcels relative to the potential for alternative uses that might enhance their utility for the mission of the base and the surrounding community that supports that mission. The plan aimed to identify potential uses for the orphan parcels, gather community feedback, and address broader needs.
- 2. Orphan Parcel Visioning, Okaloosa County Stakeholder input (surveys):** In Conjunction with Eglin Air Force Base, Okaloosa County began surveying stakeholders on alternative uses for the orphan parcels.
- 3. Orphan Parcel Master Plan Recommendations:** The Orphan Parcels Master Plan (“the Master Plan”) is a visionary blueprint that has been prepared to further the transformation of the eight Orphan Parcels into cohesive and useful contributors to the community. This plan aims to expand on the strategic plan and visioning outcomes. To consolidate ideas and develop concepts, the project team conducted a vulnerability assessment for each parcel to gain a baseline understanding of the areas covered by the scope of this master plan.

This Master Plan highlights key strategies for integrating residential, commercial, and recreational spaces to create a balanced and thriving environment. Emphasizing economic growth, environmental stewardship, and stakeholder engagement, the Master Plan outlines a high-level approach to long-term development that considers the community’s priorities and ensures thoughtful and efficient use of County resources. By leveraging the community’s strengths and partnerships, Okaloosa County aims to enhance the quality of life for its residents and promoting long-term community resilience while having positive direct and indirect impacts on Eglin Air Force Base and its service members. The Orphan Parcels Master Plan is a tool to build consensus about the future of the focus parcels and their impact on the surrounding community.

PLAN HIGHLIGHTS

This plan addresses the critical need for attainable housing, supports economic growth through retail and office development, enhances educational and veteran services, preserves natural spaces, and helps Eglin Air Force Base achieve mission objectives. By strategically integrating these elements, the plan seeks to improve the quality of life for residents, including service members and their families, while fostering long-term economic and community resilience. The highlights below offer just a glimpse into the extensive benefits this plan will bring.

“

As indicated through rising housing costs, there is an insufficient quantity of affordable housing, creating strain in the Okaloosa County housing market. The consequences of this mismatch are not only felt by aspiring homeowners and renters but can be felt throughout the economy, with the shortage of workforce housing impeding businesses' ability to attract and retain a qualified labor force. Moreover, this has direct impact on the military installations, leading to the relocation of jobs to other bases as personnel struggle to find attainable housing.”

The Okaloosa County Attainable Workforce Housing Strategic Plan (2024)

1

Provide attainable housing for Okaloosa families.



This plan could provide **attainable housing for more than 2,200 Okaloosa families over the next 20 years**, including airmen, their families, and frontline workers. Adequate and attainable housing significantly impacts the quality of life for service members and their families and supports the local economy by attracting and retaining military families who contribute to the community, leading to increased demand for local services and businesses, and fostering economic growth. The Okaloosa County Attainable Workforce Housing Strategic Plan (2024) identifies the need to respond to divergent needs of competing markets and provide a range of housing to retain Eglin service members and Okaloosa workers.

2

Provide employment opportunities through effective development.



Eglin Air Force Base is a primary driver of the regional economy, **providing over 74,000 Okaloosa jobs**. By delivering a range of sites for commercial development over the next 20 years, new development will serve as a catalyst for economic growth and workforce development, creating a robust and skilled labor market that benefits both the local and broader economy. As the County's population grows and ages in place, the demand for medical professionals and other skilled labor will naturally increase. Population growth also indicates a growing need for childcare facilities to support young families in the area. New development within the Orphan Parcels could include healthcare and childcare facilities and educational institutions which will not only provide essential services to the community but also create jobs and attract skilled professions to the area. Retail and office development could support nearly 3,000 jobs including physicians, nurses, and other skilled positions.

3

Offer veterans services to build long-term community.



Higher education and services for veterans will allow more Eglin families to make a permanent home in Okaloosa County. Providing attainable housing close to the military installation ensures that service members and their families have easy access to essential support services, such as healthcare, education, and recreational facilities.

Institutions like Northwest Florida State Colleges and other local universities provide accessible education which is a significant draw for families considering Okaloosa County as their home. Additionally, comprehensive veteran services, including healthcare, counseling, career support, ensure that veterans and their families receive necessary assistance to transition smoothly into civilian life. By holistically approaching new development, the County can ensure that the area will remain a desirable place for military families to call home, contributing to the overall growth and prosperity of the region.

4

Utilize conservation areas to drive resilience.



Although each parcel is substantial, the 20-year development program intentionally avoids fully developing every orphaned parcel. Approximately 800 acres of Orphan Parcel land would be reserved for conservation, recreation, passive open space, and potential longer-term development. This strategy prioritizes preserving the natural beauty of Okaloosa County, allowing for potential recreational use and future long-term development. By maintaining these open spaces, the County can offer residents and visitors access to natural areas for leisure.

In the near term, this conservative approach to development will also provide significant benefits in managing the County's traffic and infrastructure demands. By not overburdening the existing infrastructure with extensive new developments, the county can mitigate potential congestion and reduce the strain on public services all while thoughtfully planning to ensure sustainable growth.

5

Deliver a signature development as a gateway to Eglin.



As Eglin AFB prepares to relocate its West Gate, Parcel 5, adjacent to the SR 85 realignment, has been identified as an appropriate new location for the armament museum. This site will ensure that the museum continues to serve as an important cultural and educational landmark, welcoming visitors and providing insight into the history and significance of the base.

The combined presence of the museum, hotel, and conference center would create an economic and social hub at the gateway to the base, offering accommodation for a variety of visitors, including dignitaries, contractors, and family members of service personnel and support a range of activities such as training sessions, events, and air and space-related conferences.

PARCEL OVERVIEW

This study focuses on parcels 1, 2, 5, 9, 10, 11, 13, and 17, highlighted in Figure 1-1.

- **Parcel 1: Camp Pinchot** – Consists of 264 acres in the Southwest portion of the focus area adjacent to Lewis Turner Boulevard. Challenges affecting development at this parcel includes a high traffic corridor located along the northwest border and storm surge risk.
- **Parcel 2: East Garnier Creek** – 157 acres located in the Southwest portion of the focus area adjacent to Lewis Turner Boulevard. Potential challenges affecting development at this parcel includes a high traffic corridor located along the northern border and storm surge risk.
- **Parcel 5: Poquito Bayou** – This 91-acre parcel is located in the Southwest portion of the focus area and potential development is being led by Eglin AFB. Challenges that can affect development at this parcel includes the presence of environmental contamination/greyfield site, storm surge risk, and the extension of Eglin Boulevard to West Gate.
- **Parcel 9: North Nine** – Consists of 282 acres in the Northeast portion of the focus area bordered by SR-293 to the North and West and College Boulevard to the South. Potential challenges affecting parcel development includes a lack of access to Mid Bay Bridge Road and a required FDOT Buffer.
- **Parcel 10: K-21** – 401-acre parcel located in the Northeast portion of the focus area with SR-293 to the North and College Boulevard to the South. Challenges that may affect parcel development includes a lack of access to Mid Bay Bridge Road and a required FDOT buffer.
- **Parcel 11: L-34** – This 200-acre parcel is located in the Northeast portion of the focus area with SR-293 to the North and College Boulevard to the South. Challenges affecting development at this parcel includes no access to Mid Bay Bridge Road and a required FDOT buffer.
- **Parcel 13: L-24** – Consists of 78 acres in the Eastern portion of the focus area bordered by SR-293, SR-20, and Range Road. Potential challenges affecting development at this parcel includes curb cut challenges, a required FDOT buffer, and a lack of access to Mid Bay Bridge Road.
- **Parcel 17: Addie Lewis** – 21-acre parcel located at the center of the focus area adjacent to John Sims Parkway. This is the only parcel not within the current Eglin AFB boundary. Challenges affecting parcel development at this parcel includes the proximity to Eglin Airport flight paths, a high traffic corridor located on the Western border, and storm surge risk.

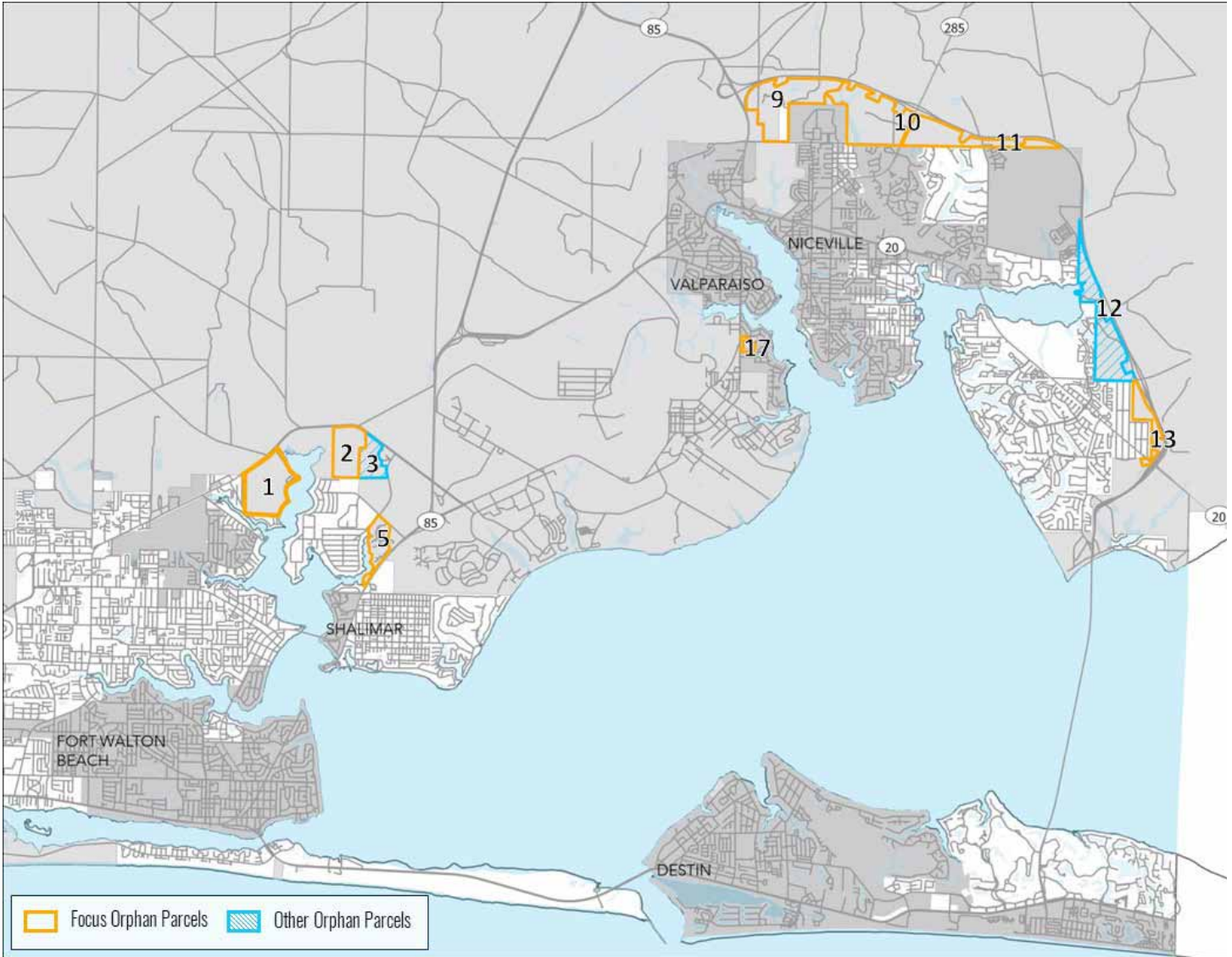


Figure 1-1. Orphan Parcels

METHODOLOGY

The project team created the Orphan Parcels Master Plan through a combination of technical analysis, stakeholder input, and industry best practices.

The County conducted a **kick-off meeting with key stakeholders**, including the Eglin AFB Real Property team. This meeting aimed to understand current findings, align on overall objectives and expectations for the Orphan Parcels Master Plan.

After the initial engagement with key stakeholders, the project team conducted a **parcel analysis**. The team reviewed the Orphan Parcels Strategic Plan, along with other supporting documents such as the recent Attainable Workforce Housing Strategic Plan, conducted by the County in spring of 2024.

- The Orphan Parcels Strategic Plan was conducted by Eglin Air Force Base in January of 2024 and covers an array of potential uses for the Orphaned Parcels.
- The Attainable Workforce Housing Strategic Plan

The project team prepared a **vulnerability and risk assessment** for each parcel based on existing data, such as mitigation plans, wetlands, comprehensive plans, and existing utility and transportation information. This vulnerability assessment reveals physical opportunities and constraints, and helps to identify risks associated with natural and man-made hazards for the orphan parcels, where risk is defined as the combination of hazard probability and severity.

The team participated in a **site visit and conducted a stakeholder roundtable**. During this session, they reviewed parcel analysis findings, confirmed the community's vision for the future, discussed how the parcels could help deliver this vision, identified criteria to prioritize parcel master plan options, and outlined next steps.

A **high-level market analysis** was conducted in order to identify some potential options for each orphan parcel. Publicly available data and forecasts related to household and employment growth, base- and community-related housing demand and affordability, and other relevant data were summarized to develop an initial assessment of the local residential and commercial real estate market. The team also looked into three case studies of comparable military public/private partnerships for the development of surplus property were developed. The project team synthesized a viability matrix by parcel, incorporating findings from the vulnerability assessment and the market study. The findings were presented to stakeholders who provided additional insights prior to moving forward with recommendations.

The team created a **recommendation plan** by parcel that accounted for the value proposition and findings from previous tasks. Concept plans were created for parcels 1, 2, 5, 9, 10, 11, 13, and 17 are based on a market-supported 20-year development program. Recommendations and plans were presented to stakeholders.

The synthesis of stakeholder input and analysis conducted by the technical team was able to provide knowledgeable insights that informed the orphan parcel recommendations.

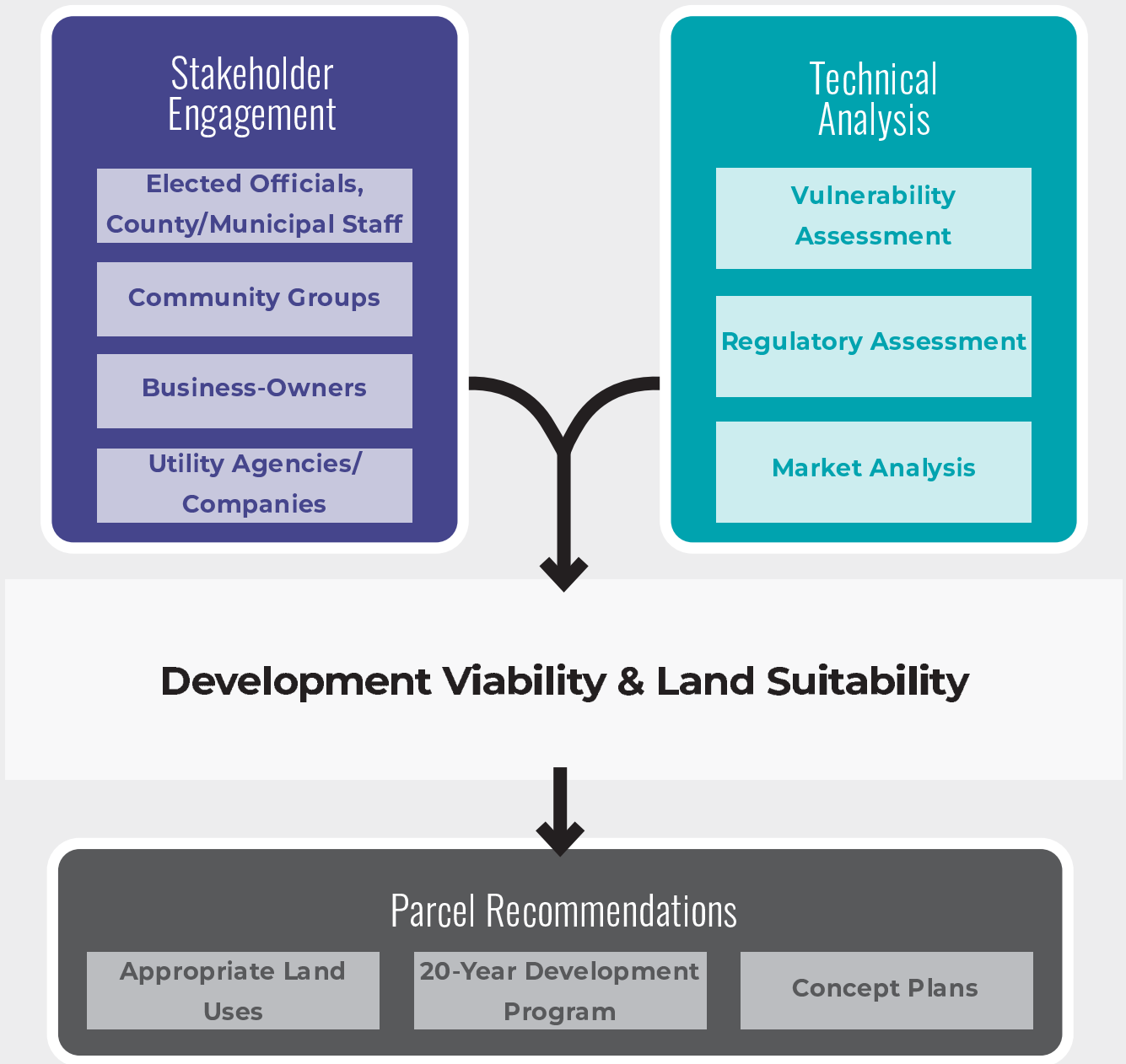


Figure 1-2. Master Planning Process

CURRENT CHALLENGES

The orphan parcels currently face significant development limitations. Although both Okaloosa County and Eglin Air Force Base have various needs, numerous implementation barriers hinder the potential for some development on these parcels. Enhanced Use Leases are one of the primary mechanisms that the military uses to lease underutilized land or facilities to private developers for commercial purposes.

The Enhanced Use Lease (EUL) process, while beneficial, presents several challenges. EUL projects are often highly complex, involving multiple stakeholders and intricate legal and regulatory requirements, which can slow down development and complicate management. Navigating the legal and policy landscape is another barrier, as compliance with various government policies and regulations can limit flexibility and speed.

ALIGNMENT WITH THE EGLIN AIR FORCE BASE MISSION

Eglin Air Force Base's main mission is testing and training. The surrounding communities are closely linked to this mission because many personnel live in Okaloosa County, and supporting these personnel and their families is essential for mission success. Enhancing local infrastructure and housing will afford more personnel, other indirectly related members of the workforce, and support services the opportunity to be near Eglin AFB. This will improve their quality of life and strengthen the connection between the base and the community, further supporting the mission.

Limited incentives for implementation can reduce motivation for military installations to pursue EUL projects, and the time required to implement these projects can lead to delays. Security and access concerns also pose a challenge, as ensuring security while allowing commercial development requires a delicate balance. Procedural differences between the military and private developers can lead to misunderstandings and conflicts, necessitating effective communication and collaboration. Delays also pose challenges due to economic factors, such as downturns and market fluctuations, which can impact the viability and financial benefits of EUL projects over time, causing additional delays or cancellations. Weaknesses in internal controls and documentation can lead to issues in managing the EUL program effectively, making proper documentation and adherence to internal controls essential for transparency and accountability.


The intent of this Master Plan is to effectively demonstrate the potential of each Orphan Parcel and to create a compelling case, a cohesive vision, and a preliminary land use plan that is backed by market findings and how they might benefit the base and the community as a whole. Regardless of how development occurs on the orphan parcels, the Master Plan aims to foster collaboration between the county and Eglin Air Force Base to ensure timely delivery of future development.


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VULNERABILITY ASSESSMENT


PURPOSE


This vulnerability assessment helps to identify risks associated with natural and man-made hazards associated with the orphan parcels. Risk, in this context, results from the combination of hazard probability and severity. Table 2-1 rates each of the hazards using the following scale.

 **Very Low** – Indicates minimal risk or impact; unlikely to be exploited or cause significant harm.

 **Relatively Low** – Suggests a low level of risk and may have some impact but isn't an immediate threat.

 **Relatively Moderate** – Implies moderate risk which may have some impact but isn't an immediate threat.

 **Relatively High** – Signified a significant risk and urgent attention is needed to mitigate the vulnerability.

 **Very High** – Indicates severe risk and immediate action is required to prevent damage.

Coastal areas tend to face increasing threats including rising sea levels, storms, and erosion. This assessment is intended to inform the remainder of the master planning process by revealing the spatial extents of potential impacts and the area's ability to respond. By assessing vulnerabilities, the planning team can put forth realistic and proactive concepts, allowing County leadership to make informed decisions about land use, infrastructure needs, and disaster preparedness.

ASSESSMENT METHODOLOGY

Conducting the Orphan Parcels vulnerability assessment involved a combination of stakeholder engagement and technical analysis.

STAKEHOLDER ENGAGEMENT

The project team engaged relevant stakeholders ranging from community leaders to county and municipal staff. Their insight was valuable in understanding the local context and identifying vulnerabilities and assessing impacts. Stakeholders collaborated with the project team in various meetings and during a stakeholder roundtable in early August 2024.

TECHNICAL ANALYSIS

The bulk of the assessment was conducted through technical analysis in which project team members gathered historical data, projections, and models to gain an understanding of each of the assessed vulnerabilities. The technical team mapped potential hazards in relation to the orphan parcels and culminated a high-level rating for each of the hazards.



RISKS & VULNERABILITIES

The project team grouped the analyzed vulnerabilities into three categories: Natural Hazards, Infrastructure Shocks, and Social Threats. Each category is defined below and further broken down by parcel in Table 2-1.



Natural Hazards

These are events or processes caused by natural forces that pose risks to human life, property, and the environment.



Infrastructure Shocks

Infrastructure shocks refer to disruptions or failures in critical systems such as transportation, utilities, communication networks and buildings.



Social Threats

These encompass various risks related to human well-being and societal functioning. These include socioeconomic factors, crime, and other physical threats.

The following further describes each vulnerability. Based on this assessment, the greatest risks to the Orphan Parcels are hurricanes and lightning, followed by tornadoes and wildfires.

Specific hazard definitions and additional risk and vulnerability maps can be located in Appendix A.

Table 2-1. Summary Risk Matrix

	PARCELS							
	1	2	5	9	10	11	13	17
NATURAL HAZARDS								
Tornado	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE
Non-Storm Surge Flooding	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY MODERATE	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW
Storm-Surge Flooding	VERY LOW	VERY LOW	RELATIVELY MODERATE	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW
Drought	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW
High Wind	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE
Extreme Rainfall	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW
Subsidence/Sinkholes	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW
Wildfire	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE
Hurricane	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH
Lightning	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH
Sea Level Rise	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW
Extreme Heat	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE
INFRASTRUCTURE SHOCKS								
Traffic Congestion	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY LOW	RELATIVELY MODERATE
Infrastructure Failure	Refer to Description on Page 37							
Utility Outage	Refer to Description on Page 37							
SOCIAL THREATS								
Social Vulnerability	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE
Crime	Refer to Description on Page 43							
Physical Terrorist Attacks	Refer to Description on Page 43							

VERY LOW
 RELATIVELY LOW
 RELATIVELY MODERATE
 RELATIVELY HIGH
 HIGH

NATURAL HAZARDS

Natural hazards evaluated in this vulnerability assessment include tornado, extreme heat, flooding, drought, extreme wind, wildfire, hurricane, lightning, subsidence/sinkholes, sea level rise (SLR), and precipitation increase.

Table 2-2. Natural Hazards by Parcel

	PARCELS							
	1	2	5	9	10	11	13	17
NATURAL HAZARDS								
Tornado	RELATIVELY HIGH	RELATIVELY HIGH	RELATIVELY HIGH	RELATIVELY HIGH	RELATIVELY HIGH	RELATIVELY HIGH	RELATIVELY HIGH	RELATIVELY HIGH
Non-Storm Surge Flooding	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY HIGH	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW
Storm-Surge Flooding	VERY LOW	VERY LOW	RELATIVELY HIGH	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW
Drought	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW
High Wind	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE
Extreme Rainfall	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW
Subsidence/Sinkholes	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW
Wildfire	RELATIVELY HIGH	RELATIVELY HIGH	RELATIVELY HIGH	RELATIVELY HIGH	RELATIVELY HIGH	RELATIVELY HIGH	RELATIVELY HIGH	RELATIVELY HIGH
Hurricane	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH
Lightning	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH	HIGH
Sea Level Rise	RELATIVELY LOW	RELATIVELY LOW	RELATIVELY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW	VERY LOW
Extreme Heat	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE

■ VERY LOW

■ RELATIVELY LOW

■ RELATIVELY MODERATE

■ RELATIVELY HIGH

■ HIGH

TORNADO

Tornadoes act as a threat to development because infrastructure damage can occur. Damages to infrastructure can be caused by tornadoes as a result of high wind speeds and flying debris. Damage to infrastructure can result in utility service disruptions and a need for expensive repairs.

Tornado risk for all parcels is relatively high. This score was established based on the Federal Emergency Management Agency (FEMA) National Risk Index (NRI). The FEMA NRI scoring for the area of interest is displayed in Figure 2-1. Historically, there is a higher frequency of tornadoes in Florida than any other state in the Southeast U.S (FSU). Tornado formation can occur at any time throughout the year in Florida but are seen most frequently in the spring and summer.

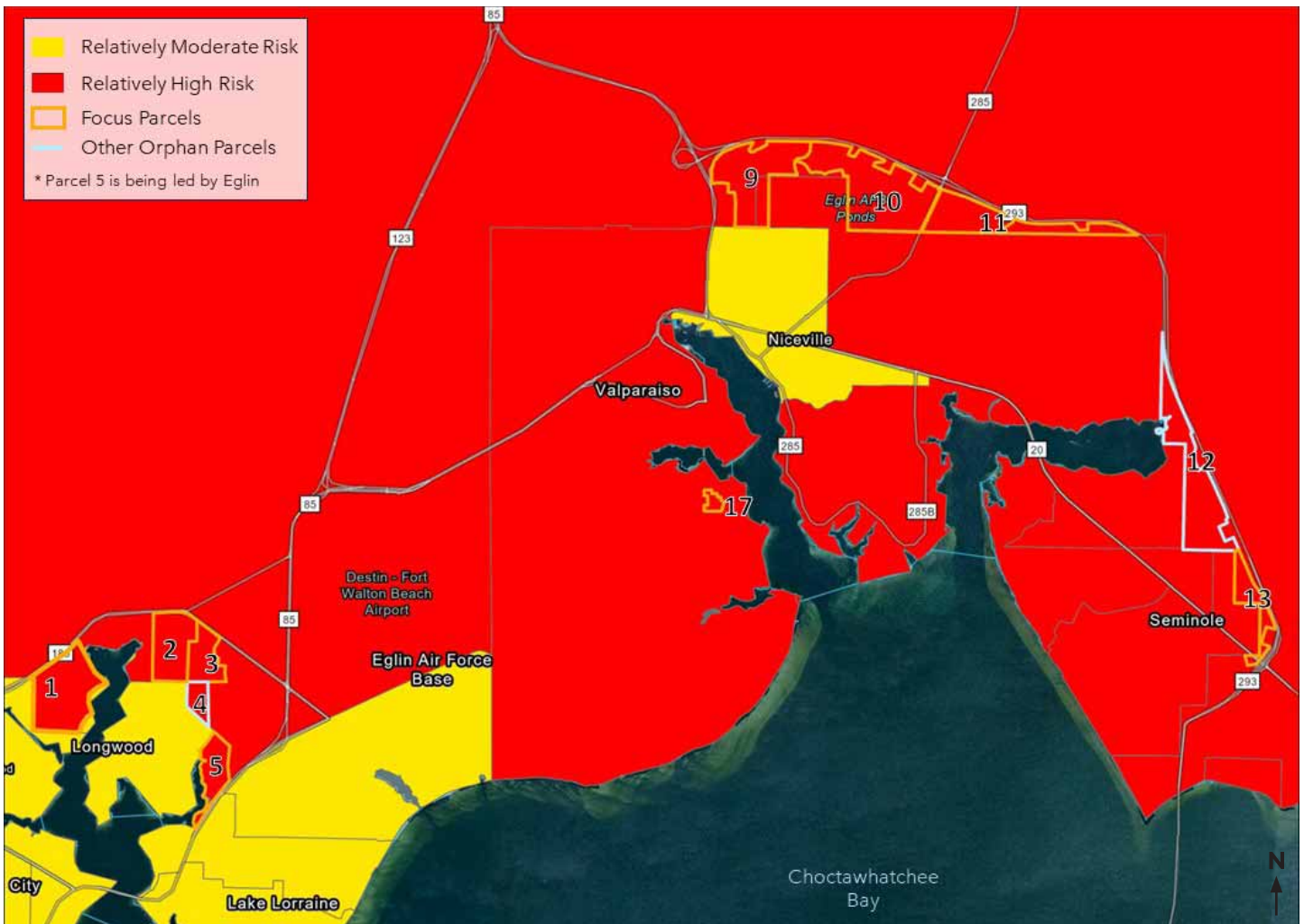


Figure 2-1. Overall Area of Interest Tornado Risk (FEMA NRI)

FLOODING

Flooding events threaten parcel development in a variety of ways. The two types of flooding being assessed include non-storm surge flooding and storm-surge flooding.

NON-STORM SURGE FLOODING

Infrastructure and surrounding communities are threatened by flooding. Non-storm surge flooding can cause infrastructure damage and as a result, utility service disruptions. Some types of non-storm surge flooding, including flash floods, can pose a significant threat to humans. Flash floods are quick moving and carry large quantities of debris. These events can cause injury and loss of life.

Non-storm surge flooding has been classified as relatively low risk for all focus parcels, apart from Parcels 5, 9, and 10. At the remaining parcels, non-storm surge flooding is not a significant threat to future developments. Figure 2-2 shows the 100-year and 500-year FEMA floodplains for the overall area of interest.

PARCEL SPECIFIC CHALLENGES

At Parcel 9 and Parcel 10 non-storm surge flooding vulnerability has been classified as relatively moderate. The center of both parcels is located in the 100-year floodplain. Mill Creek runs through Parcel 9 and the Eglin AFB Ponds are located in Parcel 10. These waterbodies are located in the 100-year floodplain and are likely to flood during precipitation events. When developing parcels 9 and 10 it is important to take the location of these waterbodies into consideration.

At Parcel 5 non-storm surge flooding has been classified as relatively high risk. This classification is based on FEMA floodplain maps. Approximately half of Parcel 5 will become inundated in both the 100-year and 500-year floodplain scenario. Flooding throughout this parcel can act as a threat to infrastructure and assets located there.

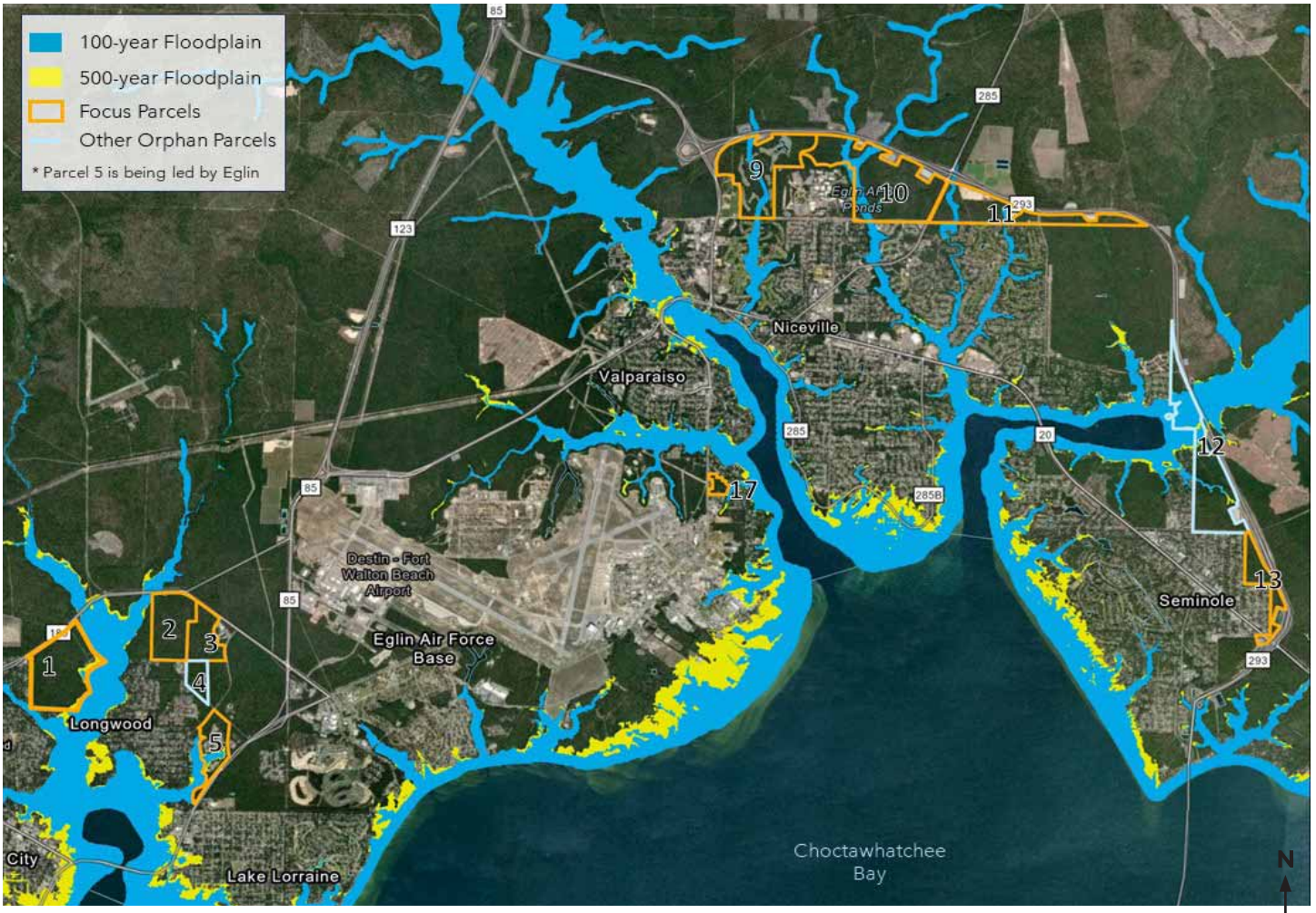


Figure 2-2. Area of Interest FEMA Floodplains (FEMA)

STORM SURGE FLOODING

Storm-surge flooding acts as a threat to infrastructure and human populations. Flood inundation can result in damage to infrastructure which can affect utility services and cause infrastructure failure (NOAA). Effects of storm-surge flooding on coastal communities can include injury and loss of life.

Storm-surge flooding has been classified as very low to relatively low risk for all focus parcels, with the exception of Parcel 5. This score was established utilizing storm surge GIS data published by Okaloosa County Public Safety Department. Figure 2-3 shows the projected extent of storm surge inundation throughout the area of interest. Storm surge is not expected to affect most of the focus parcels which results in a low vulnerability scoring. While the parcels are located within close proximity to the coast,

the threat of storm surge is reduced due to the presence of Choctawhatchee Bay. The shoreline between the Gulf of Mexico and Choctawhatchee Bay acts as a natural line of defense in storm events and reduces the intensity of incoming storms. Reduced storm intensity results in less storm-surge flooding in the area of interest.

Unlike the majority of the focus parcels, Parcel 5 is classified as having a relatively moderate vulnerability to storm-surge flooding. Approximately half of the parcel is expected to be inundated during a storm surge event. It is necessary to take this threat into consideration when developing Parcel 5 as it can result in future infrastructure damage.



Figure 2-3. Overall Area of Interest Storm Surge (Okaloosa County Public Safety Department)

DROUGHT

Prolonged periods of drought act as a threat to potential developments on the identified parcels. Threats caused by drought include water shortages and increased risk of wildfire (National Integrated Drought Information System). Water shortages can result in utility service disruption and the occurrence of wildfire can damage infrastructure.

Drought has been classified as relatively low risk for all focus parcels. This score is established using the FEMA NRI. For all parcels, with the exception of Parcel 17, the NRI classifies drought as a relatively low risk. This score is applied to Parcel 17 because the parcels are located within the same geographic area and drought is the result of weather patterns. It is expected that the same weather patterns occurring at the rest of the parcels is consistent at Parcel 17 as well. Therefore, the focus parcels are less vulnerable to drought and this hazard does not need to be considered when developing the parcels.

SUBSIDENCE/SINK HOLES

Sinkhole formation acts as a threat to infrastructure in a multitude of ways. The formation of sinkholes beneath roadways can result in roadway closures and traffic congestion. Additionally, the formation of sinkholes underneath housing or other buildings can threaten human wellbeing and result in damages to infrastructure and costly repairs.

The risk of subsidence/sink holes amongst all focus parcels is classified as very low. This score was established by assessing the favorability of the area's geology to sinkhole formation as established by the Florida Department of Environmental Protection (FDEP).

HIGH WIND

High wind events can threaten parcel infrastructure and development by damaging transmission lines and cell towers. Damage to this infrastructure can result in disruptions to power service and communications in the region.

All focus parcels have been classified as having relatively moderate high wind vulnerability. High winds can cause damage to infrastructure. This score was established based on the FEMA NRI. When developing the focus parcels wind resistant infrastructure should be considered to reduce the threat of high wind.

EXTREME RAINFALL

An increasing frequency of extreme rainfall events acts as a threat to infrastructure and communities for a multitude of reasons. Extreme rainfall events can result in flash flood events and increased rates of erosion (Natural Resources Defense Council). Flash flood events can damage infrastructure leading to utility disruptions and expensive repairs. A flash flood event can threaten human populations by causing injury and displacement through the destruction of housing infrastructure.

Extreme rainfall and precipitation increase is classified as a very low vulnerability for all focus parcels. This classification is based on the NEMAC U.S. Climate Resilience Toolkit Climate Explorer. The Climate Explorer projects the annual total precipitation expected in Okaloosa County from the 2020s to the 2090s. The projected amount of annual precipitation in the county is projected to range from 63 – 65 inches annually for the next eighty years. As a result, precipitation increase and extreme rainfall is not expected to be a significant threat to future developments on the focus parcels.

WILDFIRE

Wildfire vulnerability within parcels is taken into consideration because it can impact both infrastructure and human wellbeing. The presence of wildfire in an area can cause significant damage to infrastructure that can lead to infrastructure failure, disruption of service, and the loss of buildings and housing structures. The effects of wildfire on humans includes displacement, injury, respiratory tract irritation, and the development of chronic disorders – such as bronchitis, reduced lung function, and asthma (U.S. Environmental Protection Agency).

For all parcels wildfire risk is classified as relatively high. This score was established using the FEMA

NRI and assessing the WUI classifications of the area. Figure 2-4 shows the NRI wildfire risk score in the area of interest. All parcels, apart from Parcel 17, are classified as relatively high risk by the NRI. Parcel 17 is in an area with a relatively low risk according to the NRI, however, Figure 2-5 shows that the parcel is located within the WUI.

According to Figure 2-5, all parcels are at least partially within the WUI. Wildfires are most likely to form within the WUI, which makes all focus parcels vulnerable to wildfire events. When developing these parcels, wildfire planning and mitigation methods can be considered to reduce the risk of wildfire hazards to future developments.

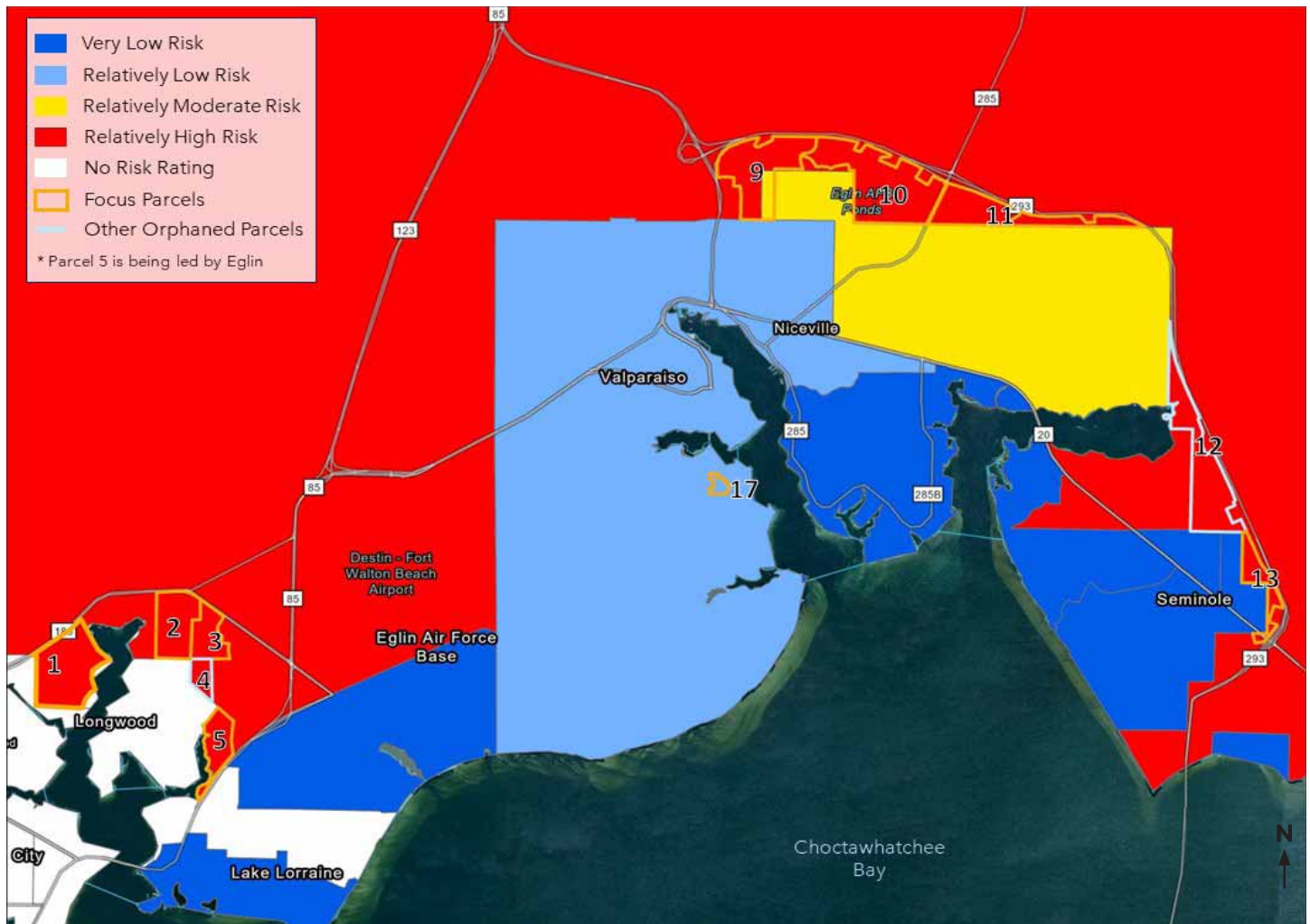


Figure 2-4. Overall Area of Interest Wildfire Risk (FEMA NRI)

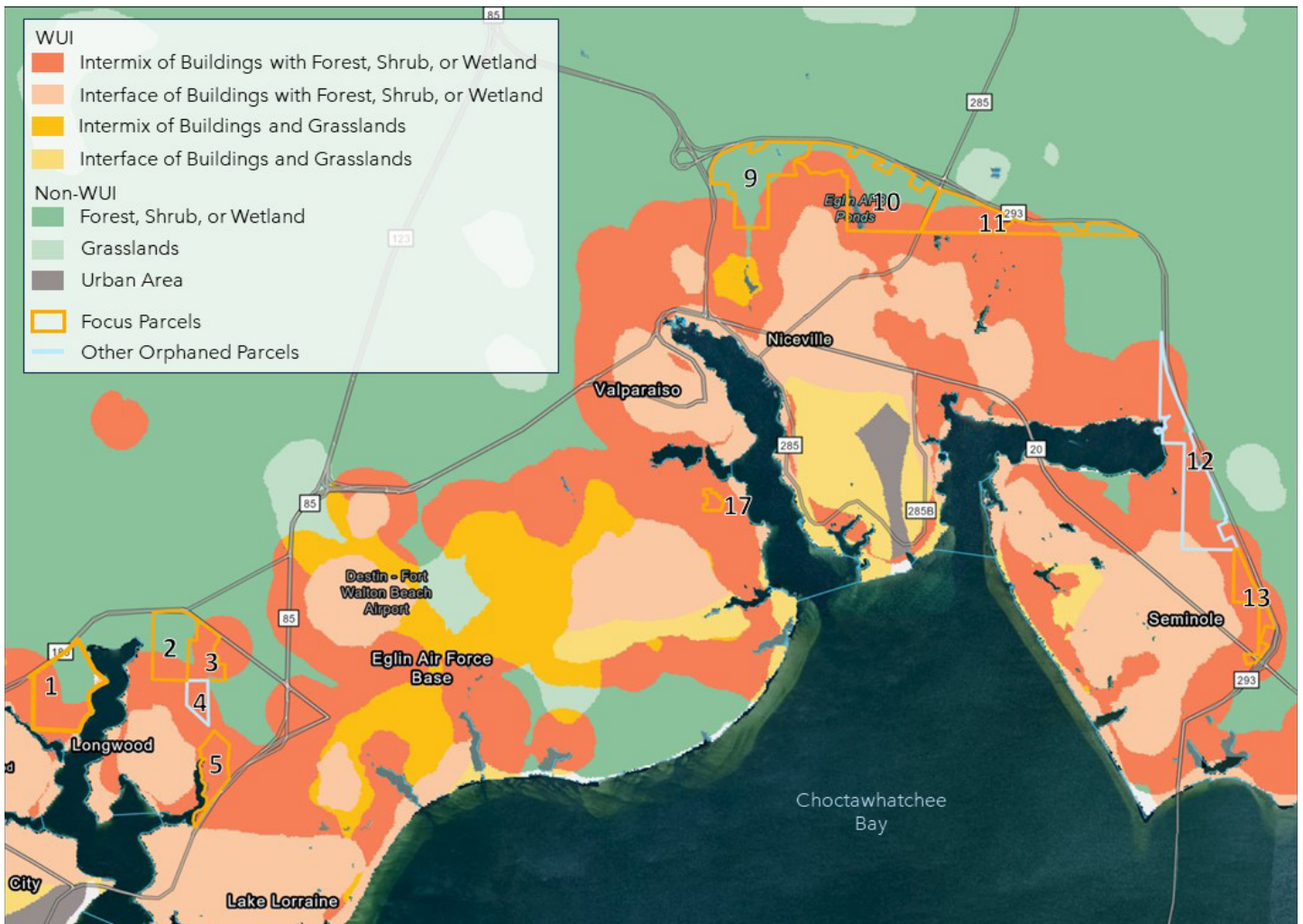


Figure 2-5. Overall Area of Interest WUI Classification



HURRICANE

Threats posed by hurricanes can threaten both infrastructure and coastal communities. Hurricane events produce strong winds, storm-surge flooding, and intense rainfall which can result in coastal flooding and tornadoes (NOAA). Infrastructure is likely to sustain damages as a result of flooding and strong winds which can cause utility service disruptions. Coastal communities are threatened by hurricanes as flooding and strong winds can damage homes and vehicles and cause injury and loss of life.

Hurricane risk for all parcels is classified as very high. This score was established based on the FEMA NRI. As seen in Figure 2-6, all parcels are located in an area of very high risk. The parcels are located on the Gulf Coast which is prone to hurricane events. Future developments established on these parcels should adhere to hurricane building codes to mitigate the risk of infrastructure damage during potential hurricane events.

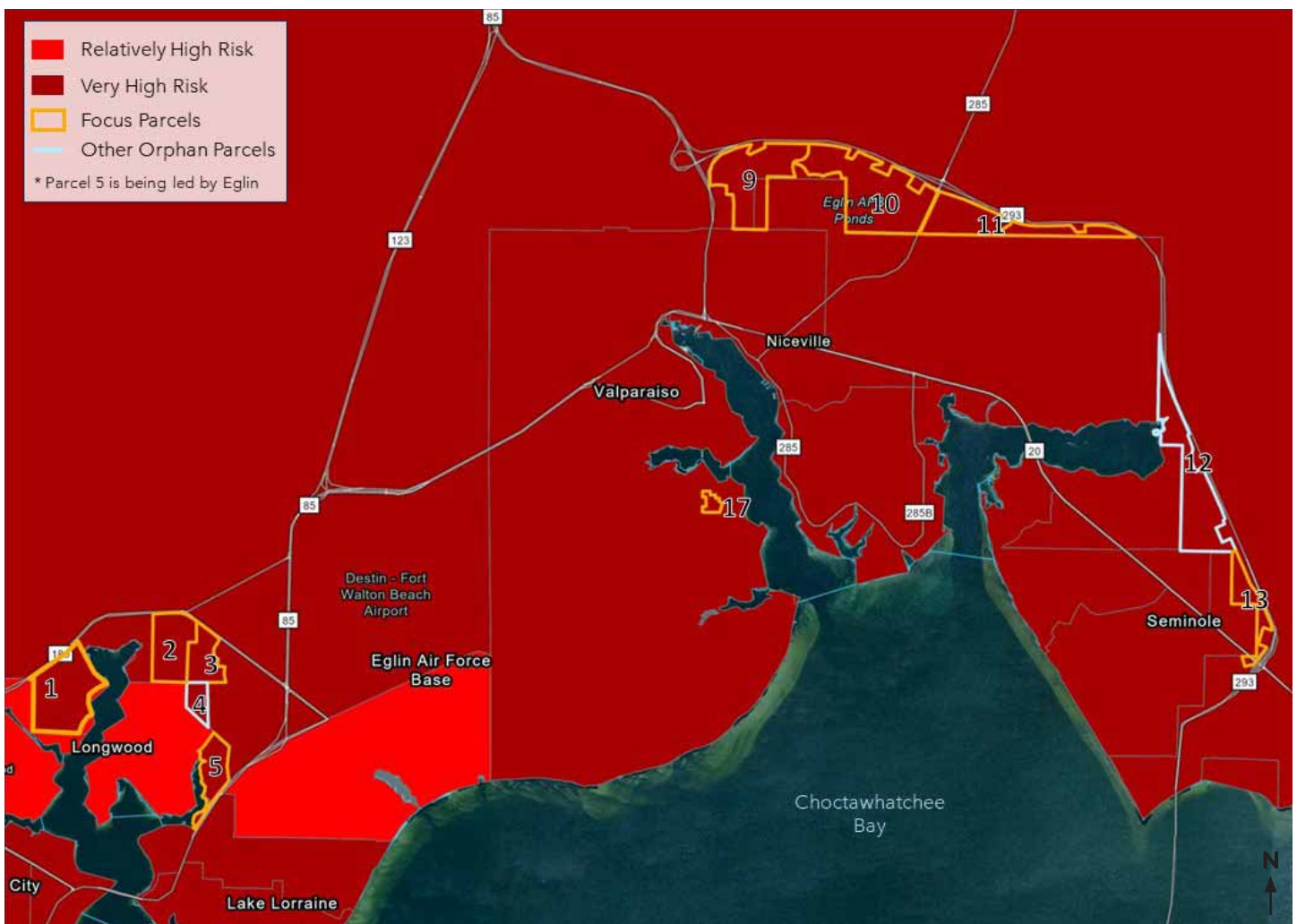


Figure 2-6. Overall Area of Interest Hurricane Risk (FEMA NRI)

LIGHTNING

Lightning is a threat for many reasons. Infrastructure damage can result from a lightning strike. Additionally, lightning strikes in the area can ignite dry fuels and cause wildfires. Florida is known as the lightning capital of the country due to the high frequency of lightning strikes that occur annually (FSU). Due to the high frequency of lightning within Florida, lightning often threatens infrastructure and communities.

The risk of lightning amongst all focus parcels is classified as very high risk. This score was established using the FEMA NRI. Figure 2-7 shows the NRI risk score for lightning throughout the area of interest. All parcels are located in an area classified as very high risk. To mitigate the risk of lightning in future developments, lightning protection infrastructure can be installed.

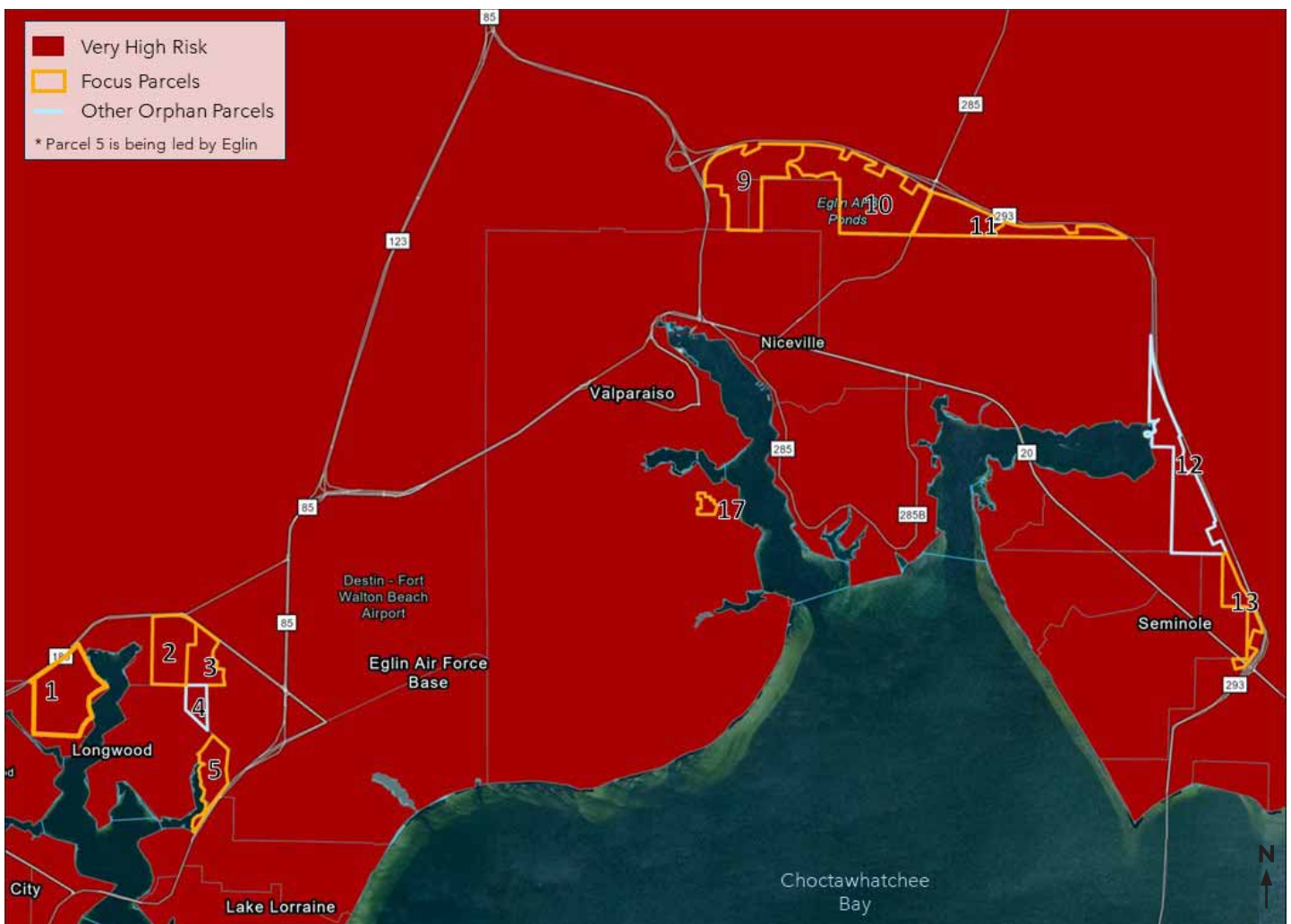


Figure 2-7. Overall Area of Interest Lightning Risk (FEMA NRI)

SEA LEVEL RISE (SLR)

The focus parcels are threatened by SLR as they are located on the coast of the Florida Panhandle. The projected increase in SLR is a threat because it can result in the inundation of infrastructure, flooding, and saltwater intrusion. These impacts can lead to erosion and utility outages caused by damage to infrastructure.

Vulnerability scores for all focus parcels ranges from very low to relatively low. This scoring was established by assessing sea level rise scenarios projected by the National Oceanic and Atmospheric Administration (NOAA). Projected scenarios include intermediate low, intermediate, intermediate high, and high for the years 2040, 2070, and 2100. The projected SLR scenarios for 2040 are displayed in Figure 2-8. It is projected that in 2040 there will be 0.8 – 1ft of SLR in the area of interest. None of the focus parcels will have any

inundation as a result of approximately 1ft of SLR. This indicates that SLR is not an immediate threat to parcel development.

The projected SLR scenarios for 2070 are shown in Figure 2-8. It is projected that in 2070 there will be 1 – 3ft of SLR in the area of interest. None of the focus parcels will have any inundation as a result of the projected SLR. This indicates that SLR is not a threat to parcel development within the next fifty years.

The projected SLR scenarios for 2100 are shown in Figure 2-8. It is projected that in 2100 there will be 2 – 7ft of SLR in the area of interest. None of the focus parcels will have any inundation as a result of the projected SLR. This indicates that SLR is not a threat to parcel development within the next eighty years.

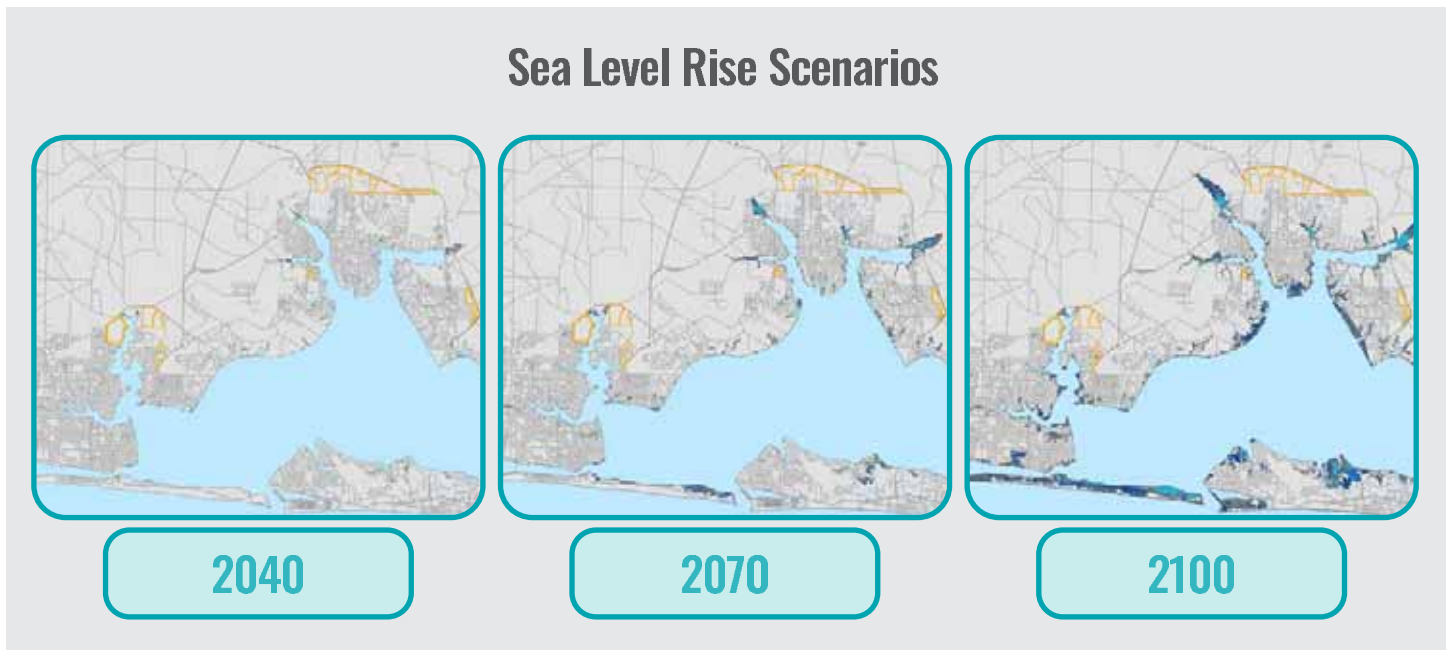


Figure 2-8. Overall Area of Interest Sea Level Rise Scenarios (NOAA)

EXTREME HEAT

Extreme heat acts as a threat to both humans and infrastructure. Prolonged exposure to extreme heat can cause stress to the heart and kidneys as the human body attempts to regulate internal body temperature. Over time this can result in the development of chronic illnesses, dehydration, and heat stroke (World Health Organization). Extreme heat can also have impacts on infrastructure. Infrastructure impacts resulting from heat can include reduced electrical system efficiency, concrete roadways buckling, and asphalt roadway deformation (Oak Ridge National Laboratory). The threat of extreme heat is projected to worsen due to climate change.

At all parcels, extreme heat risk is classified as relatively moderate. This classification is based on the National Environmental Modeling and Analysis Center's (NEMAC) U.S. Climate Resilience Toolkit Climate Explorer. Data from the climate explorer examines the 2020, 2040, and 2060 projections for average daily max temp, number of days with max temp >90, number of days with max temp >95, and number of days with max temp >100.

According to NEMAC, the average daily maximum temperature is projected to rise in the coming years. In 2020, the average daily maximum temperature was 80.1 degrees and by 2060 the average daily maximum temperature is projected to be 83.8 degrees in a high emissions scenario and 81.8 degrees in a low emissions scenario. According to NASA, a 2-degree rise in temperatures is considered greater than the critical threshold in which dangerous effects of climate change will occur.






The projected annual days with a maximum temperature greater than 90 degrees in Okaloosa County is calculated by NEMAC. In 2020 the number of days with a maximum temperature greater than 90 degrees was 100.4. By 2060 the projected number of days greater than 90 degrees is expected to be 140.4 in a high emissions scenario and 123.1 in a low emissions scenario. An increase in days greater than 90 indicates a rising threat of extreme heat events in Okaloosa County. This makes new developments on the focus parcels vulnerable.

INFRASTRUCTURE SHOCKS AND STRESSES

Infrastructure shocks and stresses evaluated in this vulnerability assessment include utility outage, traffic congestion, infrastructure failure, and cyber attack.

Table 2-3. Infrastructure Shocks and Stresses by Parcel

	PARCELS							
	1	2	5	9	10	11	13	17
INFRASTRUCTURE SHOCKS								
Traffic Congestion	RELATIVELY HIGH	RELATIVELY HIGH	RELATIVELY HIGH	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY MODERATE	RELATIVELY LOW	RELATIVELY HIGH
Infrastructure Failure	Refer to Description on Page 37							
Utility Outage	Refer to Description on Page 37							

 VERY LOW	 RELATIVELY LOW	 RELATIVELY MODERATE	 RELATIVELY HIGH	 HIGH
--	--	---	--	--

TRAFFIC CONGESTION

Communities are threatened by traffic congestion for a multitude of reasons. Elevated levels of traffic congestion can result in gridlock within urban communities which can prevent the movement of all vehicles, including emergency response teams (International Transport Forum). This can create public safety concerns within communities. Traffic congestion reduces accessibility to infrastructure within communities which is a concern.

Assessing annual average daily traffic levels on local streets is important in understanding traffic congestion. Figure 2-9 shows the annual average daily traffic on the major roadways throughout the area of interest.

Traffic Congestion is classified as relatively high at Parcels 1, 2, 5, and 17. This classification is based on FDOT roadway congestion projections for 2020 and 2045. Traffic congestion is projected to increase to 95 to >100% capacity exceedance on the majority of the surrounding roadways. Traffic Congestion is classified as relatively moderate at Parcels 9, 10, and 11. This classification is based on FDOT roadway congestion projections for 2020 and 2045. Traffic congestion is projected to increase to 95 to >100% capacity exceedance on some of the surrounding roadways. Increasing traffic congestion can make accessing parcels 1, 2, 5, 9, 10, 11, and 17 challenging.

Proposed parcel development will increase the number of residential areas. This will allow for increased population growth and consequently elevated traffic congestion.

INFRASTRUCTURE FAILURE

Infrastructure failure can occur for reasons such as aging infrastructure, natural hazards, and single points of failure. Aging infrastructure is prone to retaining damages and not operating properly. Mitigating aging infrastructure requires the replacing and updating the existing infrastructure. Single points of failure threaten infrastructure and surrounding communities because it can prolong the frequency and duration of utility outages. Disruptions to utility services can result in major impacts to the community. To mitigate single points of failure it is essential to establish utility redundancy throughout the community.

UTILITY OUTAGE

Utility outages can affect the quality of life for affected communities. Households and businesses can face disruptions in daily activities and operations as a result of a utility outage. The severity of a utility outage is dependent on the duration of time it takes to complete repairs and restore service. Future developments can reduce the likelihood of utility outages by performing regular maintenance on utility infrastructure, performing preventive measures, and ensuring redundancy within the utility system.



Figure 2-9. Area of Interest Annual Average Daily Traffic Levels (FDOT)

SOCIAL THREATS

Social threats are risks to a community's well-being that arise from factors that can increase inequality, disrupt societal cohesion, and threaten human lives. Social threats evaluated in this vulnerability assessment include social vulnerability, crime, physical terrorist attack, and industrial accidents.

Table 2-4. Social Threats by Parcel

	PARCELS							
	1	2	5	9	10	11	13	17
SOCIAL THREATS								
Social Vulnerability								
Crime	Refer to Description on Page 43							
Physical Terrorist Attacks	Refer to Description on Page 43							



SOCIAL VULNERABILITY

Social Vulnerability is classified as relatively moderate for all parcels. This score was determined using the CDC Social Vulnerability Index (SVI). The SVI is determined for each census tract and overall vulnerability is based on 4 categories – socioeconomic status, household characteristics, racial and ethnic minority status, and housing type and transportation. The CDC SVI classification for the area of interest is shown in Figure 2-10.

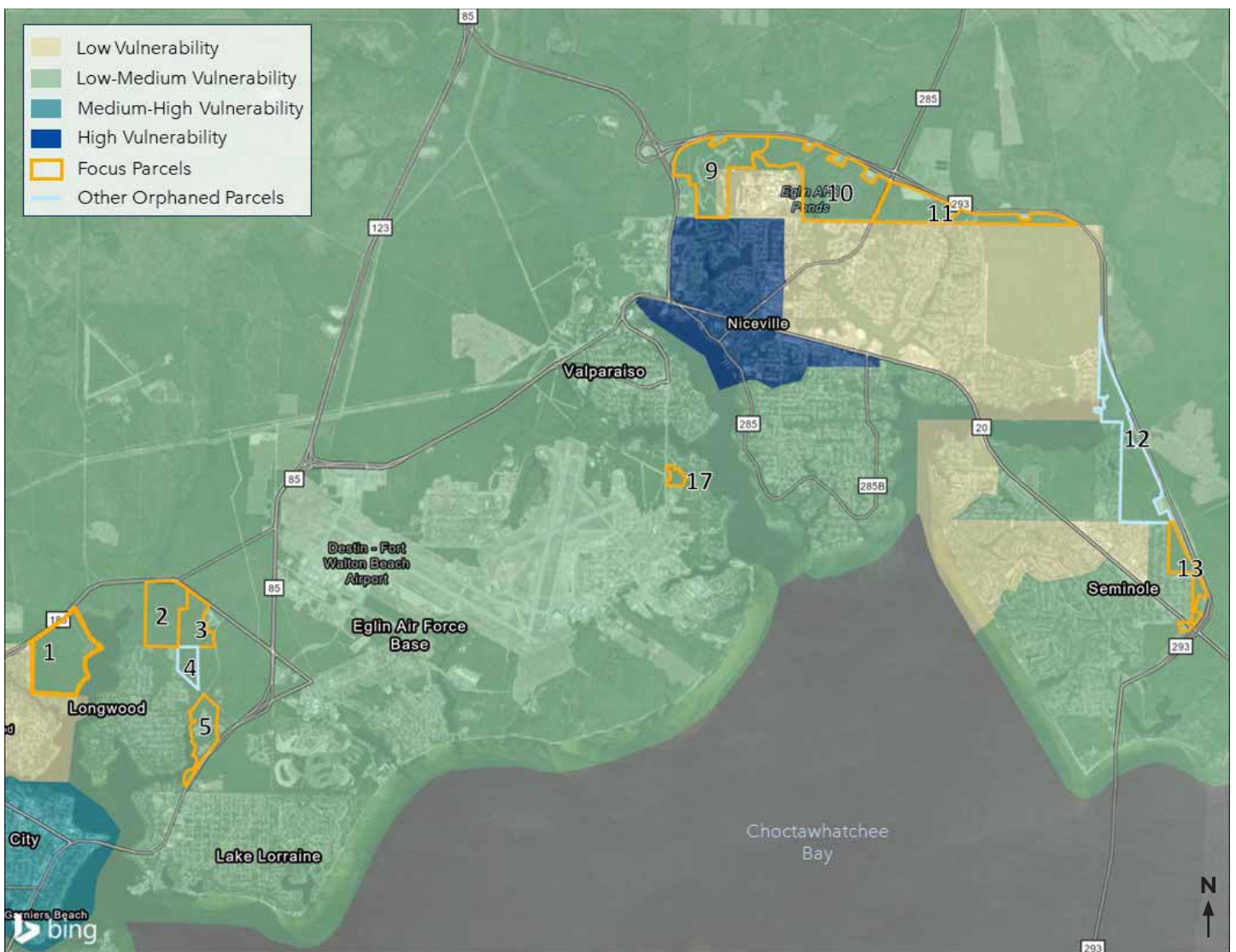


Figure 2-10. Area of Interest Social Vulnerability Index (CDC)

SOCIOECONOMIC STATUS

The socioeconomic status category assesses median household income, the percentage of individuals living below the poverty line, unemployment rates, and the percentage of individuals over 18 that have not completed their high school education. This score demonstrates the economic stability and educational attainment of a community. Communities with lower income and education levels are often more vulnerable to natural hazards. Table 2-5 outlines the census data used to assess socioeconomic status for the census tracts the focus parcels are in. All parcels, with the exception of parcel 17 are in census tract 208. Parcel 17 is in census tract 212.

HOUSEHOLD CHARACTERISTICS

The indicators utilized to assess household characteristics include the percentage of the population that is under 18 or over 65, the average household size, and the percentage of individuals with disabilities. This category provides an understanding of the quantity of vulnerable groups within communities that are more vulnerable to natural hazards. Table 2-6 outlines the census data used to assess household characteristics for the census tracts the focus parcels are in.

Table 2-5. Socioeconomic Status

	CENSUS TRACT 208	CENSUS TRACT 212
Median Household income	\$73,356	\$79,795
% Pop. Below Poverty Line	9.2%	19.5%
% Pop. Unemployed	0.4%	1.2%
% Pop. Not Completed High School	0.2%	4.7%

Table 2-6. Household Characteristics

	CENSUS TRACT 208	CENSUS TRACT 212
% Pop. Under 18	26%	20.4%
% Pop. Over 65	2.6%	13.3%
Average Household Size	2.87	2.4
% Pop. with a Disability	4.9%	15.7%

RACIAL AND ETHNIC MINORITY STATUS

Racial and ethnic minority status is characterized by the percentage of the population that belongs to a racial and ethnic minority group, including African American, Hispanic Latino, Asian, and other non-white groups. Communities with large minority populations are more likely to have challenges recovering from a natural hazard event. These challenges are often the result of language barriers, systemic inequalities, and historic marginalization. Table 2-7 outlines the census data used to assess racial and ethnic minority status for the census tracts the focus parcels are in.

HOUSING AND TRANSPORTATION

The housing and transportation category is assessed using housing characteristics such as the proportion of homes with inadequate conditions, the percentage of households with more than one person per room, and the percentage of households without access to a vehicle. Additionally, this category also assesses public transportation availability within the community. Communities that have elevated levels of poor housing conditions and limited access to transportation are more vulnerable during a natural hazard event. Table 2-8 outlines the census data used to assess housing and transportation data for the census tracts the focus parcels are in.

Table 2-7. Racial and Ethnic Minorities

	CENSUS TRACT 208	CENSUS TRACT 212
% Pop. Hispanic/Latino	13.5%	8.7%
% Pop. African American	7.4%	5.7%
% Pop. Asian	2.9%	3.2%
% Pop. Other Minority	1.1%	1.3%

Table 2-8. Housing and Transportation

	CENSUS TRACT 208	CENSUS TRACT 212
% of Households with >1 Person per Room	3%	2%
% of Households with No Access to Vehicle	2.1%	3.6%

CRIME

Crime within Okaloosa County can be assessed using the Federal Bureau of Investigation's (FBI) crime database. As seen in Figure 2-11, the data for crime rates (all property crimes and all violent crimes) demonstrates a decrease in crime rates over time in Okaloosa County. This indicates that crime may not be a significant threat to future parcel development.

PHYSICAL TERRORIST ATTACK

Physical terrorist attacks are an act of violence targeted at individuals, infrastructure, or public spaces with the intent of causing harm, fear, or disruption through physical actions (FBI). Attacks can include bombings, armed assaults, sabotage to infrastructure, and hijacking vehicles, aircraft, or ships to use as weapons.

Development of the focus parcels could potentially be impacted by physical terrorist attacks due to the proximity to Eglin Air Force Base. Military installations are at a greater risk of terrorist attacks due to the infrastructure and weapons located on the base. These events can cause injury and loss of life.

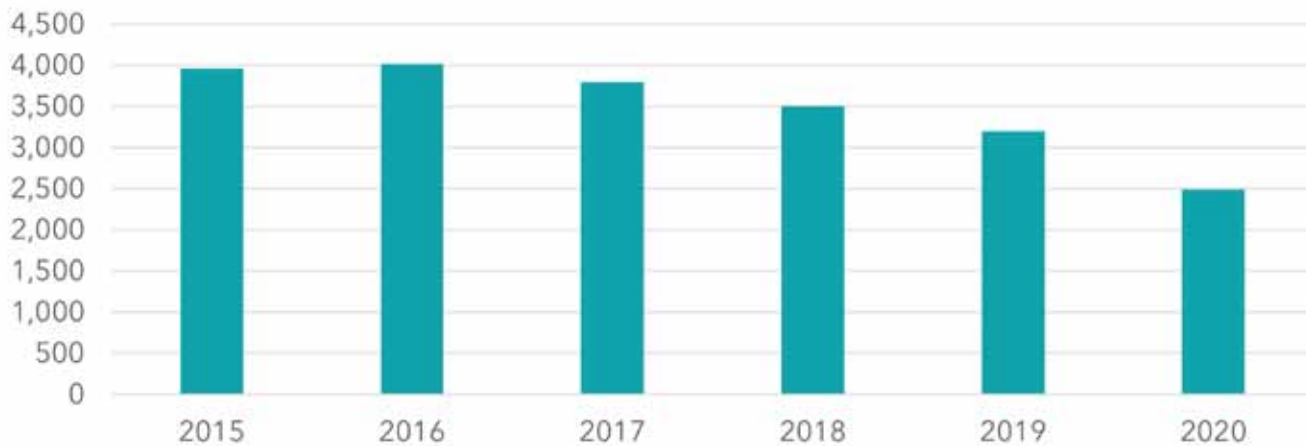


Figure 2-11. Okaloosa County Crime Rates Over Time (FBI)

MARKET ANALYSIS

PURPOSE

The market analysis examines current socioeconomic trends and gathers insights from key stakeholders to identify community needs and preferences. The objective of the analysis is to assess existing conditions and devise a range of potential uses based on an objective assessment of study area characteristics, local competition, market trends, and other important factors. Based on this assessment, recommendations for the most optimal uses are provided, which are detailed in Chapter 4, Recommendations.

Furthermore, this market analysis informs strategic decisions regarding prioritization of projects that offer the highest impact and aligning them with broader economic and community goals. By conducting a comprehensive market analysis, the project team can ensure that the Orphan Parcels Master Plan meets community needs and supports the long-term goals of Eglin Air Force Base and the surrounding area.

FINDINGS

Okaloosa County is a collection of thriving communities poised for significant growth over the next 25 years. The County has a unique opportunity to deliver additional housing options and supporting uses for its residents, veterans, military personnel, and aging population. Home to Eglin Air Force Base, a primary driver of the regional economy that supports over 74,000 jobs. Okaloosa plays a key role in supporting not just the current mission of the base, but also the ongoing pride and commitment to military service in the region, with over 32,000 veterans living in the county.

Currently, hundreds of airmen and other service members are housed outside the base, primarily within Okaloosa County. Eglin's most recent Housing Requirements and Market Analysis (HRMA) identified a private sector housing shortfall of over 1,000 units, with a particular need for 1-2 bedroom spaces to serve mid-level enlisted personnel (E3-E7).

The County is experiencing strong population growth, driven by Eglin, vacation and second home travel to the county's beaches, and a significant service sector that provides critical support to both groups. Despite Eglin's force strength remaining fairly level, the demand for housing continues to rise. However, with strong demand and limited developable land near Eglin, home prices are increasingly out of reach for most military and working families. The County's Attainable Housing Strategic Plan, completed in 2023, supports this assessment with 25 specific strategies that the County is considering for implementation.

This Market Analysis further explores the challenges and opportunities facing Okaloosa County and how the County can leverage its assets to implement effective development on the Orphan Parcels.

POPULATION TRENDS

Okaloosa County's population has grown 20% in the last 14 years, and the county expects to see an increase of 33,000 more people by 2040. The surge in population will heighten the demand for diverse housing options. This includes housing that is affordable for military personnel and working families, as well as more upscale residences for those seeking vacation or second homes. Addressing this demand is essential to prevent housing shortages and to ensure that home prices remain within reach for all segments of the population.

The growing population will also require expanded medical facilities and services. This includes not only hospitals and clinics but also specialized care centers to cater to the needs of an aging population and the specific health requirements of veterans and military personnel. Ensuring adequate medical infrastructure is vital for maintaining the health and well-being of the community.

Additionally, the increase in population will drive the need for more childcare facilities. As more families move into the area, the demand for quality childcare services will rise. Developing parcels to include childcare centers will support working parents and contribute to the overall quality of life in Okaloosa County.

Additional information regarding the senior population and child care in Okaloosa County is located in Appendix B.

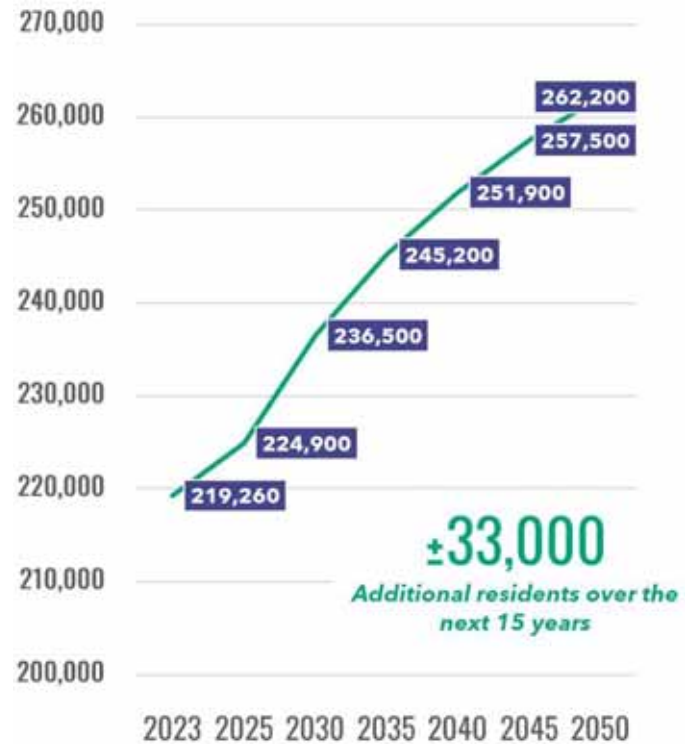


Figure 3-1. Population Growth (Bureau of Economic and Business research)

Table 3-1. Historical, Current & Projected Population (US Census)

	YEAR	POPULATION
Historical	1980	110,705
	1990	144,453
	2000	171,200
	2010	180,725
	2020	216,482
Current Population (2024)		219,260
Projected	2030	236,500
	2040	251,900
	2050	262,200

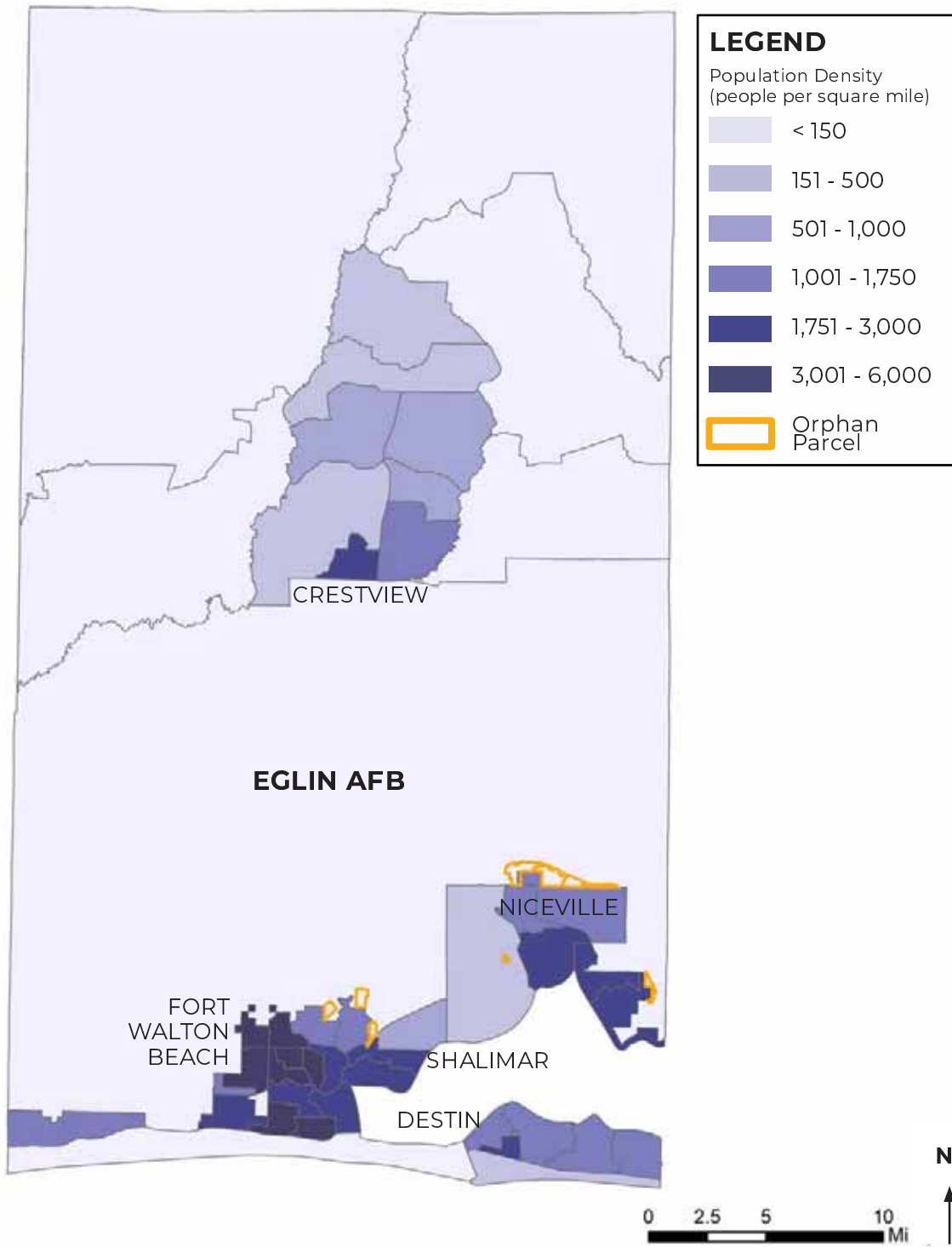


Figure 3-2. Population Density (2020 Decennial Census)

SENIOR AND VETERAN POPULATION

From 2010 to 2020 the percent of the population with veteran status has decreased, however, the overall number of veterans has increased. A growing veteran population within Okaloosa County indicates an increasing need for VA facilities and services targeted to the unique needs and interests of the veteran population throughout the area.

The percent of the population with a disability has seen an increase from 2010 to 2020. From 2010 to 2020 a 0.7% increase occurred. Populations with a large quantity of individuals with a disability require increased access to healthcare facilities.

Okaloosa County has a higher percentage of veterans and individuals with a disability in comparison to Florida and the United States. Therefore, access to specialized primary healthcare is crucial.

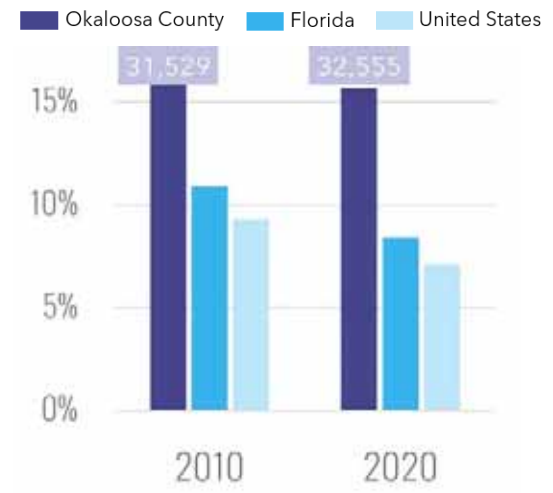


Figure 3-3. Veteran Status (2010, 2020 Decennial Census)

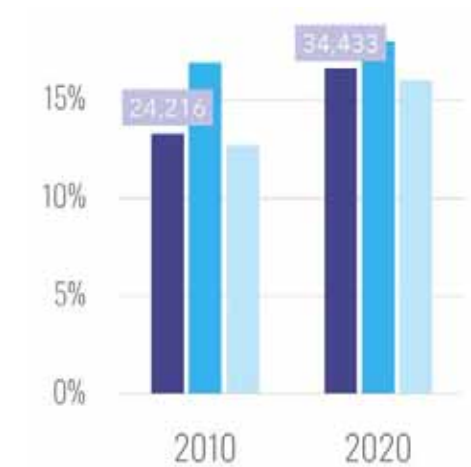


Figure 3-4. Senior Population/65+ (2010, 2020 Decennial Census)

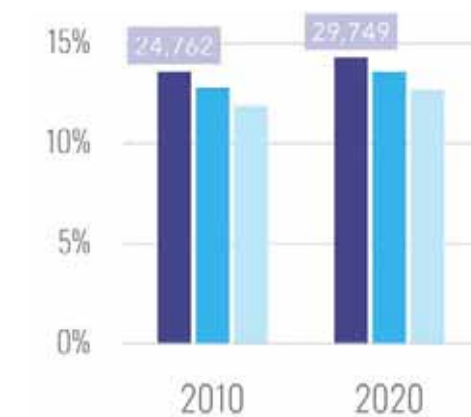


Figure 3-5. Population with a Disability (2010/2020 Decennial Census)

EMPLOYMENT & COMMUTE PATTERNS

While Okaloosa County boasts a strong local economy and a presence of key industries that attracts workers from surrounding areas, the high number of workers living outside of the County and commuting inward is a further sign that there is an affordability issue or mismatch in needed housing types throughout the County.

An increase in the availability of workforce housing within Okaloosa County will be effective in reducing the number of workers commuting inward. Increasing the number of individuals that both live and work within the county can aid in reducing commute times. Reduced commute times are beneficial for employers as employees can arrive to work in a timely manner and will not be fatigued from a lengthy commute.

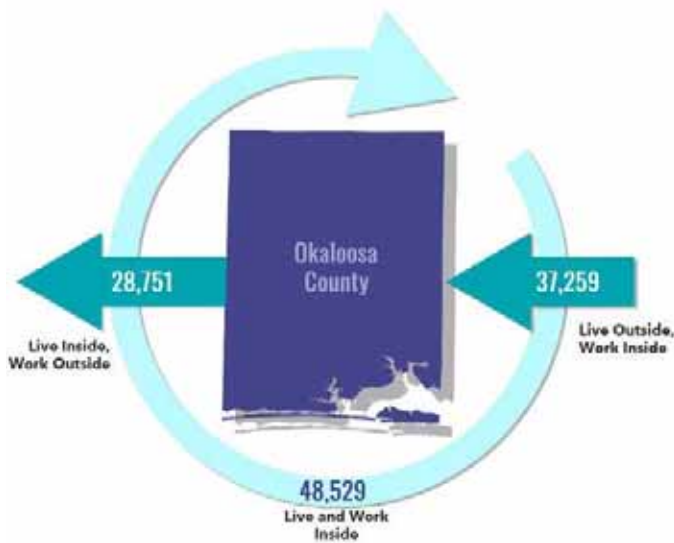


Figure 3-6. Inflow/Outflow (2021 LEHD)

Table 3-2. Inflow Job Characteristics

INFLOW JOB CHARACTERISTICS		
Internal Jobs Filled by Outside Workers	37,259	100%
Workers Aged 29 or younger	9,394	25.2%
Workers Aged 30 to 54	18,789	50.4%
Workers Ages 55 and Older	9,076	24.4%
Workers Earning \$1,250 or less per month	7,941	21.3%
Workers Earning \$1,251 to \$3,333 per month	12,142	32.6%
Workers Earning more than \$3,333 per month	17,176	46.1%
Workers in "Goods Producing"	3,971	10.7%
Workers in "Trade, Transportation, & Utilities"	8,694	23.3%
Workers in "All Other Services"	24,594	66.0%

Table 3-3. Outflow Job Characteristics

OUTFLOW JOB CHARACTERISTICS		
External Jobs Filled by Outside Workers	28,751	100%
Workers Aged 29 or younger	7,314	25.4%
Workers Aged 30 to 54	14,681	51.1%
Workers Ages 55 and Older	6,756	23.5%
Workers Earning \$1,250 or less per month	6,531	22.7%
Workers Earning \$1,251 to \$3,333 per month	10,386	36.1%
Workers Earning more than \$3,333 per month	11,834	41.2%
Workers in "Goods Producing"	3,132	10.9%
Workers in "Trade, Transportation, & Utilities"	7,474	26.0%
Workers in "All Other Services"	18,145	63.1%

RESIDENTIAL REAL ESTATE

Housing costs within Okaloosa County have fluctuated in recent years. From 2021 to 2024 there has been an approximate range of \$55k in median home sale price with the peak price increasing each year.

Increasing home costs makes housing less accessible within Okaloosa County. Housing accessibility issues can affect Eglin AFB personnel by increasing commute times because they are unable to live within close proximity to the installation. Longer commute times can hinder installation personnel's ability to support the installation mission.



Figure 3-7. Median Sale Price (Redfin)

The number of homes sold within Okaloosa County in recent years has been on a downward trend, despite an increase in the population size. This can indicate that fewer individuals and families are capable of purchasing a home due to rising housing costs.

From 2021 to 2024, the median number of days a home was on the market has steadily increased. An increase in the days a home is on the market can indicate a shrinking number of individuals and families purchasing homes. This decrease in home sales and increased days on the market may be a further symptom of a lack of housing affordability within Okaloosa County.

Table 3-4. Median Days on Market (Redfin)

YEAR	QUARTER	MEDIAN DAYS ON MARKET
2021	Q3	11
	Q4	16
2022	Q1	15
	Q2	8
	Q3	19
	Q4	31
2023	Q1	42
	Q2	26
	Q3	45
	Q4	62
2024	Q1	75
	Q2	64



Figure 3-8. Number of Homes Sold (Redfin)

NEW HOUSING SUPPLY

New home permitting since 2010 has averaged 1,069 units per year; however, this includes a significant bump in 2023, which included a large multifamily community.

Almost 40% of permits are in Crestview and the beaches, which are more expensive and far from Eglin. 80% of permits in the County are for single family units, and less than 2% are for small multifamily developments (2-4 unit structures) often referred to as part of the “missing middle” workforce housing.

Based on projected population growth and an average of 2.47 people per occupied unit across the county, Okaloosa must continue to deliver about 850 units per year to keep up with demand. With limited land and county funding constraints, there is increasing need to leverage property that is close to existing employment, services, and infrastructure.

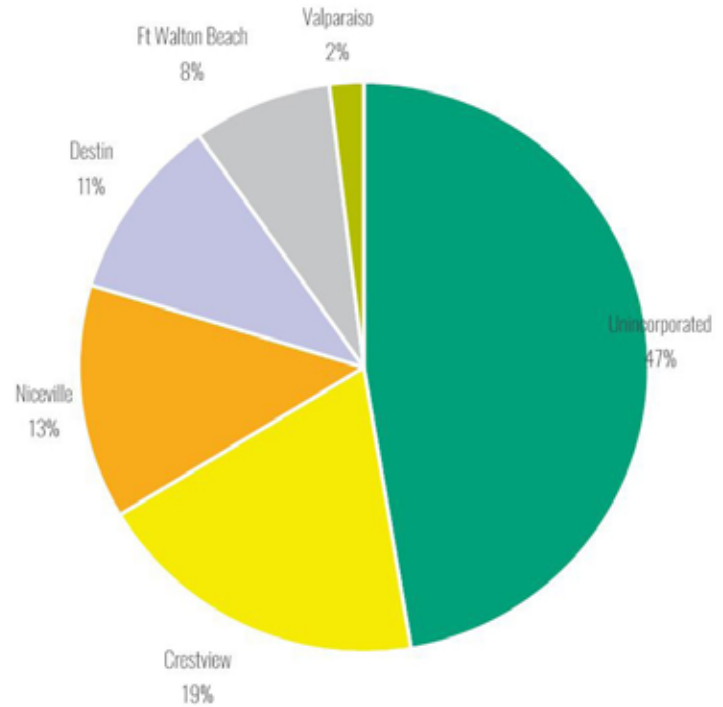


Figure 3-9. Distribution of Total Building Permits by Jurisdiction; 2010-2023 (Florida Office of Economic and Demographic Research)

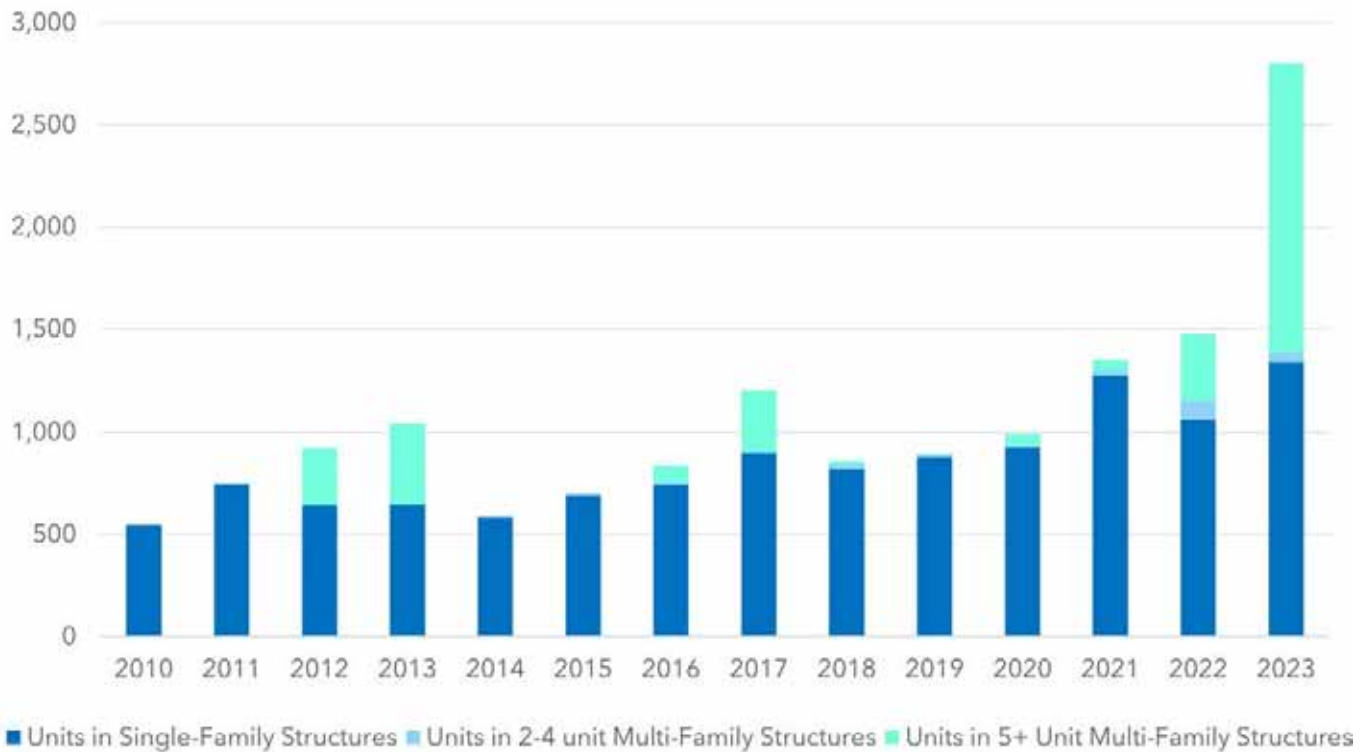


Figure 3-10. Annual Building Permits; 2010-2023 (HUD/US Census)

**EXISTING HOUSING SUPPLY
SINGLE-FAMILY HOMES IN OKALOOSA
COUNTY**

The examples below are representative of the single-family homes available within the focus area. While this sample is not representative of the housing market as a whole, we can see that a 3-4 bedroom house might range from \$275,000 to \$790,000. Single-family homes tend to be more expensive near parcels 9,10, and 11. Surrounding parcels 1, 2, and 5 single-family homes tend to be less expensive.



Figure 3-11. Single Family Home Examples (Zillow)

1



3 BED, 3 BATH - FORT WALTON BEACH
\$275,000

2



3 BED, 3 BATH - VALPARAISO
\$349,000

3



4 BED, 3 BATH - FORT WALTON BEACH
\$550,000

4



4 BED, 3 BATH - NICEVILLE
\$790,000

DUPLEX/ATTACHED HOMES IN OKALOOSA COUNTY

The examples below are representative of the duplex/attached homes available within the focus area. While this sample is not representative of the housing market as a whole, we can see that a 2-3 bedroom house might range from \$211,000 to \$610,000. Duplex/attached homes tend to be more expensive near parcels 9,10, and 11. Surrounding parcels 1, 2, and 5 duplex/attached homes tend to be less expensive.



Figure 3-12. Duplex/Attached Home Examples (Zillow)



2 BED, 1 BATH - FORT WALTON BEACH
\$211,000



2 BED, 2 BATH - NICEVILLE
\$360,000



3 BED, 2 BATH - DESTIN
\$479,900



3 BED, 3 BATH - NICEVILLE
\$610,000

APARTMENTS IN OKALOOSA COUNTY

The examples below are representative of the apartments available within the focus area. While this sample is not representative of the housing market as a whole, we can see that a 2-3 bedroom apartment might range from \$1,350/month to \$5,200/month. Apartments tend to be more expensive near parcels 9,10, and 11. Surrounding parcels 1, 2, and 5 apartments tend to be less expensive.



Figure 3-13. Apartment Examples (Zillow)



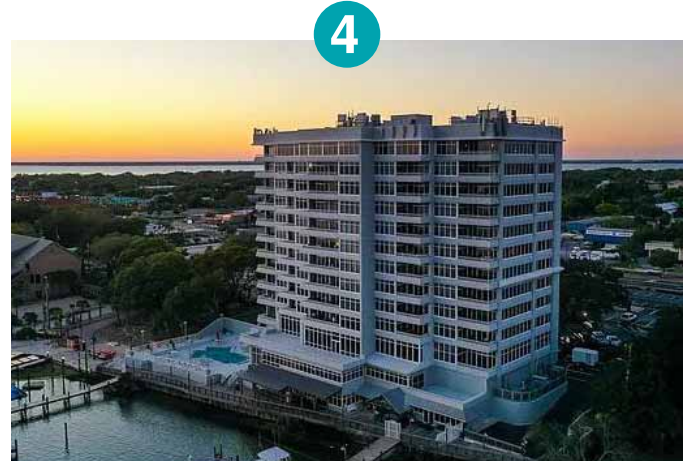
2 BED, 2 BATH - FORT WALTON BEACH
\$1,350/MONTH



2 BED, 1 BATH - NICEVILLE
\$1,750/MONTH



2 BED, 2 BATH - NICEVILLE
\$2,600+/MONTH



3 BED, 3 BATH - DESTIN
\$5,200/MONTH

RESIDENTIAL REAL ESTATE SUMMARY

The median sale price for single-family homes has remained around \$350,000, despite rising borrowing costs. New housing for sale near Eglin is scarce and often priced above \$750,000, making it unaffordable for most working families. Rental housing costs are driven higher by strong local demand, which in turn increases the already high Basic Allowance for Housing (BAH) of over \$2,000 per month. While many veterans in the county benefit from targeted housing developments, this demand also raises costs for the local workforce.

Attainable rental housing is in short supply, and there is very little attached housing available in the county. Over 52% of renters are cost-burdened, according to TPMA. Most affordable housing options are either far from employment centers like the base or are older and in poorer condition. The housing market offers little variation, forcing most households to choose between high-end rental apartments and expensive single-family homes.

To address these issues, there is an opportunity to serve residents earning 50-80% of the Area Median Income (AMI), where the county has identified a gap of 1,095 units. This would support apartments priced up to approximately \$1,900 per month or for-sale homes around \$292,000 for a family of four. Developing nodes of attached or higher-density for-sale housing can naturally enhance affordability. Additionally, providing small-scale retail and services closer to or within residential areas can reduce driving and alleviate congestion in busy corridors.

COMMERCIAL REAL ESTATE

Okaloosa County has a complex commercial real estate market that includes heavy concentrations of tourist-oriented hospitality and retail near the beaches, and large-scale industrial sites north of Interstate 10. Closer to Eglin, small scale office and suburban strip retail serves the local community and those working at and around Eglin. There are few if any properties available that are suitable for employers that require office or flex space close to Eglin, and/or in the type of mixed-use setting that is increasingly sought after in the post-pandemic office market.

Vacant commercial sites are mainly located north of I-10 or near the beach; there are limited opportunities for new commercial development near Eglin.

County Industrial Parks are also located north of I-10, providing convenient logistics but not suitable for smaller companies that prefer closer access to Eglin.

Conventional retail and hospitality are concentrated on primary corridors through Niceville and along the County’s beaches, well inside of SR 293.

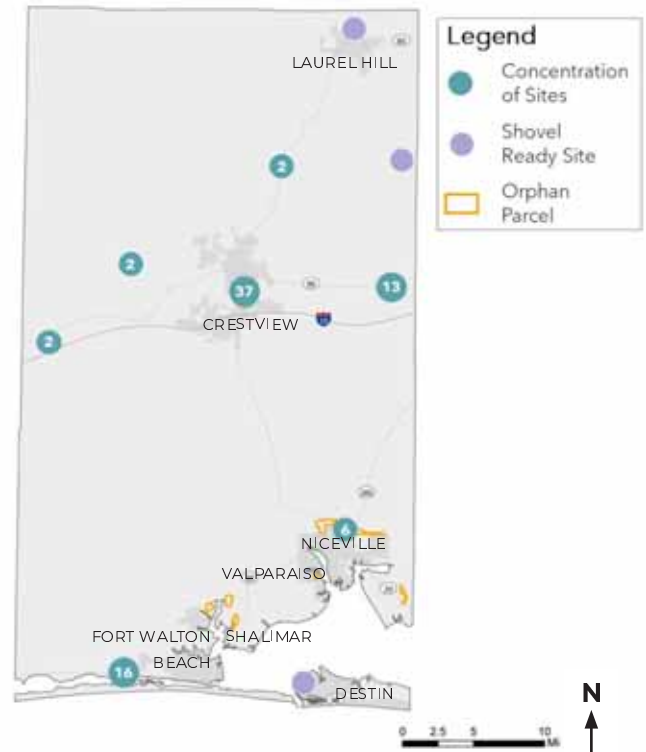


Figure 3-14. Vacant Commercial Sites

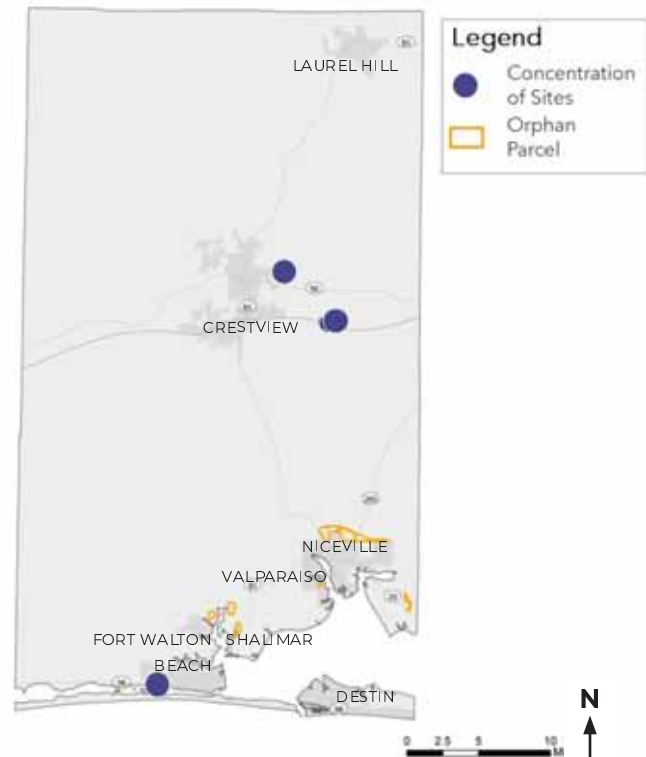


Figure 3-15. Industrial Parks Locations

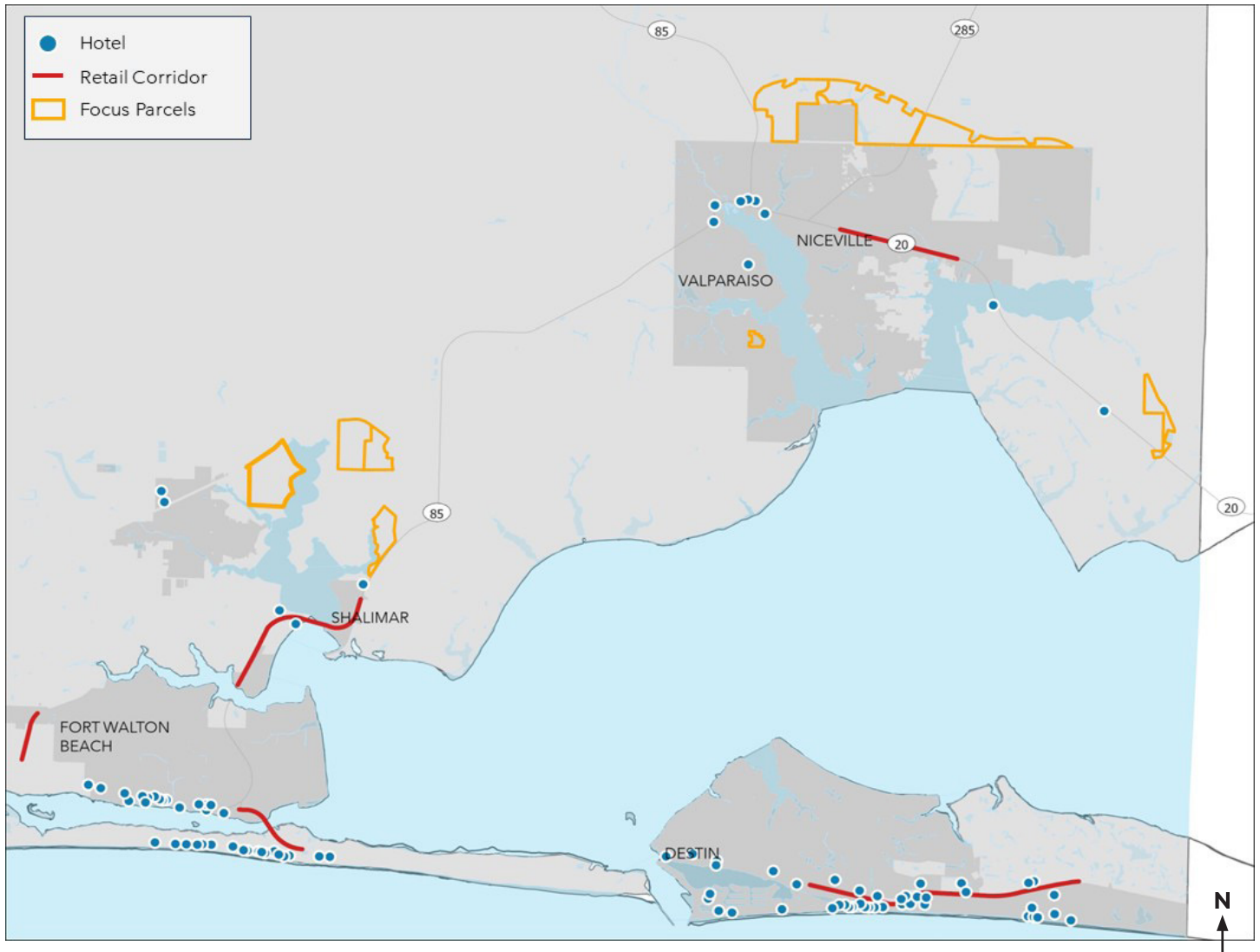


Figure 3-16. Hospitality and Retail Corridors

MEDICAL FACILITIES

Access to healthcare facilities and medical care is a fundamental aspect of providing equitable and effective healthcare. As Okaloosa County experiences an increase in its senior population, additional healthcare services tailored to the unique needs of older adults becomes necessary. Similarly, Okaloosa County's veteran population is substantial, necessitating care for veteran-related care.

The figure to the right exhibits the range of primary care and urgent care facilities, however the need for more senior and veteran medical care in the County was cited by stakeholders as a gap. Placing special focus on adding additional medical services for these populations can better support the aging population and honor the service of the community's veterans.

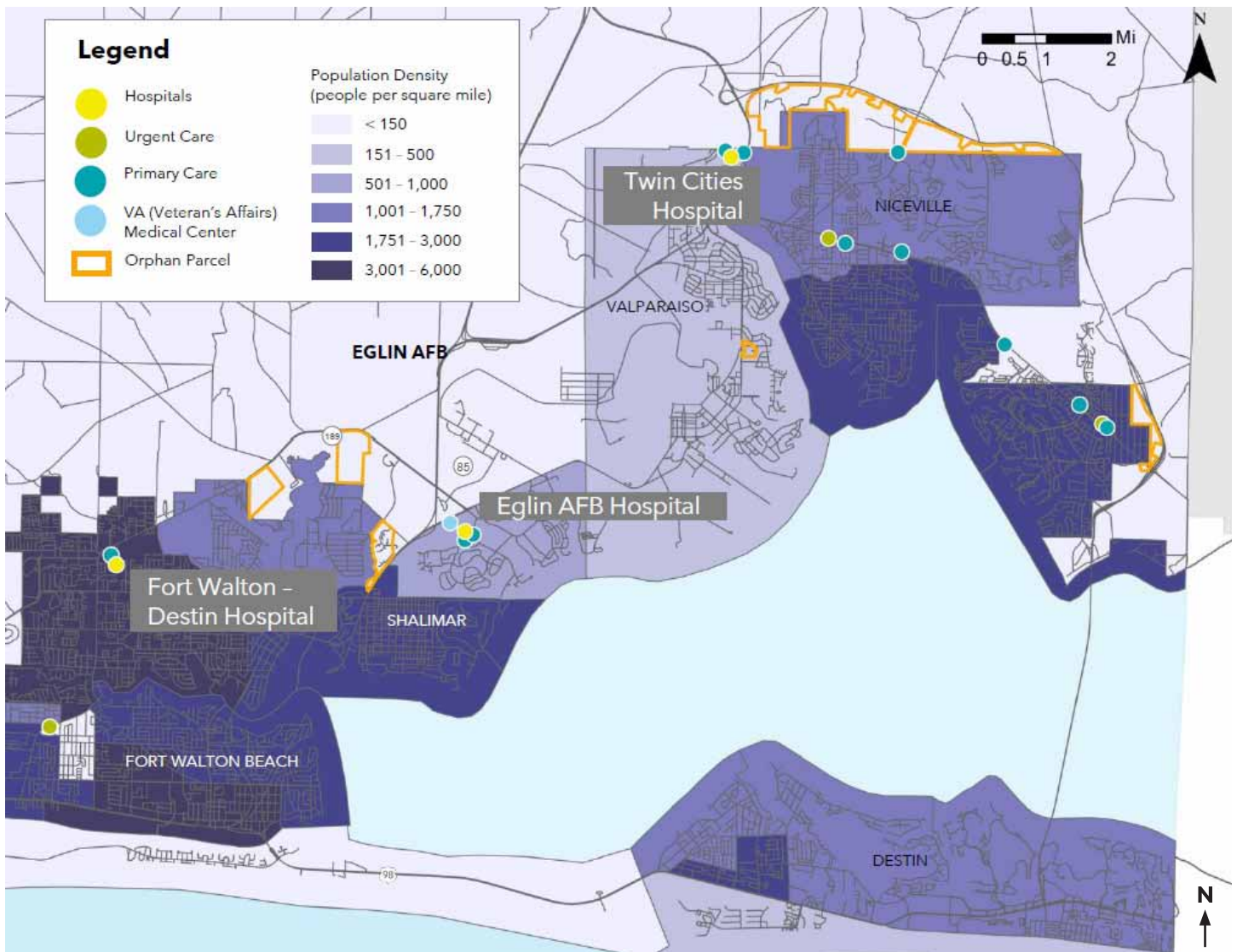


Figure 3-17. Medical Facility Locations

COMMERCIAL REAL ESTATE SUMMARY

During the master planning effort, the planning team engaged with key stakeholders. Their insights, combined with additional market research, provided valuable perspectives on commercial real estate. Eglin will remain the primary employment driver countywide, with any large new employers likely targeting pad-ready sites in the north county. Economic development officials report that existing companies struggle to recruit and retain talent, citing training and housing as major constraints. Local-serving office and community retail are concentrated along John Sims Parkway, a congested corridor running mainly west-east from Eglin to Bluewater Bay.

Medical offices are scattered across the county and in limited supply, particularly near Twin Cities Hospital. Hotels mainly target beach visitors, with the broader county served by a small number of limited-service hotels, none of which offer suitable conference space of any scale. Additionally, there is little to no retail that is walkable to residential developments.

To address these challenges, it is recommended to concentrate medical offices near existing hospitals and housing that is attainable for nurses, technicians, and other medical staff. Identifying development-ready sites for smaller employers that serve Eglin as contractors or would benefit from proximity to the base is also crucial. Developing a signature gateway to Eglin that combines hospitality, housing, and local-serving restaurants and retail can enhance the area's appeal. Furthermore, leveraging the efforts of Northwest Florida State College to deliver job readiness and training programs, along with other community support, will be beneficial.

CASE STUDIES

The market analysis outlines select case studies with applicable takeaways for consideration. Both elements frame current market trends and real-world insights of how other communities have successfully navigated similar challenges & opportunities.

OVERVIEW

The development of surplus military property through public/private partnerships has become an increasingly viable strategy for optimizing the use of these assets. These partnerships leverage the strengths of both sectors: the public sector’s long-term vision, and the private sector’s efficiency, innovation, and capital investment.

The project team researched three case studies that highlight successful collaborations between military entities and private organizations, focusing on the diverse disposal and agreement options utilized to achieve mutual benefits.

Each case study explores the development elements and how disposal and agreement options were tailored to each project. The table below outlines each of the case studies and its applicability to the Orphan Parcels in Okaloosa County.

Each case study may be relevant for the following reasons:

- **Implementation** - How the strategies and solutions were practically applied in similar military installation conditions.
- **Development Mix** - The variety of housing and commercial developments included in the plan.
- **Mission Support** - How the development aligns with and supports the primary mission of Eglin Air Force Base.
- **Economic Growth** - The potential for the development to stimulate local economic activity and job creation.
- **Veteran Housing** - The provision of housing solutions specifically tailored to meet the needs of veterans.

Development	Location	Description	Applicability
TrueNorth Commons	Colorado Springs, CO	A public-private partnership between the Air Force and City of Colorado Springs to develop a new front door to the US Air Force Academy	<ul style="list-style-type: none"> ■ Implementation ■ Development Mix ■ Mission Support ■ Economic Growth
Victory Village	Okaloosa County, FL	Veteran senior living community with resources and services tailored to meet the financial, physical, mental, spiritual, and social needs of its residents.	<ul style="list-style-type: none"> ■ Implementation ■ Mission Support ■ Veteran Housing
OLF8	Beulah, FL	Proposal for a mixed-use development across the 510-acre site that was former US Navy land	<ul style="list-style-type: none"> ■ Implementation ■ Mission Support ■ Economic Growth

Table 3-5. Case Study Summary

TRUENORTH COMMONS COLORADO SPRINGS, CO

OVERVIEW

TrueNorth Commons is a public-private partnership between the Air Force and City of Colorado Springs to develop a new front door to the US Air Force Academy on a 57-acre site. Construction began in 2022 and is currently ongoing. Development cost was \$345 million.

DEVELOPMENT MIX

- 375-room hotel and conference center
- 200,000 sq ft office space
- 30,000 sq ft retail space
- New Air Force Academy Visitor Center

IMPLEMENTATION STRATEGY

Financed via a public-private partnership between the Association of Graduates and Air Force Academy Foundation, the City of Colorado Springs, Blue & Silver Development Partners and Provident Resources Group.

Partially funded by a regional tourist tax that was specifically created for Pikes Peak adjacent developments. Air Force Academy, with permission of the Air Force, leased property to a civilian group to design and build the new Visitor Center.

IMPACTS

TrueNorth Commons is expected to create numerous jobs during both the construction phase and once the facilities are operational. This includes positions in construction, hospitality, retail, and office management. The new Visitor Center and hotel are anticipated to attract more tourists to the area, enhancing the local tourism industry.

Over the next 25 years the new development is expected to generate \$4.2 million in new property tax revenue and \$3.2 million in new sales tax revenue for El Paso County. For Colorado Springs, \$2.3 million in new property tax revenue and \$8.1 million in new sales tax revenue is expected over the same time period.



Figure 3-18. TrueNorth Commons Development Rendering (Air Force Academy Foundation)

VICTORY VILLAGE OKALOOSA COUNTY, FL

OVERVIEW

Located adjacent to the Air Force Enlisted Village (AFEV) in Shalimar, Florida on an 80-acre site purchased from the US Air Force. The development aims to be a veteran senior living community with resources and services tailored to meet the financial, physical, mental, spiritual, and social needs of its residents.

DEVELOPMENT MIX

- Accommodation for up to 800 residents
- Community center, fitness center, walking paths
- Retail component
- Fire and EMS station that will also serve AFEV and Poquito Bay neighborhood
- On-site skilled nursing and continuing care for disabled

IMPLEMENTATION STRATEGY

The project is currently in the early stages, with land acquisition and initial planning completed. The next steps include zoning, updating master plans, and exploring partnerships. \$5 million initial land purpose was structured to benefit the local military community at Eglin AFB. \$2 million received from the Florida government will be used to purchase 80 acres for development purposes from the Air Force.

IMPACTS

Victory Village is projected to contribute significantly to the local economy. By 2040, the development is expected to generate a total accumulated gross domestic product (GDP) of more than \$3 billion and total sales output of \$4.8 billion. The development is projected to create numerous jobs, both during the construction phase and once the community is operational. This includes positions in healthcare, maintenance, retail, and various service industries.

The project will provide a supportive environment for wounded warriors, their caregivers, and veterans' spouses. This includes housing, healthcare, and various amenities, enhancing the quality of life for residents. Additionally, the development will offer on-site nursing to assist with aging veterans.



Figure 3-19. Victory Village Development Rendering (Victory Village)

OLF8 BEULAH, FL

OVERVIEW

The OLF-8 development in Beulah, Florida, is a significant project aimed at transforming a former Navy helicopter training field into a vibrant economic hub. The project has been in the works for nearly 25 years and spans 540 acres. At the time of writing, Escambia County officials are in the process of selecting a master developer to oversee development of 85 acres of the site.

DEVELOPMENT MIX

- Residential
- Retail
- Light industrial
- Public school

IMPLEMENTATION STRATEGY

Escambia County initially acquired OLF-8 in a land swap with the U.S. Navy for property in Santa Rosa County. During the conceptual design phase, the consulting firm DPZ garnered a large amount of community feedback.

While there is a strong potential for the county to sell off parts of the property to individual developers, this will make realizing the community vision crafted during the conceptual phase difficult to achieve. Since the announcement of the project, there has been strong interest from development groups.

IMPACTS

Expected to create high-paying jobs and boost the local economy. In 2022, the Triumph Gulf Coast Board approved \$14.2 million towards the projects, which is expected to bring over 300 jobs to the area.

This development provides attainable housing opportunities for Escambia County Residents. The plan has designated 61 acres specifically for residential, providing a mix of multi-family units, duplexes, and townhomes. OLF8 will indirectly support the military community by improving the overall quality of life for service members and their families stationed nearby. Planned community services include schools, daycare centers, and community gardens.



Figure 3-20. OLF8 Development Rendering (DPZ CoLab)

RECOMMENDATIONS

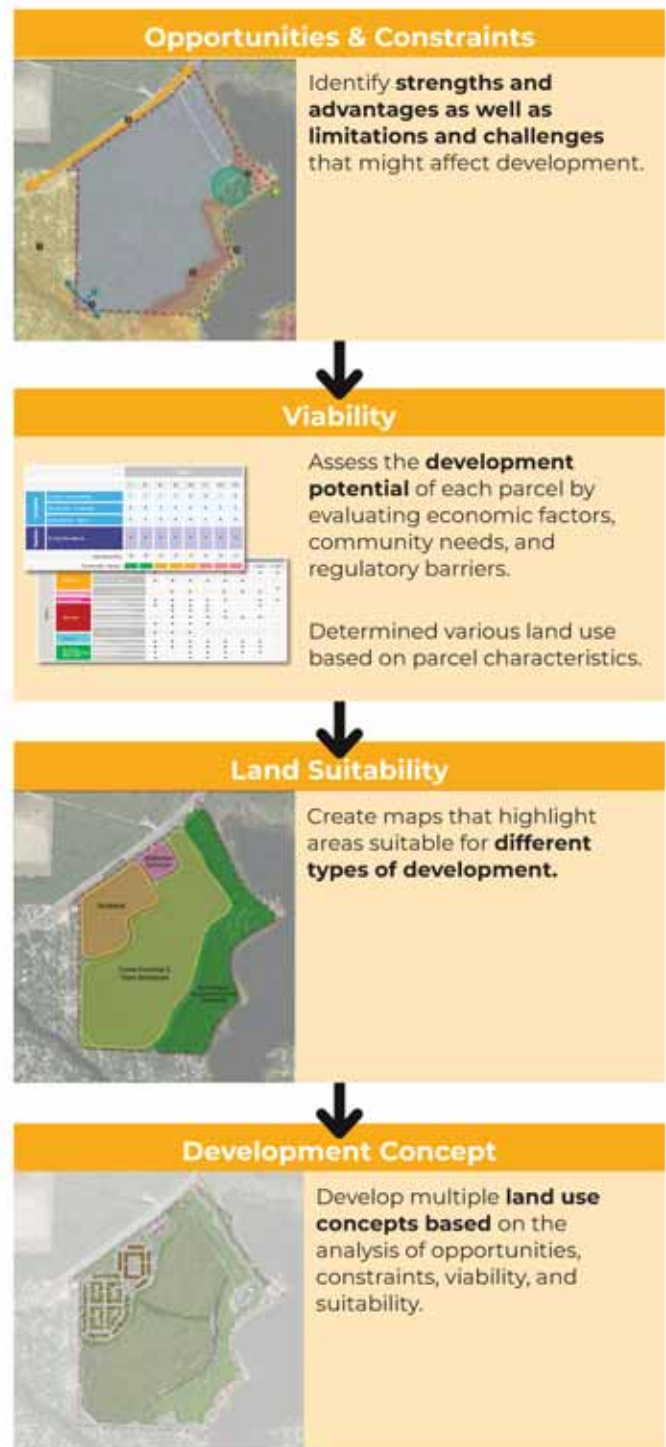
OVERVIEW

After completing an initial assessment and establishing a baseline understanding for the Orphan Parcels Master Plan, the planning team delved into potential uses for the sites. This involved a comprehensive exploration of development possibilities, to ensure each recommendation was well-informed and strategically sound.

Each recommendation is the result of a blend of stakeholder feedback and technical analysis. Stakeholder feedback was gathered through direct consultations and roundtables while technical analysis involved a detailed examination of each parcel's characteristics, including its physical attributes, accessibility, environmental considerations, and existing infrastructure.

This chapter outlines the viability scoring methodology used to evaluate each potential use. The methodology includes criteria such as economic impact, community benefit, environmental sustainability, and alignment with long-term strategic goals. Scoring each parcel on these criteria allowed the planning team to prioritize the most viable and beneficial uses. The criteria from these analyses are detailed further in the appendix, providing a transparent and thorough basis for the recommendations.

The recommendations for each Orphan Parcel are presented within the context of a 20-year development program. This long-term perspective ensures that the proposed developments are sustainable and adaptable to future changes. The recommendations create a balanced mix of residential, commercial, and recreational spaces, fostering a cohesive and thriving community proximate to Eglin AFB.



VIABILITY SCORING METHODOLOGY

While considering recommendations for each parcel, it is crucial to evaluate various viability indicators to ensure the success of future projects. The findings of the Vulnerability Assessment and Regulatory Assessment have each indicated factors which might contribute to parcel development viability.

Elements of the Market Analysis were also evaluated to help identify potential uses on the Orphan Parcels. The elements include identifying trends, gaps, and opportunities in both residential and commercial real estate markets.

Each indicator was informed and tested by the input gathered during the stakeholder workshops early on in the process. When combined with the initial findings of the Market Analysis, the stakeholder feedback was invaluable in scoring the parcels.

These indicators are separated into three categories and are as follows:

- **Vulnerability Assessment**
 - Location and Accessibility
 - Infrastructure Availability
 - Environmental Factors
- **Regulatory Assessment**
 - Zoning Regulations
- **Market Analysis**
 - Population Density
 - Community and Social Needs
 - Market Demand

Vulnerability Assessment



Location & Accessibility – proximity to major roadways and other transportation infrastructure which can enhance the attractiveness of the parcel for residential or commercial uses.



Infrastructure Availability – access to electricity, broadband, water, sewer and other public services will impact a developer's ability to develop the site.



Environmental Factors – the presence of flood zones, natural hazards, topography, and soil quality will affect construction costs and environmental risks.

Regulatory Assessment



Zoning Regulations – permitted and compatible uses will be important to understand to ensure future development is considerate of neighbors and existing land use law.

Market Analysis



Population Density – higher population density can indicate greater demand for housing and commercial businesses.



Community & Social Needs – proximity to quality schools and healthcare services are necessary factors when considering future development.



Market Demand – analyzing trends in the local market can help gauge demand for new residential and commercial development.

DEVELOPMENT VIABILITY

Development viability was scored using criteria from both the Vulnerability and Regulatory Assessments. Scoring was based on stakeholder feedback and local official input, site visit takeaways, and robust GIS analysis.

The viability and regulatory indicators are scored between one and five to quantify varying types of data, with the higher score reflecting greater potential for development. Additional detail is described in the Viability Methodology Summary found in the appendix of the document.

Aggregate scores were then totaled to give an initial sense of the parcels development viability.

Development viability can be categorized as:

- Favorable with minimal development constraints
- Moderately favorable with some development constraints
- Development possible with several constraints

As seen in the table below, while all Orphan Parcels are technically developable, this analysis identified Parcels 1 and 2 as most favorable for development, followed by 5, 9, and 10.

Table 4-1. Development Viability by Parcel

		Parcels							
		1	2	5	9	10	11	13	17
Vulnerability	Location and Accessibility	5	5	5	5	4	4	1	4
	Infrastructure Availability	4	4	5	4	4	4	5	3
	Environmental Factors	5	5	2	4	4	3	4	4
Regulatory	Zoning Regulations	2	2	2	2	2	2	2	2
	Aggregate Score	16	16	14	15	14	13	12	13
	Development Viability								

LAND SUITABILITY

The market analysis indicators informed the land suitability assessment. Keeping population density, community and social needs, and market demand in mind, the planning team evaluated each parcel according to applicable characteristics to identify suitable land uses for each parcel, ensuring that they align with both the mission of Eglin Air Force Base and the needs of the surrounding community.

This evaluation revealed that while there are opportunities for some type of development on each parcel, certain parcels offer broader suitability for a range of uses and/or greater development flexibility. Refer to the Viability Methodology Summary for additional detail on each characteristic's criteria.

The parcels on the west side of the study area have more proximity to the Eglin Gate, other employment areas, as well as traffic which in this context can reflect positive activity such as shopping and visitors. These parcels, such as Parcel 1, 2, and 5, lend themselves more to multi-family developments and office/flex spaces.

The eastern portion of the study area has more of a focus on population density and existing residential uses which influences the need for additional medical office and Neighborhood Retail uses on sites such as parcels 9 and 10.

Table 4-2. Land Suitability by Parcel

Potential Use	Characteristic	Parcels							
		1	2	5	9	10	11	13	17
Residential	Existing Surrounding Residential	■				■	■	■	■
	Proximity to Employment	■	■	■	■	■	■		
Neighborhood Commercial	Critical Mass of Residential Uses		■	■		■	■	■	■
Community Commercial	High Traffic Roads	■	■	■	■	■		■	■
Office/Flex	Dense Senior Population	■	■	■	■			■	
	Proximity to Existing Hospital		■	■	■	■			
	Proximity to Existing Medical Services		■	■	■	■	■	■	
	Proximity to Transportation	■	■	■	■				
Hospitality	Proximity to Eglin Gate	■	■	■					
	Visibility	■	■	■	■	■	■	■	
Recreation, Conservation, Open Space, Civic	Population Density	■	■	■	■	■	■	■	
	Resilience Needs	■		■	■	■	■	■	
	Water Access	■		■	■	■			

PARCEL RECOMMENDATIONS

Based on the land suitability analysis, specific development uses were recommended for each parcel, as indicated in Table 4-4. The recommended uses and development program are projected over a 20-year planning horizon and provide flexibility in order to account for uncertain market conditions. Each parcel plan further showcases how these uses may be distributed throughout the Orphan Parcels and the intensity of development that the County may expect to be supported over the 20-year timeframe. Table 4-3 demonstrates the total development program for all orphan parcels.

Each proposed use will benefit Okaloosa County in various ways. The following outlines the advantages of each:

- **Residential** — An increase in housing diversity will allow Eglin personnel and their families to live closer to the base. This supports the installation mission by reducing commute times to the installation and allowing installation personnel to arrive to work in a timely manner. The community will benefit from residential development as housing will become more affordable and accessible.
- **Neighborhood Retail** — Neighborhood retail acts as an amenity to surrounding population and to Eglin personnel by offering goods and services within a close proximity, often times placed within or alongside residential developments.

Table 4-3. Total Development Program

LAND USE	DEVELOPMENT PROGRAM
Housing	2,200 – 2,800 units
Retail	400,000 – 600,000 SF
Office	320,000 – 480,000 SF
Hotel	200 – 300 Rooms
Recreation + Open Space	650 – 950 acres

- **Community Retail** —Community retail supports the installation personnel and their families by providing necessary resources such as grocery stores. The presence of community retail near residential areas serves as an amenity that benefits Okaloosa County by addressing food deserts via grocery stores and providing services that cater to the wider community.
- **Office/Flex**—The presence of existing residential and medical facilities, proximity to transportation, and population density makes office/flex development suitable for the area. These are spaces that combine conventional office with retail, warehouse, Research & Development, or light manufacturing. This type of development is mission supportive because it aids in providing jobs for installation personnel's family members and can create specialized jobs and services that can attract larger employers to the region, increasing the opportunity for higher paying jobs for local residents.


- Hospitality** —The proximity to transportation and the Eglin west gate, along with visibility from SR 85 makes hospitality an appropriate use for the area. The development of hospitality supports the installation mission by providing accommodations for visiting installation officers and personnel, and creating space for larger gatherings and conventions. The surrounding community benefits from hospitality development through stimulation to the local economy via tourism and local job creation.

- Recreation, Conservation, Open Space & Civic Uses** — By leaving areas relatively untouched, the natural environment is preserved. The preservation of the natural environment improves resiliency and can help mitigate environmental threats and hazards such as flooding. Mitigating environmental hazards reduces the threat to installation assets. Similarly, the surrounding community benefits from environmental hazard mitigation because residential and transportation infrastructure will be more resilient. Additionally programmed and passive recreation will help to improve the quality of life for those that already live in the area as well as potential newcomers as the area around Eglin AFB continues to grow.


Table 4-4. Recommended Uses by Parcel

Potential Use	Parcels							
	1	2	5	9	10	11	13	17
Multi-Family Residential								
Townhomes								
Potential Residential								
Neighborhood Commercial								
Community Commercial								
Educational								
Office/Flex								
Hospitality								
Recreation								
Conservation/Open Space or Future Development								
Civic/Government								

PARCEL 1: CAMP PINCHOT



Total Area
264 Acres



Net Developable Area
173 Acres

Viability Criteria	Score
Location and Accessibility	5
Infrastructure Availability	4
Environmental Factors	5
Zoning Regulations	2

OPPORTUNITIES & CONSTRAINTS

- Existing Residential** — Surrounding residential communities serve as an opportunity for development. Existing residential indicates that there is a community present and a potential need for additional housing, retail, and office/flex space.
- Eldredge Road Access** — Access to Eldredge Road presents an opportunity for future connectivity between existing residential communities and potential development and infrastructure on Parcel 1.
- Historic Resource** — Camp Pinchot is the former home of the Base Commander. This present an opportunity for historic preservation.
- Scenic Views** — Waterfront views on the parcel offer opportunities for recreation or conservation
- High Traffic Corridor** — Congestion along Lewis Turner Boulevard should may impact parcel accessibility during peak travel times.
- Storm Surge Risk** — Storm surge flooding acts as a threat to infrastructure and human populations. Flood risks can be mitigated using green-grey infrastructure such as bioswales and permeable pavement.

Aggregate Viability Score **16**

Favorable with minimal development constraints

- Water & Sewer Infrastructure** — Parcel 1 is not currently connected to the County’s water and sewer systems and will require additional infrastructure to establish these services.

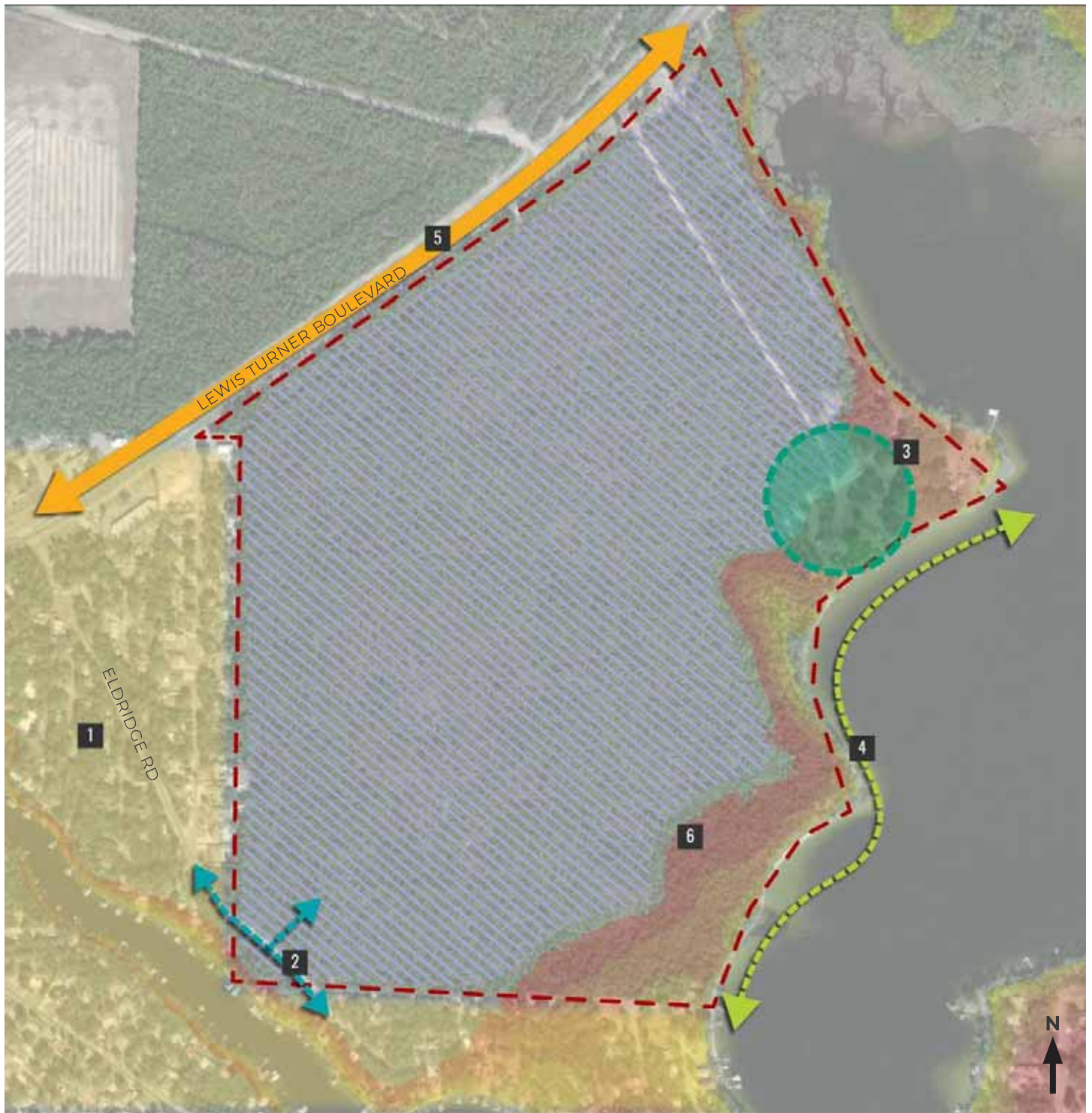


Figure 4-1. Parcel 1 Opportunities & Constraints

APPROPRIATE USES

- 1. Residential** — Due to the proximity to existing residential southwest of the parcel, Lewis Turner Boulevard, and employment Parcel 1 is suitable for residential development. building a variety of housing types will reduce housing accessibility issues throughout Okaloosa County. This supports the installation mission by reducing commute times to the installation and the community will benefit as housing will become more affordable and accessible.
- 2. Neighborhood Commercial** — Due to the proximity to existing residential, population density and Lewis Turner Boulevard Parcel 1 is suitable for neighborhood commercial. Neighborhood commercial acts as an amenity to surrounding population and to Eglin personnel by offering goods and services within a close proximity, often times placed within or alongside residential developments.
- 3. Conservation/Natural Resource Management** — Parcel 1 is ideal for conservation/natural resource management due to waterfront access and existing untouched natural environment. The preservation of the natural environment improves resiliency and can help mitigate environmental threats and hazards such as flooding.
- 4. Recreation** — Waterfront access and nearby residential makes Parcel 1 ideal for recreation. The surrounding community benefits from recreation space as it acts an amenity and assists in the preservation of the natural environment.



Residential

*200-300 Units
8-12 Units Per
Acre*



Neighborhood Commercial

± 18,000 SF



Open Space

± 60 Acres



Recreation

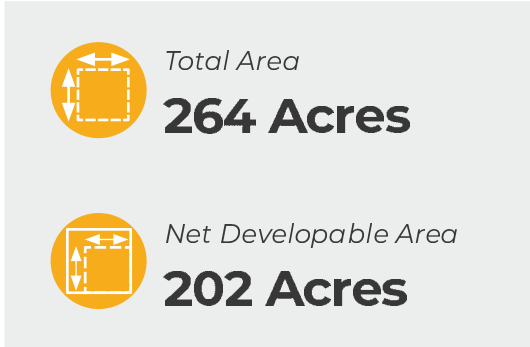
± 85 Acres





Figure 4-2. Parcel 1 Concept Plan

PARCEL 2: EAST GARNIER CREEK



Viability Criteria	Score
Location and Accessibility	5
Infrastructure Availability	4
Environmental Factors	5
Zoning Regulations	2

OPPORTUNITIES & CONSTRAINTS

- Existing Residential** — Residential communities located to the south of Parcel 2 serve as an opportunity for development. Existing residential indicates that there is a community present and a potential need for additional housing, retail, and office/flex space.
- Existing REEF Campus** — Located East of Parcel 2 is the REEF campus which is a research facility belonging to the University of Florida. The existing REEF Campus would support the development of office/flex space at this parcel.
- Future Victory Village** — To the south of Parcel 2 the development of a veteran senior living community is underway. This development provide housing for senior veterans and support aging in place.
- High Traffic Corridor** — Congestion along Lewis Turner Boulevard should may impact parcel accessibility during peak travel times.
- Storm Surge Risk** — Storm surge flooding acts as a threat to infrastructure and human populations. Flood risks can be mitigated using green-grey infrastructure such as bioswales and permeable pavement.

Aggregate Viability Score **16**

Favorable with minimal development constraints

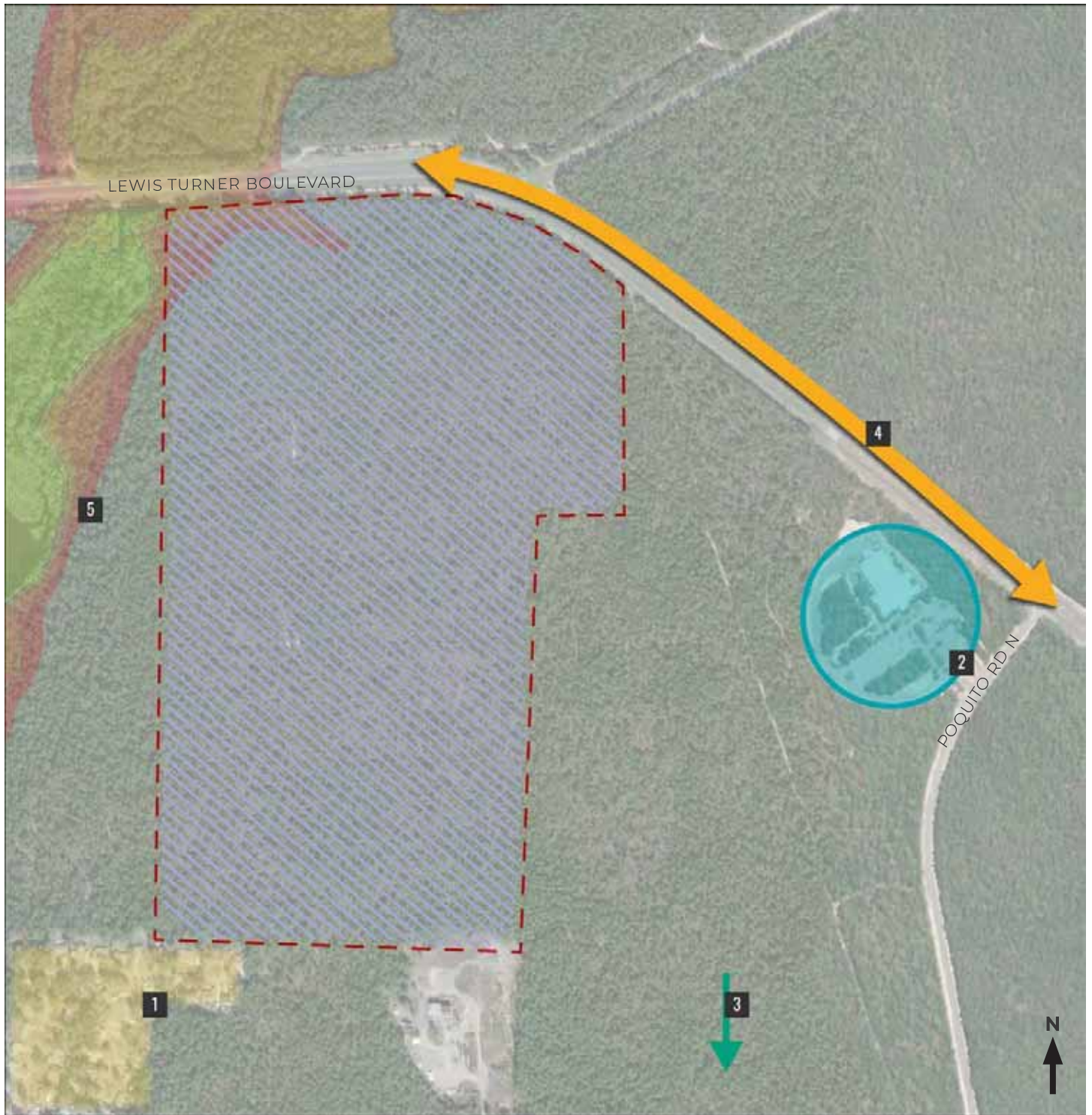
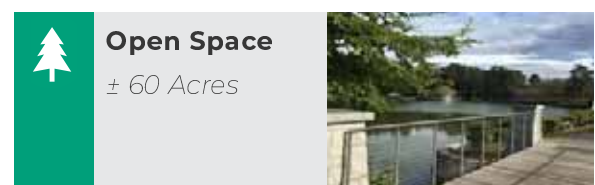
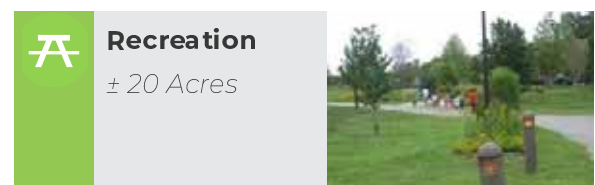
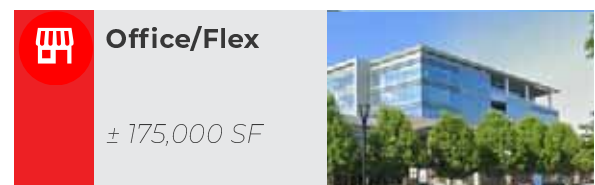
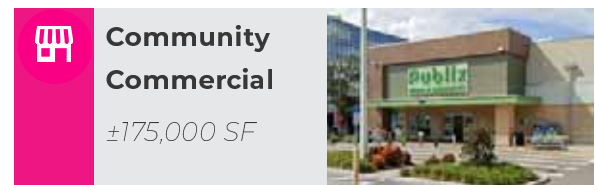
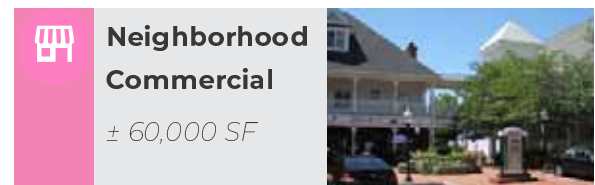
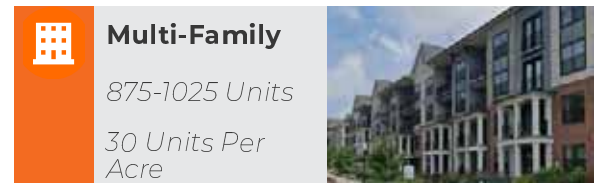
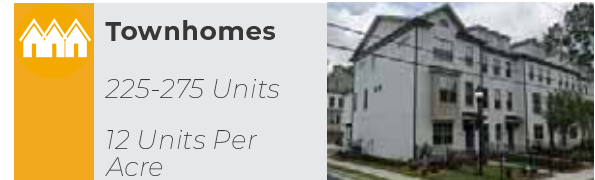


Figure 4-3. Parcel 2 Opportunities & Constraints

APPROPRIATE USES

- 1. Townhomes** — Building a variety of housing types address housing accessibility issues throughout Okaloosa County. This increase in the housing supply will allow Eglin personnel and their families to live closer to the base, furthering the installation mission.
- 2. Multi-Family Residential** — Building a variety of housing types address housing accessibility issues throughout Okaloosa County. This increase in the housing supply will allow Eglin personnel and their families to live closer to the base, furthering the installation mission.
- 3. Neighborhood Commercial** — Due to the proximity to existing residential and Lewis Turner Boulevard Parcel 2 is suitable for neighborhood commercial. Neighborhood commercial acts as an amenity to surrounding population and to Eglin personnel by offering goods and services within a close proximity.
- 4. Community Commercial** — Due to the proximity to existing residential, population density and Lewis Turner Boulevard Parcel 2 is suitable for community commercial. This development is mission supportive because it supports the installation personnel and their families by providing necessary resources.
- 5. Office/Flex** — The presence of existing residential, proximity to Lewis Turner Boulevard, and the REEF Campus makes Parcel 2 suitable for office/flex development. This development is mission supportive because it aides in providing jobs for installation personnel's family members.
- 6. Recreation** — Due to proposed and existing residential, Parcel 1 ideal for recreation. The surrounding community benefits from recreation space as it acts an amenity and assists in the preservation of the natural environment.
- 7. Open Space** — Parcel 2 is ideal for the preservation of open space. By leaving areas relatively untouched, the natural environment is preserved. This open space can potentially be utilized for future development.



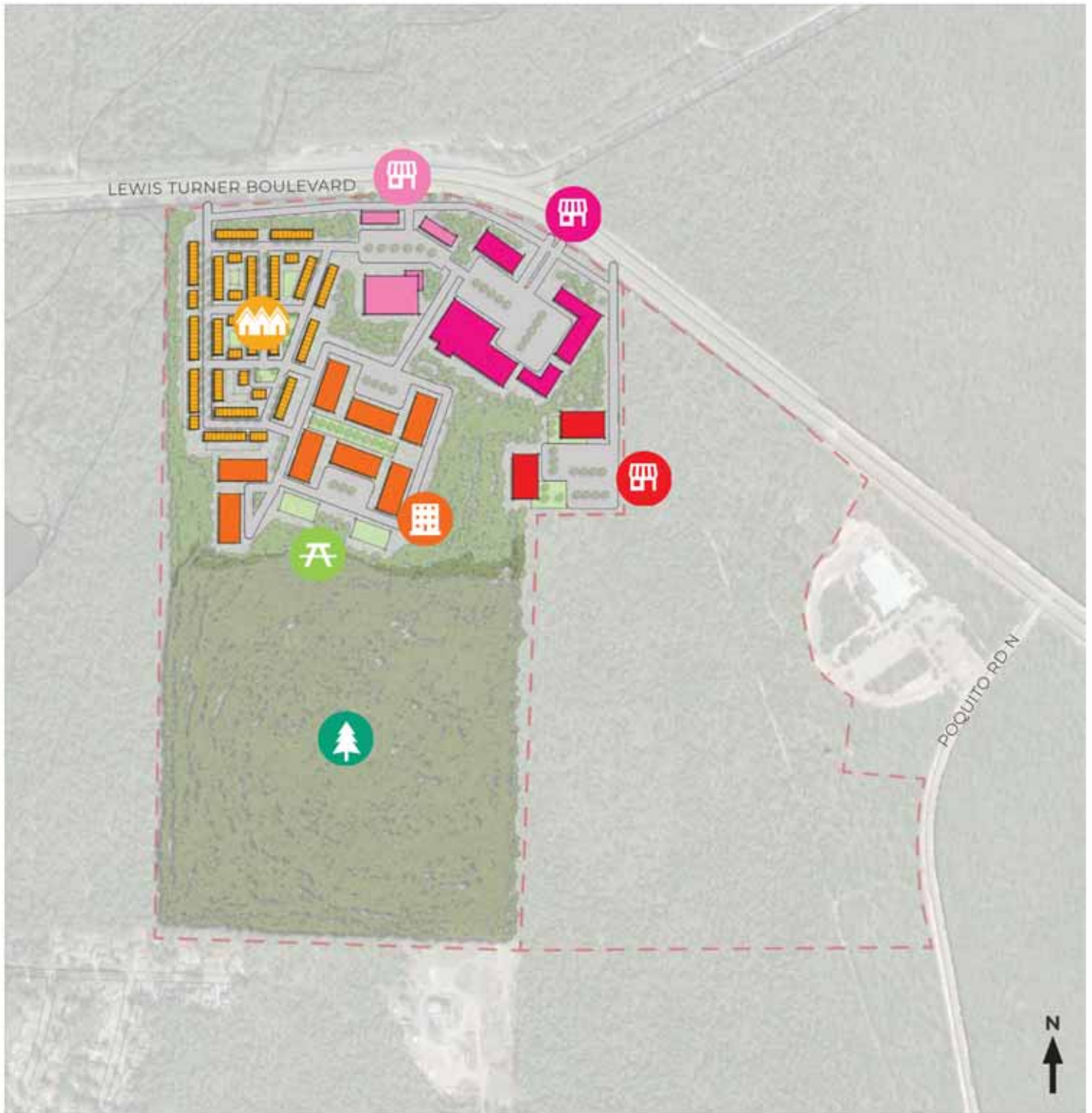




Figure 4-4. Parcel 2 Concept Plan

PARCEL 5: POQUITO BAYOU



Total Area
91 Acres



Net Developable Area
39 Acres

OPPORTUNITIES & CONSTRAINTS

- 1. Scenic Views/Conservation Opportunity** — Waterfront views along the western boundary of Parcel 5 are a benefit for potential development and parcel utilization. Scenic views on the parcel offer opportunities for recreational use and conservation.
- 2. Air Force Enlisted Village (AFEV)** — The Air Force Enlisted Village located to the northwest of the parcel acts as an asset to development. Future development may provide additional amenities and offerings for senior veterans living in the AFEV.
- 3. Existing Single Family Housing** — Residential communities to the west of Parcel 5 indicates that there is an existing community and a potential need for additional housing, retail, and office/flex space.
- 4. Future SR 85 Realignment** — The Eglin Westside Expansion and relocation of the west gate includes the realignment of State Route 85. The proximity of the new road alignment will create visibility for parcel 5, making it a prime location for the new armament museum.

Viability Criteria	Score
Location and Accessibility	5
Infrastructure Availability	5
Environmental Factors	2
Zoning Regulations	2

Aggregate Viability Score 14

Moderately favorable with some development constraints

- 5. Environmental Contamination**— The presence of environmental contamination on the parcel can act as a hindrance for development. Environmental contaminants can be harmful to human wellbeing which can make this site a poor location for development. Conducting environmental remediation can alleviate this issue.
- 6. Storm Surge Risk** — Storm surge flooding acts as a threat to infrastructure and human populations. Flood risks can be mitigated using green-grey infrastructure such as bioswales and permeable pavement.
- 7. Eglin Boulevard Extension**— The extension of Eglin Boulevard will provide additional east-west access to Parcel 5.

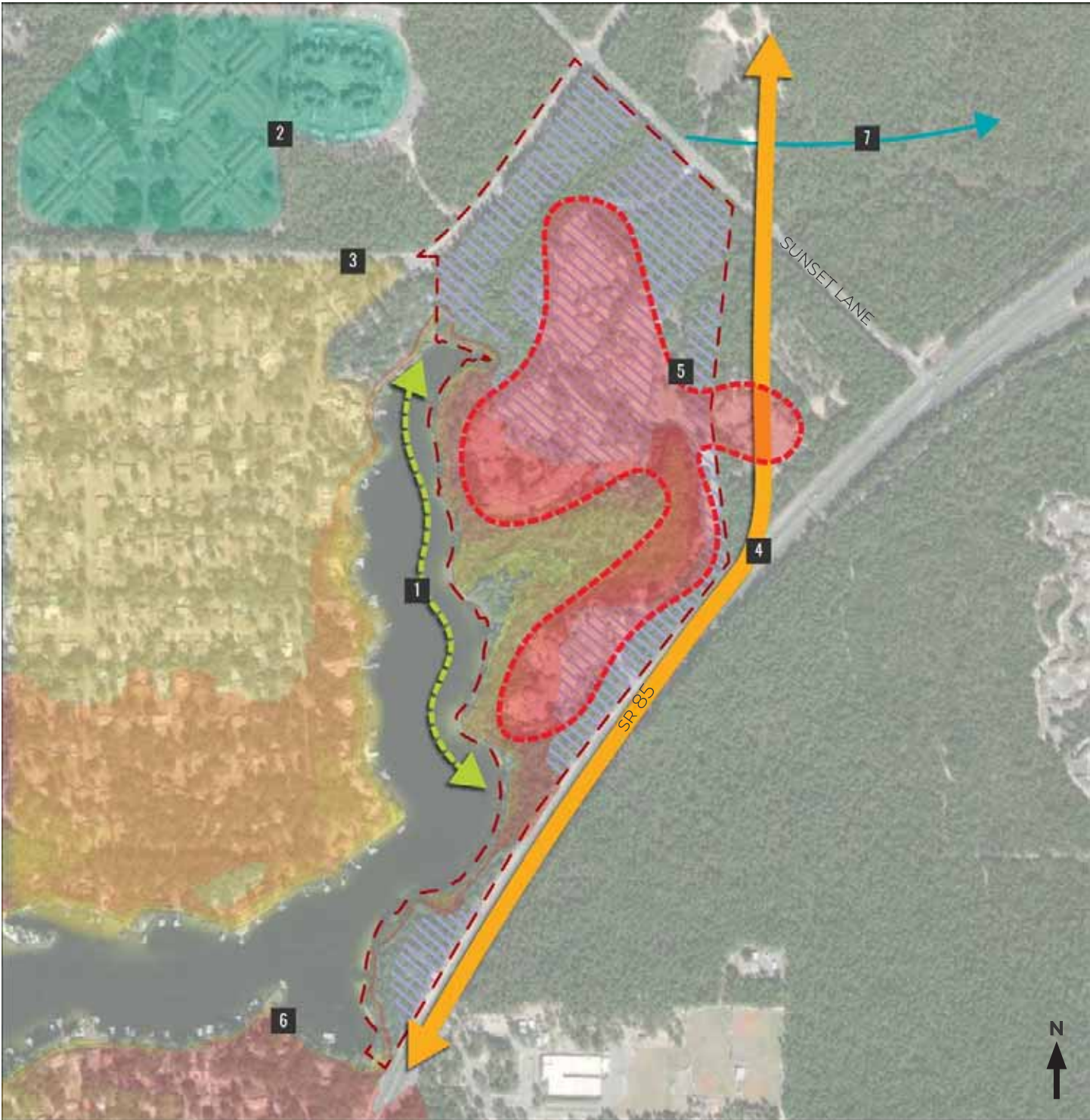
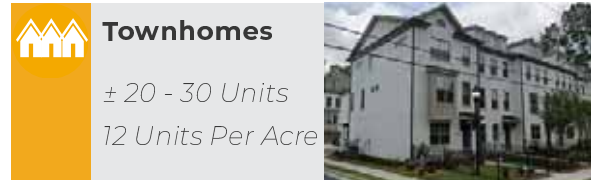


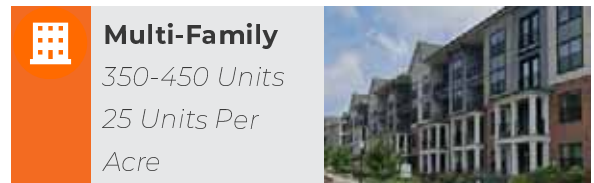
Figure 4-5. Parcel 5 Opportunities & Constraints

APPROPRIATE USES

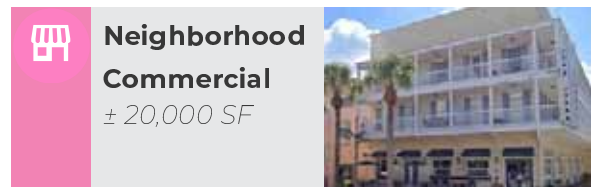
1. Townhomes — Building a variety of housing types will reduce housing accessibility issues throughout Okaloosa County. This increase in the housing supply will allow Eglin personnel and their families to live closer to the base, furthering the installation mission.



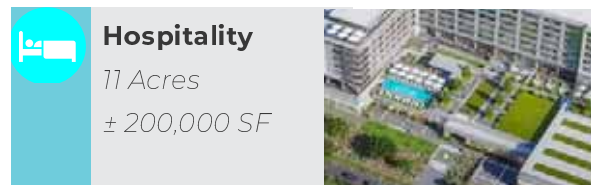
2. Multi-Family Residential — Building a variety of housing types address housing accessibility issues throughout Okaloosa County. This increase in the housing supply will allow Eglin personnel and their families to live closer to the base, furthering the installation mission.



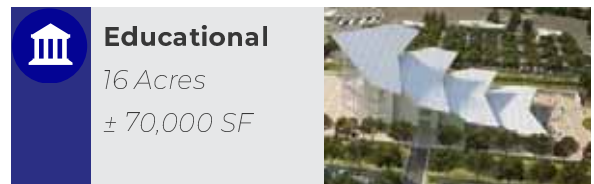
3. Neighborhood Commercial — Due to the proximity to existing residential and Eglin Parkway Parcel 5 is suitable for neighborhood commercial. Neighborhood commercial acts as an amenity to surrounding population and to Eglin personnel by offering goods and services within a close proximity.



4. Hospitality— The proximity to the Eglin west gate, along with visibility from SR 85 makes Parcel 5 suitable for hospitality. This development supports the installation mission and the surrounding community by providing accommodations for visiting installation personnel, creating space for large gatherings, and stimulating the local economy.



5. Educational — The proximity to the Eglin west gate, along with visibility from SR 85 makes Parcel 5 suitable for an Air Force Museum. This development supports the installation mission and the surrounding community by promoting education about Air Force history and importance.



6. Open Space — The presence of environmental hazards makes Parcel 5 ideal for open space. By leaving areas relatively untouched, the natural environment is preserved. This preservation can help mitigate environmental hazards such as flooding.

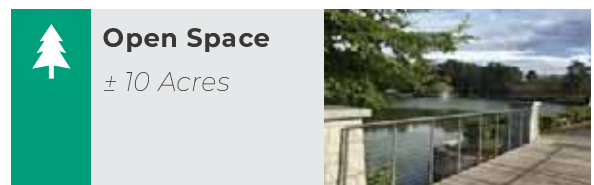
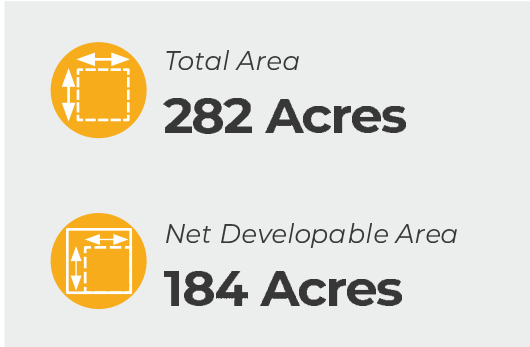




Figure 4-6. Parcel 5 Concept Plan

PARCEL 9: NORTH NINE



OPPORTUNITIES & CONSTRAINTS

- 1. Northwest Florida State College** — Higher education in the area provides opportunities to train the future local workforce, supporting the local economy and needed services for future Okaloosa residents.
- 2. Existing College Planetarium** — The presence of science, technology, engineering, and mathematics (STEM) fields, encourage young people to consider careers in the Air Force and for young airmen to continue their education.
- 3. College Boulevard Transportation & Utility Access** — College Boulevard located on the southern boundary offers an opportunity to connect future developments to College Boulevard as well as Niceville water and sewer.
- 4. Wetlands** — The presence of wetlands throughout Parcel 9 act as a constraint to development as they limit where development can occur. The wetlands take up a large amount of space in the center of the parcel which makes development difficult.

Viability Criteria	Score
Location and Accessibility	5
Infrastructure Availability	4
Environmental Factors	4
Zoning Regulations	2

Aggregate Viability Score **15**

Moderately favorable with some development constraints

- 5. Existing Golf Cart Path**— The bridge over College Boulevard offers an alternative transportation mode for crossing the busy thoroughfare.
- 6. Eglin AFB Golf Course** — The golf course serves as a valuable regional amenity, drawing locals and visitors alike to enjoy the area and support new commercial businesses.
- 7. No Access to Mid Bay Bridge Road** — The toll road will restrict access to Parcel 9 from the west and north, limiting curb cuts to Colledge Boulevard.
- 8. FDOT Buffer** — Mid Bay Bridge Road requires a buffer along the state route for future widening which prohibits development along the western and northern property boundaries.

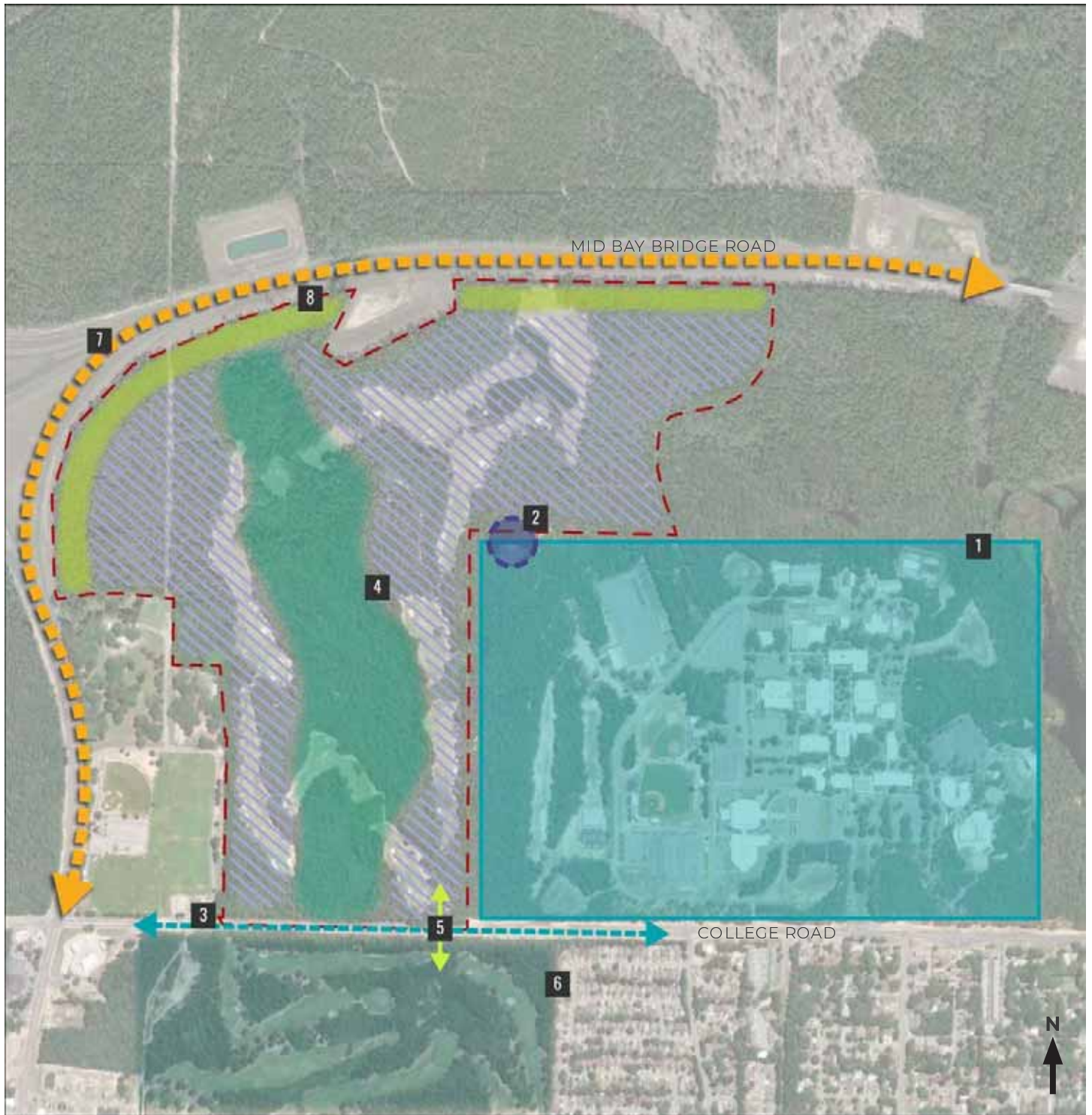




Figure 4-7. Parcel 9 Opportunities & Constraints

APPROPRIATE USES



- 1. Townhomes** — Building a variety of housing types will reduce housing accessibility issues throughout Okaloosa County. This increase in the housing supply will allow Eglin personnel and their families to live closer to the base, furthering the installation mission.
- 2. Multi-Family Residential** — Building a variety of housing types address housing accessibility issues throughout Okaloosa County. This increase in the housing supply will allow Eglin personnel and their families to live closer to the base, furthering the installation mission.
- 3. Neighborhood Commercial** — Due to the proximity to existing residential and connections to College Road Parcel 9 is suitable for neighborhood commercial. Neighborhood commercial acts as an amenity to surrounding population and to Eglin personnel by offering goods and services within a close proximity.
- 4. Office/Flex** — The presence of existing residential and medical facilities, proximity to College Road, and population density makes Parcel 9 suitable for office/flex development. This development is mission supportive because it aides in providing jobs for installation personnel's family members.
- 5. Open Space** — The presence of wetlands throughout Parcel 9 makes this parcel ideal for open space. By leaving areas relatively untouched, the natural environment is preserved. This preservation can help mitigate environmental hazards such as flooding.





Townhomes
± 90 - 130 Units
12 Units Per Acre





Multi-Family
± 225 - 325 Units
30 Units Per Acre




Neighborhood Commercial
± 20,000 SF



Office/Flex
± 20 Acres
130,000 - 190,000 SF



Open Space
± 150 Acres



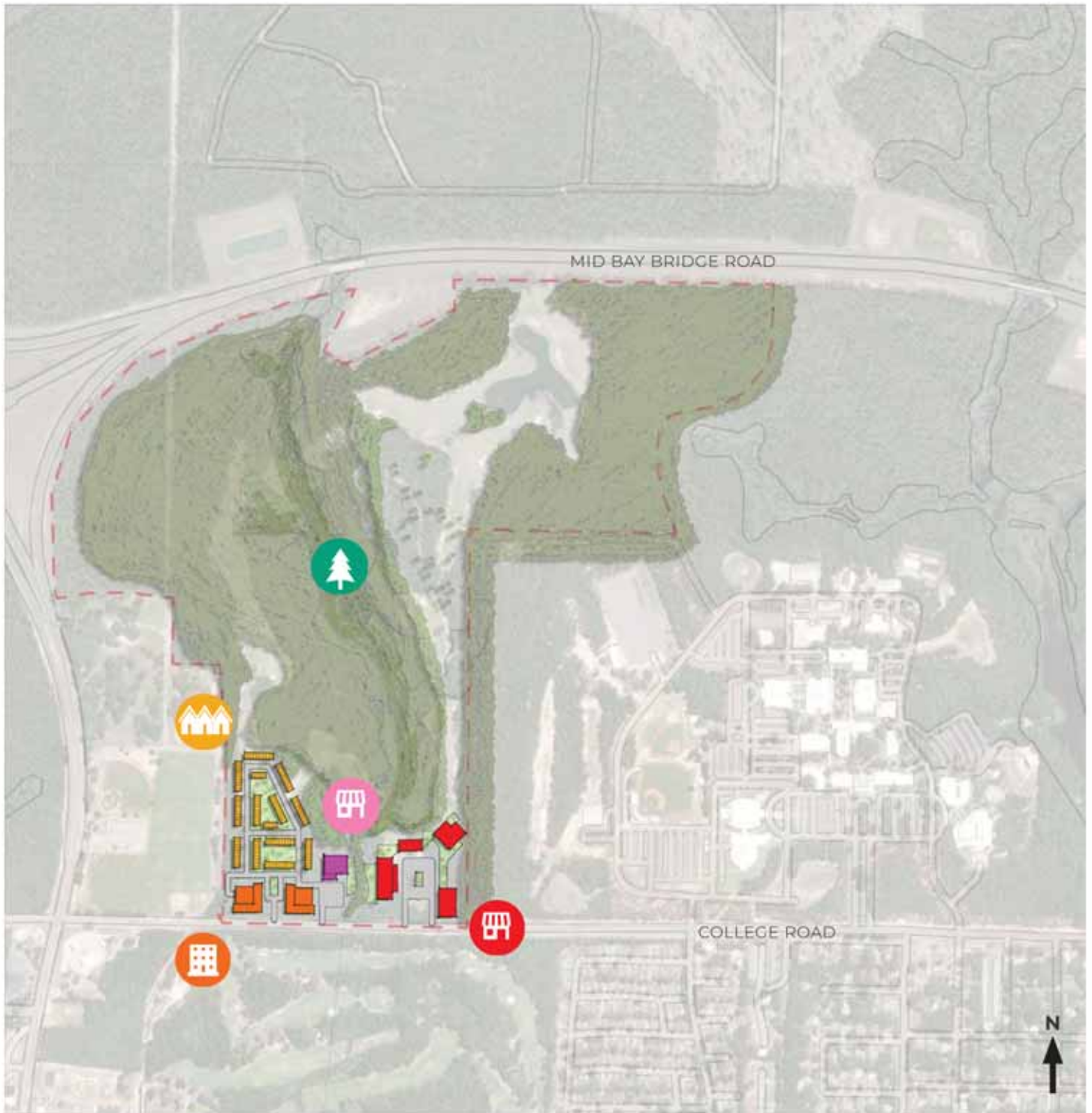


Figure 4-8. Parcel 9 Concept Plan

PARCEL 10: K-21



OPPORTUNITIES & CONSTRAINTS

- 1. Wetlands/Conservation Opportunity** — The presence of wetlands throughout Parcel 10 act as a constraint to development as they limit where development can occur. However, the wetlands on the parcel can serve as an opportunity to establish an area for environmental conservation.
- 2. NWFSC Expansion** — NWFSC has expressed interest in expanding the campus to the north for educational purposes.
- 3. City of Niceville** — The City of Niceville is located to the south of Parcel 10 and serves as an opportunity for potential development. There is potential to connect to Niceville’s water and sewer utilities which makes development easier.
- 4. Northwest Florida State College** — Higher education in the area provides opportunities to train the future local workforce, supporting the local economy and needed services for future Okaloosa residents.
- 5. College Road Access** — A potential opportunity for development on Parcel 10 is College Boulevard located on the southern border of the parcel. There is potential to connect future developments to College Boulevard which can increase connectivity to surrounding communities.

Viability Criteria	Score
Location and Accessibility	4
Infrastructure Availability	4
Environmental Factors	4
Zoning Regulations	2

Aggregate Viability Score **14**

Moderately favorable with some development constraints

- 6. Forest Road Access** — Forest Road located along the eastern border presents an opportunity to connect future developemnts to Forest Road which can increase connectivity to surrounding communities.
- 7. Interchange Access** — This area captures traffic from the Mid Bay Bridge Road via the interchange to the northeast of Parcel 10.
- 8. Lack of Access to Mid Bay Bridge Road** — The toll road will restrict access to Parcel 10 from the north, limiting curb cuts to Colledge Boulevard.
- 9. FDOT Buffer** — Mid Bay Bridge Road requires a buffer along the state route for future widening which prohibits development along the northern property boundaries.

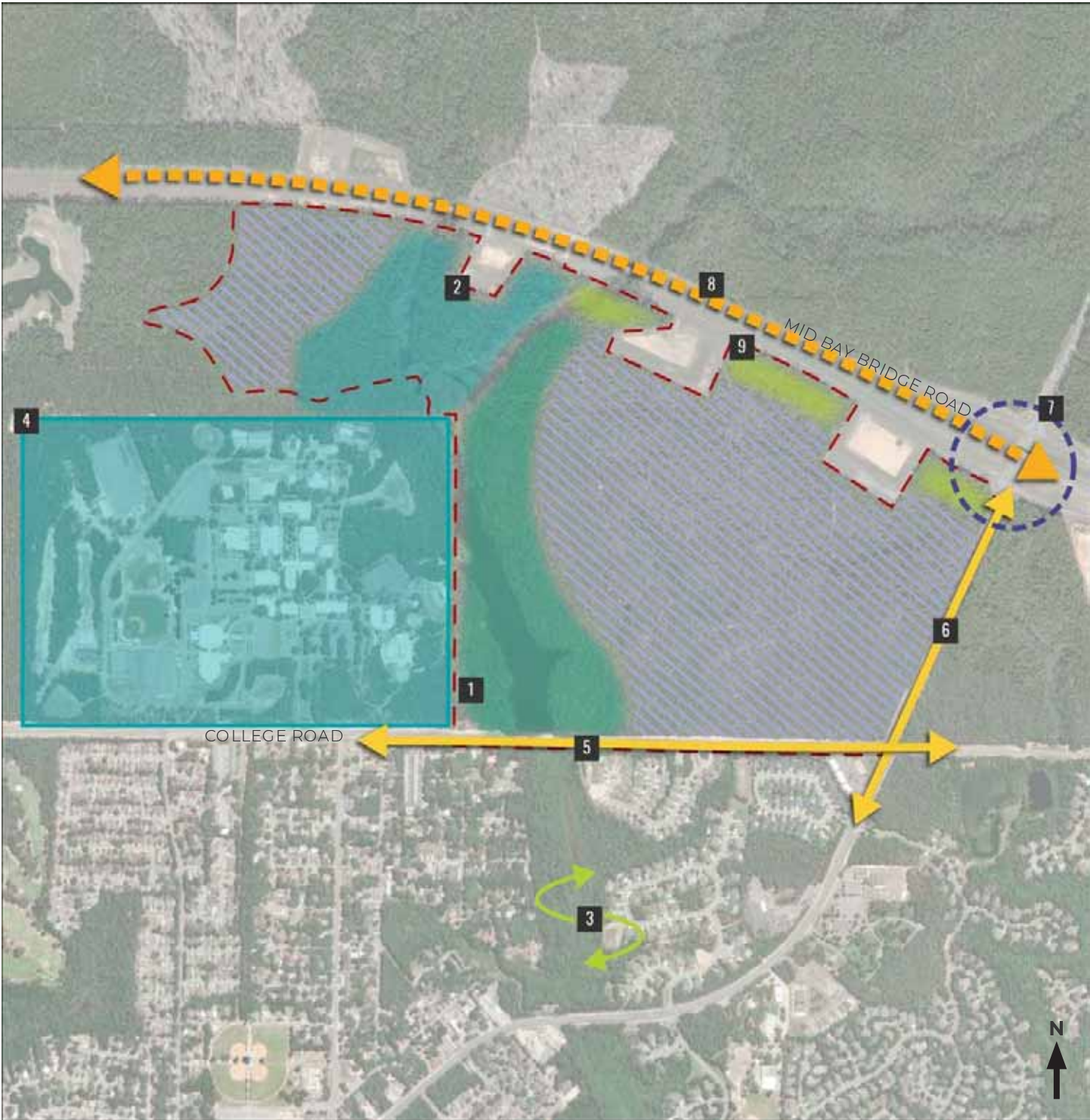



Figure 4-9. Parcel 10 Opportunities & Constraints

APPROPRIATE USES



- 1. Residential** — Due to the proximity to existing residential in the City of Niceville, College Road, and employment Parcel 10 is suitable for residential development. To actively address demand for senior housing, the County might consider attracting a 55+ active adult community. This supports the installation mission by reducing commute times to the installation and the community will benefit as housing will become more affordable and accessible.
- 2. Townhomes** — Building a variety of housing types will reduce housing accessibility issues throughout Okaloosa County. This increase in the housing supply will allow Eglin personnel and their families to live closer to the base, furthering the installation mission.
- 3. Neighborhood Commercial** — Due to the proximity to existing residential and connections to College Road Parcel 10 is suitable for neighborhood commercial. Neighborhood commercial acts as an amenity to surrounding population and to Eglin personnel by offering goods and services within a close proximity.
- 4. Open Space** — The presence of wetlands throughout Parcel 10 makes this parcel ideal for open space. By leaving areas relatively untouched, the natural environment is preserved. This preservation can help mitigate environmental hazards such as flooding.





Residential
± 80 - 120 Units
8 Units Per Acre




Townhomes
± 250 - 350 Units
12 Units Per Acre



Community Commercial
± 10 Acres
± 175,000 SF



Open Space
± 190 Acres



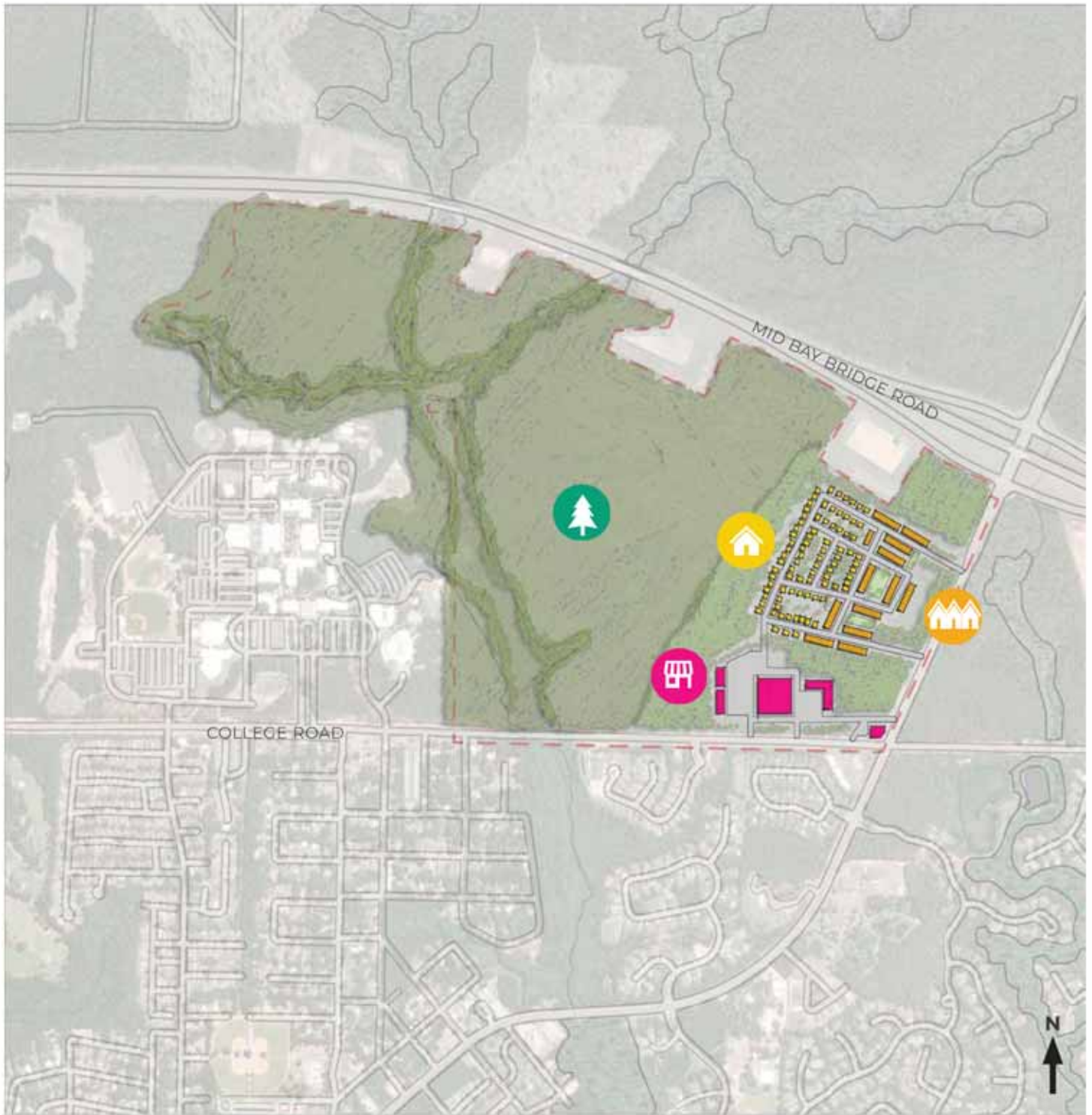


Figure 4-10. Parcel 10 Concept Plan

PARCEL 11: L-34



Viability Criteria	Score
Location and Accessibility	4
Infrastructure Availability	4
Environmental Factors	3
Zoning Regulations	2

OPPORTUNITIES & CONSTRAINTS

- Existing Residential** — Surrounding residential communities serve as an opportunity for development. Existing residential indicates that there is a community present and a potential need for additional housing, retail, and office/flex space.
- College Boulevard Transportation & Utility Access** — College Boulevard located on the southern boundary offers an opportunity to connect future developments to College Boulevard as well as Niceville water and sewer.
- Lack of Access to Mid Bay Bridge Road** — The toll road will restrict access to Parcel 11 from the north, limiting curb cuts to Colledge Boulevard.
- FDOT Buffer** — Mid Bay Bridge Road requires a buffer along the state route for future widening which prohibits development along the northern and eastern property boundaries.

Aggregate Viability Score **13**

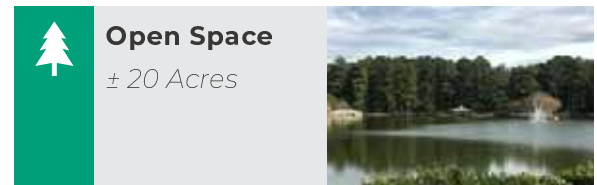
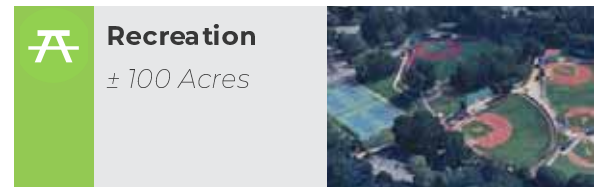
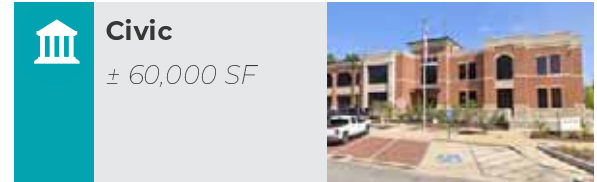
Development possible with several constraints



Figure 4-11. Parcel 11 Opportunities & Constraints

APPROPRIATE USES

- 1. Civic** — As the community continues to grow and the demand for expanded services increases, there will be a need for a new fire station and public safety center. Parcel 11 presents an ideal location for future civic uses, being close to residential neighborhoods and areas likely to experience future growth.
- 2. Neighborhood Commercial** — Due to the proximity to existing residential, population density and transportation Parcel 11 is suitable for neighborhood commercial. Neighborhood commercial acts as an amenity to surrounding population and to Eglin personnel by offering goods and services within a close proximity, often times placed within or alongside residential developments.
- 3. Recreation** — Due to proposed and existing residential, Parcel 11 ideal for recreation. The surrounding community benefits from recreation space as it acts an amenity and assists in the preservation of the natural environment.
- 4. Open Space** — Parcel 11 is ideal for the preservation of open space. By leaving areas relatively untouched, the natural environment is preserved. This open space can potentially be utilized for future development.



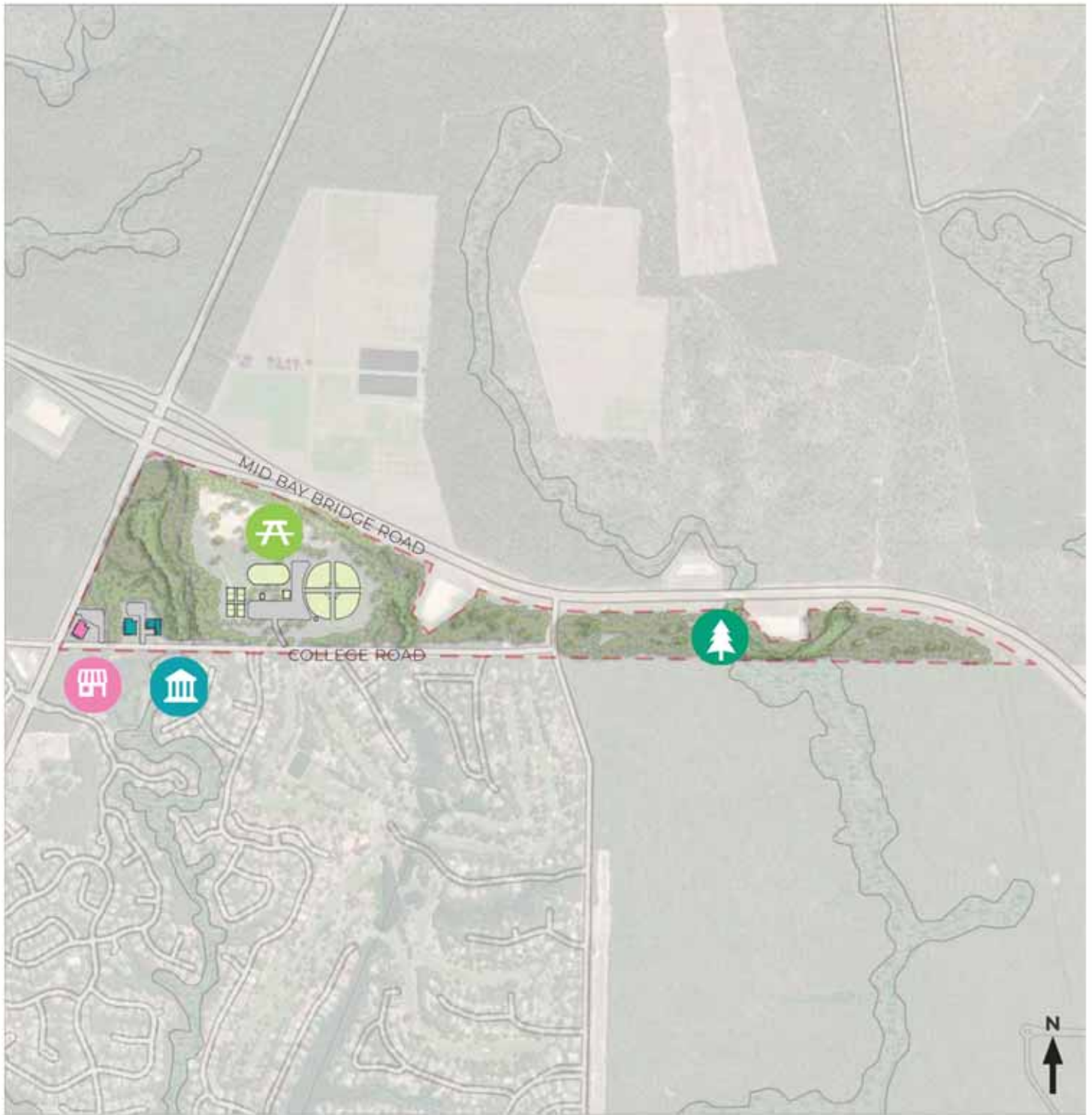
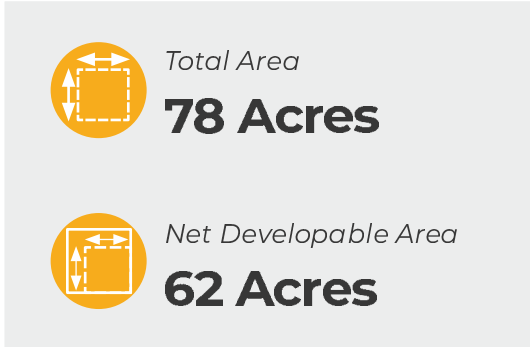


Figure 4-12. Parcel 11 Concept Plan

PARCEL 13: L-24



Viability Criteria	Score
Location and Accessibility	1
Infrastructure Availability	5
Environmental Factors	4
Zoning Regulations	2

OPPORTUNITIES & CONSTRAINTS

- 1. Existing Residential** — Surrounding residential communities serve as an opportunity for recreation.
- 2. Potential Trail Connections** — There are existing trails to the north of Parcel 13. When developing the parcel there is an opportunity to connect to these trails and provide passive recreation for the surrounding communities.
- 3. 293-20 Interchange** — This area captures traffic from the Mid Bay Bridge Road via the interchange to the southeast of Parcel 13.
- 4. Range Road Junction** — This area captures traffic from the Mid Bay Bridge Road via the interchange to the northeast of Parcel 13.
- 5. Curb Cut Challenge** — There are curb cut challenges present to the north and south of Parcel 13 which constrains development. These challenges can limit potential connectivity to surrounding communities.
- 6. FDOT Buffer** — Mid Bay Bridge Road requires a buffer along the state route for future widening which prohibits development along the eastern property boundaries.
- 7. Lack of Access to Mid Bay Bridge Road** — The toll road will restrict access to Parcel 13 from the north, limiting curb cuts to Colledge Boulevard.

Aggregate Viability Score

12

Development possible with several constraints



Figure 4-13. Parcel 13 Opportunities & Constraints

APPROPRIATE USES

- 1. Open Space** — Parcel 13 is ideal for the preservation of open space due to challenges connecting to transportation. By leaving areas relatively untouched, the natural environment is preserved. This open space can potentially be utilized for future development.



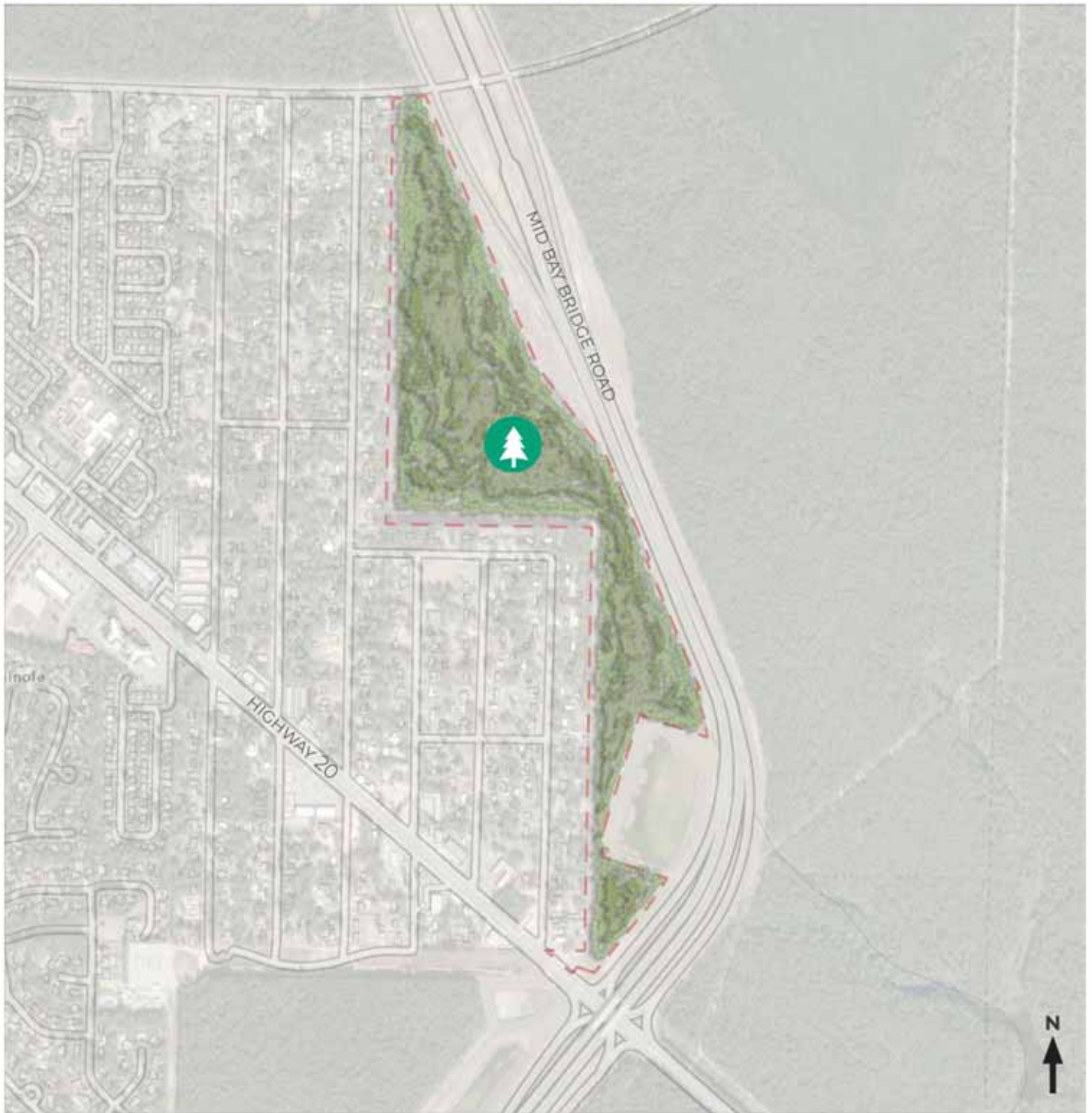
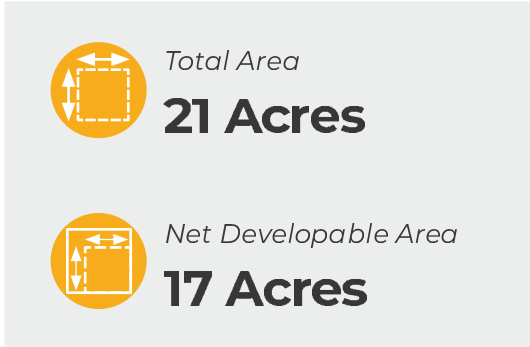


Figure 4-14. Parcel 13 Concept Plan

PARCEL 17: ADDIE LEWIS



OPPORTUNITIES & CONSTRAINTS

- Existing Residential** — Surrounding residential communities serve as an opportunity for development. Existing residential indicates that there is a community present and a potential need for additional housing, retail, and office/flex space.
- Existing Street Network** — Due to the existing residential properties on Parcel 17, there is an existing street network. There is an opportunity to expand the existing street network in future developments.
- Existing School Board Property** — An existing school board property is located against the southern border of the parcel. The location of this property provides an opportunity for expansion into Parcel 17.
- To Eglin Airfield and Destin Fort Walton Airport** — Parcel 17 is located in the flight path of Eglin Airfield and Destin Fort Walton Airport. This can act as a constraint to development due to noise concerns. Before development begins on the parcel it is recommended that a sound assessment is conducted.

Viability Criteria	Score
Location and Accessibility	4
Infrastructure Availability	3
Environmental Factors	4
Zoning Regulations	2

Aggregate Viability Score

13

Development possible with several constraints

- High Traffic Commercial Corridor** — The presence of a high traffic corridor along the parcel acts as a constraint to development. Traffic surrounding the parcel can limit parcel accessibility and parcel development could potentially worsen existing traffic.
- Storm Surge Risk** — Storm surge flooding acts as a threat to infrastructure and human populations. Flood risks can be mitigated using green-grey infrastructure such as bioswales and permeable pavement.

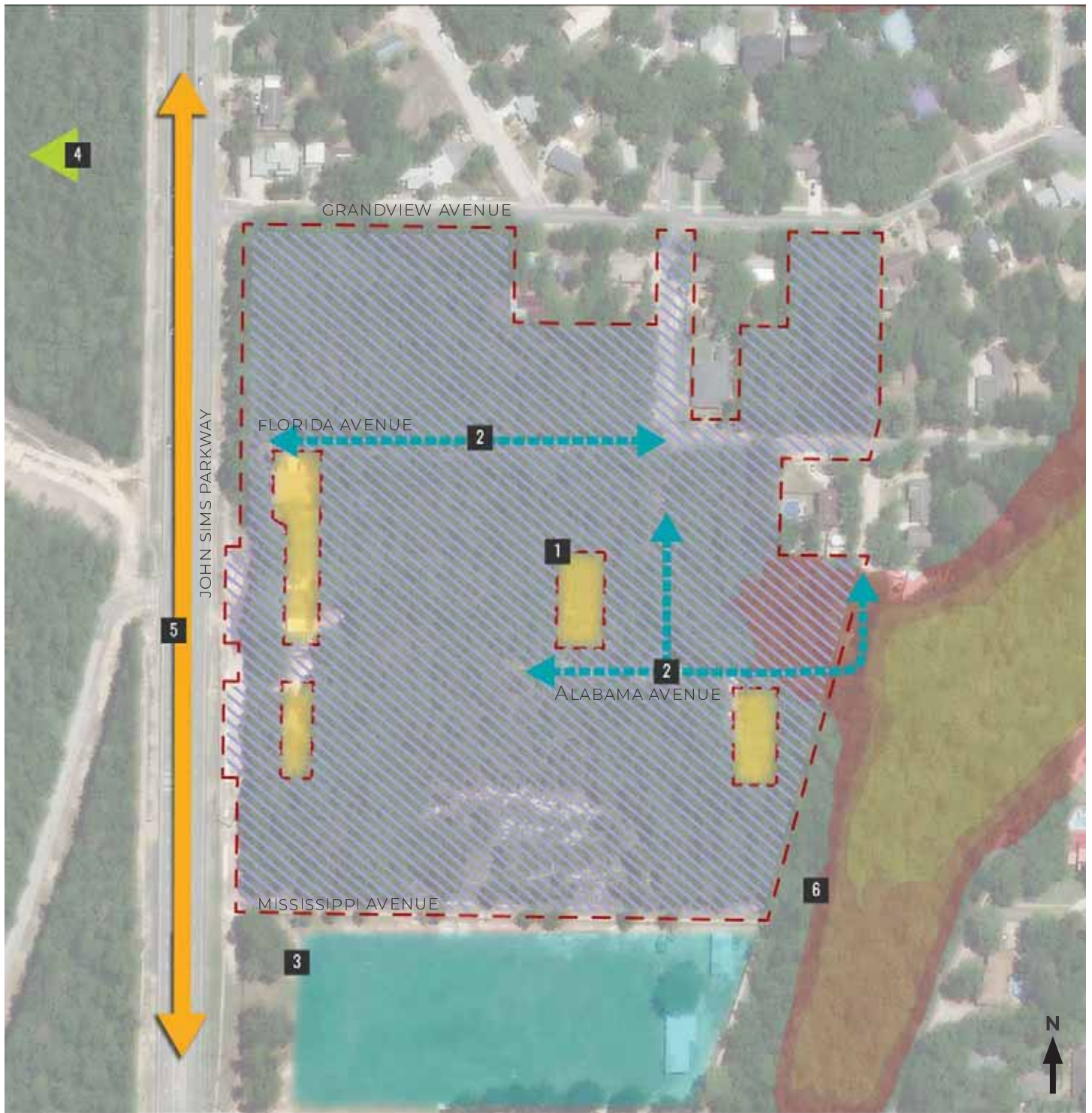
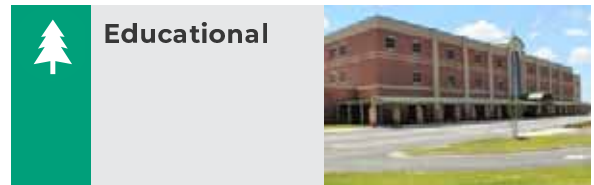


Figure 4-15. Parcel 17 Opportunities & Constraints

APPROPRIATE USES

- 1. Residential** — Due to the proximity to existing residential, John Sims Parkway, and employment Parcel 17 is suitable for residential development. This increase in the housing supply will allow Eglin personnel and their families to live closer to the base, furthering the installation mission. This supports the installation mission by reducing commute times to the installation and allowing installation personnel to arrive to work in a timely manner. The community will benefit from residential development as housing will become more affordable and accessible.
- 2. Educational** — Parcel 17 is an ideal location for future educational facilities due to the presence of an existing school along the south border of the parcel. The expansion of the existing school will support the families of installation personnel and improve the overall quality of life in Okaloosa County.



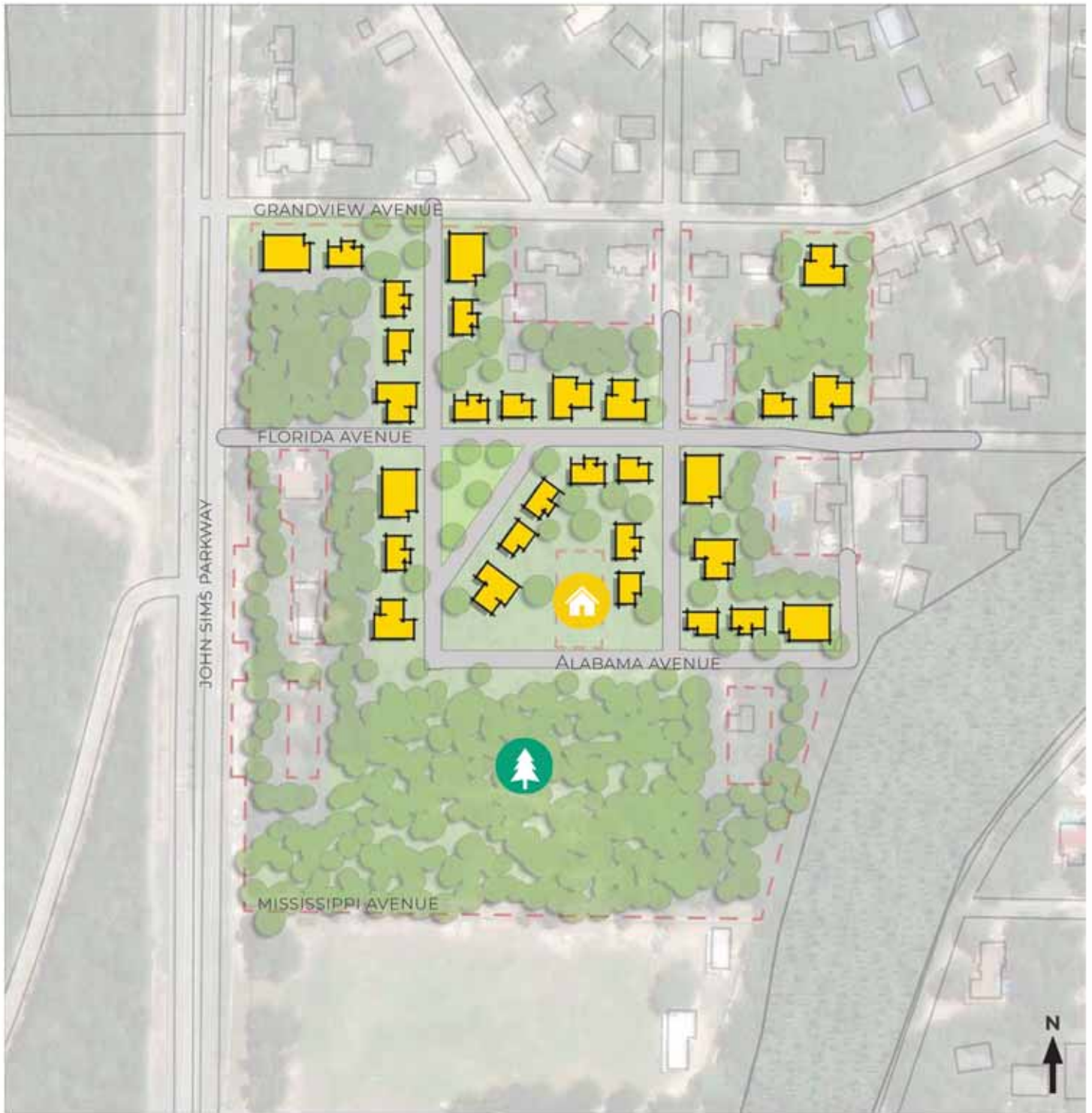


Figure 4-16. Parcel 17 Concept Plan

PRIORITY DEVELOPMENT

To initiate and attract quality development, public investment is crucial. It can expedite redevelopment much more effectively than relying solely on private investment. The following sections detail the implementation projects and priority parcels the County may pursue over the next 20 years.

Among these, Parcel 9, Parcel 5, and Parcel 10 will be prioritized. These parcels have been identified as key areas for development due to their strategic locations and potential for high-impact projects. By focusing on these priority parcels, the County aims to create a ripple effect that will stimulate further investment and development in surrounding areas.

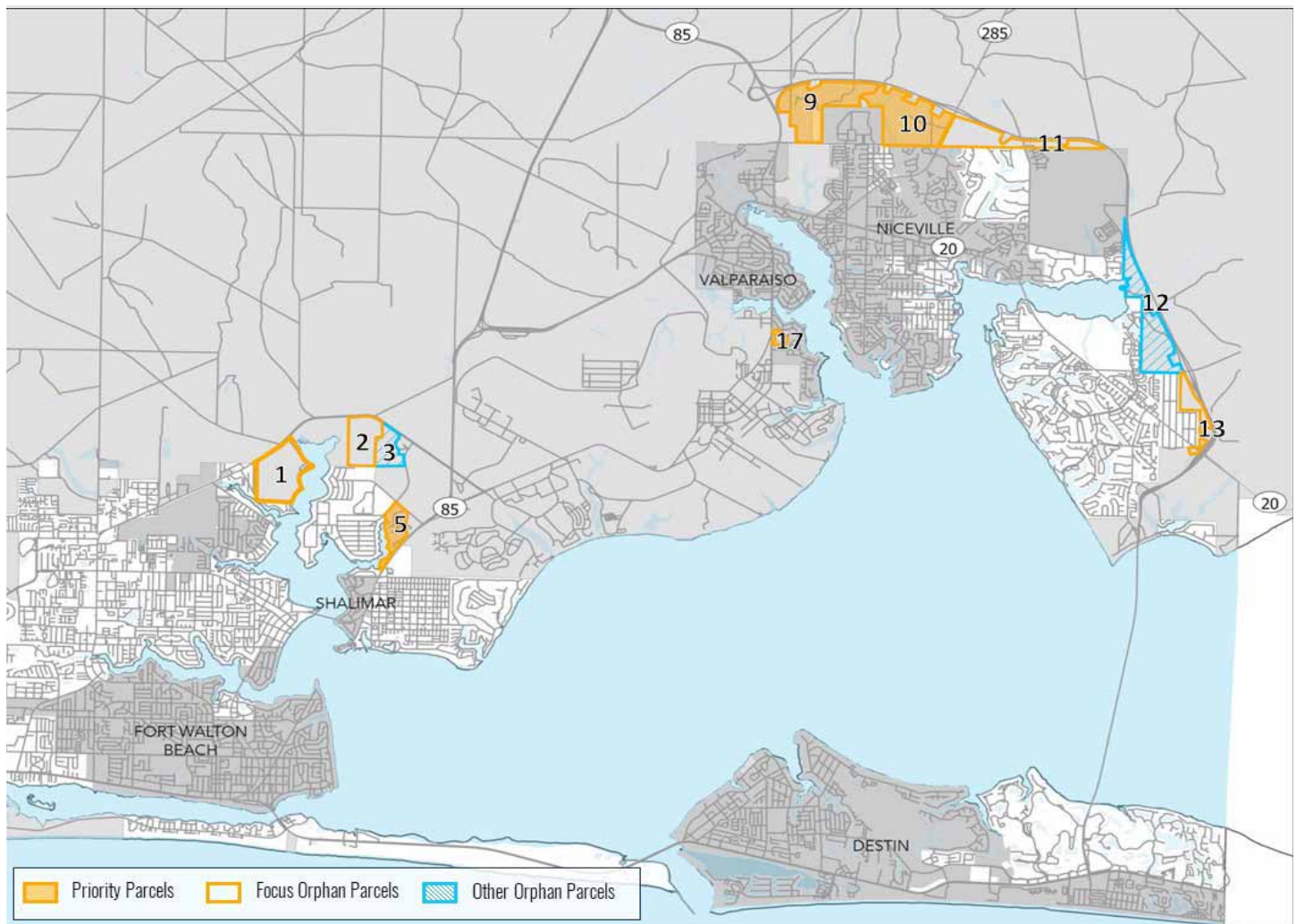


Figure 4-17. Overall Focus Area

Parcel 9 is envisioned as a hub for commercial and mixed-use development, and infrastructure improvements, offering opportunities for businesses and residential spaces that will enhance the local economy and community vibrancy.

Parcel 5 is targeted for public amenities and a signature gateway development which will not only improve the quality of life for residents but also attract new businesses and visitors to the area and accommodate installation mission-related functions.

Parcel 10 is identified as a prime location for additional housing, college expansion, and neighborhood-serving businesses, supporting the need for attainable housing. The preservation of wetlands will also serve as a necessary mechanism to mitigate flood hazards.

By prioritizing these parcels, the County is taking a proactive approach to redevelopment, ensuring that public investment is strategically directed to areas with the highest potential for positive impact. This focused investment strategy will help to accelerate redevelopment efforts and attract quality development to the region.

WHAT'S NEXT?

The Orphan Parcels Master Plan represents a transformative opportunity for Okaloosa County, addressing critical needs while fostering economic, social, and environmental advantages. Maintaining momentum is crucial for the successful implementation of the Master Plan. By consistently advancing the outlined strategies—garnering buy-in, fostering collaboration, aligning policies, and strategizing for infrastructure investments—the County can build a strong foundation for sustainable development. This ongoing commitment will ultimately lead to the realization of the plan's full potential and the long-term benefits for the community and Eglin AFB.

1. Garner Buy-In from the Air Force Base and the Department of Defense – Advocating for the Orphan Parcels Master Plan involves addressing the critical needs of the community while recognizing the economic, social, and environmental advantages of developing these parcels. It also underscores the mutual benefits for Eglin AFB and its mission, highlighting how the development can support both the community and the base's operational goals. By adopting the Orphan Parcels Master Plan, Okaloosa County can streamline discussions with Eglin AFB, ensuring alignment on future development. This proactive approach will help prevent surprises and facilitate a smooth, efficient development process as interest in the Orphan Parcels grows.

- 2. Foster Collaboration** – Fostering collaboration between the community and the development sector is essential to ensure that each parcel is developed thoughtfully, with the future of the surrounding community in mind. By working together, stakeholders can implement a cohesive vision that balances growth with the needs and values of local residents, ensuring sustainable and beneficial development for all.
- 3. Support Policy Alignment** – Ensure that future plans align with local policies, strategic goals, and the mission of Eglin AFB to facilitate smooth implementation. The County should review policy documents, such as the 2020 Comprehensive Plan, and make necessary, publicly-vetted amendments to align with market-supported use recommendations. Updating land use policies before receiving applications will expedite the process for private developers who aim to advance the vision of the Orphan Parcels Master Plan.

4. Strategize for Infrastructure Investments –

Advocate for securing grant funding for major infrastructure investments to catalyze new development, ensuring the necessary support systems are in place to maximize the potential of the orphan parcels, minimizing the financial impact on tax-payers and potential developers. In order to position the Orphan Parcels as attractive development options for outside investment, securing funding for critical infrastructure, such as water and sewer, is paramount. Outside of the traditional methods of raising capital through fees, property taxes, and bonds, there exist a number of federal and state grants programs that provide assistance to local governments aiming to create new or enhance existing infrastructure. Often these will have certain criteria attached to them, from proximity to military installations to resilience goals.

While there are many moving parts, the unwavering pursuit of the community's vision will ultimately ensure the successful implementation of this ambitious plan. Continued dedication will not only bolster Okaloosa County's economy and sense of community but also effectively support Eglin AFB. Working alongside local partners and the United States Department of Defense, Okaloosa County is paving the way for a promising future for the Orphan Parcels.

FUNDING EXAMPLES

1. Defense Community Infrastructure

Program — Designed to address deficiencies in community infrastructure, be supportive of a military installation, and to enhance military value, installation resilience, and/or military family quality of life.

2. Building Resilient Infrastructure and Communities

— Local governments may invest in projects such as infrastructure upgrades, flood mitigation measures, and disaster preparedness initiatives to enhance resilience and reduce the risk of damage from extreme weather events.



APPENDICES

VULNERABILITY ASSESSMENT ADDENDUM

HAZARD DEFINITIONS

Tornadoes: Narrow, rotating columns of air that extend from a thunderstorm down to the ground (NOAA). The formation of a tornado can occur anywhere if the air conditions are right, but these hazard events typically occur during the spring and summer.

Non-Storm Surge Flooding: Causes of non-storm surge flooding include prolonged precipitation events, climate change cause sea level rise, and snow melt. The severity of flooding is dependent on land use and development as well as elevation (NOAA). Low lying areas with high amounts of development and impervious surfaces experience heightened flooding.

Storm Surge: Classified as the rise in sea level during hurricane events (NOAA). This increase in sea level can result in coastal flooding. The intensity of storm surge is dependent on storm intensity, wind speed, angle of approach to the coast, and the coastline shape and characteristics. During a category 5 hurricane, potential storm surge inundation is greater than a category 1 hurricane. Hurricanes with a faster wind speed will result in more intense storm surge at the coastline while slower wind speeds result in storm surge that penetrates further inland. Storms approaching perpendicular to the coast are more likely to have a more intense storm surge than storms with a more parallel approach. Additionally,

coastlines with a more concave shape are more likely to experience greater storm surge than shorelines with a more convex coastline. Based on these variables, the Federal Emergency Management Agency (FEMA) projects storm surge intensity for each hurricane category scenario.

Drought: Characterized as a prolonged period of dry weather with very little to no precipitation (NASA). Throughout Florida droughts are most likely during the dry season – October through May. Over time, droughts can have negative effects on the environment which can threaten parcel development.

High Wind: Tends to occur during a severe thunderstorm or strong weather system. Isolated wind damage can begin occurring at wind speeds ranging from 40-50 mph and more widespread damage occurs with higher windspeeds (National Weather Service).

Subsidence: Classified as the gradual settling or sudden sinking of the Earth's surface caused by the movement of underground materials (NOAA). Causes of subsidence can include both human activity (pumping, fracking, or mining) and natural events (earthquakes, soil compaction, isostatic rebound, or erosion). Sinkholes are one form of subsidence that commonly occurs in Florida due to the geologic properties of the rocks underlying the land surface.

Extreme Rainfall: Heightened as a result of climate change and can act as a threat to infrastructure and communities. Projected atmospheric warming caused by climate change increases the amount of moisture that can be held in the atmosphere (EOS). Increased atmospheric moisture results in more intense rainfall events. Atmospheric warming also increases the rate of evaporation which can result in more extreme rainfall events.

Wildfires: Classified as unplanned fires that burn in wildlands. Wildland environments can include forests, shrubs, grasslands, and prairies. The areas with the greatest wildfire risk are the wildland-urban interface (WUI). WUI is the transition zone between land developed by human intervention and wilderness land (FEMA). The likelihood of wildfire occurrence in an area is determined by the availability of fuel, ignition sources, topography, weather, and time of year (U.S. Department of Agriculture). Fuel availability is dependent on the vegetation type present in the area. Ignition sources can include power transmission lines and lighting. Wildfire is a climate-sensitive hazard as prolonged periods of drought combined with extreme heat increases the likelihood of wildfire formation.

Hurricanes: Rotating low-pressure weather systems formed over tropical or subtropical water with high wind speeds. When a tropical storm reaches wind speeds of 74 mph, it is classified as a hurricane (NOAA). Depending on maximum wind speed, hurricanes are categorized on a scale of 1 – 5. The greater the category, the greater the magnitude of the storm.

Lightning: The visible electrical discharge that reaches from the atmosphere to the ground that is often created during a thunderstorm (FEMA). While the conditions needed for lightning to occur is understood, the process of lightning formation has not been verified which makes forecasting lightning strikes difficult and unreliable.

Sea Level Rise (SLR): The result of melting ice sheets and glaciers and from thermal expansion within the ocean (NASA). As a result of its large surface area and low albedo, the ocean absorbs the majority of atmospheric heat causing water to become warmer and expand while increasing the rate of ice sheet and glacial melt. Impacts of increasing rates of SLR includes increased intensity of storm surge, tidal flooding, and damage to coastal areas.

Extreme Heat: A period of intense heat and humidity with temperatures above 90 degrees that lasts at least two to three days (U.S. Department of Homeland Security). Higher levels of humidity increase the feeling of heat and increases the risk associated with extreme heat. Florida experiences the highest humidity levels of any state (Florida State University). These elevated humidity levels intensify the high temperatures seen throughout the state.

Infrastructure Failure: Classified as the breakdown or malfunctioning of a physical system or facility that supports a community (United Nations Office for Disaster Risk Reduction).

Utility Outages: The temporary disruption in delivery of essential services provided by utilities (U.S. Department of Homeland Security). A common cause of utility outages is infrastructure failure. Utility services that can be affected by utility outages includes electricity, water, natural gas, and telecommunications.

Traffic Congestion: The result of the number of vehicles present on a roadway exceeding the roadway capacity. When roadway capacity is exceeded, it can cause slower speeds, longer commute times, and gridlock. Increasing population size within an area can worsen roadway congestion as the number of vehicles on the roadways increases as well.

Crime: Defined as any action that violates the laws established by a governing authority and can be punished by legal sanctions. Areas with high crime rates are affected in many ways. The economy of an area is affected by high crime rates due to increased business costs and reduced productivity. Socially, elevated rates of crime can have a negative impact on quality of life. High crime rates can also result in damage to infrastructure through acts of vandalism.

Physical Terrorist Attacks: An act of violence targeted at individuals, infrastructure, or public spaces with the intent of causing harm, fear, or disruption through physical actions (FBI). Attacks can include bombings, armed assaults, sabotage to infrastructure, and hijacking vehicles, aircraft, or ships to use as weapons.

HAZARD AND RISK FIGURES

NON-STORM SURGE



Figure A-1. Parcel 9 and Parcel 10 FEMA Floodplain (FEMA)

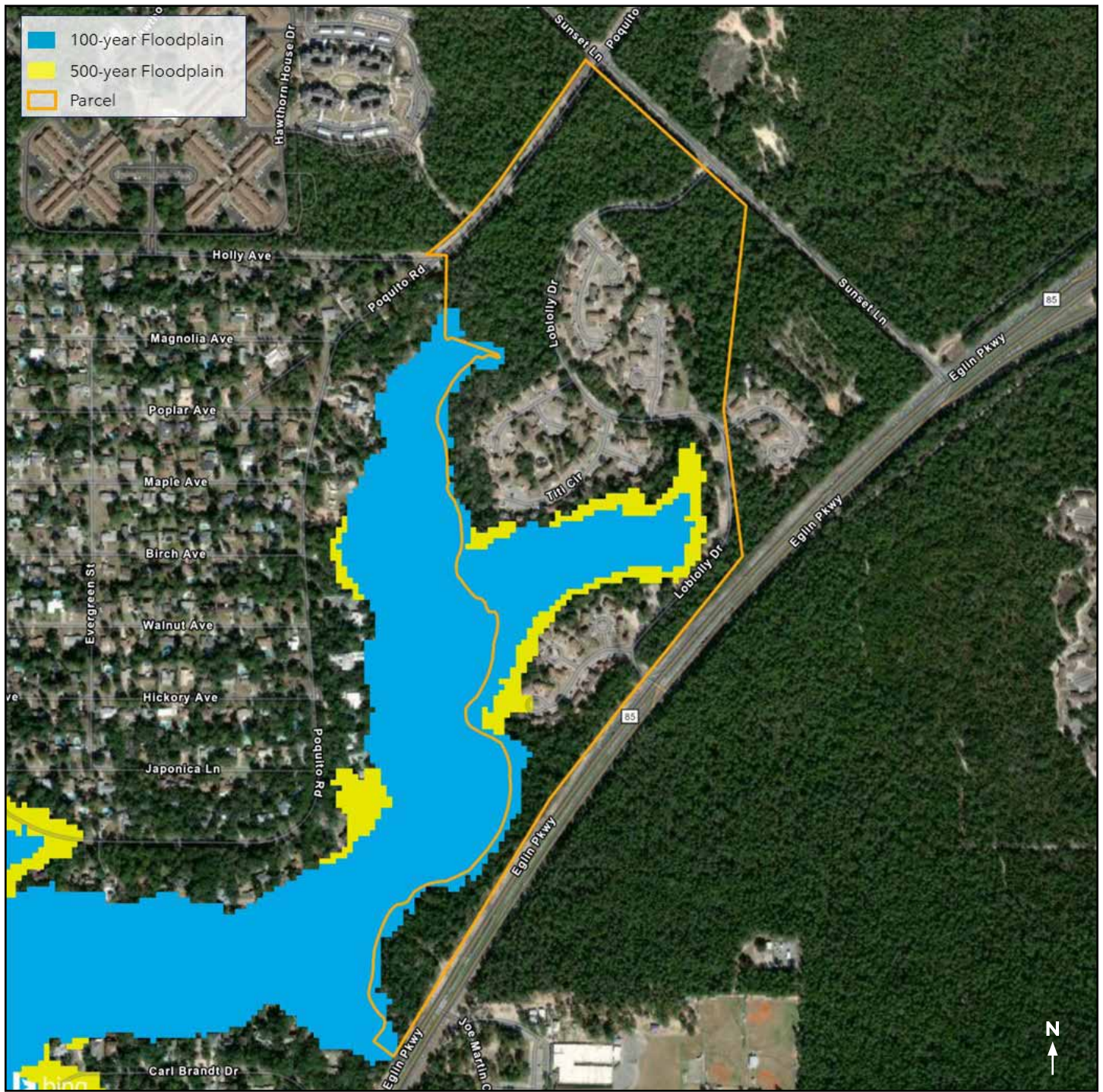


Figure A-2. Parcel 5 FEMA Floodplain (FEMA)

DROUGHT

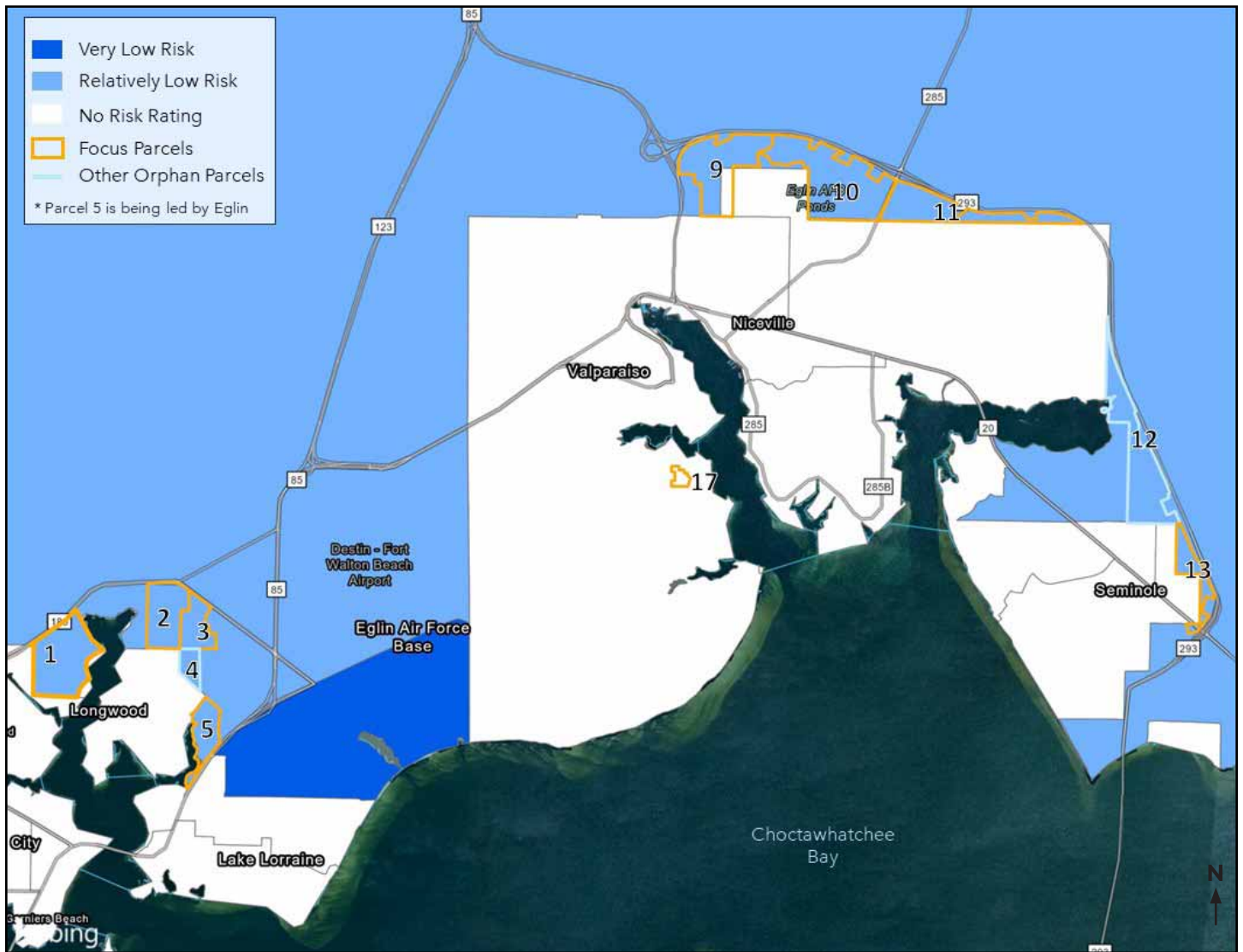


Figure A-3. Overall Area of Interest Drought Risk (FEMA NRI)

HIGH WIND

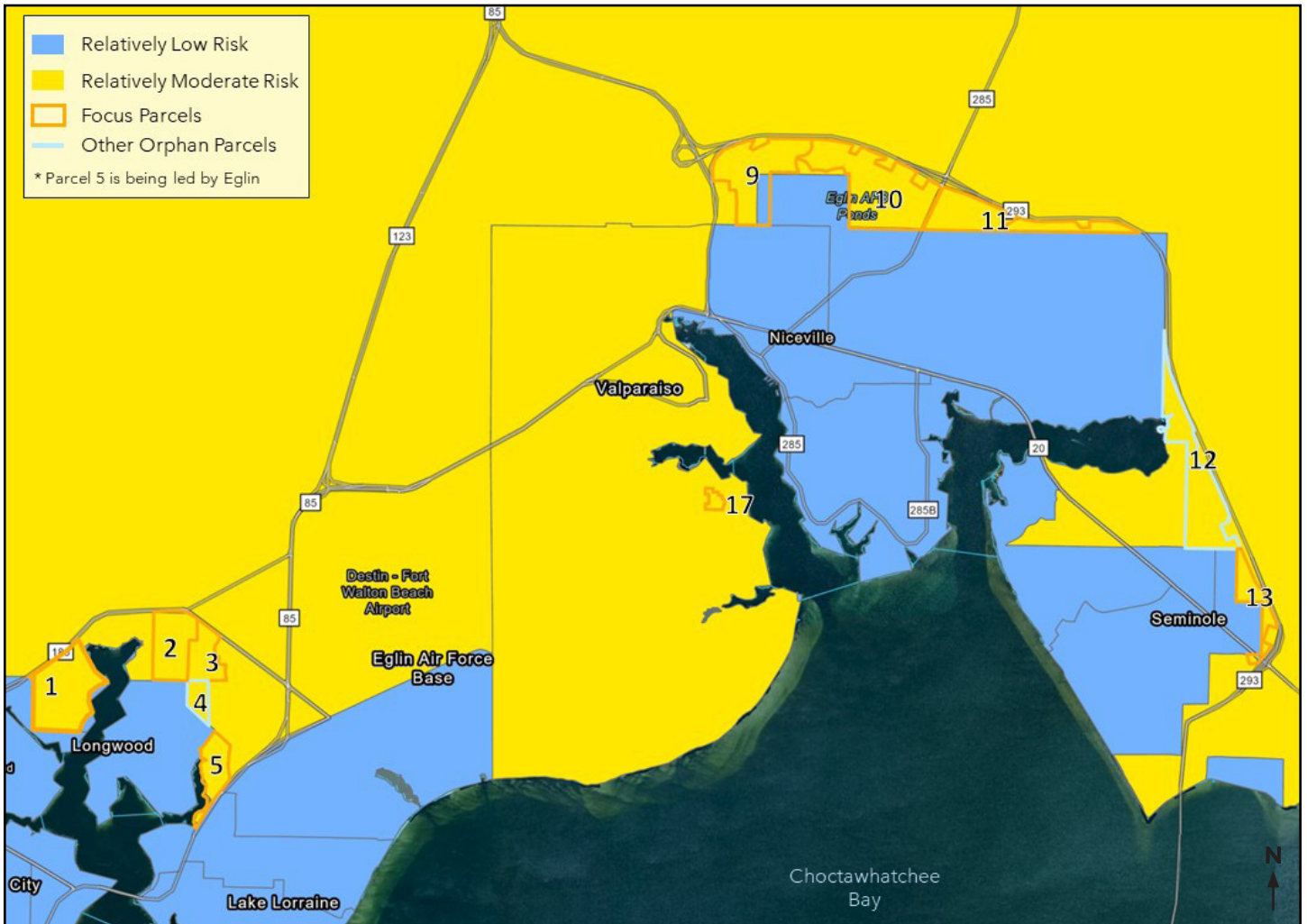


Figure A-4. Overall Area of Interest High Wind Risk (FEMA NRI)

SUBSIDENCE/SINKHOLE

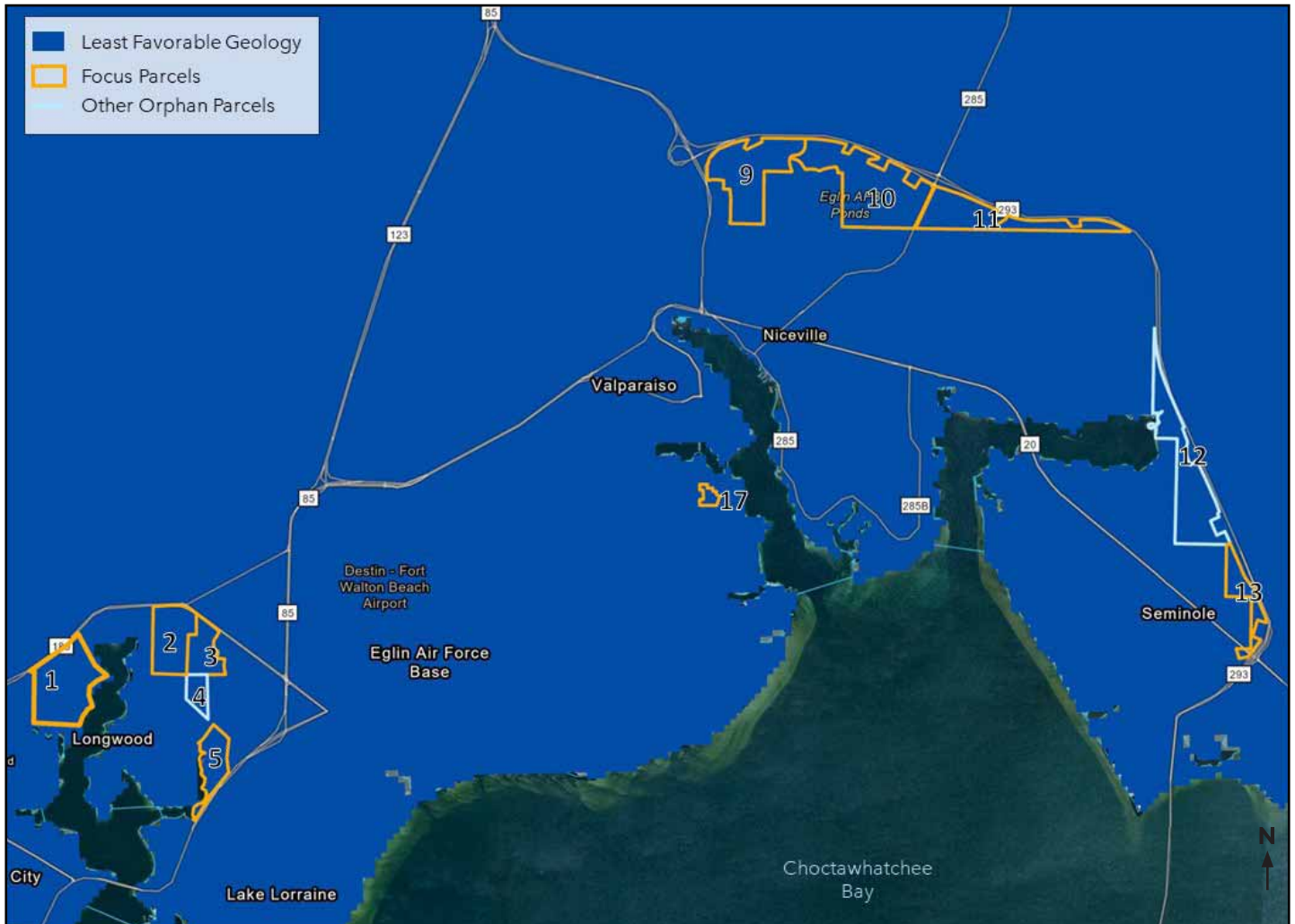


Figure A-5. Overall Area of Interest Favorable Geology for Sinkhole Formation (FDEP)

EXTREME RAINFALL

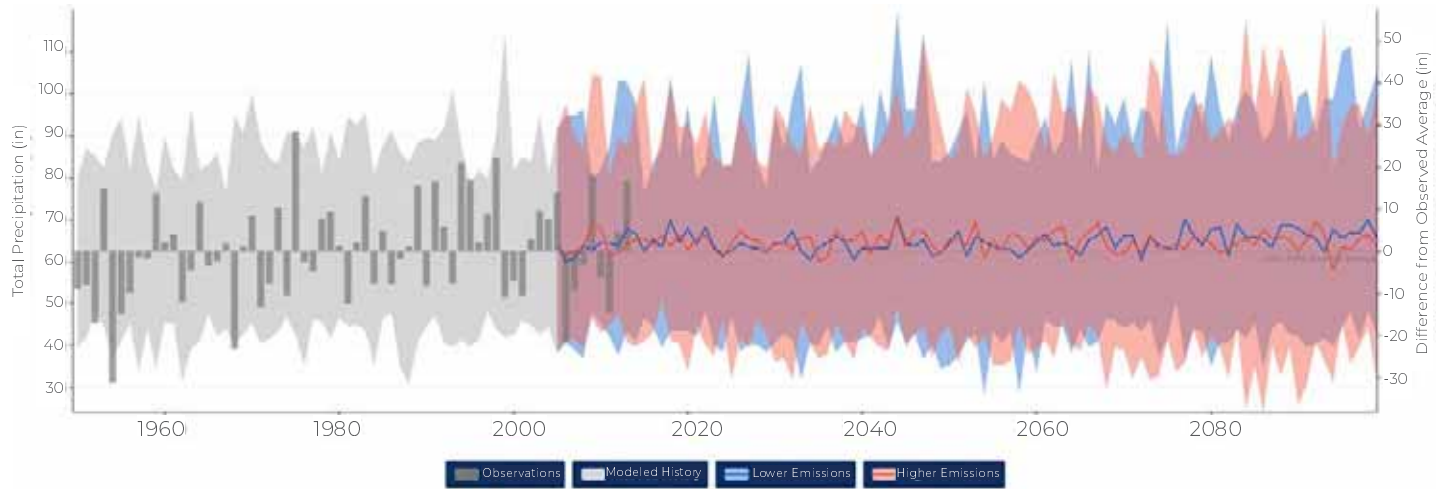


Figure A-6. Okaloosa County Total Precipitation Projections (NEMAC)

EXTREME HEAT

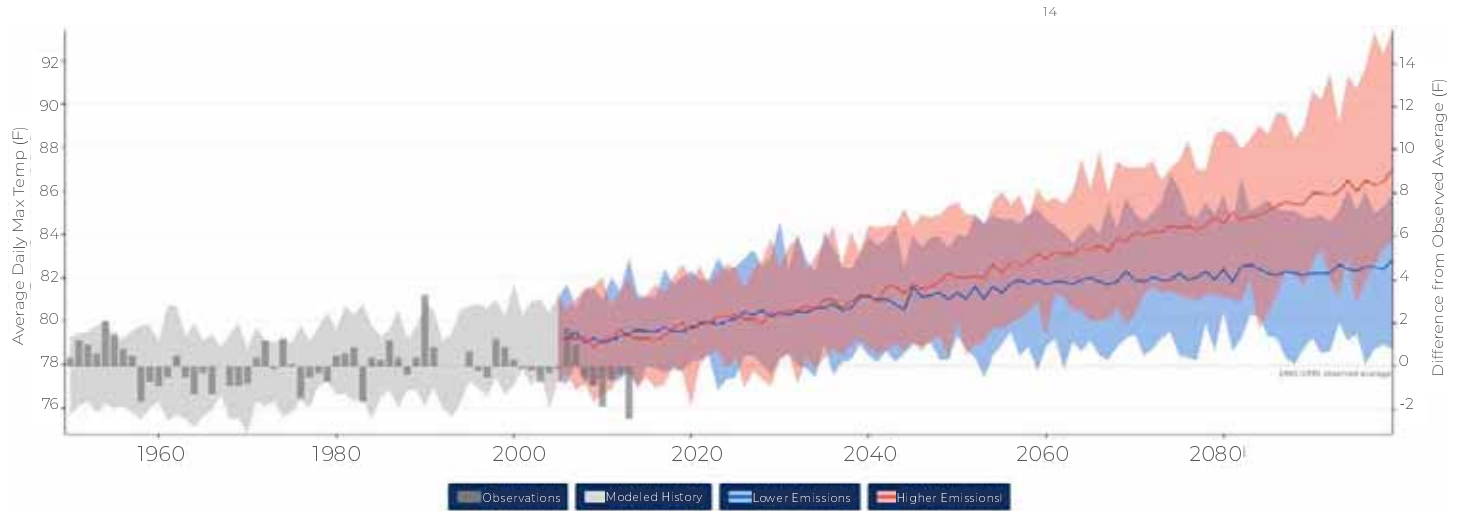


Figure A-7. Okaloosa County Average Daily Maximum Temp Projections (NEMAC)



Figure A-8. Okaloosa County Days with Maximum Temp >90F Projections (NEMAC)

MARKET ANALYSIS ADDENDUM

VIABILITY INDICATOR METHODOLOGY

Methodology

As Jacobs offers recommendations for each parcel, it is crucial to evaluate the developmental viability to ensure the success of future projects. To do so, the Jacobs team has identified several viability indicators to rank parcels according to their developability. These indicators are separated into three categories and are as follows:

1. Vulnerability Assessment
 - a. Location and Accessibility
 - b. Infrastructure Availability
 - c. Environmental Factors
2. Regulatory Assessment
 - a. Zoning Regulations
 - b. Regulatory Barriers
3. Market Analysis
 - a. Population Density
 - b. Community and Social Needs
 - c. Market Demand

Each indicator is scored between one and five to quantify varying types of data, with the higher score reflecting greater potential for development. A general description of each ranking is provided below.

Vulnerability Assessment

Location and Accessibility - Proximity to major roadways and other transportation infrastructure which can enhance the attractiveness of the parcel for residential or commercial uses.

1. Accessible via unpaved roads, no existing curbs cuts/entrances.
2. Accessible via local neighborhood roads. One site edge along public right of way, no existing curbs cuts/entrances.
3. Accessible via local neighborhood roads. Multiple site edges along public right of way, at least one existing curbs cuts/entrances.
4. Adjacent to/entrances placed on major roadways with one site edge along public right of way, one existing curbs cuts/entrances.
5. Adjacent to/entrances placed on major roadways with multiple site edges along public right of way, with more than one existing curbs cut/entrance. Dedicated public transit stops within .25 miles of the property boundary.

Infrastructure Availability - Access to electricity, broadband, water, sewer, and other public services will impact a developer's ability to develop the site.

1. No nearby existing infrastructure
2. Existing infrastructure that minimally covers development needs along right of ways adjacent to site.
3. Existing infrastructure that partially covers development needs along right of ways adjacent to site.
4. Existing infrastructure that fully covers development needs along right of ways adjacent to site.
5. Infrastructure already in place on site.

Environmental Factors - The presence of flood zones, natural hazards, topography, and soil quality will affect construction costs and environmental risks.

1. Environmental constraint affects 75% of developable acreage. Intense environmental remediation required.
2. Environmental constraint affects 50% of developable acreage. Some environmental remediation required.
3. Environmental constraint affects 30% of developable acreage. Some environmental remediation required.
4. Environmental constraint affects 15% of developable acreage. Little to no environmental remediation required.
5. Environmental constraint affects 5% or less of developable acreage. No environmental remediation required.

Regulatory Assessment

Zoning Regulations - Permitted and compatible uses will be important to understand to ensure future development is considerate of neighbors and existing land use law.

1. Adjacent uses are incompatible with proposed program.
2. Adjacent uses are compatible with proposed program.

Outcomes/Scoring

The following scores indicate how well each parcel aligns with the assessment criteria.

		Parcels							
		1	2	5	9	10	11	13	17
Vulnerability	Location and Accessibility	5	5	5	5	4	4	1	4
	Infrastructure Availability	4	4	5	4	4	4	5	3
	Environmental Factors	5	5	2	4	4	3	4	4
Regulatory	Zoning Regulations	2	2	2	2	2	2	2	2
Aggregate Score		16	16	14	15	14	13	12	13
Development Viability									

Market Analysis

Keeping population density, community and social needs, and market demand in mind, the planning team evaluated each parcel according to applicable characteristics to identify suitable land used for each parcel, ensuring that they align with both the mission of Eglin Air Force Base and the needs of the surrounding community.

The assessment of population density is necessary as a higher population density can indicate greater demand for housing and commercial businesses. Community and social needs can be analyzed through the assessment of an area's proximity to quality schools and healthcare services. Market demand is established by analyzing trends in the local market.

The following characteristics were considered when conducting the market analysis but, unlike the vulnerability and regulatory assessments, did not receive a score.

- *Existing Surrounding SFR* - The presence of existing single family residential in adjacent properties indicates a higher population density and therefore a greater demand for additional housing and commercial businesses.
- *Proximity to Employment* - Employment centers within close proximity to a development may allow for high density residential uses to supply local jobs with local workers.
- *Critical Mass of Residential Uses* - Where residential uses are concentrated, local retail and office can thrive due to a more concentrated population density.
- *Traffic* - Office and retail developments are more likely to succeed when placed along existing high-volume roads that provide connectivity to one another. High-volume traffic is classified as more than 25,500 average annual daily trips and/or major road connectivity.
- *Proximity to Existing Hospital* - Medical offices typically prefer to be located adjacent to or within a close proximity to existing hospitals. Close proximity to a hospital is classified as an existing hospital present within a 2-mile radius.

- *Density of Senior Population* – A significant presence of senior populations indicates a need for close proximity to medical facilities. Dense senior populations is classified as a census tract population that is comprised of 20% or more seniors.
- *Availability of Existing Medical Services* – Areas are benefitted by the presence of readily available existing medical services. The presence of medical services (excluding hospitals) within 2 miles of the site is considered close proximity.
- *Proximity Of Eglin AFB Gate* – Eglin AFB plays a critical role within Okaloosa County as an employer. Existing and future developments within close proximity to the installation will have a greater impact on the installation mission. Close proximity of a development is within 2.5 miles of an Eglin AFB Gate.
- *Proximity to Public Transportation* – Office and retail developments are more likely to succeed when they have connectivity to major roadways and surrounding development. Close proximity to public transportation increases development connectivity. Close proximity is classified as the presence of a public transit stop within a .5 mile radius.
- *Visibility* – Site visibility plays a large factor in the placement of hospitality-related developments. A site is considered highly visible if it can be viewed from a public right of way with little to no forest cover.
- *Population Density* – Areas with a higher population density have a greater demand for additional housing and commercial businesses. A dense population is classified as greater than 500 people per square mile on a census tract/adjacent census tract.
- *Resilience Needs* – Areas faced with environmental hazards, such as storm surge risk, are more vulnerable and would benefit from efforts to increase overall resilience.

Outcomes/Scoring

The following indicates which characteristic each parcel possesses and compatible uses according to those characteristics.

Potential Use	Characteristic	Parcels							
		1	2	5	9	10	11	13	17
Residential	Existing Surrounding Residential	■				■	■	■	■
	Proximity to Employment	■	■	■	■	■	■		
Neighborhood Commercial	Critical Mass of Residential Uses		■	■		■	■	■	■
Community Commercial	High Traffic Roads	■	■	■	■	■		■	■
Office/Flex	Dense Senior Population	■	■	■	■			■	
	Proximity to Existing Hospital		■	■	■	■			
	Proximity to Existing Medical Services		■	■	■	■	■	■	
	Proximity to Transportation	■	■	■	■				
Hospitality	Proximity to Eglin Gate	■	■	■					
	Visibility	■	■	■	■	■	■	■	
Recreation, Conservation, Open Space, Civic	Population Density	■	■	■	■	■	■	■	
	Resilience Needs	■		■	■	■	■	■	
	Water Access	■		■	■	■			

MARKET ANALYSIS DATA COLLECTION

DEMOGRAPHIC SNAPSHOT

A widening range of ages within Okaloosa County has created issues with both housing and services accessibility. There is a need for an increased number of housing that is accessible to the workforce within the county. There is also a need for increased medical facilities to reduce waiting times and allow for greater accessibility for both civilians and veterans.

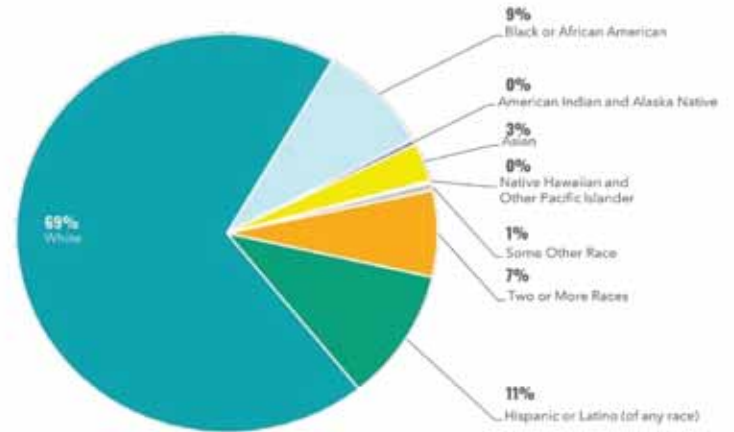


Figure B-1. Race & Ethnicity (2020 Decennial Census)

Table B-1. Population by Age (2010, 2020 Decennial Census)

Age Cohort	2010			2020		
	Okaloosa	Florida	US	Okaloosa	Florida	US
Under 5	6.5%	5.8%	6.6%	6.5%	5.3%	6.0%
5 to 9	6.0%	5.8%	6.6%	6.1%	5.3%	6.1%
10 to 14	6.3%	6.1%	6.8%	6.0%	5.8%	6.5%
15 to 19	5.5%	6.7%	7.3%	6.8%	5.7%	6.5%
20 to 24	7.0%	6.5%	7.0%	7.8%	6.0%	6.7%
25 to 29	8.3%	6.3%	6.8%	7.6%	6.6%	7.1%
30 to 34	7.7%	5.9%	6.4%	6.0%	6.4%	6.8%
35 to 39	6.6%	6.5%	6.8%	6.4%	6.1%	6.5%
40 to 44	5.6%	7.1%	7.1%	6.6%	6.0%	6.1%
45 to 49	5.4%	7.5%	7.5%	8.2%	6.3%	6.3%
50 to 54	5.9%	6.9%	7.1%	7.3%	6.6%	6.4%
55 to 59	7.2%	6.3%	6.2%	6.2%	6.9%	6.7%
60 to 64	6.1%	5.7%	5.1%	5.1%	6.5%	6.2%
65 to 69	5.2%	4.8%	3.8%	4.2%	6.1%	5.3%
70 to 74	4.2%	4.0%	3.0%	3.3%	5.2%	4.1%
75 to 79	2.9%	3.3%	2.4%	2.8%	3.9%	2.8%
80 to 84	2.1%	2.6%	1.9%	1.6%	2.6%	1.9%
85 years and older	1.6%	2.2%	1.7%	1.4%	2.7%	2.0%

EDUCATIONAL ATTAINMENT

Educational attainment has improved within Okaloosa County from 2010 to 2020. The percent of the population without a college degree decreased from 62.7% to 56.8% and there was a 3.1% increase in individuals with a Bachelor's degree.

In comparison to the state of Florida and the United States as a whole, Okaloosa County has higher rates of educational attainment. In 2020, 19.3% of individuals 25 and over have a Bachelor's degree in Florida and 16.8% within the United States. Comparatively, 19.9% of individuals have received a Bachelor's degree within Okaloosa county.

Northwest Florida State College is located within the study area. The presence of this institution improves the accessibility of higher-level education within Okaloosa County.

Enhanced educational attainment improves the working class and contributes to workforce development. Advancing educational opportunities aligns with Eglin's mission by bolstering civilian employment related to the installation.

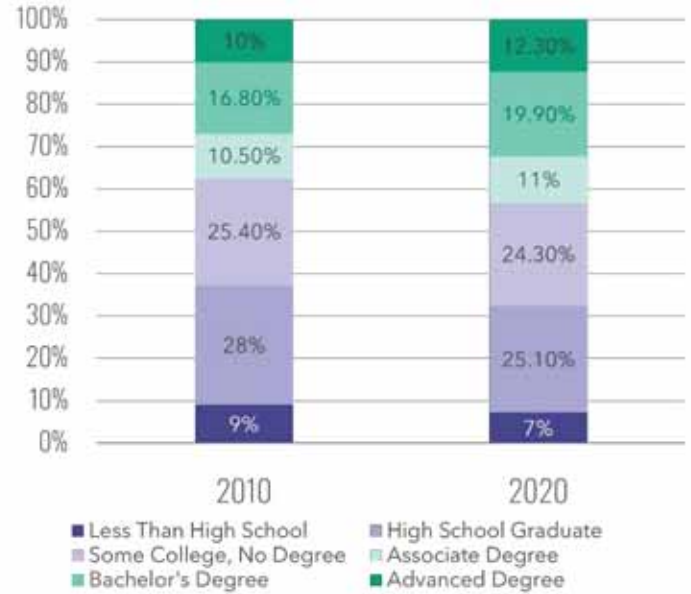


Figure B-2. Educational Attainment (2010, 2020 Decennial Census)

SENIOR & VETERAN POPULATION

Areas with the higher percentages of senior and veteran populations will require an increased number of medical services. These areas would also benefit from the development of senior and veteran housing developments.

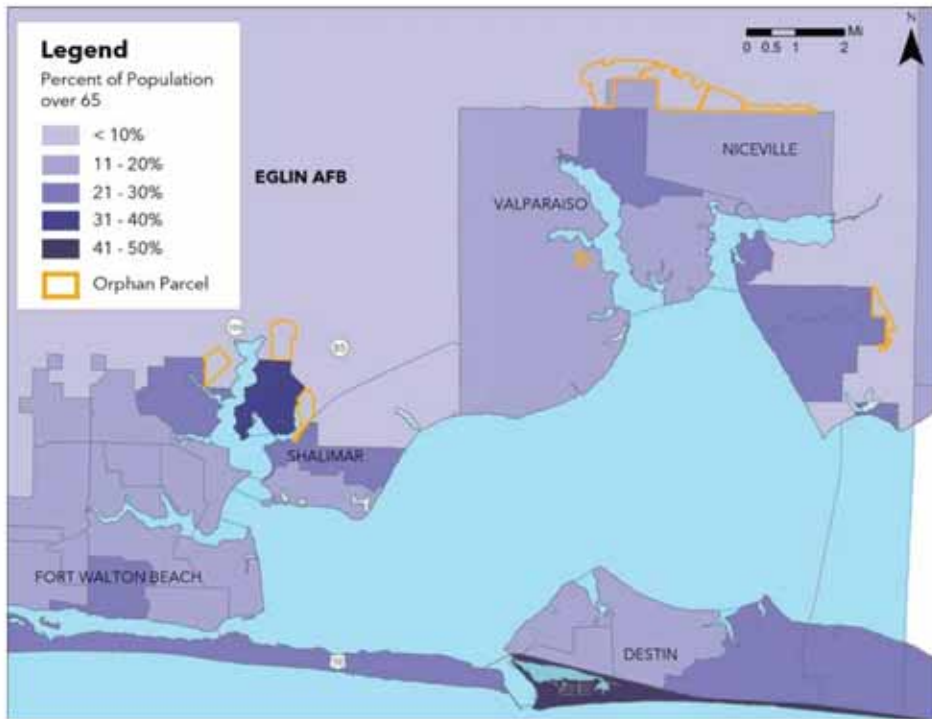


Figure B-3. Senior Population (2020 Decennial Census)

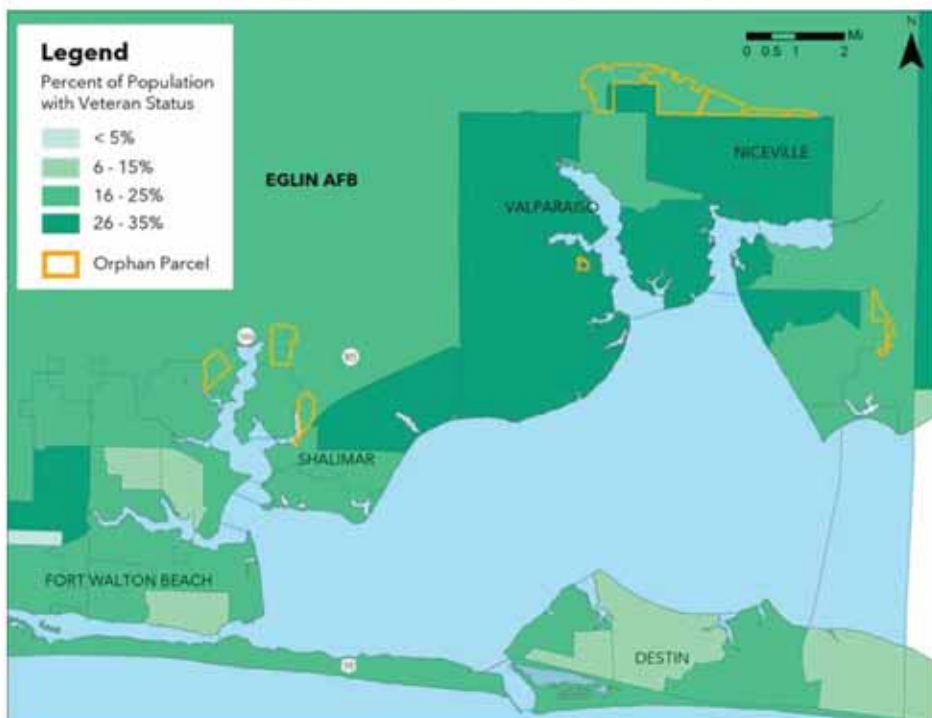


Figure B-4. Veteran Population (2020 Decennial Census)

CHILDCARE DEMAND

The lack of childcare staff and facilities poses a challenge to installation personnel, many of whom have young families in the region. Although Eglin AFB has their own on-base childcare facilities additional childcare efforts are needed at the regional level.

Childcare accessibility issues stem from a lack of availability, long waitlists, high costs of existing options, long commutes to available childcare, childcare deserts, and the military childcare waitlist system. These issues can be mitigated using childcare business initiatives, expanding Military Childcare in Your Neighborhood+ (MCCYN+) subsidy programs, assisting local Child Care Resource & Referral network (CCR&R) and installation of Child Development Centers (CDCs), increasing childcare workforce pay, supporting localized enhanced use leases (EUL), revising military installation childcare center fee structures, and creating flexible spending accounts to use pre-tax money for childcare.

EMPLOYMENT BY INDUSTRY

The industries that employ the greatest number of individuals within Okaloosa County is governmental, professional and business services, trade, transportation, and utilities, leisure and hospitality, and education and health services.

Top employers within the county:

- Eglin AFB
- Okaloosa County School District
- Walmart Super Center
- HCA Florida Fort Walton-Destin Hospital
- Publix
- Okaloosa County
- Northwest Florida State College
- North Okaloosa Medical Center
- Reliance Test & Technology
- Lockheed Martin

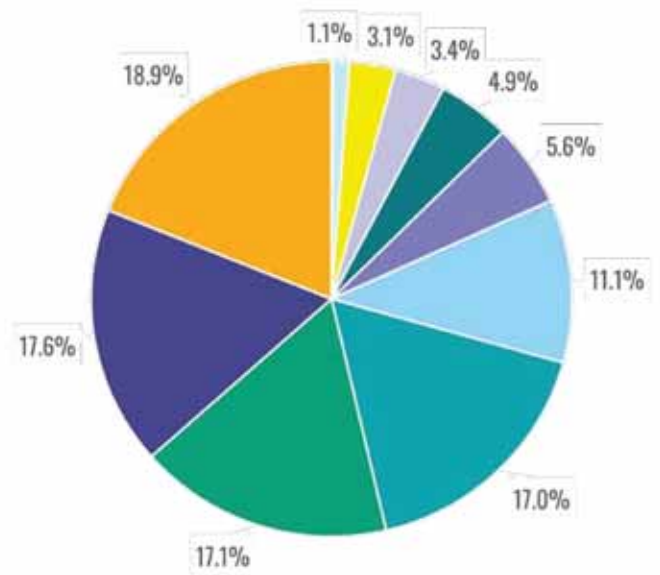


Figure B-5. Average Annual Employment of All Industries (Florida Office of Economic and Demographic Research)

Table B-2. Average Annual Employment of All Industries (Florida Office of Economic and Demographic Research)

INDUSTRY		
Government	16,863	18.9%
Professional and Business Services	15,703	17.6%
Trade, Transportation and Utilities	15,257	17.1%
Leisure and Hospitality	15,167	17.0%
Education and Health Services	9,903	11.1%
Financial Activities	4,996	5.6%
Construction	4,372	4.9%
Manufacturing	3,033	3.4%
Other Services	2,766	3.1%
Information	981	1.1%
Natural Resource and Mining	89	0.1%
Total Workforce	89,130	100%

INCOME

Annual wage influences the quality of life for individuals and families. Areas with higher costs of living require a higher annual wage to comfortably live in the area. High housing costs in Okaloosa County reduces housing accessibility for all individuals, including those with higher annual wages.

The highest paying industries within Okaloosa County includes information, professional and business services, and manufacturing. While professional and business services is the second largest industry, information and manufacturing combined only accounts for 4.5% of the total workforce.

Increasing the number of high-paying jobs within the county can improve housing accessibility. As a result, the number of individuals that both live and work in Okaloosa County will increase.



Figure B-6. Average Annual Wage (2020 Decennial census)



Figure B-7. Median Income (2020 Decennial Census)

HOUSING OVERVIEW

With strong demand and limited developable land near Eglin, home prices are increasingly out of reach of most military and working families.

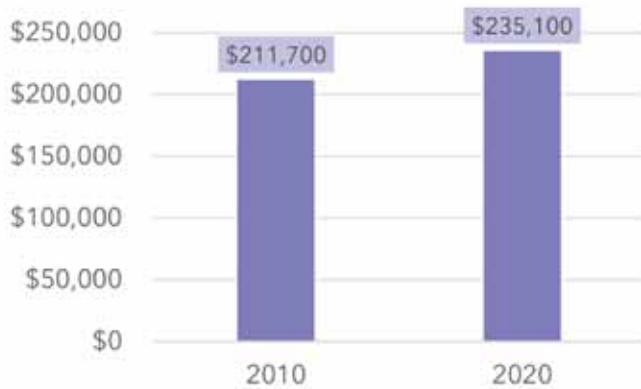


Figure B-8. Median Home Value (2020 Decennial Census)

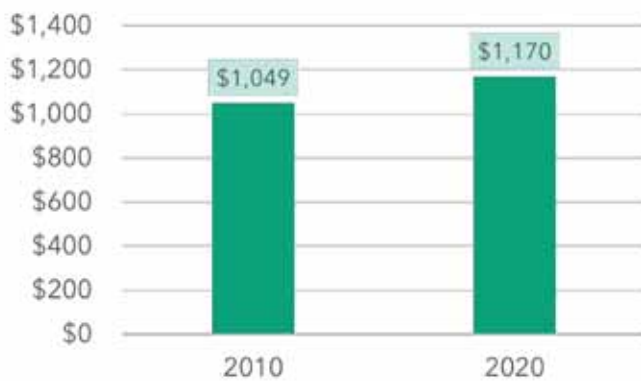


Figure B-9. Median Rent (2020 Decennial Census)

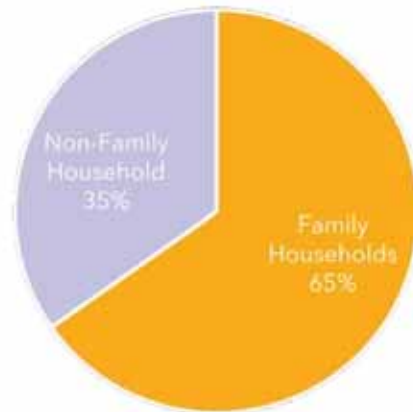
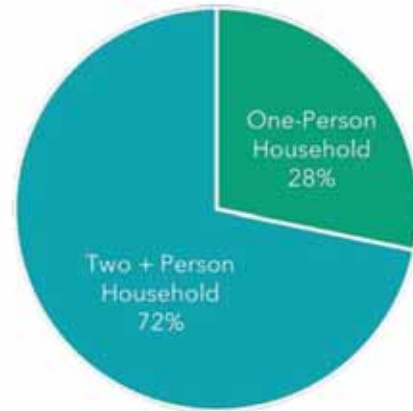


Figure B-10. Household Composition (2020 Decennial Census)



Figure B-11. Number of Housing Units (2010, 2020 Decennial Census)



Figure B-12. Housing by Tenure (2020 Decennial Census)

SOURCES

Table B-3. Sources

	Development	Document	Link
1	TrueNorth Commons	<ul style="list-style-type: none"> TrueNorth Commons Groundbreaking Flyer 	<ul style="list-style-type: none"> https://www.afacademyfoundation.org/s/1885/images/gid2/editor_documents/wr-7175_true_north_commons_groundbreaking_flyerdocumart.pdf?gid=2&pgid=61&sessionId=f6525644-064f-4392-973e-2165bad96d9a&cc=1
2	Victory Village	<ul style="list-style-type: none"> Victory Village Economic Impact 	<ul style="list-style-type: none"> Victory Village Economic Impact.pdf (sharepoint.com)
3	OLF8	<ul style="list-style-type: none"> Adopted Master Plan Marketability Study 	<ul style="list-style-type: none"> https://myescambia.com/docs/default-source/upload/olf-8/olf-8-adopted-master-plan.pdf?sfvrsn=da2ed76f_2 https://myescambia.com/docs/default-source/documents/engineering/marketabilitystudy-final-sm-(1).pdf?sfvrsn=a9660f6e_0

PRELIMINARY TAKEAWAYS

New housing proximate to Eglin that is targeted to working families and military personnel will be highly desirable. Affordability can be supported in several ways, including:

- Higher density development including attached or townhome designs
- Proximity to Eglin and other key local employers
- Land acquisition and infrastructure strategies that reduce upfront development costs, including use of existing infrastructure

A signature gateway development could provide a combination of housing, hospitality, and attractions such as the Air Force Armament Museum. Case studies suggest that such a development can have a strong placemaking influence and engage the community's spirit in supporting Eglin and local veterans.

New developments could feature limited amounts of retail space to support residents and minimize car trips; however, large scale retail development is not expected to be an efficient use for the orphan parcels.

STAKEHOLDER ENGAGEMENT ADDENDUM

INTRODUCTION

Stakeholder engagement was critical in the development of the Orphan Parcels Master Plan. Gathering stakeholder input allowed the project team and key stakeholders to align on objectives, review findings, and confirm the community’s vision. The synthesis of stakeholder input and technical analysis provided the insight necessary to inform the final recommendations proposed by the project team.

Enclosed are the Stakeholder Roundtable Overview and the Orphan Parcels Master Plan Recommendations.

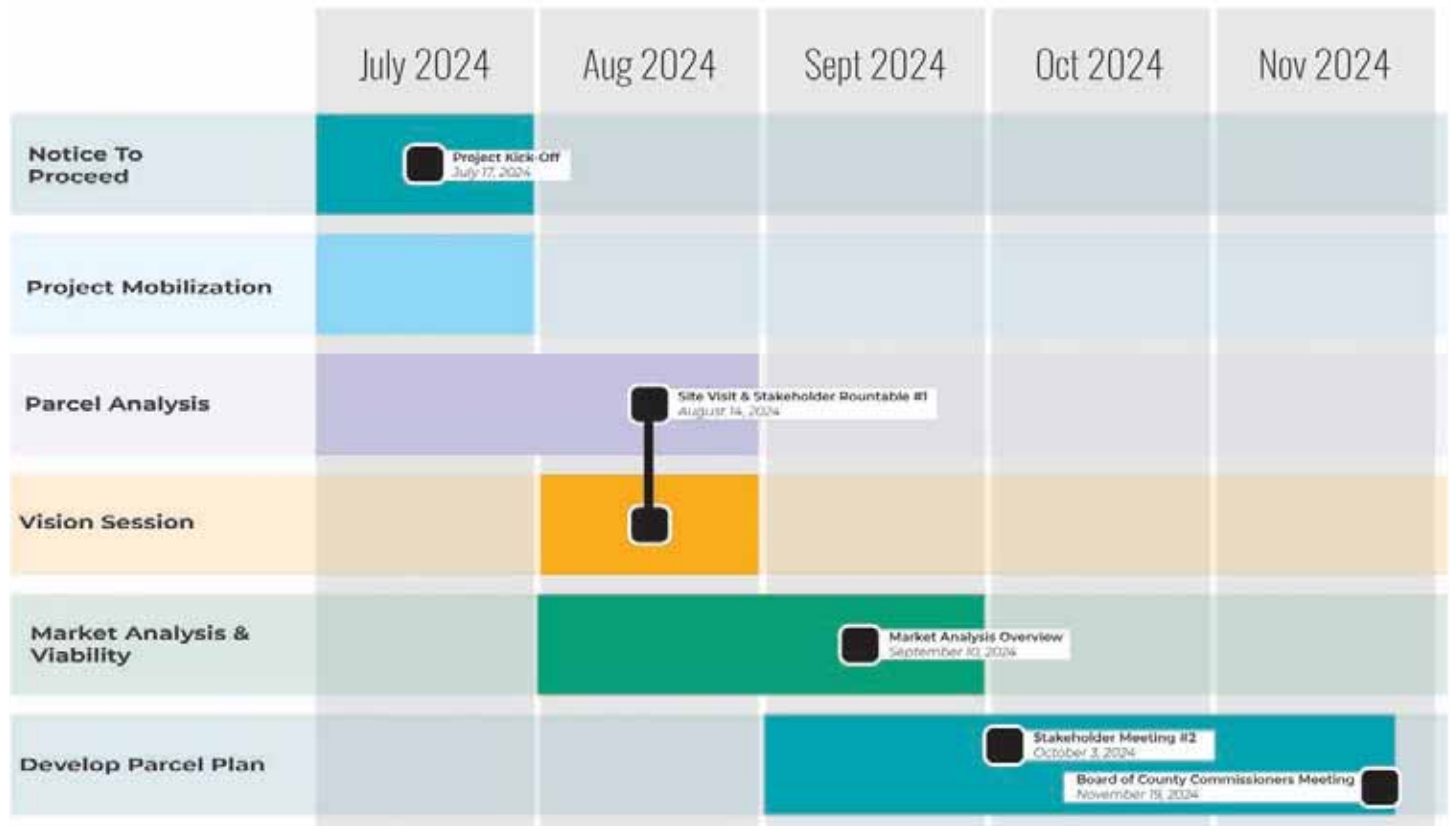


Figure C-1. Orphan Parcel Master Plan Schedule



Orphan Parcels Master Plan

Stakeholder Roundtable Overview | Wednesday, August 14, 2024 | 1:00 PM

Okaloosa County Administration Building

1250 Eglin Pkwy,
Shalimar, FL 32579

Attendees

NAME	ORGANIZATION	ROLE
MEGAN HOLDER	Jacobs	Sr Consultant
JONATHAN BARTLETT	Jacobs	Sr Consultant
JONATHAN CORONA	Jacobs	Lead Planner
TANYA GALLAGHER	Jacobs	Project Manager
SHEILA FITZGERALD	Okaloosa County Staff	Deputy Director
SAMANTHA CUTSINGER	Okaloosa County Staff	Executive Assistant to Chairman
PAUL MIXON	Okaloosa County BOC	Mixon Chairman
TED CORCORAN	FWB Chamber	Chamber of Commerce President
CHRIS FRASSETTI	City of Ft. Walton Beach	Growth Management Director
DANIEL J. PAYNE	City of Ft. Walton Beach	Public Works and Utility Services Director
SHEILA FITZGERALD	Okaloosa BCC	County Administrator
KEVIN BROWN	Northwest Florida State College	Associate Vice President for Government Relations and Special Projects
DAVID DEITCH	City of Niceville	City Manager
JEFF PETERS	City of Ft. Walton Beach	City Manager
BERNARD JOHNSON	Florida Power and Light	Regional External Affairs Manager
GORDON KING	Okaloosa Gas District	Chief Executive Officer

Agenda

1. Project Principles
2. Purposed of the Stakeholder Roundtable
3. Project Schedule
4. Vulnerability & Risk Assessment
5. Parcel Discussion

Overview

Project Principles

- The Jacobs team opened the Stakeholder Roundtable and Vision session by presenting the project principles to the stakeholders. Identified project principles included:
 - Include key stakeholders in decision-making
 - Determine market viability by parcel
 - Understand mechanisms for reuse and development
 - Prioritize parcel development based on criteria established by Jacobs team and stakeholders
 - Develop concept plans for the agreed parcels
 - Detail actionable steps to develop parcels

Purpose of the Stakeholder Roundtable

- The Stakeholder Roundtable and Vision Session was conducted on August 14th, 2024, by the Jacobs team. Key stakeholders present included representatives of surrounding municipalities, business development leaders, and utility and infrastructure representatives,. The purpose of this exercise was to:
 - Review the parcel analysis findings outlined in the Vulnerability and Risk Assessment,
 - Understand the vision for the community for the future,
 - Facilitate discussion around how the Orphan Parcels can best help deliver the community vision,
 - Identify the criteria to prioritize parcel master plan options, and
 - Outline the next steps in the master planning process.
- The Card Wall - The Jacobs team facilitated the Stakeholder Roundtable using cards that summarized existing conditions and known information. The cards identified gaps and needed information which the stakeholder group helped to fill. The card wall is represented in the photographs below.





Project Schedule

- Megan Holder gave a brief overview of the project schedule and its status. As of August 13th, the parcel analysis was underway. Following the Stakeholder Roundtable, the team will begin the Market Analysis.

Vulnerability & Risk Assessment

- The project team grouped the assessed vulnerabilities into three categories: Natural Hazards, Infrastructure Shocks, and Social Threats, defined below. Please see the separate Vulnerability and Risk Assessment document for additional detail on the categories and levels of risk identified for each parcel.
 - **Natural Hazards** - Classified as events or processes caused by natural forces that pose risks to human life, property, and the environment.
 - **Infrastructure Shocks** -Refers to disruptions or failures in critical systems such as transportation, utilities, communication networks and buildings.
 - **Social Threats** - Social threats encompass various risks related to human well-being and societal functioning. These include socioeconomic factors, crime, and other physical threats.

Parcel Discussion

The project team moved forward with a discussion about each of the focus parcels. Jacobs provided a high-level overview of each parcel including the acreage, results of the vulnerability assessment, and proposed uses from the strategic plan which need further vetting and discussion. The Jacobs team prioritized the following topics for each parcel:

- **Implementation/Legal Challenges** - The practical steps and legal considerations necessary to develop each parcel including zoning challenges, Department of Defense processes, and any other barriers that the project team should be aware of.
- **Economic/Community Needs and Challenges** - An alignment on community expectations around economic objectives and other physical needs of the area (i.e. housing, public spaces, securing funding, etc.).
- **Appropriate Uses** - Recalling previously recommended uses and discussing additional uses that might be appropriate to address the community's needs.
- **Development Intensity/Infrastructure Needs** - A discussion focused on the scale and intensity of development appropriate for the orphan parcels as well as infrastructure improvements needed to support future development such as roads and utilities.

Parcel 1: Camp Pinchot

Parcel Overview

- Camp Pinchot is a 135-acre parcel that has been classified as suitable for housing, commercial use, conservation and recreation
- The vulnerability and risk assessment revealed that hurricanes and lightning are classified as high risks and tornadoes, traffic congestion, and wildfires are relatively high risks
- Previous studies and discussion have indicated that factors to consider include parcel adjacency to general's homes and the need for a force main and lift station to connect to the existing force main and lift station

Discussion Takeaways

- This parcel is considered to have the most natural beauty of the Orphan Parcels
- Ideal path forward is to be sold outright to a developer
- Distance from Fort Walton Beach makes annexation difficult
- Commercial use only would be an underutilization of the parcel

Parcel 2: East Garnier Creek

Parcel Overview

- East Garnier Creek is a 166-acre parcel that has been classified as suitable for housing, skilled workforce facilities and businesses, an innovation campus, secure office spaces, and conservation
- The vulnerability and risk assessment revealed that hurricanes and lightning are classified as high risks and tornadoes, traffic congestion, and wildfires are relatively high risks
- Previous studies and discussion have indicated that factors to consider include environmental concerns from old asphalt plant to the south, water lines would need to cross Parcel 3, and currently there are 30" mains being installed to improve water pressure

Discussion Takeaways

- Developmental focus should be on townhomes, apartments, and multifamily to cater more towards young families, airmen, and seniors
- Affordable housing within the parcel should aim to be under \$1,000/month
- Parcel is a potential site for unclassified missions that are not apart of the new sensitive compartmented information facility (SCIF)
- Development on Parcel 3 (not a focus parcel) will impact development on East Garnier Creek. If commercial is developed on Parcel 3, housing will be the focus of Parcel 2
 - High likelihood of this happening - Parcel 3 developer is looking for 1 million square feet of new commercial development

Parcel 5: Poquito Bayou

Parcel Overview

- Poquito Bayou is a 91-acre parcel that has been classified as suitable for skilled workforce facilities and businesses, commercial uses, conservation and recreation
- The performed vulnerability and risk assessment revealed that hurricanes and lightning are classified as high risks and tornadoes, traffic congestion, storm-surge flooding, and non-storm surge flooding and wildfires are relatively high risks
- Previous studies and discussion have indicated that factors to consider include the water and sewer systems connected to county infrastructure and the former 100 SFH/base housing

Discussion Takeaways

- This parcel would be ideal for a convention hotel and/or workforce housing, no desire for single family housing
- Dependent on current zoning, multifamily may be possible
- Closest parcel to the future Eglin AFB gate - potential for armament center or welcome center
- Contamination issues from termite spray would need to be factored
- NIMBYism is present on the other side of the bayou
- Future development should be set back from SR85 realignment

Parcel 17: Addie Lewis Parcel

Parcel Overview

- The Addie Lewis Parcel consists of 22 acres and has been classified as suitable for housing and commercial use
- The vulnerability and risk assessment revealed that hurricanes and lightning are classified as high risks and tornadoes and wildfires are relatively high risks
- Previous studies and discussion have indicated that factors to consider include the presence of water/sewer mains throughout the neighborhoods to the west, the need for on-site water lines to connect to existing offsite mains, and that water/sewer connections are doable

Discussion Takeaways

- Parcel is located directly outside the existing Eglin AFB gate and within the city limits of Valparaiso
- Future school property expansion is planned along the southern edge of the parcel, however outreach efforts to the school board have been fruitless
- Concerns that Valparaiso will not be open to future growth on this parcel

Parcel 9: North Nine

Parcel Overview

- North Nine is a 280-acre parcel that has been classified as suitable for mixed density housing, general commercial, and street front commercial
- The vulnerability and risk assessment revealed that hurricanes and lightning are classified as high risks and tornadoes and wildfires are relatively high risks
- Previous studies and discussion have indicated that factors to consider include the ability to connect to Niceville's water and sewer and the sewer plant west of Eglin is expected to close in the future

Discussion Takeaways

- Potential for a mix of uses: location for education (K-8 charter school or child development center), office to support adjacent hospital, dorm space for students of neighboring NWFSC, single family housing
- Investigate the widening of College Blvd to 4 lanes in order to alleviate Interstate traffic into Eglin AFB
- NWFSC has a new president, so college expansion plans are in flux
- Potential for 1,000 units of housing and as an infrastructure solution for surrounding parcels
- Future development should be set back from the Mid-Bay Bridge Connector

Parcel 10: K-21

Parcel Overview

- K-21 is a 401-acre parcel that has been classified as suitable for mission growth support, housing, conservation, and recreation
- The vulnerability and risk assessment revealed that hurricanes and lightning are classified as high risks and tornadoes and wildfires are relatively high risks
- Previous studies and discussion have indicated that the opportunity to connect to Niceville's water and sewer lines has been confirmed and should be considered

Discussion Takeaways

- Potential for active 55+ community (VA retirement community)
- Amenities to include: walking trails, medical space, access to FL-285 and College Blvd
- Wetlands are prevalent on the parcel, providing challenges to development
- Infrastructure is less of an issue - being able to connect to Niceville water and sewer
- Future development should be set back from the Mid-Bay Bridge Connector

Parcel 11: L-34

Parcel Overview

- L-34 is a 200-acre parcel that is suitable for housing, environmental buffers, and conservation

- The vulnerability and risk assessment revealed that hurricanes and lightning are classified as high risks and tornadoes and wildfires are relatively high risks
- Previous studies and discussion have indicated that the opportunity to connect to Niceville’s water and sewer lines should be considered

Discussion Takeaways

- Create a sports complex park modelled after Frank Brown Park
- Potential for commercial use along 285 which would provide benefits to residents and college students due to a current lack of business on the north side of town
- Housing is not proposed, however, Deer Moss Creek is being built to the south of the parcel
- Need for road setback (not on the range side)

Parcel 13: L-24

Parcel Overview

- L-24 is an 80-acre parcel that is suitable for commercial use, environmental buffers, and conservation
- The vulnerability and risk assessment revealed that hurricanes and lightning are classified as high risks and tornadoes and wildfires are relatively high risks
- Previous studies and discussion have indicated that factors to consider include the presence of sewer mains throughout the neighborhood to the west, the need for on-site water lines to connect to existing offsite mains, and that water and sewer connection is possible

Discussion Takeaways

- Parcel access is a challenge due to a lack of access off of 283 (bridge authority may not allow it)
- Opportunity to continue multi-use path down into Parcel 11 and 13 parallel to highway at College Blvd and Forest Rd intersection
- Need for road setback (not on the range side)

Next Steps

The Stakeholder Roundtable was a crucial step in collecting information vital to the development of the Orphan Parcels Master Plan. The Jacobs team will move forward with a high-level Market Analysis that looks at county-wide trends, demographic characteristics, and growth patterns. The team will also develop case studies of comparable military public/private partnerships. This technical analysis and research along with the Stakeholder Roundtable feedback will inform a viability assessment based on existing infrastructure, site constraints, military compatibility and community need necessary to begin the parcel plans.

Development Viability

Development viability was scored using both Vulnerability and Regulatory criteria. Each indicator is scored between one and five to quantify varying types of data, with the higher score reflecting greater potential for development. Additional detail is described in the Viability Methodology Summary.

While all Orphan Parcels are technically developable, this analysis identified Parcels 1 and 2 as most favorable for development, followed by 5, 9, and 10.

		Parcels							
		1	2	5	17	9	10	11	13
Vulnerability	Location & Accessibility	5	5	5	4	5	4	4	1
	Infrastructure Availability	4	4	5	3	4	4	4	5
	Environmental Factors	5	5	2	4	4	4	3	4
Regulatory	Zoning Regulations	2	2	2	2	2	2	2	2
	Aggregate Score	16	16	14	13	15	14	13	12
Development Viability		Favorable with minimal development constraints		Moderately favorable with some development constraints		Development possible with several constraints			

Orphan Parcels Master Plan | Parcel Recommendations

Land Suitability Summary

Keeping population density, community and social needs, and market demand in mind, the planning team evaluated each parcel according to applicable characteristics to identify suitable land uses for each parcel, ensuring that they align with both the mission of Eglin Air Force Base and the needs of the surrounding community.

This evaluation revealed that while there are opportunities for some type of development on each parcel, certain parcels offer broader suitability for a range of uses and/or greater development flexibility. Refer to the Viability Methodology Summary for additional detail on each characteristic's criteria.

Note that the parcels on the west side of the study area have more proximity to the Eglin Gate, other employment areas, as well as traffic. These parcels, such as Parcel 1, 2, and 5, lend themselves more to multi-family developments and general commercial.

The eastern portion of the study area has more of a focus on population density and existing residential uses which influences the need for additional medical office and neighborhood commercial uses on sites such as parcels 9 and 10.

Potential Use	Characteristic	Parcels							
		1	2	5	17	9	10	11	13
Multi-Family Residential	Proximity to Employment	•	•	•	•	•	•	•	•
Townhomes	Critical Mass of Residential Uses								
Regional Residential	Existing Surrounding Residential	•	•	•	•	•	•	•	•
Neighborhood Commercial	High Traffic Roads	•	•	•	•	•	•	•	•
Community Commercial	Domestic Senior Population	•	•	•	•	•	•	•	•
Medical Office/Educational	Proximity to Existing Hospital	•	•	•	•	•	•	•	•
General Commercial	Availability of Existing Medical Services	•	•	•	•	•	•	•	•
Neighborhood-Serving Commercial	Proximity to Transportation	•	•	•	•	•	•	•	•
Open Space/Natural Resource Management	Proximity to Eglin Gate	•	•	•	•	•	•	•	•
Recreation	Visibility	•	•	•	•	•	•	•	•
Recreation/Conservation/Open Space/Civic Government	Population Density	•	•	•	•	•	•	•	•
	Resilience Needs	•	•	•	•	•	•	•	•
	Water Access	•	•	•	•	•	•	•	•

Orphan Parcels Master Plan | Parcel Recommendations

Parcel Recommendations Summary

Based on the suitability evaluation conducted by the planning team, the figure to the right summarizes the recommended uses for each of the Orphan Parcels. The following is a market-supported development program projected over a 20-year planning horizon. Each parcel plan further breaks down how these uses could be distributed throughout the Orphan Parcels. Subsequent slides go into greater technical detail by parcel.

Land Use	Development Program
Housing	2,200 - 2,800 units
Retail	400,000 - 600,000 SF
Office	320,000 - 480,000 SF
Hotel	200 - 300 Rooms
Recreation + Open Space	650 - 950 acres

Potential Use	Parcels							
	1	2	5	17	9	10	11	13
Multi-Family Residential	•	•	•	•	•	•	•	•
Townhome	•••	•••	•••	•••	•••	•••	•••	•••
Regional Residential	•	•	•	•	•	•	•	•
Neighborhood Commercial	••	••	••	••	••	••	••	••
Community Commercial	••	••	••	••	••	••	••	••
Medical Office/Educational	•	•	•	•	•	•	•	•
General Commercial	•	•	•	•	•	•	•	•
Neighborhood-Serving Commercial	•	•	•	•	•	•	•	•
Open Space/Conservation or Future Development	•••	•••	•••	•••	•••	•••	•••	•••
Civic Government	•	•	•	•	•	•	•	•

Orphan Parcels Master Plan | Market Analysis

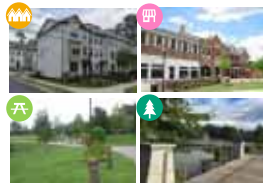
Parcel 1: Camp Pinchot Proposed Program

<p>Residential 200-300 Units 8-12 Units Per Acre</p>	<p>Neighborhood-Serving Commercial ± 18,000 SF</p>
<p>Open Space/Natural Resource Management ± 85 Acres</p>	<p>Recreation ± 60 Acres</p>



Orphan Parcels Master Plan | Parcel Recommendations

Parcel 1: Camp Pinchot Precedence



Orphan Parcels Master Plan | Parcel Recommendations

Parcel 2: East Gamler Creek Proposed Program

<p>Multi-Family 875-1025 Units 30 Units Per Acre</p>	<p>Townhome 225-275 Units 12 Units Per Acre</p>	<p>Open Space ± 30 Acres</p>
<p>Neighborhood-Serving Commercial ± 60,000 SF</p>	<p>Community Commercial ± 175,000 SF</p>	<p>Recreation ± 30 Acres</p>
	<p>General Commercial ± 175,000 SF</p>	



Orphan Parcels Master Plan | Parcel Recommendations

Parcel 12: East Garden Creek
Precedence



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Parcel 13: Proquin Bluffs
Proposed Program

Multi-Family 200-400 Units 20 Units Per Acre	Townhomes 20-30 Units 12 Units Per Acre	Neighborhood Serving Commercial 1-20,000 SF
Educational Museum & Wellness Center 10-20 Acres 1-20,000 SF	Flexibility Hotel & Conference Center 1-2 Acres 1-200,000 SF	Open Space 1-2 Acres
		Recreation 1-2 Acres

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Parcel 15: Proquin Bluffs
Precedence



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Parcel 17: Adelle Lakes
Proposed Program

Educational Public School 10-15 Acres	Potential Residential 20-40 Units 2 Units Per Acre
--	---

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Parcel 19: North Pine
Proposed Program

General Commercial 1-20 Acres 1-20,000 SF	Multi-Family 200-400 Units 20 Units Per Acre	Townhomes 20-30 Units 12 Units Per Acre
Neighborhood Serving Commercial 1-20,000 SF	Open Space 1-20 Acres 10-20 Acres Potential Passive Open Space	Recreation 1-20 Acres

© 2018 Project Studio Plan / Third Recommendations



Parcel 20: North Pine
Precedence



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Parcel 10-K-21
Proposed Program

Y Action Adult Community (20+) 80,130' Gross 8 Units Per Acre	MM Medium-Density 210,250' Gross 12 Units Per Acre	SP Neighborhood Serving Commercial 0.25 Units Per Acre
SP Community Commercial 4.10 Units Per Acre 1,500,000' Gross	SP Open Space Potential Public Access/Development 4.25 Units Per Acre	

Other Parcel Study Plan / Final Recommendations



Parcel 10-K-21
Precedence



Other Parcel Study Plan / Final Recommendations



Parcel 11-L-22
Proposed Program

SP Public Facility Public Works & Fire Station 4,400,000' Gross	SP Neighborhood-Serving Commercial 0.25 Units Per Acre
SP Open Space 4.25 Units Per Acre	SP Recreation 4.25 Units Per Acre

Other Parcel Study Plan / Final Recommendations



Parcel 11-L-22
Precedence



Other Parcel Study Plan / Final Recommendations



Parcel 12-L-24
Proposed Program

SP New 200' Use 4.25 Units Per Acre	SP Open Space & Conservation 4.25 Units Per Acre
---	--

Other Parcel Study Plan / Final Recommendations



Parcel 12-L-24
Precedence



Other Parcel Study Plan / Final Recommendations



Next Steps

- Direct Staff to Read the Orphan Parcels and the Department of Public Works** (located at the Orphan Parcel Review Office) to determine the critical needs of the community, design the customer, and environmental objectives and establish the master plan, and approve the final master plan for sign-off with the council.
- Public Collaboration** - Encourage Collaboration amongst agencies and the community to ensure that all needs are met, and the master plan is developed with the community's needs in mind.
- Support Policy Alignment** - Update future plans along with local, regional, and state policies to ensure that the master plan is in line with the community's needs.
- Investigate for Infrastructure Investments** - Advise the local government on the need for infrastructure investments, including the necessary funding sources and the potential impact of the plan on the local economy, including the potential impact on the local and regional economies.

Orphan Parcels Master Plan | Final Recommendations

Master Plan Status

Orphan Parcels Master Plan | Final Recommendations



Orphan Parcels Master Plan Recommendations
Appendix

JACOBS

Overview

After completing the initial assessment and establishing a baseline understanding for the Orphan Parcels Master Plan, the planning team defined the potential uses for the parcels. Each recommendation is informed by a blend of stakeholder feedback and technical analysis, detailed further in the document. This document outlines the viability, zoning, infrastructure, and the planning team's preliminary recommendations for each Orphan Parcel within the context of the 20-year development program.

Orphan Parcels Master Plan | Final Recommendations

Viability Scoring Methodology

When considering redevelopments for a site parcel, it is crucial to evaluate overall viability indicators to assess the success of future projects. The findings of the **Viability Assessment and Regulatory Assessment** from each Parcel Map which helps contribute to post-development viability.

Elements of the **Market Analysis** were evaluated to help identify potential uses for the Crystal River, further exploration of the area.

Viability Assessment	Regulatory Assessment	Market Analysis
<ul style="list-style-type: none"> Location & Accessibility - proximity to major roadways and other transportation infrastructure which can enhance the attractiveness of the parcel for residential or commercial uses. Infrastructure Availability - access to electricity, broadband, water, sewer and other public services and impact a developer's ability to develop the site. Environmental Factors - the presence of flood zones, natural hazards, topography, and soil quality will affect construction costs and environmental risks. 	<ul style="list-style-type: none"> Zoning Regulations - permitted and compatible uses will be important to understand to ensure future development is consistent of neighbors and existing land uses. Regulatory Barriers - understanding the complexity and duration of the permitting process can help in planning for development timeline. 	<ul style="list-style-type: none"> Population Density - higher population density can indicate greater demand for housing and commercial businesses. Community & Social Needs - proximity to quality schools and healthcare services are necessary factors when considering future development. Market Demand - analyzing trends in the local market can help gauge demand for new residential and commercial developments.

Source: Parcel Maps Parcel Viability Assessments

Parcel 1: Camp Pinchot

Total Area 264 Acres	Net Developable Area* 117 Acres												
Target Parcel Size 18	<table border="1"> <thead> <tr> <th>Assessment Category</th> <th>Score</th> </tr> </thead> <tbody> <tr> <td>Location & Accessibility</td> <td>4</td> </tr> <tr> <td>Infrastructure Availability</td> <td>4</td> </tr> <tr> <td>Environmental Factors</td> <td>4</td> </tr> <tr> <td>Zoning Regulations</td> <td>4</td> </tr> <tr> <td>Regulatory Barriers</td> <td>4</td> </tr> </tbody> </table>	Assessment Category	Score	Location & Accessibility	4	Infrastructure Availability	4	Environmental Factors	4	Zoning Regulations	4	Regulatory Barriers	4
Assessment Category	Score												
Location & Accessibility	4												
Infrastructure Availability	4												
Environmental Factors	4												
Zoning Regulations	4												
Regulatory Barriers	4												

Opportunities & Constraints

- Existing Residential
- Strategic Road Access
- Historic Resources
- Green Spaces
- High Traffic Corridor
- Storm Surge Risk

Source: Parcel Maps Parcel Viability Assessments



Parcel 1: Camp Pinchot Land Suitability

Applicable Characteristics

Characteristic	Parcel 1
Existing Residential	•
Strategic Road Access	•
Historic Resources	•
Green Spaces	•
High Traffic Corridor	•
Storm Surge Risk	•

Appropriate Uses

- Residential
- Townhomes
- Neighborhood Commercial
- Community/Neighborhood Business Management
- Recreation

Source: Parcel Maps Parcel Viability Assessments



Parcel 1: Camp Pinchot Precedence



Source: Parcel Maps Parcel Viability Assessments



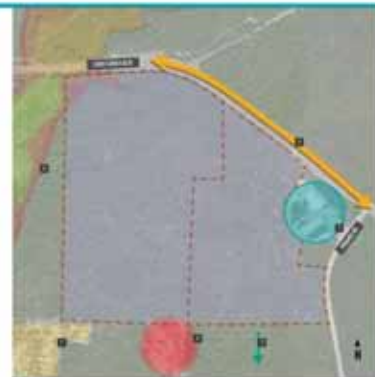
Parcel 2: East Garner Creek

Total Area 264 Acres	Net Developable Area* 202 Acres												
Target Parcel Size 18	<table border="1"> <thead> <tr> <th>Assessment Category</th> <th>Score</th> </tr> </thead> <tbody> <tr> <td>Location & Accessibility</td> <td>4</td> </tr> <tr> <td>Infrastructure Availability</td> <td>4</td> </tr> <tr> <td>Environmental Factors</td> <td>4</td> </tr> <tr> <td>Zoning Regulations</td> <td>4</td> </tr> <tr> <td>Regulatory Barriers</td> <td>4</td> </tr> </tbody> </table>	Assessment Category	Score	Location & Accessibility	4	Infrastructure Availability	4	Environmental Factors	4	Zoning Regulations	4	Regulatory Barriers	4
Assessment Category	Score												
Location & Accessibility	4												
Infrastructure Availability	4												
Environmental Factors	4												
Zoning Regulations	4												
Regulatory Barriers	4												

Opportunities & Constraints

- Existing Residential
- Strategic Road Access
- Future Military Village (Military Housing)
- Community/Neighborhood Business Management
- High Traffic Corridor
- Storm Surge Risk

Source: Parcel Maps Parcel Viability Assessments



Parcel 2: East Garner Creek Land Suitability

Applicable Characteristics

Characteristic	Parcel 2
Existing Residential	•
Strategic Road Access	•
Future Military Village (Military Housing)	•
Community/Neighborhood Business Management	•
High Traffic Corridor	•
Storm Surge Risk	•

Appropriate Uses

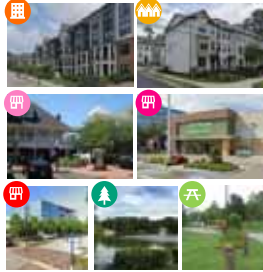
- Townhomes
- Multi-Family Residential
- Neighborhood Commercial
- Community/Neighborhood Business Management
- Community/Neighborhood Business Management

Source: Parcel Maps Parcel Viability Assessments



Parcel 2: East Garner Creek

Precedence



Orphan Parcels Master Plan | Parcel Recommendations



Parcel 5: Poquito Bayou

Total Area
91 Acres

Net Developable Area
39 Acres

Aggreg. Viability Score	Viability Criteria	Score
15	Location & Accessibility	5
	Infrastructure Availability	5
	Environmental Factors	2
	Zoning Regulations	2
	Regulatory Barriers	1

Opportunities & Constraints

1. Scenic View/Conservation Opportunity
2. Air Force Enlisted Village (Veteran Housing)
3. Existing Single-Family Residential
4. Future SR-85 Realignment (Westside Expansion Plan)
5. Environmental Contamination/Greyfield Site
6. Storm Surge Risk
7. Eglin Boulevard Extension to West gate

Orphan Parcels Master Plan | Parcel Recommendations



Parcel 5: Poquito Bayou

Land Suitability

Applicable Characteristics

Characteristic	Parcel 5
Population Density	■
Existing Surrounding Residential	■
Choice Mix of Residential Uses	■
Proximity to Major Roads	■
Proximity to Employment	■
Traffic	■
Proximity to Transportation	■
Close, Single Population	■
Proximity to Public Facilities	■
Proximity to Existing Hospital	■
Availability of Existing Medical Services	■
Viability	■
Topographic Match	■
Water Access	■

Appropriate Uses

- Townhomes
- Hospitality
- Educational
- Open Space

Orphan Parcels Master Plan | Parcel Recommendations



Parcel 5: Poquito Bayou

Precedence



Orphan Parcels Master Plan | Parcel Recommendations



Parcel 17: Addie Lewis

Total Area
21 Acres

Net Developable Area
17 Acres

Aggreg. Viability Score	Viability Criteria	Score
14	Location & Accessibility	4
	Infrastructure Availability	3
	Environmental Factors	4
	Zoning Regulations	2
	Regulatory Barriers	1

Opportunities & Constraints

1. Existing Single Family Residential
2. Existing Street Network
3. Existing School Board Property
4. To Eglin Airfield & Destin Fort Walton Airport
5. High Traffic Commercial Corridor
6. Storm Surge Risk

Orphan Parcels Master Plan | Parcel Recommendations



Parcel 17: Addie Lewis

Land Suitability

Applicable Characteristics

Characteristic	Parcel 5
Population Density	■
Existing Surrounding Residential	■
Choice Mix of Residential Uses	■
Proximity to Major Roads	■
Proximity to Employment	■
Traffic	■
Proximity to Transportation	■
Close, Single Population	■
Proximity to Public Facilities	■
Proximity to Existing Hospital	■
Availability of Existing Medical Services	■
Viability	■
Topographic Match	■
Water Access	■

Appropriate Uses

- Single-Family Residential

Orphan Parcels Master Plan | Parcel Recommendations



Parcel 17: Addie Lewis
Precedence



Ophan Parcels Master Plan | Parcel Recommendations

Parcel 9: North Nine

Total Area 282 Acres	Net Developable Area 184 Acres												
Aggregate Viability Score 16	Viability Criteria												
<small>Maximumly Suitable with some development constraints</small>	<table border="1"> <tr><td>Location & Accessibility</td><td>5</td></tr> <tr><td>Infrastructure Availability</td><td>4</td></tr> <tr><td>Environmental Factors</td><td>4</td></tr> <tr><td>Proximity to Employment</td><td>2</td></tr> <tr><td>Zoning Regulations</td><td>2</td></tr> <tr><td>Regulatory Barriers</td><td>1</td></tr> </table>	Location & Accessibility	5	Infrastructure Availability	4	Environmental Factors	4	Proximity to Employment	2	Zoning Regulations	2	Regulatory Barriers	1
Location & Accessibility	5												
Infrastructure Availability	4												
Environmental Factors	4												
Proximity to Employment	2												
Zoning Regulations	2												
Regulatory Barriers	1												

- Opportunities & Constraints**
1. Northwest Florida State College
 2. Existing College Planetarium
 3. College Boulevard Access & Potential Tie-In to Niceville Utilities
 4. Wetlands
 5. Existing Golf Cart Path
 6. Eglin AFB Golf Course
 7. No Access to Mid Bay Bridge Road
 8. FDOT Buffer
- Ophan Parcels Master Plan | Parcel Recommendations



Parcel 9: North Nine
Land Suitability

Applicable Characteristics

Characteristic	Parcel 5
Population Density	■
Location Surrounded by Residential	■
Critical Mass of Residential Uses	■
Proximity to Employment	■
Proximity to Transportation	■
Change in Population	■
Proximity to Existing Schools	■
Availability of Existing Medical Services	■
Utilities	■
Employee Needs	■
Water Access	■

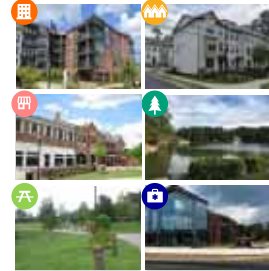
Appropriate Uses

- Townhomes
- Multi-Family Residential
- Neighborhood Commercial
- Medical Office
- Open Space

Ophan Parcels Master Plan | Parcel Recommendations



Parcel 9: North Nine
Precedence



Ophan Parcels Master Plan | Parcel Recommendations



Parcel 10: K-21

Total Area 401 Acres	Net Developable Area 250 Acres												
Aggregate Viability Score 15	Viability Criteria												
<small>Maximumly Suitable with some development constraints</small>	<table border="1"> <tr><td>Location & Accessibility</td><td>4</td></tr> <tr><td>Infrastructure Availability</td><td>4</td></tr> <tr><td>Environmental Factors</td><td>4</td></tr> <tr><td>Proximity to Employment</td><td>2</td></tr> <tr><td>Zoning Regulations</td><td>2</td></tr> <tr><td>Regulatory Barriers</td><td>1</td></tr> </table>	Location & Accessibility	4	Infrastructure Availability	4	Environmental Factors	4	Proximity to Employment	2	Zoning Regulations	2	Regulatory Barriers	1
Location & Accessibility	4												
Infrastructure Availability	4												
Environmental Factors	4												
Proximity to Employment	2												
Zoning Regulations	2												
Regulatory Barriers	1												

Opportunities & Constraints

1. Wetlands/Conservation Opportunity
 2. NWFS Expansion (Study in Progress)
 3. City of Niceville
 4. Northwest Florida State College
 5. College Road Access & Potential Tie-In to Niceville Utilities
 6. Forest Road Access
 7. Interchange Access
 8. No Access to Mid Bay Bridge Road
 9. FDOT Buffer
- Ophan Parcels Master Plan | Parcel Recommendations



Parcel 10: K-21
Land Suitability

Applicable Characteristics

Characteristic	Parcel 5
Population Density	■
Location Surrounded by Residential	■
Critical Mass of Residential Uses	■
Proximity to Employment	■
Proximity to Transportation	■
Change in Population	■
Proximity to Existing Schools	■
Availability of Existing Medical Services	■
Utilities	■
Employee Needs	■
Water Access	■

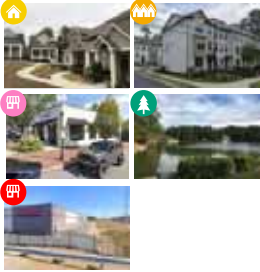
Appropriate Uses

- Single Family Residential
- Townhomes
- Neighborhood Commercial
- General Commercial
- Open Space

Ophan Parcels Master Plan | Parcel Recommendations



Parcel 10: K-21
Precedence



Orphan Parcels Master Plan | Parcel Recommendations



Parcel 11: L-34

Total Area
200 Acres

Net Developable Area
142 Acres

Aggreg. Viability Score	Viability Criteria	Score	
14	Location & Accessibility	4	
	Infrastructure Availability	4	
	Environmental Factors	3	
	Zoning Regulations	2	
Development possible with several constraints		Regulatory Barriers	1

Opportunities & Constraints

- Existing Single Family Residential
- College Boulevard Access & Potential Tie-in to Niceville Utilities
- No Access to Mid Bay Bridge Road
- FDOT Buffer

Orphan Parcels Master Plan | Parcel Recommendations



Parcel 11: L-34
Land Suitability

Applicable Characteristics

Characteristic	Parcel 5
Population Density	■
Existing Surrounding Residential	■
Close Mix of Residential Uses	■
Proximity to Light Rail	■
Proximity to Employment	■
Traffic	■
Proximity to Transportation	■
Dense, Senior Population	■
Proximity to Existing Hospital	■
Availability of Existing Medical Services	■
Visibility	■
Science Needs	■
Water Access	■

Appropriate Uses

- Civic Uses
- Neighborhood Commercial
- Recreation
- Open Space

Orphan Parcels Master Plan | Parcel Recommendations



Parcel 11: L-34
Precedence



Orphan Parcels Master Plan | Parcel Recommendations



Parcel 13: L-24

Total Area
78 Acres

Net Developable Area
62 Acres

Aggreg. Viability Score	Viability Criteria	Score	
14	Location & Accessibility	1	
	Infrastructure Availability	5	
	Environmental Factors	4	
	Zoning Regulations	2	
Development possible with several constraints		Regulatory Barriers	2

Opportunities & Constraints

- Existing Residential
- Potential Trail Connections
- 293 - 20 Interchange
- Range Road Junction
- EOD Range Trails
- Curb Cut Challenge
- FDOT Buffer
- No Access to Mid Bay Bridge Road

Orphan Parcels Master Plan | Parcel Recommendations



Parcel 13: L-24
Land Suitability

Applicable Characteristics

Characteristic	Parcel 5
Population Density	■
Existing Surrounding Residential	■
Close Mix of Residential Uses	■
Proximity to Light Rail	■
Proximity to Employment	■
Traffic	■
Proximity to Transportation	■
Dense, Senior Population	■
Proximity to Existing Hospital	■
Availability of Existing Medical Services	■
Visibility	■
Science Needs	■
Water Access	■

Appropriate Uses

- Open Space

Orphan Parcels Master Plan | Parcel Recommendations



Parcel 13-L-24

Precedence



Orphan Parcels Master Plan | Parcel Recommendations

PREPARED BY

Jacobs