

West Moreno District

Pensacola, Florida

Reconnaissance & Strategic Assessment

September 2014



BAPTIST. 

GENERATION OUTREACH

BRINGING HEALTH CARE TO HOMELESS



Christ Community

HEALTH SERVICES



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Executive Summary



Executive Summary



Mandate & Methodology

Live Work Learn Play (LWLP) has been mandated by the City of Pensacola, Escambia County, and Baptist Health Care to examine the neighborhood that surrounds Baptist Hospital's downtown campus, specifically a two-block section on the southwest corner of West Moreno and E Street. The purpose of this analysis is to offer broad neighborhood revitalization strategies and to explore the potential to leverage Baptist Hospital's growth and expansion needs as a catalyst to create a mixed-use neighborhood core and central gathering place that would serve the neighborhood residents and employees, as well as Baptist employees, patients, and visitors.

This Reconnaissance and Strategic Assessment is the culmination of a four-month engagement. In the development of this report, LWLP has drawn upon a combination of on-site reconnaissance, primary research such as stakeholder interviews, focus groups, and targeted surveys, along with a thorough review of existing and previously issued reports and studies. What follows reflects our analysis, vision, planning and development strategies, and articulates a series of key recommended next steps to advance the project towards implementation in a manner that marries public and private sector objectives.



Stakeholder Objectives

The coalition of the City, County, and Baptist Health Care would not have been possible without the intersection of key civic and corporate objectives. First, Baptist's desire to consolidate administrative functions into a new professional office building, and, in so doing, availing itself of additional space in its medical towers for its growing medical office needs represents the cornerstone of the partnership. Couple this desire with the City and County's longstanding efforts to revitalize the Westside of Pensacola, and the result is a unique opportunity to catalyze the resurgence of a neighborhood that has been long underserved.

A mixed-use neighborhood center like the one envisioned in this report would not only serve Baptist's practical office needs, but its retail and public realm components could provide a nexus of community life for the hospital campus and the neighborhood. The active neighborhood core would be a crucial step toward achieving the public goals of neighborhood revitalization by offering residents access to daily needs and entertainment, as well as spurring additional private investment in the area.

Context & Overview

Downtown Pensacola has enjoyed a sustained influx of public and private investment, resulting in increased property values, burgeoning residential and office demand, and perhaps, most importantly, a renewed appreciation of walkable, mixed-use environments. Additionally, the construction of the new waterfront ballpark and adjacent private development is representative of the nationwide trend of economic and community development by way of the creation of a vibrant urban core.

Baptist Health Care is one of the most honored and respected healthcare providers in the country, and its level of care is unmatched in the region, particularly in the areas of orthopedic and cardiovascular care. Baptist and its subsidiaries employ over 5,500 people within the downtown neighborhood alone. The hospital is growing, both physically and economically, and is therefore in a position to significantly and positively affect the adjacent neighborhood.

However, the Baptist Campus and the surrounding neighborhood currently face significant challenges that are inhibiting private investment in the area, and public investment in the area has yet to spur meaningful change. Crime and poverty rates are high, and dilapidated houses, a largely inconsistent sidewalk network, and limited neighborhood services and amenities mar the landscape. Nevertheless, the level of community pride and desire for improvement is high, and Baptist Health Care remains committed to improving the lives of its neighboring community.

Executive Summary (cont'd)



Vision for the Neighborhood & Development

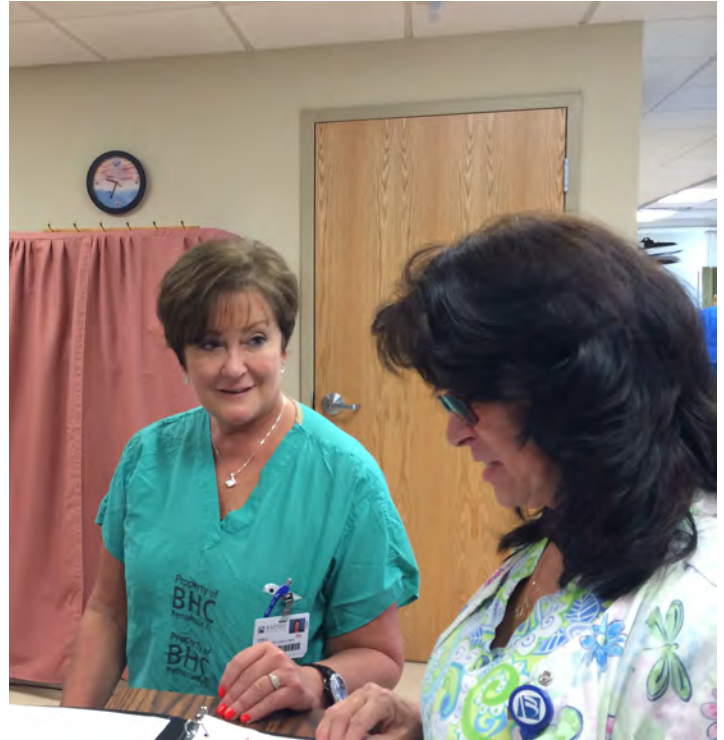
The West Moreno District, anchored by a world-class hospital, will be a catalyst for the resurgence of the Westside, with a broad mix of retail and a safe and active public realm. To achieve that vision, the neighborhood must strive to be distinct, safe and walkable, and a desirable place to live and work, with services and amenities that are convenient and accessible. The development at the corner of West Moreno and E Street will be the cornerstone of the district and serve as a national model for hospital-driven revitalization efforts. The project will be a safe and inclusive gathering place with diverse retail and an active urban environment that promotes health and wellness through its programming and design.



Target Market Overview

Almost 6,500 patients, visitors and employees visit the Baptist Campus on a typical weekday, while proximate neighborhood residents grow the Primary Draw Area to over 11,000 people. These are people without convenient access to quality food options or amenities and thus would have the propensity to spend time and money in a mixed-use neighborhood core adjacent to Baptist multiple times per week. Additional residents and employees in the Secondary and Tertiary Draw Areas broaden the potential population of achievable customers for this project to serve.

| Baptist Hospital Daily Population | |
|-----------------------------------|---------------|
| Baptist Daily Population | 6,481 |
| Baptist Employees | 5,600 |
| Inpatients | 159 |
| Outpatients | 223 |
| Hospital Visitors | ~499 |
| Neighborhood Residents | 4,800 |
| Total Daily Population | 11,281 |



Survey Results

To substantiate programming recommendations, Baptist employees, visitors, and patients were surveyed to assess their key behaviors and retail preferences. The survey results indicate that there would be overwhelming support for the creation of a mixed-use cluster of retail, restaurants, and amenities like the ones recommended in this report. It also reinforces that there is significant latent demand among Baptist employees, patients, and visitors for a more diverse array of retail experiences on campus.



Executive Summary (cont'd)



Phasing

Given that the target site will be developed in multiple phases over time, the initial phase of the project must be designed both to allow for future growth and to create an environment that stands alone and feels complete in advance of any additional development. A master plan that not only flexibly accommodates future development phases, but allows for interim uses of undeveloped lands that can productively complement the initial phase, can serve these often competing objectives.



Programming

The programming of the mixed-use development (and impetus of the project) is based on Baptist's stated need of up to 66,000 SF of professional office space. This report recommends a series of guiding principals that should inform the programming of the at-grade experience and offers a host of economically viable uses that we believe would meet the needs of the primary trade area. These recommended uses include restaurant concepts, food purveyors, neighborhood amenities, and public realm enhancements. We have also identified a number of potential interim programming initiatives for the utilization of the undeveloped portion of the parcel, such as a community garden, an event lawn, and areas for sports and recreation. Finally, future development opportunities such as multi-family projects, lodging, and senior living facilities are also explored. While the office component is the economic backbone of the initial phase of the project, the ground floor programming will make up the primary end-user experience, and define the project for future generations

Neighborhood Initiatives

A series of strategic neighborhood initiatives will enhance safety, connectivity, and the economic prospects of the entire study area, which will in turn contribute to the attraction of further private sector investment when coupled with the mixed-use core envisioned in this report.

1. Parking strategies will increase the convenience and connections within the neighborhood over time
2. Streetscaping priorities that promote safety, multi-modal transportation, and healthy living
3. Wayfinding and neighborhood signage initiatives that promote community identity and visitor convenience
4. Parks and open-space enhancements that increase community enjoyment and storm-water management



Public Sector Participation

Focused public investment married to private investment and development can create an exponential return on that investment by catalyzing change in both the short and long terms. Given the scale of desired improvements, a project of this nature is not feasible as a stand-alone private sector project. In order for the project to be developed in such a way as to achieve the collective stated objectives of the City, County and Baptist, public investment and cooperation will be required in order to leverage Baptist's investment in its continued campus growth. Opportunities for public investment and support may include streetscape improvements, foundational infrastructure, and small business incentives, among other items.

Next Steps

In order to move the project forward, the goals and conceptual vision outlined in this report must be translated into a physical master plan of the overall site, as well as a Phase 1 design developed iteratively with a proforma financial planning exercise that quantifies and helps all parties understand the nature of their respective commitments (financial and otherwise) required to achieve the desired development outcomes. Once funding and financing commitments are solidified from all parties, implementation of the development can move forward. Broadly speaking, these steps are:

1. Development Program Refinement
2. Master Planning & Design
3. Proforma Financial Planning & Feasibility
4. Funding & Financing Commitments
5. Development Implementation

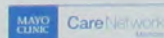
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BAPTIST *and* MAYO CLINIC



THE BEST. TOGETHER.



Project Introduction







Baptist Health Care, the City of Pensacola, and Escambia County have joined together to explore how the confluence of public and private sector goals can be leveraged to catalyze a transformation in the district that surrounds Baptist Hospital's downtown campus. The impetus for the project was Baptist's desire to redevelop two city blocks on the southwest corner of West Moreno and E Street to serve its need for professional office space, coupled with the City and County's long-standing emphasis on revitalizing one of Pensacola's most underserved neighborhoods. To that end, the three parties have engaged Live Work Learn Play to analyze, envision, and provide implementation strategies for the creation of a mixed-use development on the parcel, as well as provide broader recommendations to aid in the experiential and economic success of the district as a whole. This report is the culmination of that effort and is meant to serve as the first important step toward shaping the opportunity while assessing its viability and desirability for all parties.

Collective Goals

While the City, County, and Baptist each have important specific outcomes, all three parties have common goals that have been expressly communicated to our team before and during the engagement. These three collective goals are at the very core of this strategic assessment and form the basis of our report.

New Development (Get Shovels in the Ground)



Baptist has immediate office space needs, as their medical office towers are fully occupied, and many of their administrative functions have been moved to inefficient cottages on campus or off the campus altogether. In addition, there is immediate demand for additional medical office space to move into the medical towers. The City and County have targeted the Baptist neighborhood for redevelopment and revitalization since the creation of the Brownsville Redevelopment Area (1997), Palafox Redevelopment Area (2000) and Englewood Redevelopment Area (2001), yet crime and poverty persist in the district and continue to inhibit any notable redevelopment activity. Therefore the desire to secure private investment to get new development projects underway that can serve the public good is paramount for all three parties.

Improve the E Street Corridor



E Street is a key corridor that passes through both City and County jurisdictions. With Pensacola High School and the County office buildings to the north, and downtown Pensacola and the budding waterfront developments to the south, E Street represents a key opportunity to advance the City's stated objective of improving the north/south connections. With Baptist Hospital as a key neighborhood anchor, the potential for an active, walkable commercial center along the E Street corridor represents a key opportunity. For Baptist, E Street represents the primary access route and sense of arrival for a vast majority of its employees and visitors. Consequently, stimulating development and activity along the E Street corridor is a key desired outcome for all three parties.

Catalyze Westside Redevelopment



It is clear that the revitalization and activation of the Westside of Pensacola and Escambia County are key benefits for all parties. This report will show that the neighborhood that surrounds Baptist Hospital has not seen any major private investment outside of the Baptist Campus in many years, and the residents live in a state of extreme poverty. The impoverished state of the neighborhood has a negative effect on the upward mobility of its residents, and the perception of a lack of safety is a clear deterrent for potential patients in choosing where they receive local healthcare. The revitalization of the core of this neighborhood would be a clear sign to consumers, private developers, and to local residents that this neighborhood is on a path to becoming a safe and inviting place to invest, spend time and money, and live.

Baptist Health Care

Our interviews with Baptist executives have uncovered several key objectives related to the West Moreno site and the surrounding neighborhood. Each of the following core objectives can be accomplished by creating a mixed-use neighborhood core that services not only its employees and visitors to the hospital, but also the surrounding residents and business owners.

Meet Professional Office Space Need

Baptist has an immediate need for up to 65,000 SF of professional office space to accommodate its expanding in-house physician practice, to utilize the medical office towers, and to relocate and consolidate various administrative functions.

Improve the Campus Experience for Patients, Visitors & Employees

Creating a more active public realm, a more cohesive campus environment, and offering its primary users more diverse retail, food & beverage options are all key goals for the project.

Improve the Lives of People in its Community

As expressed in the Baptist Health Care mission statement, the organization has a sense of responsibility to its community to leverage its economic power to improve lives through its development efforts.

City of Pensacola

The Baptist neighborhood redevelopment is an important part of several of the City's primary initiatives, as identified by Mayor Hayward.

Creating Healthier Communities

The built environment has been shown to have the potential to positively affect health and wellness by promoting walkability with a safe and inviting sidewalk experience, an active public realm, and positioning daily necessities and conveniences within walking distance of population centers.

Establishing a Connection Between North & South Pensacola

A commercial district anchored by Baptist would create a psychological connection and a commercial stepping-stone between the North and South.

Moving Prosperity Westward

The creation of a successful commercial core in one of Pensacola's most historically impoverished Westside neighborhoods will spur redevelopment opportunities, create local job opportunities, and increase property values for current homeowners.

Escambia County

The County, as expressed in its Brownsville Community Redevelopment Agency plan, is focusing on the following initiatives that will be directly impacted by the initiatives detailed in this report:

Catalyze private reinvestment on commercial corridors, public areas and residential neighborhoods

Continue to improve streetscape and multi-modal infrastructure along commercial corridors

Improve neighborhood security, particularly at known locations with high levels of crime

Work with and build upon institutional anchors, particularly Baptist Health Care and Lakeview Center

Ensure all public improvement projects include adequate funding and other provisions for on-going maintenance

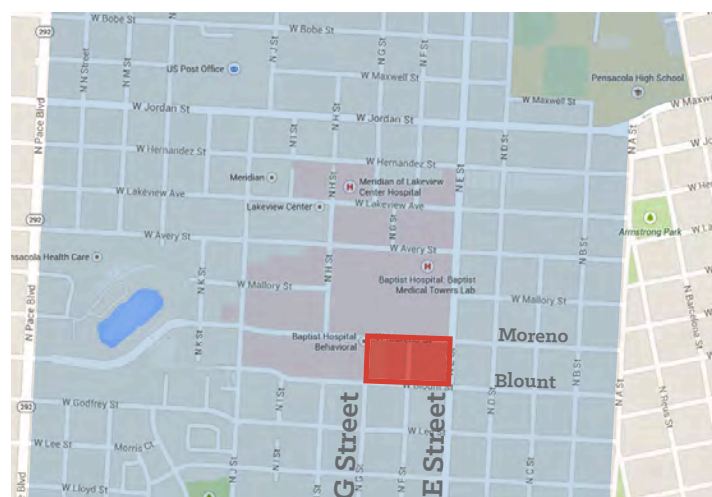
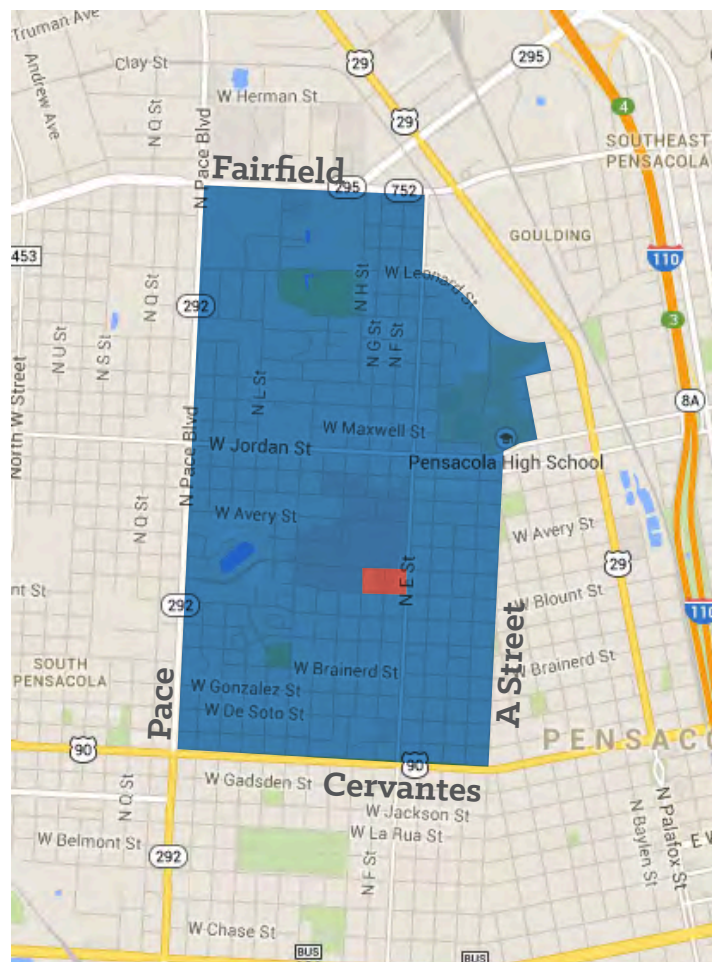
Continue to involve residents and business owners in the planning process and build community programs

Statement of Mandate

Live Work Learn Play (LWLP) was engaged by Baptist Health Care (BHC), The City of Pensacola (COP), and Escambia County (EC) to complete a Reconnaissance Memorandum and Strategic Assessment for the neighborhood surrounding the Baptist Health Care campus, specifically the parcels south of West Moreno St. that have been targeted by BHC for redevelopment. The goal of the engagement is to provide BHC, COP and EC with the preliminary analysis, vision, mixed-use planning and strategies to advance key civic and community initiatives in the study area, beginning with the redevelopment potential of the targeted redevelopment site. This market assessment is intended to direct the mixed-use programming of anchor and secondary uses, implementation strategies and phasing of the project.

Key Objectives

1. Develop the strategic vision and market positioning for the project that will drive commercial demand, and improve the economic and experiential conditions in the neighborhood
2. Complete a relevant trade area analysis and assessment in order to identify market gaps and demand for retail uses
3. Assess the end-user profiles and segments for the study area and how the project can address their needs and capture commercial spending
4. Identify anchor and secondary retail programming opportunities
5. Provide guidance on priority implementation strategies and next steps for the project



District Area
 Site Area



Primary Research

LWLP conducted dozens of interviews with public officials and key stakeholders both on-site and from our offices in Montreal and Nashville to obtain a multitude of perspectives and opinions on the clearest path toward development. We also ran detailed demographic and population reports on the primary, secondary, and tertiary markets for the study area to learn about the residents' propensity to visit and spend. Finally, we held local focus groups and conducted online and in-person surveys of Baptist employees, patients and visitors, as well as neighborhood residents, to gain information about key behaviors and desires of those in the primary market.



Site Visits

LWLP has conducted three site visits to the study area. The first visit was intended to meet with the clients, public officials, and key stakeholders, as well as to assess the physicality and character of the neighborhood, site, and city. The second site visit included a presentation of our initial findings, a focus group of local residents, as well as further interviews and project update meetings with key project stakeholders. Our third visit will be an exploration of the next steps toward the realization of the initiatives introduced in this report.



Secondary Research

We reviewed relevant studies and policy documents supplied by the clients to learn about current and past efforts to expand the campus, revitalize the neighborhood, and improve the campus experience. We reviewed current office space allocations, customized and standard real estate reports, and public and private policy documents to determine the initial feasibility of a mixed-use district. Finally, we reviewed and incorporated detailed employee information in the primary and secondary draw areas to assess the total customer base for the District. A complete list of secondary research documents is included in Appendix B.



Best Practices & Industry Knowledge

Live Work Learn Play ultimately processed and filtered all of the above research through the lens of our professional expertise, drawing on our urban development and medical district experience and knowledge of best and emerging practices, applied to the particular and unique context and needs of the City, County, and Baptist Health Care.



A photograph of a street scene, likely during a community event or festival. The street is lined with trees and buildings. On the left, there are American flags and a balcony with plants. In the center, a purple tent with a logo is set up. A group of people, including children and adults, are gathered on the street. Some are standing, while others are sitting on the ground. The ground is decorated with colorful chalk drawings. The sky is clear and blue. A blue banner with white text is overlaid on the top half of the image.

Context & Overview

Pensacola Metro Today

Overview

The City of Pensacola, also known as the “City of Five Flags” due to the fact that it has been ruled by 5 different nations, is one of the United States’ oldest settlements. Originally populated by Native Americans, the area was settled by the Spaniards in the early 1600s, and joined the United States in 1821 under the governance of Andrew Jackson. In the years hence, Pensacola has grown into an important port city, the center of Naval Aviation, and a popular tourist destination with its impeccably white beaches. Most recently, Pensacola has begun to rediscover its historic district that has the potential to become one of Florida’s next great southern downtowns.

Pensacola Top Economic Drivers

| <u>Industry Sector</u> | <u>Annual Revenue</u> |
|------------------------|-----------------------|
| 1. Health Care | \$2.5B |
| 2. Finance | \$1.6B |
| 3. Construction | \$1.3B |
| 4. Real Estate | \$1.0B |
| 5. Tourism | \$599MM |
| 6. Military | \$522MM |

Source: Pensacola Chamber of Commerce, 2010

Pensacola Top Employers

| <u>Company</u> | <u># of Employees</u> |
|------------------------------------|-----------------------|
| 1. Naval Air Station Pensacola | 20,887 |
| 2. Sacred Heart Health System | 5,000 |
| 3. Baptist Health Care | 3,163 |
| 4. Naval Air Station Whiting Field | 2,950 |
| 5. Lakeview Center | 2,000 |

Source: CBRE, August 2013

Escambia County Population

302,715 (2012)

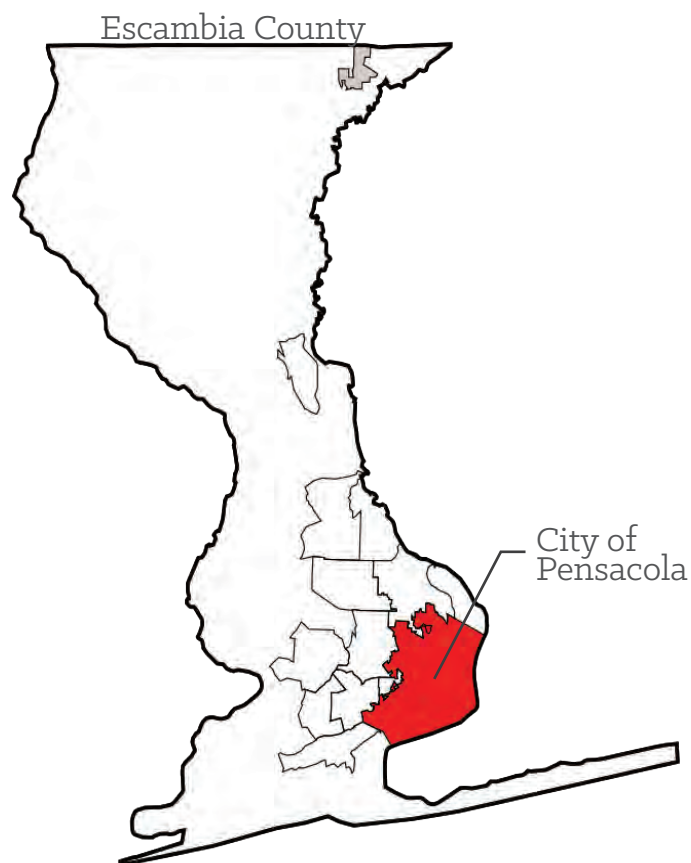
Source: United States Census Bureau



City of Pensacola Population

52,340 (2012)

Source: United States Census Bureau





Downtown

Since the turn of the century, and particularly in the past five years, public and private investment in the historic downtown district has given rise to a well-functioning mixed-use environment with ground floor retail and restaurants, active parks and green space, and an improving office market. The historic buildings, entertainment venues, and government offices located downtown have served as key anchors to the resurging urban district. However, very few neighborhood services and amenities exist downtown due to its small residential population relative to the North.



North/Northeast

North and Northeast Pensacola have largely been developed subsequent to the construction of the interstate system in the late 1950s, and are consequently automobile-centric environments characterized by single-use development including national and regional retail in malls and big box power centers, office parks, and single-family homes. It has become the center of commercial activity in the region due to its automobile accessibility. The major universities of UWF and Pensacola State College have followed the development, as has Sacred Heart Hospital, Baptist Health Care's primary competitor.



Pensacola Beach/Gulf Breeze

Pensacola Beach and Gulf Breeze are located south of the City of Pensacola. The area is both an affluent suburb of Pensacola and a popular beach destination for tourists from around the Southeast. Commercial development is much like the North, with national retail and chain restaurants along Highway 98, the main east/west beach artery. High-rise hotels and condominium complexes line the beach, along with the associated tourist-related entertainment and retail establishments. Single-family residences and vacation homes are also prevalent. Gulf Breeze Hospital and the Andrews Institute are also located in Gulf Breeze and cater to the suburban clientele.



Westside

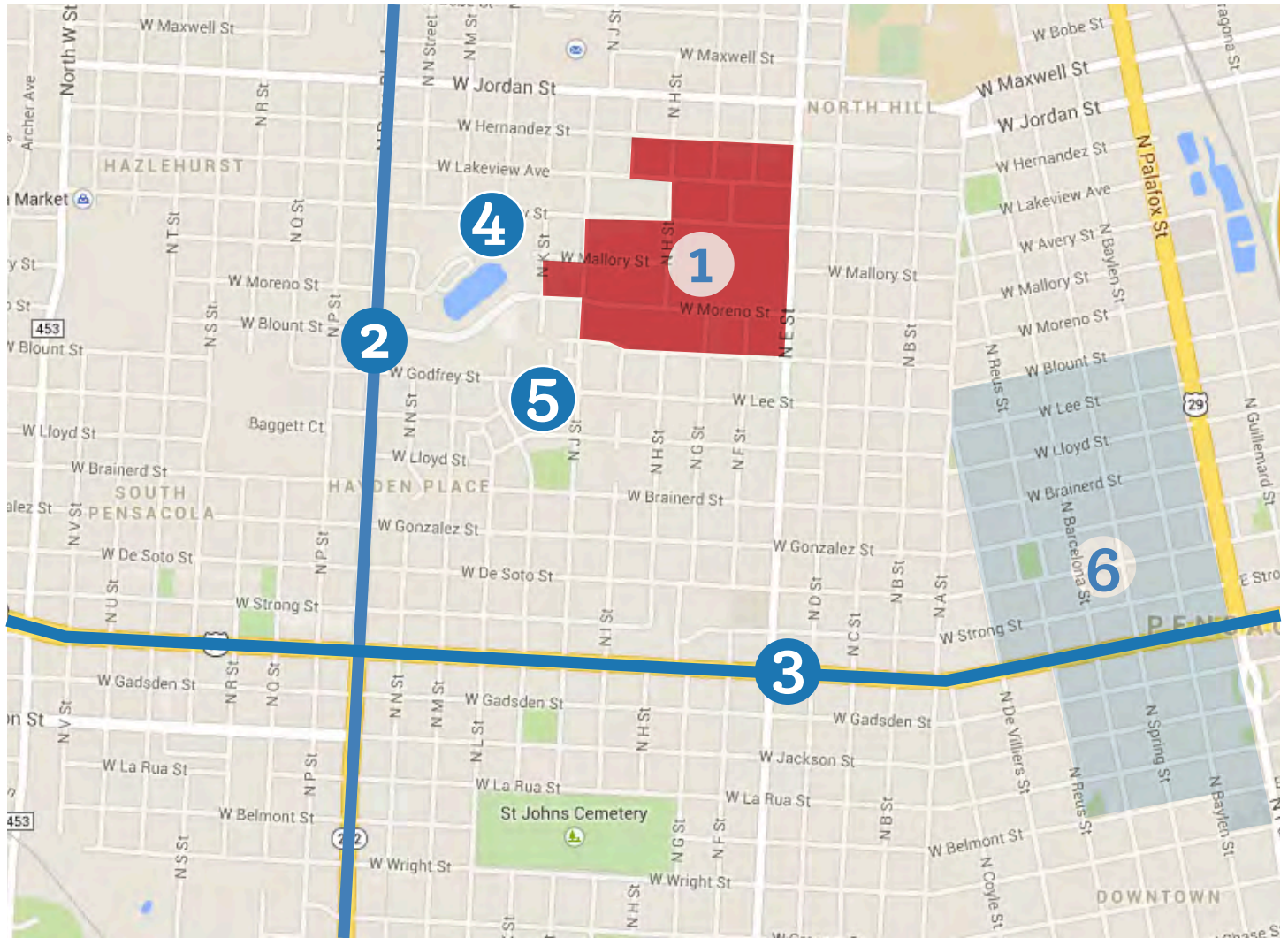
The Westside of Pensacola, where the study area is located, is the center of the African-American culture and history in Pensacola. While the neighborhoods exhibit a strong cultural heritage and solidarity among the residents, they are largely impoverished and lack basic commercial services and amenities. Dilapidated single-family shotgun homes, public housing projects, and low-income retirement homes are the predominant residential typologies, with a notable exception being the North Hill District, where pre-war era homes have been renovated and investment has been made in parks and neighborhood identity efforts. Commercial development largely consists of under-occupied or below-market retail strip centers, with the exception of some pockets of national retail along the major arteries.



West Pensacola

West Pensacola looks and feels very much like the aforementioned Westside, particularly as one approaches the city limits. As one moves westward, the economy is largely driven by the Pensacola Naval Air Base with single-use retail, strip centers, and commuter-centric retail and restaurants along the major corridors. Single family, lower and middle-income housing, and some pockets of office development exist.

West Moreno Neighborhood



Baptist Campus

The Baptist Downtown Campus opened in 1951 in its current location. In the years since, the hospital has grown to encompass about 25 square blocks. It consists of the main hospital, three medical office towers, Lakeview Center, a behavioral medicine building, and many other smaller structures. As the campus has grown, existing structures have been repurposed to serve Baptist's office and record storage needs. The sole retail use outside of the hospital is the Sunshine Café, a 30-seat "fast casual" restaurant that is beloved by the local community. The rest of the campus is single-use office and medical office uses, with hospital surface parking interspersed throughout.



Pace Boulevard

Pace Boulevard is the main north/south arterial road in West Pensacola, and is the western border of the study area. It sees significant traffic counts, but aside from a CVS/Walgreens corner and various fast food outlets, the commercial development is characterized by underperforming strip centers and other single-use, auto-centric development, as well as vacant and undeveloped parcels. The Brownsville CRA has targeted the Pace Boulevard corridor as a potential redevelopment opportunity.



Cervantes Street

Cervantes Street is also State Highway 90, and marks the southern border of the study area. This portion of Cervantes cuts through the Westside of Pensacola's low-income residential district, and its commercial development consists of package stores, fast food, and other similarly undesirable outlets. It is also the primary entry point to the study area and the Baptist campus.



Retirement Community

The Westminster Retirement Village is built along the banks of an attractive retention pond on the west side of the study area. The lower-income apartment complex is within a short walk to the campus along West Moreno. As the neighborhood matures, the village has the opportunity to become part of a larger, more expansive aging-in-place senior living center.



Morris Court

Morris Court is a three-phase public housing project situated on the northwest section of the study area. While phase 1 is somewhat in disrepair, phase 2 (pictured) and phase 3 are, according to our focus group attendees, relatively pleasant and communal living environments. Investment in the neighborhood core will serve to provide those residents with much needed services and amenities, and create more jobs within walking distance.



North Hill/ East of "E" Street Homes

The North Hill District is located to the east of E Street and continues eastward to Palafox St. Its historic older homes have seen significant investment in the past decade, and has become a desirable location for people wanting to live closer to the downtown area in single-family homes. Other homes in the neighborhood show signs of investment, and the city's neighborhood signage effort is helping stimulate that activity.



Blighted Houses

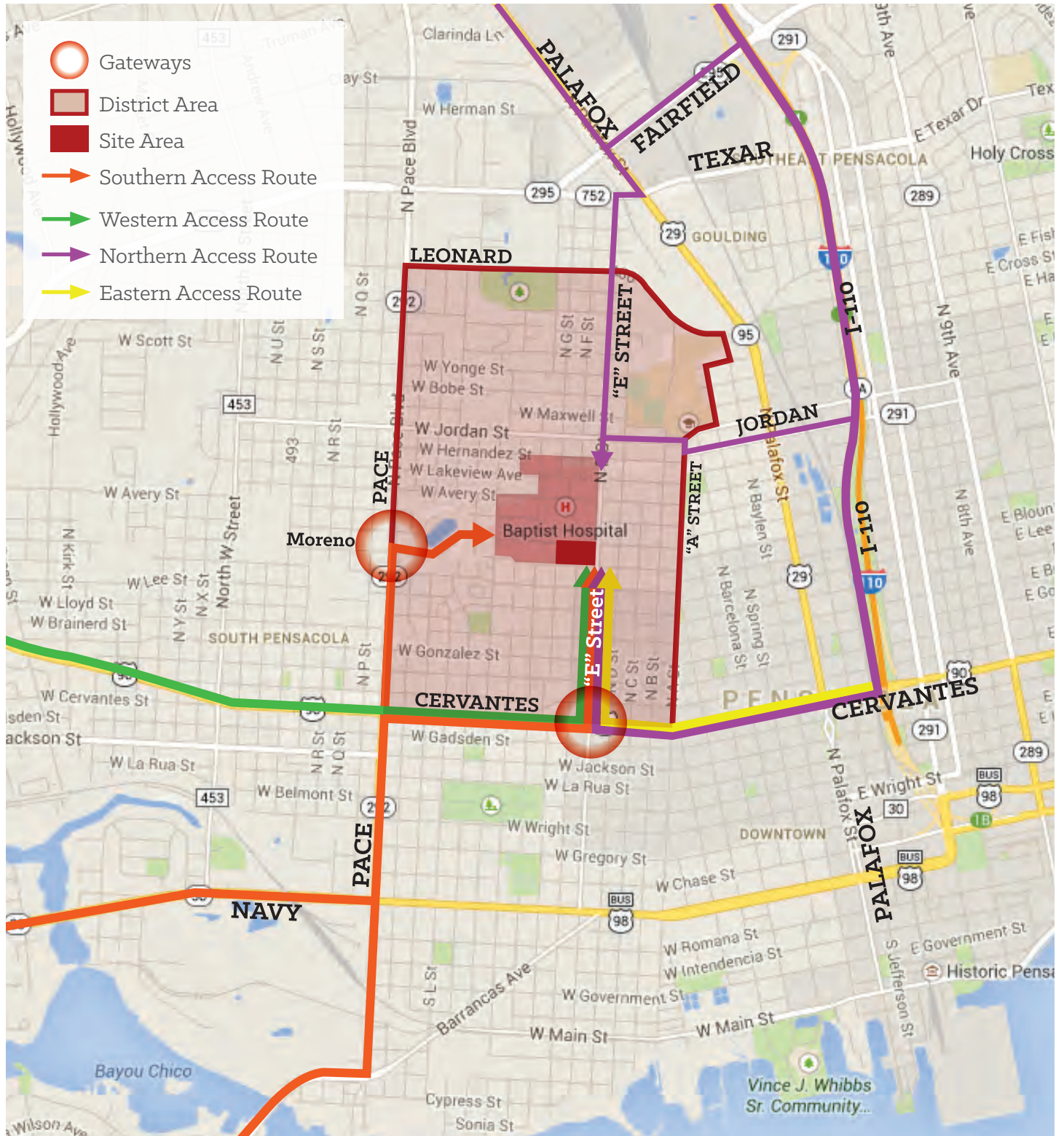
The study area is littered with blighted and dilapidated houses, some of which are unoccupied. These present an opportunity for demolition and redevelopment to improve the adjacent housing stock for people living in and moving to the neighborhood as it undergoes revitalization.



Access Routes to Baptist Hospital

Access Routes

When planning a mixed-use neighborhood core, it is important to understand how the different user groups will access the site area. Employees, residents, and visitors to the neighborhood may take different routes to arrive to the district based on their daily routines or intended destination. Understanding the access points also informs important programming and design decisions as they relate to gateway corridors, wayfinding strategies and creating an appropriate sense of arrival.



SWOT - Strengths



Baptist Employment

Baptist is the largest non-governmental employer in Escambia County, employing over 6,500 people, with over 4,800 employed on the Baptist Main campus alone. The employee average salary is skewed upward with the number of doctors and skilled professionals on campus at any given time.

Capitalization:

Leverage the volume and spending capacity to create a vibrant retail presence that feeds off the captive employee market.



Baptist's International Healthcare Reputation

Baptist Health Care is considered one of the world's finest hospitals in terms of care, and is affiliated with two of the biggest brand names in medicine: the Mayo Clinic and Dr. James Andrews.

Capitalization:

Extend and enhance promotional efforts in the region to reflect the true standard of care, and reinforce the brand's commitment to promoting a healthy community.

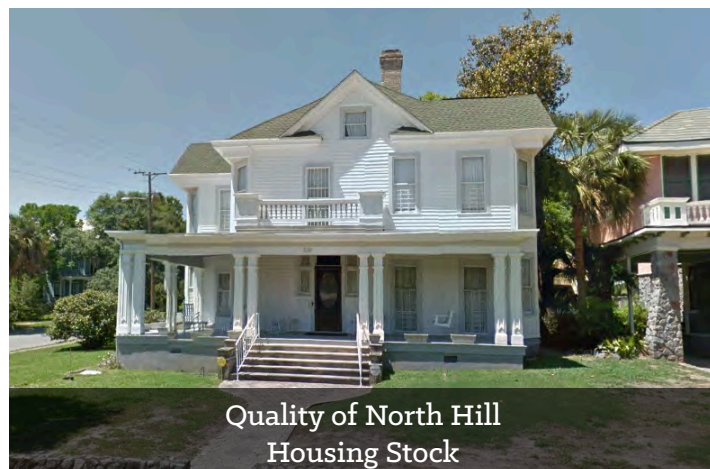


Success of Downtown/Belmont-DeVilliers

Pensacola residents and employees have begun to understand the benefits of a walkable, mixed-use core, which bodes well for the viability of a new district bolstered by a formidable anchor.

Capitalization:

Position the project as a continuation of that development trend, providing a compact and walkable retail environment.



Quality of North Hill Housing Stock

North Hill has a significant number of upper and middle class historical homes that will help shape the character of new housing development in the Baptist neighborhood.

Capitalization:

Break down the psychological boundaries that define Baptist campus to reach North Hill so the two areas will eventually be seen as one contiguous urban fabric.

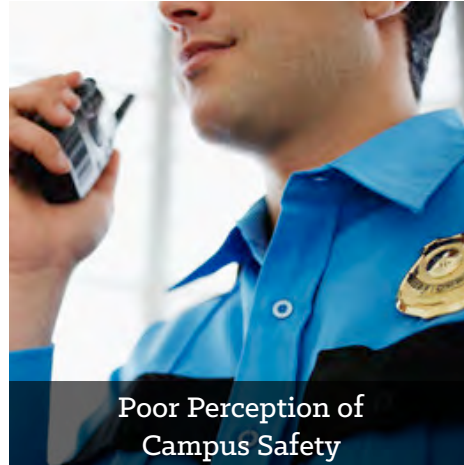


Limited Quality Food Options

Few food options exist for Baptist employees and visitors, and even less for the larger neighborhood.

Buttress:

Prioritize healthy, convenient, and high-quality restaurants and food purveyors in the project.



Poor Perception of Campus Safety

The necessity of evening security escorts and the neighborhood's poor safety reputation is a deterrent for pedestrians.

Buttress:

Create a "green zone" on the project site, through design strategies and site activation, where no crime occurs and everyone feels safe at all times, day or night.



Limited Third Places

Very few options exist for people to have informal meetings and convenient public places to get away from the office.

Buttress:

Prioritize a coffee shop/café experience, as well as public realm enhancements that create an inclusive public environment.

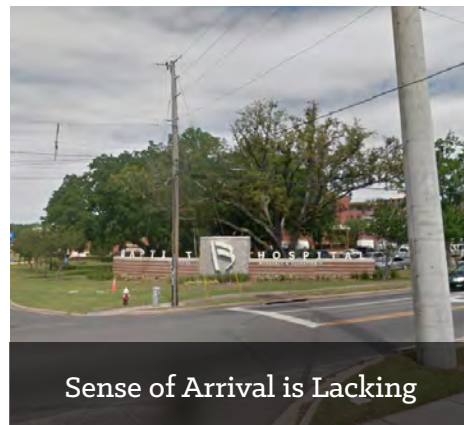


Neighborhood Stigmatized by Blight

Low property values caused by lack of housing demand has created blighted structures throughout the neighborhood

Buttress:

Stimulate private investment by creating a vibrant neighborhood center nearby



Sense of Arrival is Lacking

Aside from the monument sign on the corner of West Moreno and E Street, arrival gateways to the campus and neighborhood are not well indicated and do not add to neighborhood identity and vibrancy.

Buttress:

Ensure future development has appropriately designed arrival gateways along primary access corridors that welcome people to the district and help define neighborhood identity.



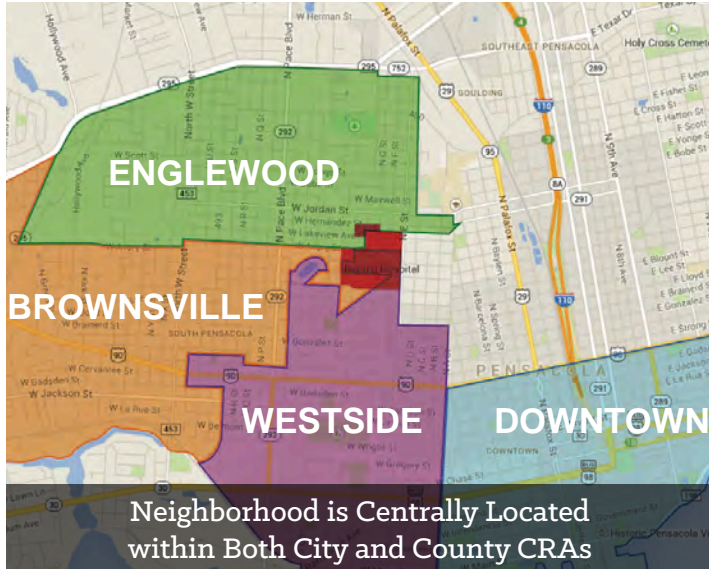
Limited Wayfinding Around Hospital

The wayfinding that directs and attracts pedestrians and motorists to the neighborhood and the hospital campus is inconsistent and confusing.

Buttress:

Influence the traffic and parking patterns of employees and visitors to allow for interaction with the new development through consistent and attractive wayfinding directing people to the area.

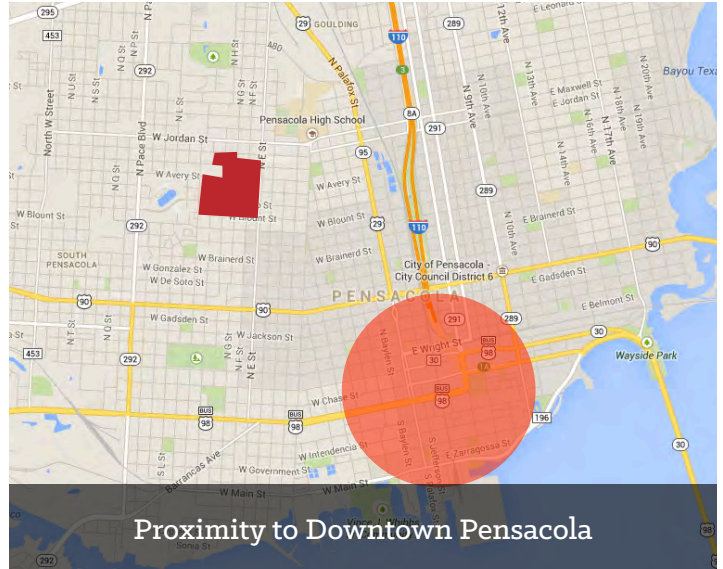
SWOT - Opportunities



Englewood, Brownsville, and Westside Redevelopment districts each touch the study area, creating eligibility for multiple funding sources.

Strategy:

Ensure that the ultimate development plan incorporates public projects that are eligible for CRA investment.



Downtown Pensacola is a short drive and/or bicycle trip from the district, which will be an important benefit for future housing development.

Strategy:

Plan for the development of housing for people who desire proximity to the downtown core, including Baptist employees who could benefit from living both close to work and downtown.



Efforts in North Hill, Belmont-DeVilliers, and downtown Pensacola to brand communities with signage have proven successful.

Strategy:

Incorporate a neighborhood identity plan into the signage and wayfinding initiatives in the project.



Both Mayor Hayward and Chairman May have been vocal in their support of neighborhood revitalization efforts in the Baptist district.

Strategy:

Ensure that city and county remain engaged throughout the development planning stages and that staff are kept informed of progress along the way.



High crime rates in the area could be a deterrent for private investment and financing vehicles, as well as impact people's desire to visit the project once developed.

Mitigation:

Increase police presence, support neighborhood outreach efforts, and repair or enhance streetlighting, and design a safe, well-lit environment for the project.



The commercial demise of Pace Boulevard could divert public attention and potentially public funds to the west of the target site

Mitigation:

Move quickly to advance the project in order to boost economic activity and ensure that funding is available for the project.



Despite the redevelopment districts that touch the study area, limited funding could prevent significant public investment in the project and thus inhibit its ability to be realized in the manner envisioned.

Mitigation:

Build the case for the exponential cumulative social and economic effect of public investment in the project, and investigate alternative paths for public investment.

Commercial Real Estate Snapshot

Commercial Real Estate Summary - Pensacola, Florida

| | July 2014 | 3-month Average | 12-month Average | 2-year Average |
|-------------------------|-----------|-----------------|------------------|----------------|
| Area for Lease (SF) | 356,682 | 329,145 | 279,716 | 319,912 |
| Asking Lease (per SF) | \$12.56 | \$11.50 | \$10.91 | \$10.24 |
| Reported Lease (per SF) | \$9.86 | \$10.38 | \$10.46 | \$10.29 |

Source: Catalyst CRE, LLC

Retail Summary - Pensacola, Florida

| Mid-Year 2013 | Overall Pensacola | Downtown | Gulf Breeze | Ferry Pass/ N. Pensacola | West Pensacola |
|-------------------------------------|-------------------|----------|-------------|-----------------------------|----------------|
| Total Gross Leasable Area (SF) | 18,304,849 | 988,578 | 185,740 | 3,407,701 | 2,114,892 |
| Quoted Rental Rates | \$11.17 | \$13.44 | \$25.00 | \$16.82 | \$9.02 |
| Mall Market- Quoted Rental Rates | -- | -- | -- | \$23.58 | -- |

150,564 SF of retail space built in the last 4 quarters in Pensacola

Source: CoStar Group 2013 Mid-Year Report



Baptist Existing Retail Program

LWLP conducted a focus group consisting of the key operators of each of the following retail establishments on the Baptist Campus. Each of the operators cited challenges related to their individual locations that inhibit their ability to maximize exposure and/or convenience to potential customers. From a food and beverage standpoint, it is clear that there is current unmet demand during breakfast and lunch hours, where long lines and limited options deter more frequent spending. The lack of significant evening and weekend retail activity points to latent demand. The following is a list of existing retail operations on the Baptist Campus along with relative facts about each.



Baptist Bistro Café

- Operates for breakfast, lunch, dinner, and a moonlight shift, 7 days a week
- Sodexo Cafeteria within Hospital
- Breakfast is busiest time, followed by lunch
- Customers have complained about food quality, health, and price



Subway

- Located in Medical Office Tower 3
- Open from 7am-8pm Monday through Friday, closed on weekends
- Average annual sales of ~\$404,000
- Long lines at lunch time often a deterrent for employees



Sunshine Café

- Casual dining across West Moreno from main hospital entrance
- Open weekdays 10am-3pm, closed on weekends
- An employee favorite, but considered unhealthy



Quality Cup
(Starbucks Coffee)

- Open Monday - Friday: 7:30am-4:00pm, closed on weekends
- Located in Medical Office Tower 3
- Small seating area
- Serves coffee, pastries, and some light breakfast options



Towers Rx Pharmacy

- Open weekdays 9am-6pm and Saturdays - 9am-12pm
- Annual Sales of about \$6 million (1/3 from Baptist Employees)
- Offers local and bedside delivery



Gift Shop

- Main location in Medical Towers, with kiosk in hospital
- Offers snacks, flowers, jewelry, handbags, etc.
- Also rents medical equipment
- Revenue 60% Baptist employees

Baptist Health Care

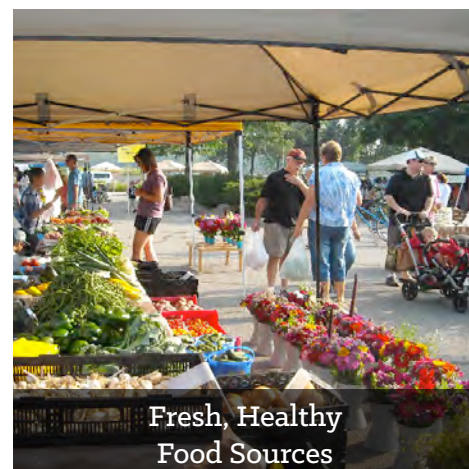
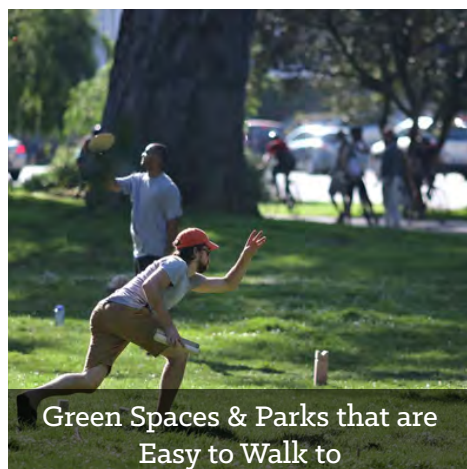
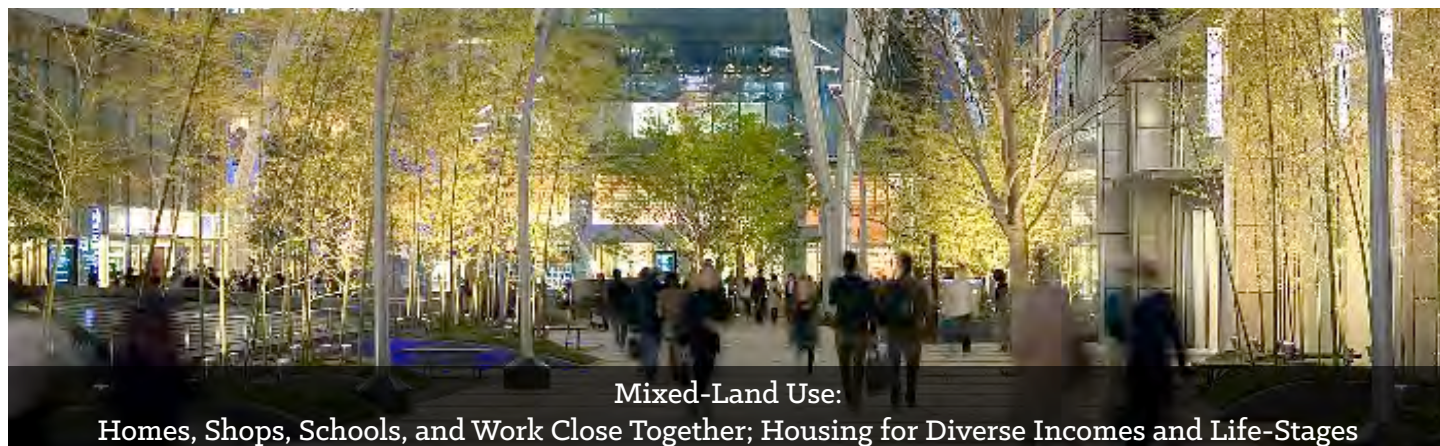


Baptist Health Care is one of the premier healthcare providers in the country. In addition to an ongoing partnership with the Mayo Clinic, Baptist is home to the world's most recognizable name in medicine, Dr. James Andrews, a pioneer in orthopedic surgery. Baptist has a national reputation for world-class care, particularly in the areas of orthopedics and cardiovascular care. Interestingly, it is clear from our interviews that Baptist's reputation is more lauded outside of Pensacola than from within. Many Pensacola residents begin their evaluation of the hospital by referencing neighborhood safety and the campus experience, rather than quality of care and its physician network. Ultimately, the campus experience is part of the patient experience, and, in its current form, the Baptist campus is a deterrent for those with a choice in local healthcare. Baptist has a unique opportunity to leverage its national reputation and strong brand affiliations to help create a new local perception. The creation of an integrated mixed-use neighborhood core would create a campus environment that is reflective of the level of care it provides to its patients.

Designing Healthy Communities

A notable shift is underway in the healthcare industry. Hospital systems are beginning to change their measures of success from the traditional metric of number of patients treated to one of population health management. The shift means that hospitals are now more focused on preventive measures than ever before. One clear way to promote a healthier population is through the built environment. Studies have shown that people who live in areas with a high WalkScore (which measures a location's walkability by accounting for streetscape and commercial development within walking distance) have lower obesity and related health problems. In fact, the Center for Disease Control has issued an official "Healthy Community Design Principles" checklist that includes the following relevant points that should inform the vision and design of the project and district:

Healthy Community Design Principles





A photograph of a restaurant entrance at dusk. A blue banner with white text is overlaid on the top half of the image. The scene below shows a sidewalk with several people, a tree, a black lamppost, and a large planter with a small tree. The restaurant has large glass windows and a dark door. The word "Ramen" is visible in the window. The overall atmosphere is warm and inviting.

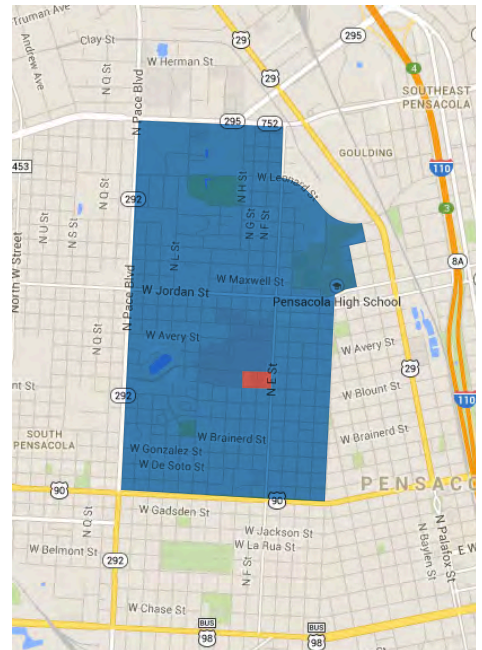
Vision & Guiding Principles



West Moreno District

Vision

West Moreno will be the **next great Pensacola district**, characterized by a **world-renown hospital anchor**, diverse living options, a **broad mix of retail services and amenities**, and an **active and accessible public realm** that invites pedestrian activity. It will be a **catalyst** for the **resurgence** of Pensacola's Westside, and **emblematic** of the culture of historically African-American neighborhoods.



■ District Area ■ Site Area

With Baptist Health Care as an economic engine and community steward, the West Moreno District has a rare opportunity to improve the quality of life of its residents and visitors, layering social and economic opportunity to an already rich cultural history and neighborhood pride. The neighborhood will include parks and public spaces for recreation, reflection, and fellowship and an environment that reflects the strong community bonds and family values that currently exist within it. The creation of a vibrant, appropriately scaled, mixed-use neighborhood center will be the catalyst for future private and public investment by setting the framework for a fully integrated and diverse neighborhood that offers the convenient access to quality services and amenities that the residents have long deserved. Local business will be given the opportunity to succeed through the evolution of a safe, connected, walkable neighborhood for people to live, work, learn, and play.

Guiding Principles



Safe, Walkable Neighborhood

Without a safe and inviting pedestrian experience that connects a core commercial center to the residential and employment populations, future private investment will lag considerably. Therefore, special attention must be paid to streetscape improvements such as lighting, sidewalks, and bicycle infrastructure. Without interesting places to walk, there is no point to such an investment, thus the development of a neighborhood retail core is pivotal to achieving the vision.



A Great Place to Work

Baptist Health Care and its subsidiaries employ over 5,500 people who come to work on campus every day, and thousands more who are employed in and around the study area. In order to make their work experience more enjoyable, the employees want and need an interesting arrival destination, diverse retail options before and after work, and a safe and inviting public realm to utilize throughout the day. With this environment in place, the neighborhood will be better positioned to attract new businesses, and current businesses will find attracting new employees much easier.



Everyday Conveniences

If the neighborhood is to become an attractive destination for new residents looking for more urban living, potential residents must be able to envision their daily needs being met within the neighborhood. The retail programming must include daily necessities such as staple groceries, personal care, and neighborhood eateries. Also, a variety of “3rd Places” must be present, public gathering places where local residents and employees can imagine themselves incorporating into their daily routine.



Diversity of Living Options

Diversity is the key to a vibrant and functional neighborhood. Housing typologies must be diverse enough to meet the needs of the distinct demographic segments wishing to live in an urban environment. Young professionals, families, young adults, and seniors wishing to age in place each have different housing demands that should be met over time, which means incorporating a combination of single-family homes, workforce housing, and convenient multi-family developments.



Distinct, Vibrant Neighborhood

Perhaps most importantly, the neighborhood should build upon its existing history and character, creating a clear value proposition for potential residents, small business operators, and employees. Architecture and scale should be contextually appropriate, and the programming of the retail district should reflect the culture, history, and demands of the existing neighborhood population, Baptist Health Care and the new residents and business who will choose to make this district their home.

Baptist Development Project

Vision

The new development at West Moreno and “E” Street will be a **catalytic project** for both Baptist Hospital and the surrounding neighborhood, and a national model for the hospital-anchored civic revitalization efforts. It will be a **safe and inclusive gathering place** that physically and experientially **integrates** Baptist with its surroundings, and improves the quality of life for employees and residents with **diverse retail amenities** and an **active urban environment**.



West Moreno & E Street looking southwest



West Moreno & E Street looking west

The proposed redevelopment site is the first most critical step in the revitalization of the neighborhood and the enhancement of the Baptist Hospital campus. The mixed-use commercial project, with diverse options for shopping, dining, and socializing, will signal the emergence of a safe and accessible neighborhood with a bright economic and experiential future, as well as serving the expansion needs of the core economic engine that is Baptist Health Care. The development will be the central mechanism for achieving the goals for the City, County, and Baptist by improving the lives of the community through convenience, health and wellness, as well as providing for their daily core needs. The project will be a key public gathering place for employees, visitors to the hospital, and current and future residents, and will therefore be the key agent that will affect true integration between Baptist and the community.

Guiding Principles



Local Independent Operators

In order for the site to be truly catalytic, the retail operators must be beloved ambassadors for the project and the neighborhood. Therefore, it is critical that local independent operators be targeted for tenancy. Independent operators tend to create the most inventive and flexible retail concepts that grow into neighborhood treasures, while serving the key demands of the local market. They tend to assimilate into the culture of a neighborhood more quickly, as well, helping to create and define the neighborhood district identity.



Neighborhood Destination

The site must become the new center of gravity for the budding neighborhood. The project's program should not only cater to the daily needs of the neighborhood residents, employees, and visitors, but it should also have an attractive arrival experience, an active public realm, and convenient, predictable parking. If successful, it will be the place where people will gather, meet friends and colleagues, and choose to spend their free time.



Health & Wellness

All aspects of the redevelopment should promote health and wellness, either directly or indirectly. The pedestrian and bicycle experience should be encouraged through convenience and safety, and the public space should encourage active engagement through sports and recreation, relaxing contemplation, or simply a pleasant and interesting walk. The restaurants and food purveyors should provide healthy options to the consumer at a reasonable price, and wellness-related retailers should be considered and targeted. It should be an environment designed to foster healthy living and habits and cultivate and encourage wellness.



Thoughtful Urbanism

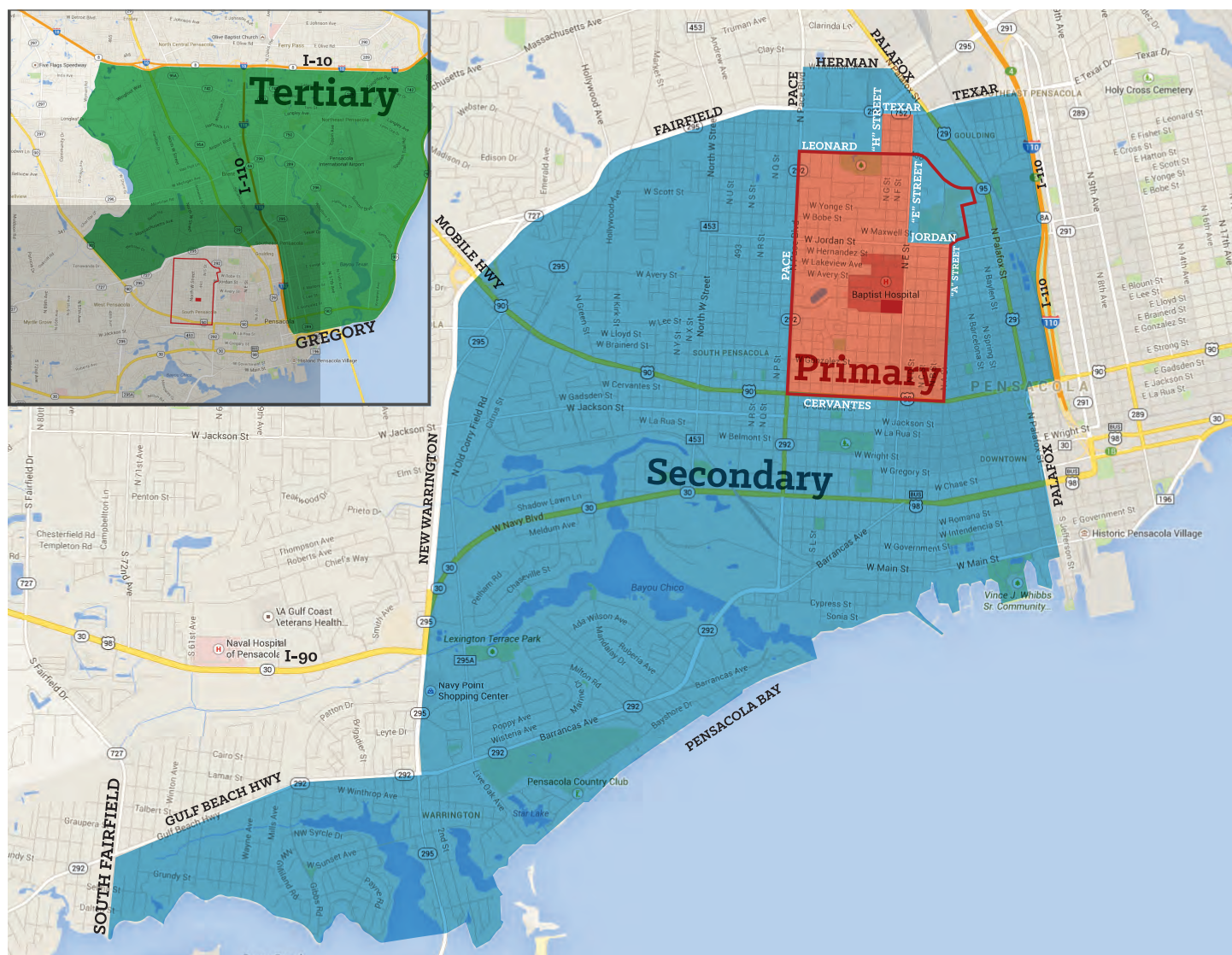
As the project enters the design phase, special attention should be paid to creating an interesting urban environment that is not only compact and vibrant with a diverse range of uses, but also neighborhood-scaled and contextually appropriate. For this project to be truly catalytic for future investment and growth, it must serve as the important precedent that the urban experience is unique, deliberate, and carefully considered, setting a standard for future development.



Target Market Analysis



Target Market Draw Areas



Methodology

Analyzing the target market is a critical step in not only determining the feasibility of a mixed-use retail development as a whole, but also in formulating the types of retail uses that are most likely to succeed within it. The target market is broken into three geographic areas, the primary, the secondary and the tertiary. The target market analysis that follows is based on identifying target retail customer segments within those geographic draw areas. Within these draw areas, the residents, employees, patients and visitors (as the case may be) are quantified and segmented based on having similar propensities and potential to spend time and money on commercial goods and services in the district. We analyzed and identified key behaviors and characteristics that help inform how they would likely interact with the district. While a full Commercial Economic Study to estimate the potential retail economy and viability of retail space was not included in the scope of this engagement, this analysis of the target market is a useful tool beginning to zero in on who could frequent the project and generate that economy.

Target Market Overview

Primary Draw Area

The people who make up the primary draw area are those closest to the district thus having the propensity to spend time and money there. Some might use the district daily and others less frequently, but when programming and designing a mixed-use retail environment, especially one envisioned as a neighborhood destination, it is these users who should generally be considered the primary end-users, and retail uses and design elements should cater to their needs. Our assessment of competitive and complementary urban environments and our review of physical and psychological barriers between adjacent neighborhoods have led to the illustrated polygon above. While we have segmented the primary draw area among employees, residents, visitors and patients, we have also sub-segmented these groups to account for differences in behaviors and desired experiences.

Daily Population 11,281

Baptist Daily Population 6,481

Baptist Employees 5,600 total/daily

Inpatients 13,500 total/ 159 daily

Outpatients 81,500 total/ 223 daily

Hospital Visitors ~236,000 total/ 499 daily

Neighborhood Residents 4,800 total/daily

Secondary Draw Area

The secondary draw area represents the area whose inhabitants and employees will frequent the proposed district less regularly than those in the primary draw area. Employees will be able to frequent the establishments before and after work and during lunch hours, while residents may visit the district on nights, weekends, and holidays but likely no more than a few times per month.

Residents 27,852 total

Employees ~11,757 total

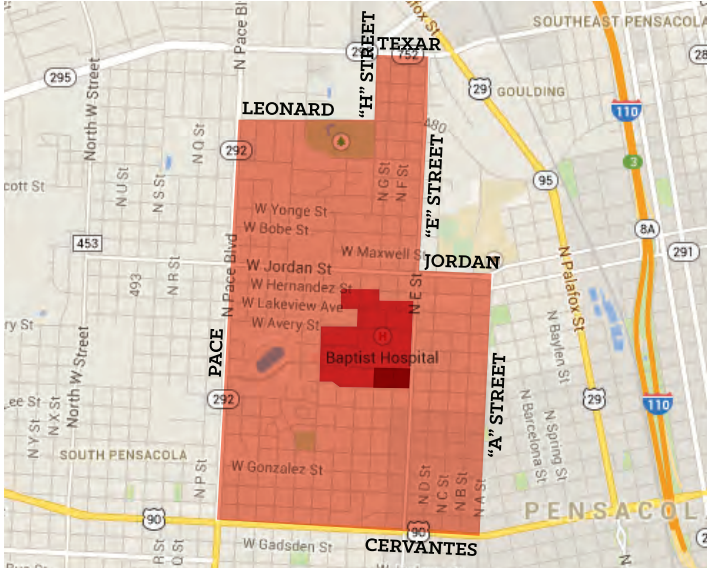
Tertiary Draw Area

Residents of the tertiary draw area will be the least frequent visitors to the project, with a very small percentage of residents potentially visiting the district only a handful of times per year. In order to attract them, it is critical that the neighborhood core incorporates high quality eateries and unique and interesting destination events, as this will likely not be a convenient destination.

Residents 73,677 total



Primary Draw Area: Baptist Hospital



Employees

Total Population (including Lakeview Center):
5,674

Baptist Health Care and its affiliate companies (including Lakeview Center) employ over 4,800 people who work every day on the Baptist main campus. For the purposes of sorting the employees by their spending ability and behavior patterns, we have segmented the employees into three distinct groups*.

**Currently, BHC only keeps a full spectrum of data on their full-time employees, rather than their independent contractors, though the compensation and corresponding ratios are reportedly similar. Therefore, the total number of employees has been estimated based on an extrapolation of the totals provided by BHC.*

Doctors and Senior-Level Executives and Managers

Population: 1,972

This group of employees has flexible hours and the highest salaries. They prefer food and beverage establishments with a higher average ticket price and that have healthier options. They are also more likely to utilize boutique retailers, gym and workout facilities, and personal services and amenities (i.e. massages, dry cleaning). A significant percentage of this group will use the district on an almost daily basis.

Key Behaviors:

- Flexible hours and higher disposable income
- Prefer food and beverage establishments with a higher than average ticket price and healthier food options

Desired Experiences:

- Specialty/boutique retailers, fitness facilities, and personal services and amenities
- Personal Services and amenities for daily/weekly use



Clinicians, Nursing Staff and Mid-Level Managers

Population: 1,540

These employees have less schedule flexibility and disposable income, but still have capacity for non-essential items. They eat lunch at about the same time every day, though clinicians may have more variable hours. They will seek out casual, affordable restaurants, comfortable places for a drink after work, and are also likely to use services and amenities. Although they might not have the disposable income to spend money in the district as often as other employees, they would likely utilize the district several times per week.

Key Behaviors:

- Less flexible hours and disposable income, but have the financial to afford non-essential items
- Concurrent lunch break hours (clinicians may be different)

Desired Experiences:

- Casual, affordable restaurants
- Comfortable places for a drink after work
- Personal services and amenities for daily/weekly use



Administrative Support, Service Workers and Support Personnel

Population: 1,387

This group of employees has clearly defined work hours, lunch and break times. They have less disposable income and are more likely to frequent the quick-serve eateries, and less likely to visit the less essential retail offerings like sit-down restaurants, boutique retailers and personal services.

Key Behaviors:

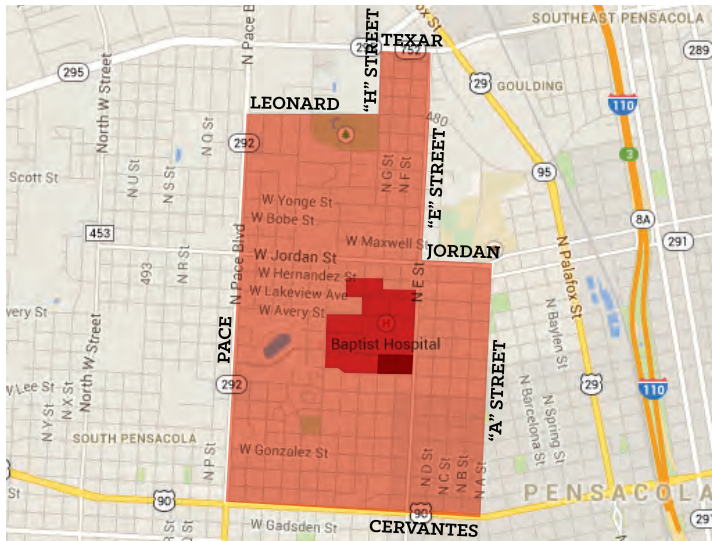
- Defined work hours, and lunch and break times
- Less disposable income
- Less likely to visit higher than average ticket price options

Desired Experiences:

- Quick-serve eateries
- Casual, affordable restaurants
- Comfortable places for a drink after work
- Personal services and amenities for daily/weekly use



Primary Draw Area: Baptist Hospital



Patients

Estimated Annual Patient Visitation:
~95,000

Baptist sees over 95,000 patients per year. Many come from out of the area for inpatient and outpatient treatment. Many of these patients also bring a family member or friend with them, or, in the case of inpatients, they receive visitors. The result is a very large cohort of potential customers for a retail district.



Inpatients ~13,500 (Avg. Length of Stay: 4.29 days)

Inpatients at Baptist will have a low visitation rate, due to the fact that they are incapacitated and receive their meals in their rooms. However, some inpatients are allowed and encouraged to take walks around the campus as part of their healing process and could benefit from access to an inviting public realm proximate to the campus. A commercial district might entice them to return upon discharge. Their time of discharge is likely to be the only occasion an inpatient might utilize the district.

Key Behaviors:

- Low probability of visiting retail offerings due to the fact that they are incapacitated and receive their meals in the hospital
- The only time this type of end-user would utilize a retail district would be upon their discharge from the hospital
- Some are allowed and encouraged to walk around the campus as part of their healing process

Desired Experiences:

- A tranquil, safe environment in which to walk and rest outdoors
- Bedside delivery or rapid prescription fillings by a retail pharmacy like Towers Rx

Outpatients ~81,500

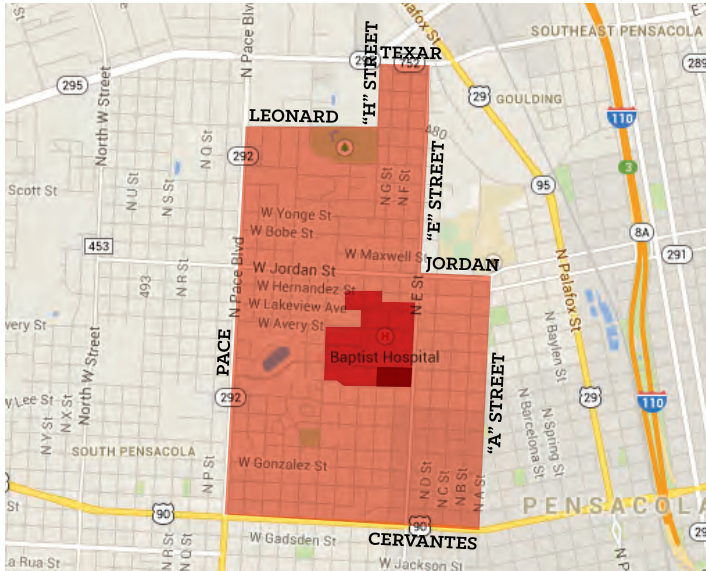
Outpatients vary from those coming to the hospital to treat an acute health issue, ongoing treatments, regular visits, or standing, regular appointments. Outpatients are a key segment to target, particularly those who are not suffering from an acute health problem. Outpatients often have waiting times, and certainly can utilize the commercial goods and services upon arrival or departure.

Key Behaviors:

- Often visit the hospital for minor ailments
- May utilize the retail district due to waiting times at the hospital and can certainly visit the district before or after their hospital appointment

Desired Experiences:

- Neighborhood conveniences, particularly a pharmacy
- Social eateries that are proximate to the hospital
- Specialty gift stores



Hospital Visitors

Estimated Annual Visitation:
~236,000

While the actual number and demographic breakdown of visitors (those coming to the hospital to aid or support a patient) is difficult to estimate, it stands to reason that almost all inpatients have some level of visitor support, and many outpatient procedures require that someone be available to transport the patient to and from the procedure. That support is likely in the form of a friend or family member, so demographic information will mirror that of the patient. Many of these visitors will have protracted waiting times in which they will have the ability to visit the retail offerings, particularly the eateries, gift shops, and personal services.

Baptist Hospital Visitors

Annual Visitors: ~182,000*



Key Behaviors:

- Primarily visit the hospital to aid or support a patient
 - Nearly all inpatients have some level of visitor support
 - Many outpatients require transportation assistance after their procedure
- Demographic information for these end-users will likely mirror that of the patient because these visitors are usually friends or family
- Many of these end-users/visitors will have prolonged waiting times

Desired Experiences:

- A stimulating place (see below) to pass time while waiting for friends or family who are patients at the hospital
 - Retail offerings
 - Eateries
 - Gift Shops
 - Personal Services

**The visitation estimation is based on inpatients receiving 1.5 visitors per day, and 50% of outpatients being accompanied.*

Medical Office Visitors

Annual Visitors: ~54,000



Key Behaviors:

- Patient follow-up visits
- Regular Doctor or specialist appointments

Desired Experiences:

- Convenient, quick-serve dining options
- An attractive, safe, public realm and parking experience

**Baptist
Hospital**

← **EMERGENCY**

W **Blount** St
1400

INJURY
Call
433
H

Primary Draw Area: Neighborhood Residents



Neighborhood Residents

Total Residential Population:
4,854

| 2014 Estimates | A | B |
|---|----------|----------|
| Population | 810 | 4,044 |
| Population Growth (2010-2014) | -0.13% | 2.63 |
| Median Household Income | \$26,488 | \$17,420 |
| Median Age | 37.2 | 40.2 |
| Average Household Size | 2.37 | 2.13 |
| Households Without People Under the Age of 18 | 68.69% | 71.35% |
| Families Below Poverty | 33.16% | 47.41% |
| Renter Occupied Housing | 45.59% | 69.16% |

Source: Claritas SiteReports, 2014

The physical blight and impoverished state of the neighborhood surrounding the BHC campus has been well documented. However, the creation of a commercial center that is anchored by the Baptist campus will be the first step in creating an environment that will begin to infuse new residents with current ones. There is a clear distinction between the residents on either side of E Street, with the number of residents to the east being fewer, but higher in likely disposable income. The residents in the primary trade area will be able to use the district primarily on nights, weekends, and holidays.

Key Behaviors:

- Likely to use the District throughout the day and on weekends
- Will have unrivaled access to the District but with a higher than average unemployment rate, less disposable income

Desired Experiences:

- Traditional neighborhood conveniences
- Civic services and programs
- Restaurants and entertainment
- Diverse, quality retail offerings
- Cultural events and festivities programming



Secondary Draw Area

Residents

Total Population: 27,852

The North Hill district is a neighborhood in transition with a wide array of socioeconomic categories. The proximity to Baptist would enable those residents with the time and money to spend in the district to walk, bike, or drive to the district. Residents who can afford it will have the propensity to visit a few times a month. Their proximity to downtown and its services and amenities will keep them from regularly frequenting the site. Residents west of Pace and north of Barrancas are largely impoverished, with a high rate of unemployment, therefore they will not have the propensity to spend much time and money in the district. They will likely be interested in the lower-cost eateries, and some neighborhood conveniences.

Downtown residents and residents south of Barrancas are farther away from the district than the others in the secondary segments, but as the downtown residential population grows, they will likely have the financial capacity to visit the district. The western residents have fewer dining and retail options in their area than the downtown residents, but are farther away.

| 2014 Estimates | Zone A | Zone B | Zone C | Zone D |
|---|----------|----------|----------|----------|
| Population | 4,119 | 14,858 | 4,138 | 4,739 |
| Population Growth (2010-2014) | 0.34% | 1.96% | 1.69% | -1.39% |
| Median Household Income | \$25,873 | \$28,492 | \$30,244 | \$41,431 |
| Median Age | 42.9 | 36.4 | 43.0 | 45.8 |
| Average Household Size | 2.34 | 2.37 | 2.03 | 2.10 |
| Households without people under the age of 18 | 73.01% | 68.50% | 78.70% | 79.18% |
| Families below Poverty | 35.00% | 24.80% | 20.47% | 14.74% |
| Renter Occupied Housing | 35.96% | 49.75% | 51.39% | 36.64% |

Source: Claritas SiteReports, 2014

Zone A: North Hill Area

Residential Population: 4,119

Key Behaviors:

- Proximity to Baptist Hospital will allow these end-users to walk and access the District regularly
- The proximity of this area to downtown will likely create competition

Desired Experiences:

- Social eateries
- Unique specialty shops
- Neighborhood conveniences

Zone B: Downtown Area

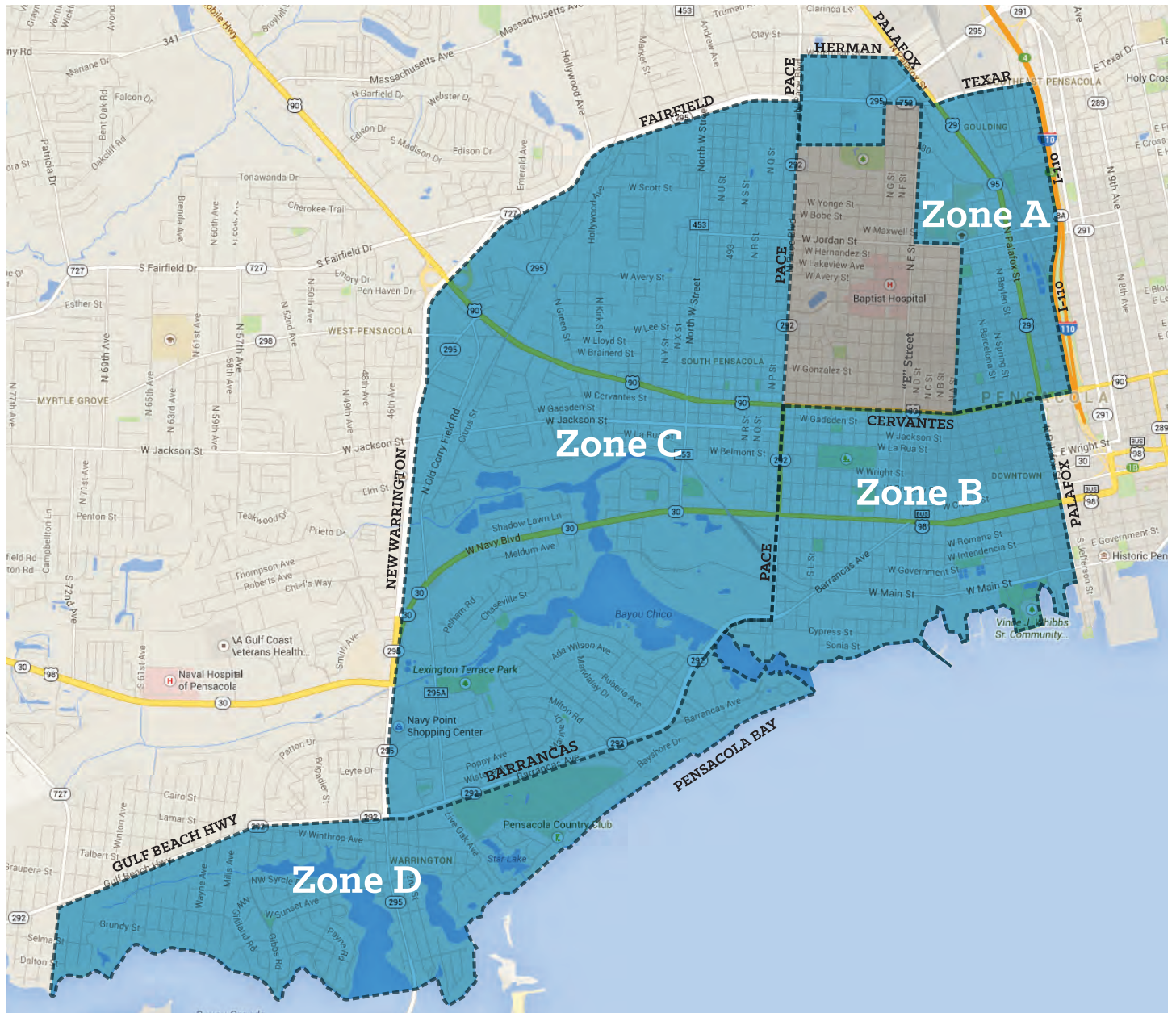
Residential Population: 14,858

Key Behaviors:

- Growing downtown population will have the financial capacity to utilize the District if offered quality uses.
- The proximity of this area to downtown will likely create competition

Desired Experiences:

- Destination cafés and restaurants
- Diverse, quality retail offerings
- Affordable activity based retail uses



Zone C: West of Pace Boulevard

Residential Population: 4,136

Key Behaviors:

- Mainly impoverished households with a high rate of unemployment, these end-users have a highly limited amount of disposable income
- If able to visit the District, quality, affordable retail uses along with everyday neighborhood services and amenities will interest this group

Desired Experiences:

- Quick-serve food and drink
- Neighborhood conveniences

Zone D: Bayou Grande Area

Residential Population: 4,739

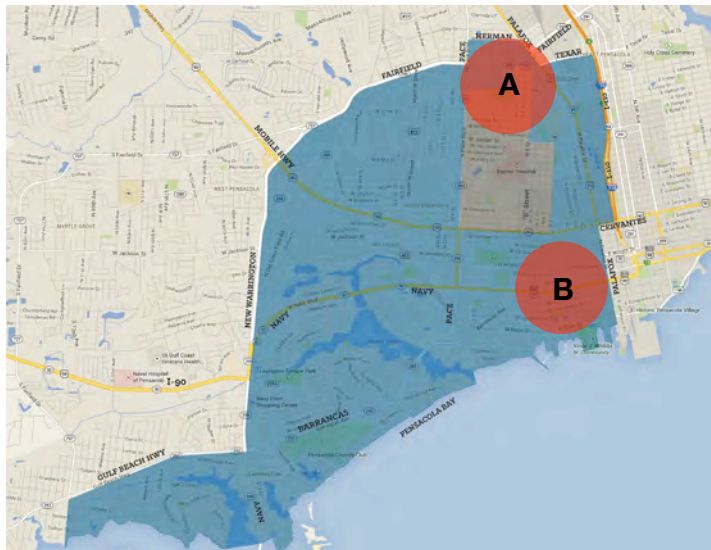
Key Behaviors:

- Too far to use the District for neighborhood conveniences, a quality retail environment could attract them due to the lack of alternative options in the west side of the city
- Residents in this area will utilize the District primarily on nights and weekends, though the higher average age suggests some retirement schedules

Desired Experiences:

- Health and wellness experiences
- Dinner and entertainment

Secondary Draw Area (cont'd)



Employees

Estimated Population: ~11,757

While the employees to the north are currently more apt to utilize fast-food chain establishments in the Cordova Mall area, if there are quality, affordable lunch establishments in the district, it is anticipated that some will find their way to the district, given their proximity and convenience. Downtown employees will be more difficult to attract, given the numerous options available to them in the central business district. However, their familiarity with walkable urban environments will likely attract some of them to quality eateries and unique shopping experiences a few times per month.



Escambia County Central Office Complex



Blount Building, downtown Pensacola

Zone A: Employees to the North

Estimated Population: ~6,563

Public Employees: ~2,853

Private Employees: ~3,710

Key Behaviors:

- More apt to travel northeast to chain establishments in the Cordova Mall area but could be drawn to the District if offered quality, affordable retail offerings

Desired Experiences:

- Affordable lunch options
- Neighborhood conveniences
- Health and wellness related uses

Zone B: Downtown Employees

Estimated Population: ~5,128

Public Employees: ~712

Private Employees: ~4,416

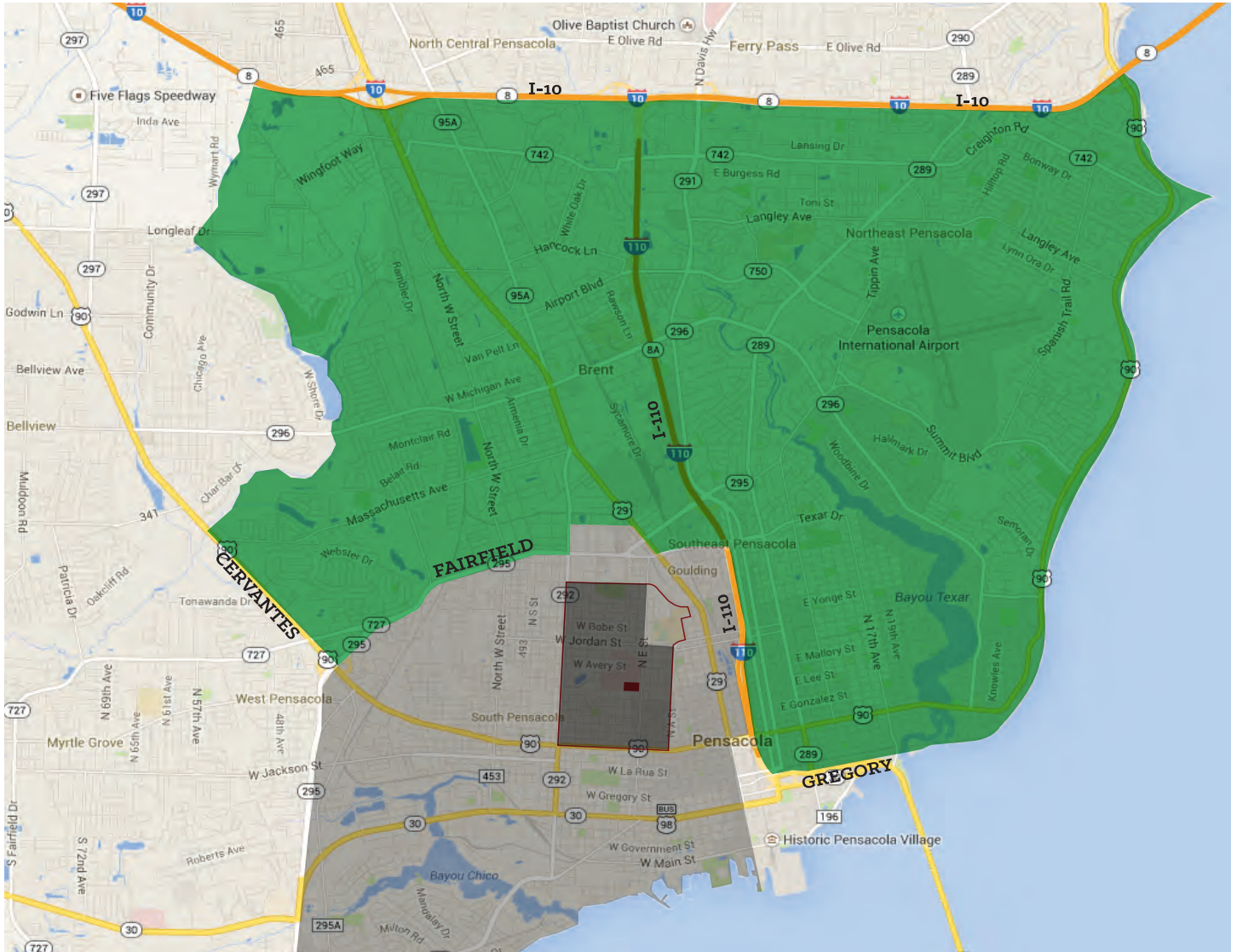
Key Behaviors:

- Given the numerous retail options in the central business district, these end-users will be difficult to attract
- Familiarity with walkable urban environments may draw these employers to the District, if offered a high-quality, unique destination

Desired Experiences:

- Destination eateries
- Unique, quality boutique shops

Tertiary Draw Area



Residents

Total Population: 73,677

| 2014 Estimates | |
|---|----------|
| Population | 73,677 |
| Population Growth (2010-2014) | 1.78% |
| Median Household Income | \$41,628 |
| Median Age | 37.5 |
| Average Household Size | 2.28 |
| Households Without People Under the Age of 18 | 72.53% |
| Families below Poverty | 15.46% |
| Renter Occupied Housing | 37.24% |

Source: Claritas SiteReports, 2014

Key Behaviors:

- Residents and employees of this target market will be the least frequent end-users of the District
- High quality retail offerings will be critical to attracting these end-users who have a wide array of retail options in various areas north of the downtown area

Desired Experiences:

- Destination eateries
- Unique, quality boutique shops
- Destination events and activities

Visitor & Patient Survey Highlights

89%

(only 4.5% believe such an environment will have no impact)

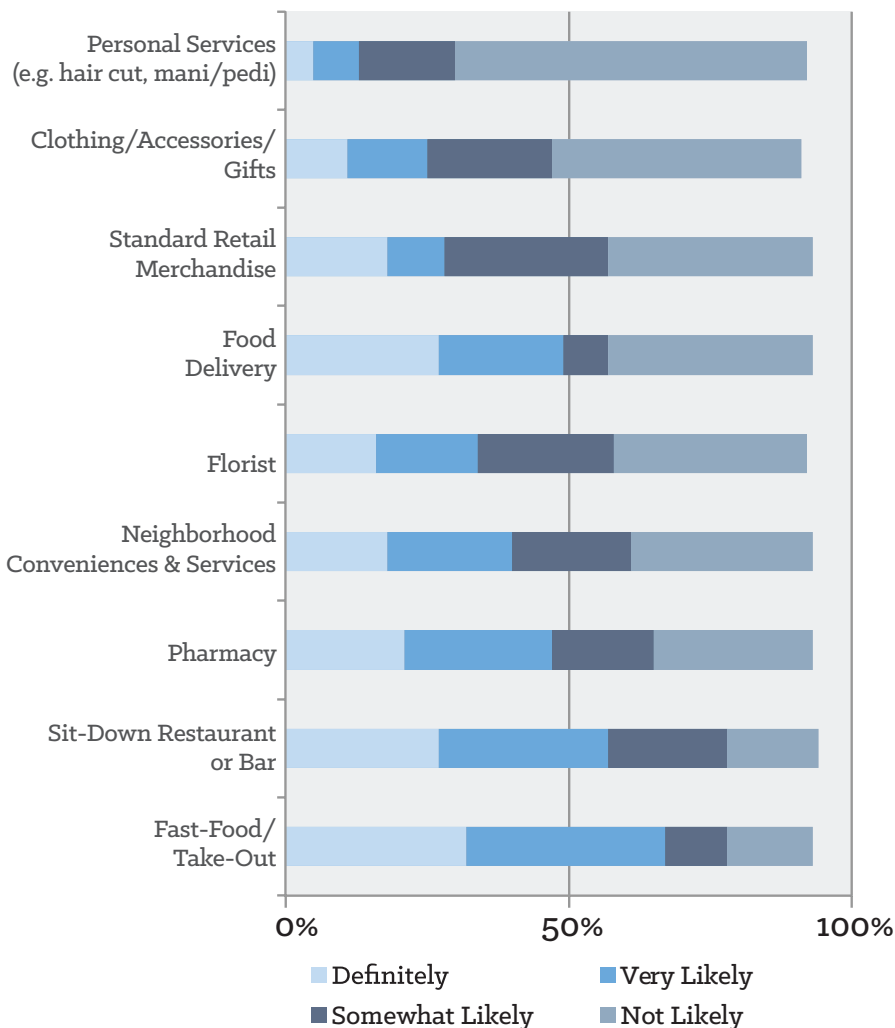
of **patient** survey respondents believe a walkable retail environment will **improve the Baptist Campus experience**

75%

(only 4% believe such an environment will have negative or no impact)

of **visitor** survey respondents believe a walkable retail environment will **greatly improve the Baptist Campus experience**

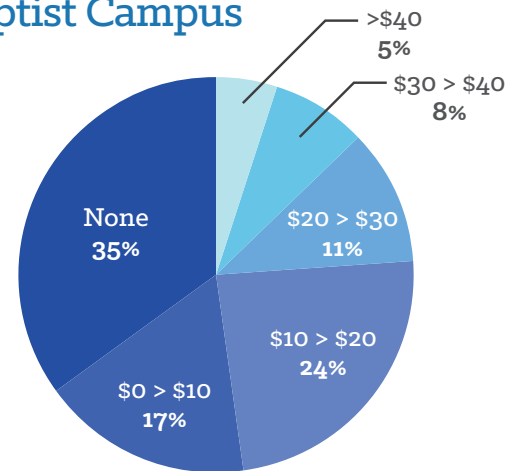
When visiting the Baptist Campus, how likely would you be to utilize the following retail offerings if they existed?



48%

of visitors are **at least somewhat likely** to use **lodging**, if it is **on or near** the Baptist Campus

Amount of money Visitors spend per day/visit on the Baptist Campus



\$3,027,880

Potential Annual Visitor Retail Revenue

(based on an estimated 236,000 visitors per year)



Not even a coffee?

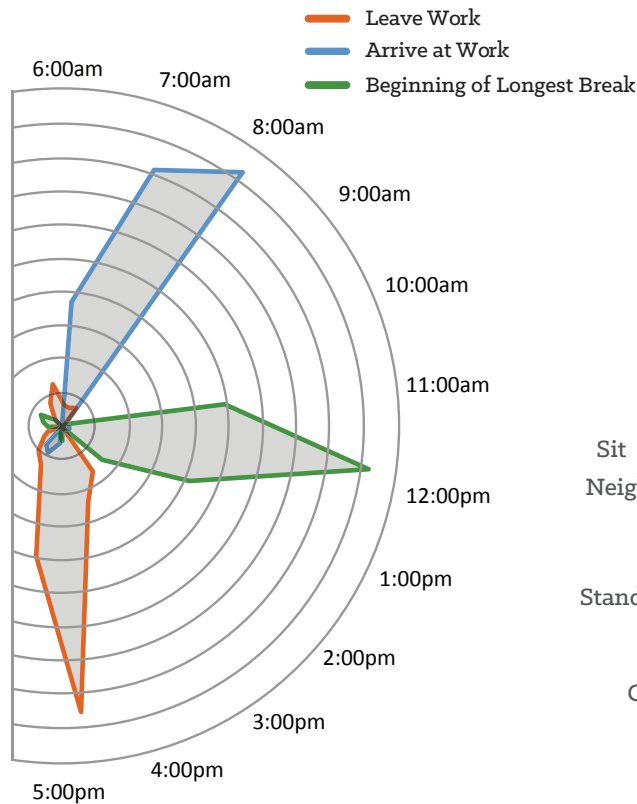
% of visitors reported NOT using the following:

| | |
|----------------|-------|
| Coffee Shop | 62.5% |
| Tower Pharmacy | 69.5% |
| Gift Shop | 71.6% |
| Sunshine Café | 88.5% |

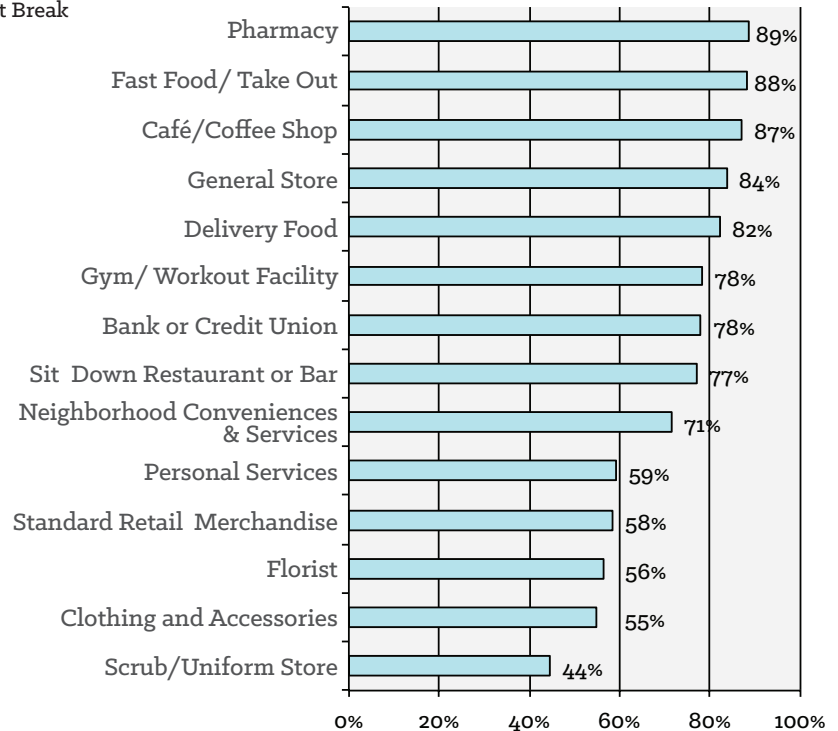
(Discrepancy between what visitors want, and what visitors do points to a significant latent demand)

Employee Survey Highlights

Employee Workday Behavior



Employees report being at least “somewhat likely” to utilize the following a minimum of once per week



56%

of employees **eat breakfast** on the Baptist Campus at least once a week

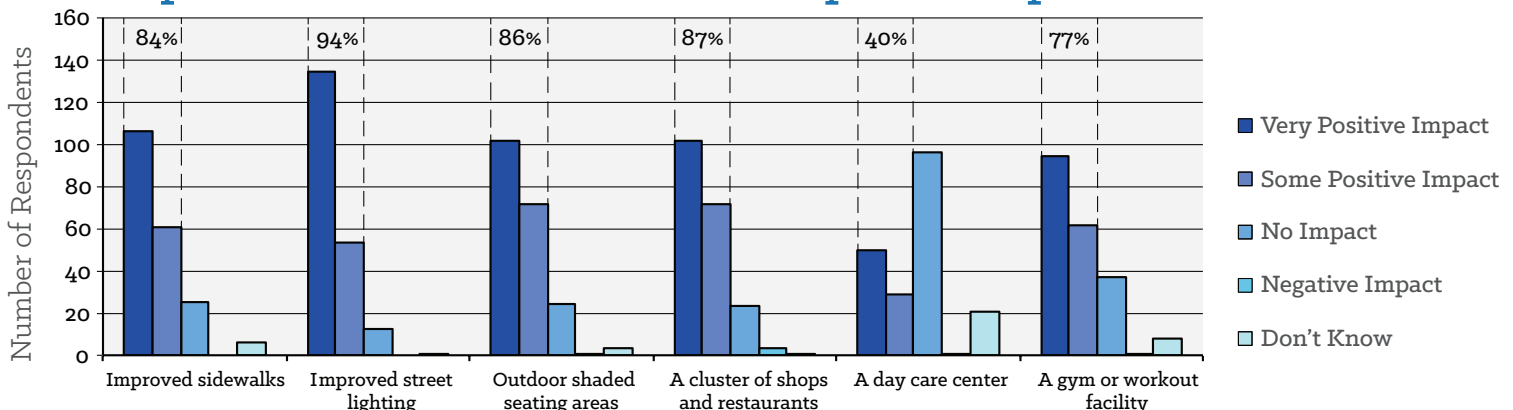
90%

of employees **eat lunch** on the Baptist Campus at least once a week

50%

of employees **eat lunch** on the Baptist Campus at least twice a week

Impact of Potential Uses on the Baptist Campus



Respondents: Employees (Online): 241 | Patients (In Person): 96 | Visitors (In Person): 75





Preliminary Programming

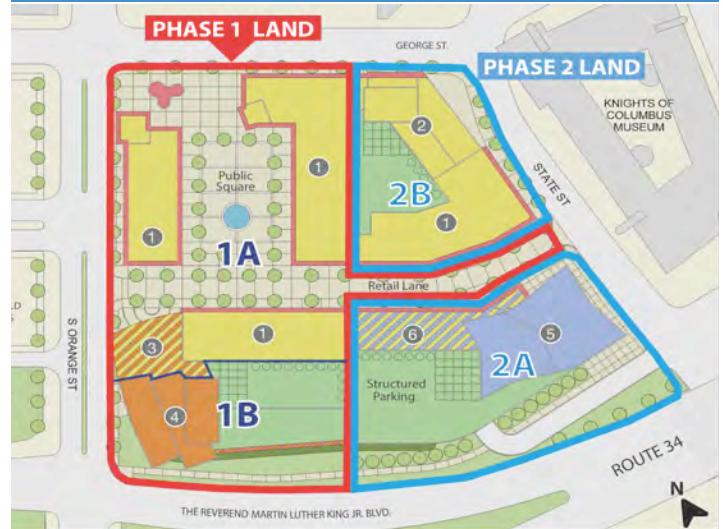


Phasing Principles

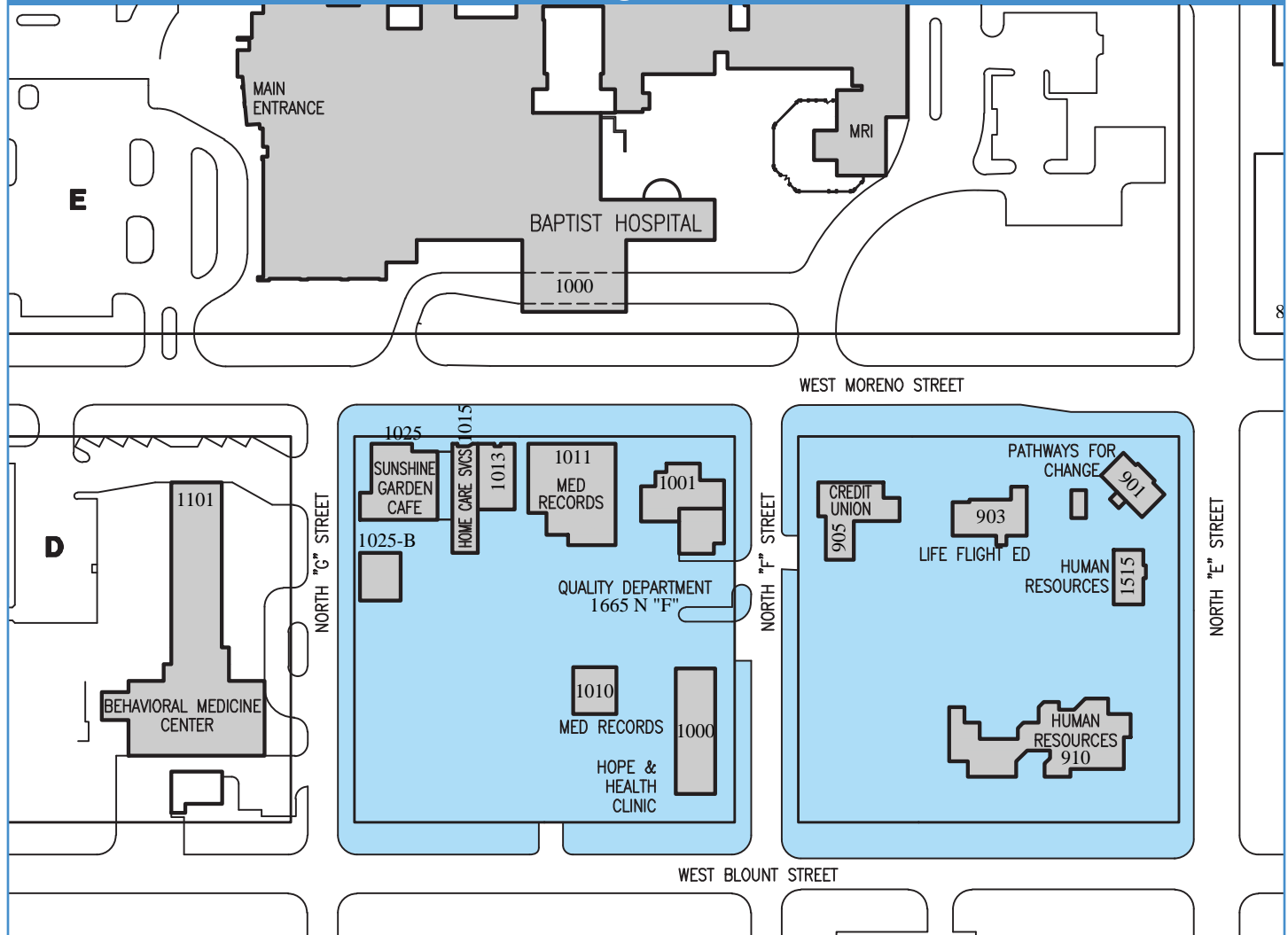
Given Baptist's current office requirement and the realities of the primary draw area, the entire two-block parcel will not be developed in the first phase of development. However, it is critical that the first phase of the project be designed in such a way that it will appear complete as a stand-alone project, and yet will also seamlessly integrate with potential future phases. This phased approach is most effectively achieved by beginning with a master planning process that envisions the future in a conceptual and flexible manner, with the understanding that future circumstances may dictate change.

In addition to envisioning the uses and locations of future development, an interim land use strategy should also be employed. Rather than allowing the undeveloped portion of the site to remain as a cleared development pad, interim uses are suggested in this report to create an environment without holes in the urban fabric and experience.

Phasing Site Plan Example:
LWLP Coliseum Development, New Haven, CT



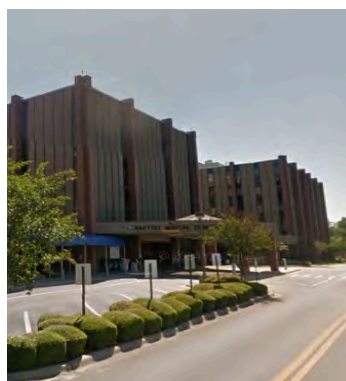
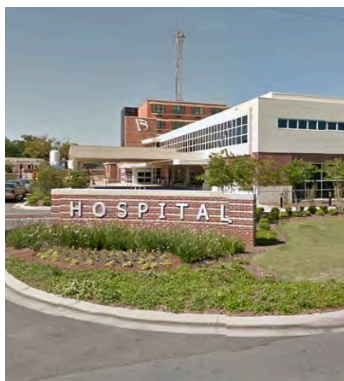
Existing Site Area



Baptist Professional Office Space

Professional Office Building

Baptist Health Care has communicated a very specific, but potentially flexible, space allocation program for the proposed office portion that will drive this first phase of the mixed-use development. As the table below details, Baptist has identified over 66,000 SF of office tenancy that could be located in the first phase of development, as it attempts to relocate office users from the Medical Towers, from makeshift, repurposed cottages, and even from off-campus. As time passes, however, the total square footage may expand or contract based on the financial viability of phase 1 as well as the growth of Baptist's burgeoning in-house physician program and its associated medical office requirements.



From Baptist Medical Towers

Total Required SF: 16,429

Additional SF: 4,777

- Service Line Directors
- Surgical Admin./Ormis Support
- Decision Support/Internal Audit
- BHC Foundation
- (BHC Administration)
- Accounting/Finance
- Reimbursement
- BMG Administration
- Insurance Verification
- BMG Marketing & Recruiters
- BMG Finance

From Street Buildings

Total Required SF: 18,432

- Corporate Compliance
- Marketing Strategies
- Medical Records
- Case Management
- Marketing Communications
- Human Resources
- Risk Management

From Other Possible Tenants

Total Required SF: 1,791

Additional SF: 17,000

- (Business Office)
- Volunteer Services
- Education

From Other Inventory

Additional SF: 9,000

- (Information Services)

Totals

Required Program: 36,652 SF

Additional Desired Program: 30,777 SF

Optimal Program: 67,429 SF



Retail Programming Principles

Prescribing the most appropriate retail concepts to be included in the proposed development is a crucial determinant of success. It is also necessary that the retail programming be consistent with the overarching goals of the development and the neighborhood as a whole. Therefore we have outlined the following guiding principles for retail programming toward the goal of achieving an experientially excellent and economically viable retail environment.



Local Independent Operators

As mentioned in the guiding principles for the project, populating the retail units with local and independent operators is key to creating an urban retail environment. First, the project must be clearly differentiated from the national retail offerings to the north and along the key arteries. Second, local operators tend to immediately immerse themselves into the community and become local ambassadors who help promote the neighborhood as well as themselves. Lastly, independent retailers offer the kind of flexible and creative retail experience necessary for a unique mixed-use experience.



Versatile Concepts

With limited retail space likely available in the first phase of development, it will be critical that each concept be flexible enough to offer more than one neighborhood benefit in order to achieve a well-rounded neighborhood experience, as well as to ensure they have different revenue streams to support their economic viability. For instance, the grocer might offer prepared meals, the coffee shop might also serve a light dinner, and the shoe store might also host a running club. A diverse and financially viable retail environment is achievable with limited space, but only if concepts are able to diversify themselves as well.



Healthy Living

Retail concepts that promote or complement a healthy lifestyle must be prevalent within the project. Whether it is a grocer that offers fresh local produce, a fitness/wellness concept, or a café with vegan and vegetarian offerings, each selected tenant should be willing and eager to incorporate health and wellness into their concept. It is a hallmark of the Baptist Health Care mission and will be an important branding effort as the neighborhood is marketed to the broader population.



Needs of Primary Market

Each of the targeted retail concepts should be tailored to meet the daily needs of the primary market. The temptation to be "all things to all people" should be avoided, and rather the desired experiences and necessary services and amenities required by the neighborhood residents, employees, patients and visitors should be the key programmatic driver. This new district will be a micro-economy, and those people using the district on a daily basis will be the key to success.

Potential Retail Uses

Food & Beverage



Coffee & Sandwich Shop

Café experiences have become ubiquitous due to the many numbers of ways they are utilized by students, employees and residents as gathering places, for lunch, for morning coffee, and for solitary study.



Neighborhood Grill & Pub

With evening activity currently sparse, a grill and pub would offer employees and residents a place to have a drink after work and even stay for dinner. Visitors of patients will also appreciate the respite.



Healthy Treats

Sweet dessert and snack options are excellent pedestrian traffic generators with extended active hours. Families, employees, and visitors will appreciate those treats if healthier options exist.



Quick-Serve Breakfast & Lunch

Employment centers and young neighborhoods benefit greatly from the inclusion of convenient, fast breakfast and lunch options for people with limited free time or disposable income.



Casual Full-Service Dining

The success of the Sunshine Cafe is a clear signal that the market exists for a casual full service dining options. A strong patio presence and healthier options will increase that demand.

Daily Services & Amenities



Neighborhood Market

A health-conscious, high-quality market that offers staple grocery items and fresh produce, as well as prepared meals, would fill a clear need for both residents and employees.



Salon

A hair and nail salon is a popular neighborhood amenity that would serve neighborhood residents, employees, and visitors to the campus.



Pharmacy

Currently, about $\frac{2}{3}$ of Tower Rx revenue is from the community outside the hospital, despite its internal location. An exterior location with available parking would improve convenience without sacrificing existing customers.



Day Care

A neighborhood and hospital day-care concept could provide employees and young neighborhood residents with a place to drop off children while shopping, working, or playing.



Dry Cleaner

Dry cleaning and wash-and-fold services are important neighborhood amenities that could serve employees and residents.



Potential Retail Uses

Health & Wellness



Fitness Center

A fitness center that would also house some physical therapy functions could have a broad appeal, while also utilizing some upper story space.



Wellness/Day Spa

A wellness center that offers massage therapy and dermatology services would be an excellent amenity for residents, employees, patients and visitors.

General Retail



Florist/Gift Shop

Locating the gift shop within the district would attract more visitors to the new development and showcase the new concepts.



Occupational Retail

Our interviews suggest that demand may exist for a small retail space that sells clinical attire, rents medical equipment, and sells other functional clothing items.

Public Realm Programming

Public Realm Programming Principles

The public realm is a vital portion of the built environment that defines a city's identity through facilitating the circulation of people and resources, and defining the connections between different places. It primarily consists of roadways, sidewalks and various types of open spaces that create the urban fabric where social interaction occurs. A well-designed public realm balances mobility and access needs for all users and contributes to the sense of place by encouraging users to engage with the city's environments in a manner that is inclusive to all users. Therefore, it is important that the public realm is safe, sustainable, and accessible. Our assessment of the existing conditions as well as the broader vision for the neighborhood and the site has yielded the following guiding principles for creating an active and inviting public realm.



Scale

The scale of the urban environment often refers to the architectural proportions of urban spaces in relation to their users. In order to support the creation of a place that is vibrant, inviting and inclusive, the scale of the environment must fit the size of the person in such a way that safety, accessibility and comfort are paramount. Certain design amenities must be provided to allow for people to rest, socialize and pass through so that they are encouraged to spend time in the public realm and activate these spaces.



Affordability

The creation of a thoughtful, sustainable and accessible public realm need not be expensive, as the core fundamentals that drive the design of such spaces are derived from best practices, which are not dependant on costly construction materials. The public realm should be a durable environment that can withstand the wear and tear of weather and daily use, so a certain level of quality must be attained. This level of quality can be achieved through the design and construction process and not necessarily through expensive materials.



Comfort/Accessibility

The public realm should first and foremost invite users to stay and use the spaces available, by designing environments to be comfortable and accessible to all users. The notorious heat of the region should be mitigated with shade trees and permeable, green surfaces, for instance, and the main plaza and patios should have seating options that encourage informal gatherings and outdoor dining.



Surface Permeability/Green Space

Because storm water management is an important consideration, the surface of the public space should be permeable wherever possible, and ample green space should be incorporated throughout the project to allow water to enter the ground. Aside from being less expensive to maintain, green space reduces the heat island effect of paved surfaces, while adding to the aesthetic quality of an urban environment.

Potential Public Realm Uses

Public Realm Elements



Public Plaza



Terraces/Patios



Functional Public Art



Nightscaping



Trees & Shade



Outdoor Seating

Interim Land Uses

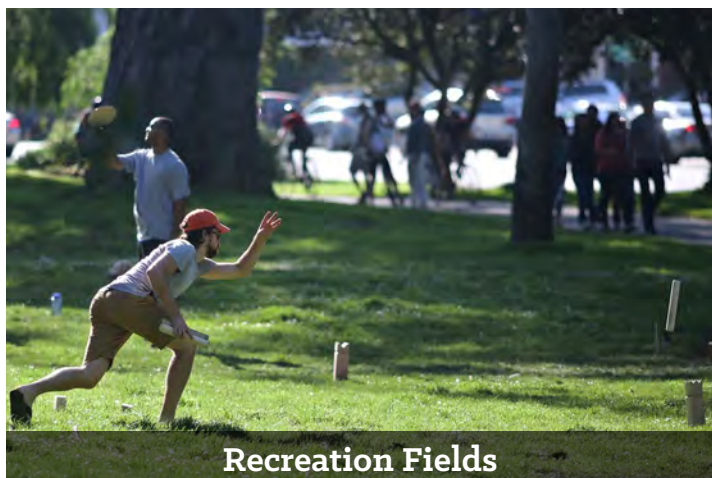
Potential Interim Programming

Once the first phase is complete, a significant portion of the site will remain undeveloped. Rather than appearing as vacant and unused, the undeveloped portions of the site should be programmed with interim uses and events to ensure that the entire site is active as it awaits future development. Interim programming also attracts new people to the neighborhood and creates rituals and habits for existing residents and employees. Though the location of the undeveloped portion is difficult to predict at this stage of the process, we anticipate that the following interim site activation initiatives be considered during the master planning stage.



Community Gardens

As an interim and potentially long-term use, community gardens have been a powerful tool for creating positive social and economic changes within challenged neighborhoods. Widely adopted as a community building resource that provides access to a healthy, natural source of food, community gardens also address issues of stormwater management and radiate heat through more permeable and less heat absorbent surfaces when compared to paved landscapes, such as asphalt or concrete. Within the Baptist and Westside community, community gardens could become a conduit for addressing multiple goals, including healthy communities, community education, engagement and cohesion, equitable places, beautification, stormwater management, brownfield contamination.



Recreation Fields

Temporarily programming a section of green space as a community recreation field would offer an important opportunity for neighborhood residents to utilize the site for soccer, Frisbee, or other active recreation activities that require a large open space. This use would meet the principle of creating opportunities for healthy lifestyle as well as providing a needed neighborhood amenity.



Events Programming

Neighborhood rituals, events and festivities such as a weekly farmers market, seasonal festivals, and small-scale concerts and performances often require large open spaces like those which will likely be available. Evening and weekend activities would add to the retail viability during the times when Baptist has fewer employees on campus.

Potential Future Programming

In order to properly master plan the entire site, it is necessary to begin the conversation with what other uses might occupy the portion of the parcels that will remain undeveloped in phase one. Based on our interviews with Baptist executives, and our assessment of anticipated demand over time, we have identified the following future development opportunities as potentially viable in the medium to long terms as the campus and the neighborhood matures. These will need to be validated over time based on market demand and realities.



Hospital Expansion

It is difficult to predict how the hospital might expand over the next decade, but with the brand development efforts related to the Andrews Institute and the Mayo Clinic, it is reasonable to imagine that Baptist might consider adding additional medical office or other ancillary services to the campus. Locating a hospital expansion on upper stories could allow for further development of the retail core, which would only add to the neighborhood experience.



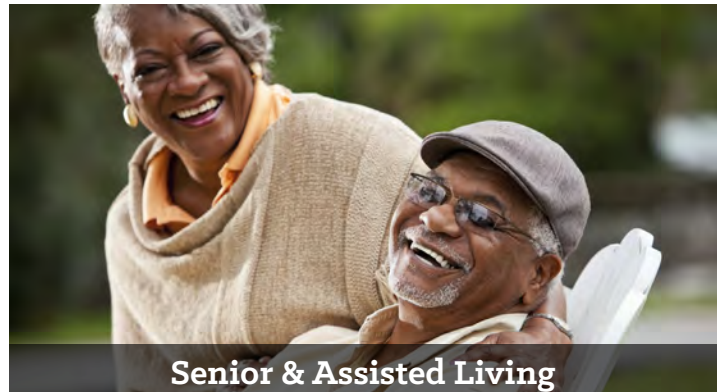
Hospitality

Our discussions with Visit Tallahassee yielded a lukewarm assessment of the current demand for hospitality options in the downtown Pensacola market. Current internal accounting procedures make it difficult to determine Baptist's annual hotel expenditures for visiting consultants and doctors, nor is there a means of tracking overnight stays related to family and friends of patients. However, as the Baptist neighborhood and downtown Pensacola matures, a small hotel with meeting space might meet a latent or burgeoning demand.



Multi-Family Residential

As demand for urban living options increases over time, as is expected throughout the United States, and particularly in Pensacola due to the rapid expansion of downtown, a multi-family residential development could prove feasible in the next phase of development. Younger medical professionals wishing to live close to work, or aging seniors desiring to be near their healthcare provider could be two large potential user groups for such a typology.



Senior & Assisted Living

Independent, assisted living, and memory care facilities located in or around the site may prove to be an important component for future development. Given Baptist's ability to provide supplemental medical care and the existence of an interesting and lively neighborhood core, the district could prove to be an attractive location for seniors and their families, and serve or serving an exponentially increasing demographic segment.

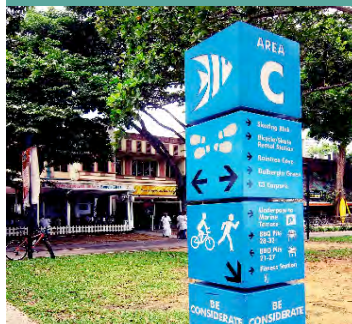
Parking

Parking on the Baptist campus currently consists of large expanses of surface parking, the bulk of which expands west and north from the hospital and the medical towers. Other parking areas have evolved throughout the West Moreno corridor. Heretofore, constructing structured parking has not proven economically feasible or necessary due to the amount of excess land owned by Baptist. However, the result is a parking plan that is unorganized and expansive, and not conducive to a vibrant urban streetscape. LWLP does not anticipate that the financial pro-forma of the first phase of development will support the construction of a parking deck, but does recommend several interim steps to improve the parking configuration to better serve the campus as well as to add to the retail viability of the new development.

A more in-depth parking study will be necessary as part of the master planning process, but LWLP recommends the following adjustments be considered. First, West Moreno should be widened to accommodate short-term or metered on-street parking to allow for convenient access to the retail environment. Second, wherever possible, the current patient, visitor, and employee parking zones and access routes should be reconfigured to allow for proximity and interaction with the new mixed-use development. Third, bicycle racks should be installed near the new development to incentivize bike commuting and access to the retail. And finally, to improve the pedestrian experience, the existing off-street parking should be consolidated to the interior of the campus to allow for future and even temporary active uses to be placed along West Moreno.

As the campus matures, structured parking will likely become more financially feasible as the cost of construction can be shared among existing and future users, and may also prove necessary to serve the growing populations in the district. When it does, to preserve the urban fabric, the parking decks should be obscured, set back from the street, or wrapped with active ground floor uses.

Short-Term Strategy



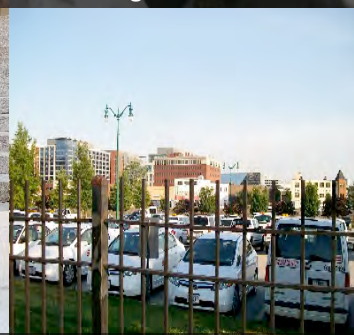
Reorient Parking Zones to Allow for Interaction with Retail District



Time-Limited Street Parking Along West Moreno



Prioritize Bicycle Parking



Off-Street Surface Parking

Long-Term Strategy



Hidden/Obscured Structured Parking

Streetscaping

Streetscaping consists of the various elements that make up the public right-of-way, including sidewalks, streetlights, medians, roads, street trees and bike lanes. They are publicly built and managed, but they are critical components to the experience of a mixed-use neighborhood like our study area endeavors to become. One needs to look no further than downtown Pensacola or the North Hill district to see the profound impact streetscape improvements can have on private investment. Most importantly for the neighborhood as a whole, the sidewalk network needs to be complete. It is not necessary in the more residential areas to have sidewalks on both sides of the street but the sidewalks that currently exist need to connect to the arterial sidewalks, and arterial roads (like West Moreno) should have sidewalks on at least one side of the street. Pedestrian crosswalks should be painted wherever a sidewalk meets a road and street trees should be considered in areas where none exist, particularly in the areas that will become more commercially vibrant. Finally, with safety a prime concern in the area, dark spots need to be identified and remedied by increased streetlighting.



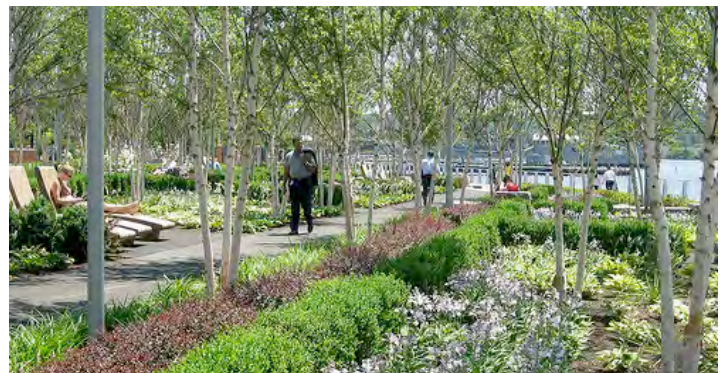
Wayfinding & Neighborhood Signage

One of the city's stated policy initiatives is to improve neighborhood identity efforts. Successful efforts have been made nearby in the Belmont-DeVilliers and the North Hill districts. Neighborhood signage in the Baptist neighborhood would be an excellent first step in creating a sense of neighborhood unity and pride. Upgraded street signs, arrival gateway monuments, and streetlight banners should be installed first around the major access points and core of the neighborhood, and then expanded over time. A complementary effort would be to install internal wayfinding signs that direct pedestrians and vehicles to the neighborhood core and Baptist campus. Additionally, wayfinding that attempts to draw people in from outside the district should be explored.



Parks & Open Space

Parks and green space are critical not only to storm water management, but also to efforts to foster a healthy, walkable neighborhood. Currently, Morris Court Park is the only public park within the neighborhood. Armstrong Park is within a relatively short walk from the campus, but is widely considered to be part of the North Hill neighborhood. However, the water retention pond on the western side of West Moreno St. has the potential to be converted into a public green space with the simple addition of sidewalks and benches. Other blighted structures should be considered for public acquisition for small "pocket" urban parks.





Public Sector Participation





A Necessary Partnership

In order for the Baptist Health Care project to be developed in such a way that the aforementioned goals of the city, county, and Baptist are achieved, public investment and cooperation will be required. Our discussions with public officials indicate that the appetite for such a partnership exists for the express purpose of lifting an historically underserved population and neighborhood out of the throes of poverty and blight. Without public support, the most economically feasible approach to meeting the Baptist professional office space needs would be the construction of a single-use office building or complex. However, such a development would have little or no effect on the economy or experience of the neighborhood. Conversely, it is clear that the public sector does not have the resources or public mandate to initiate the level of public improvements required to significantly incentivize the private sector to invest in the Westside neighborhood. The fact that the city and county joined Baptist to explore this opportunity collectively is further testament to the public sector's understanding of this reality.

The city and county have limited resources that must be deployed across their respective jurisdictions. How that deployment is allocated is a function of often competing variables such as political influence, perceived need, and stated policy, among many others. In the end, however, public administrations are held accountable for the end result of the use of resources. Therefore, it stands to reason that opportunities wherein public resources can be tied to a significant private investment by a major economic anchor for clear public benefits that reinforce stated city and county objectives deserve consideration.



Focused vs. Dispersed Public Investment

The public sector generally has a limited capacity to spend, and therefore public investment is often made in a piecemeal fashion in geographically dispersed areas where some aspect of the public realm has fallen well below standard, such as in the case of potholes, crumbling sidewalks, or blighted structures. When public safety is a concern, obviously such investments are necessary, but the effect is that dispersed investment largely goes unnoticed, and it rarely spurs additional private investment. However, in an urban environment, focused public investment, in conjunction with private investment, in neighborhood cores can have an exponential impact on future private investment, and the result is often transformative. Throughout the county, state, county, and municipal governments are beginning to understand that tying public investment to major private development projects creates an exponential return on that investment in both the short and long terms.



Precedents

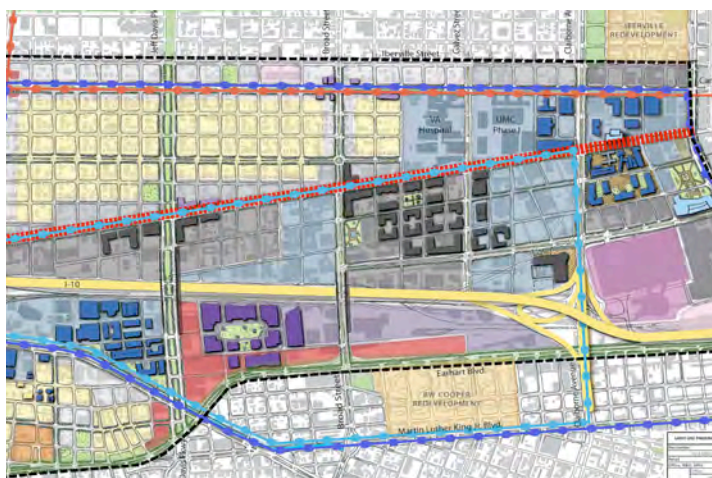
Below are two of many examples in other markets where the public sector is leveraging the effects of medical anchors to affect change in historically underserved populations. Fueled by the growth trajectory of healthcare and life sciences industries, these medical districts offer a much needed investment infusion to adjoining neighborhoods and communities seeking to gain traction with their revitalization efforts. Through the clustering of complementary uses, they facilitate the strategic leveraging of public/private assets with the goal of repurposing vacant land, dilapidated structures and underutilized property.

Local governments and planning departments are capitalizing on this movement by envisioning “town center” concepts similar to what is proposed in this report, where the medical center or health sciences complex would serve as the anchor for an expansive community replete with housing, active green spaces, walkable arterials, organic grocery stores, fitness centers and other lifestyle conveniences.

Bio District - New Orleans, LA

<http://biodistrictneworleans.org>

<http://biodistrictneworleans.org>



Spanning 1,500 acres in the downtown and Mid-City areas of economically ravaged New Orleans, this district will feature a world-class bioscience ecosystem providing high-paying jobs in research and development and healthcare delivery.

University of Colorado, Anschutz Medical Campus - Denver, CO
<http://www.ucdenver.edu/anschutz>

<http://www.ucdenver.edu/anschutz>

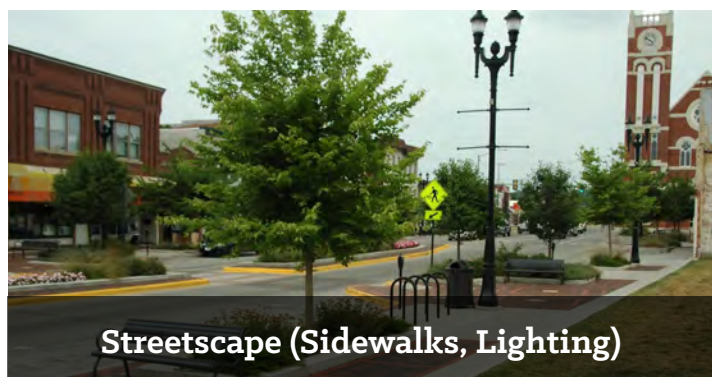
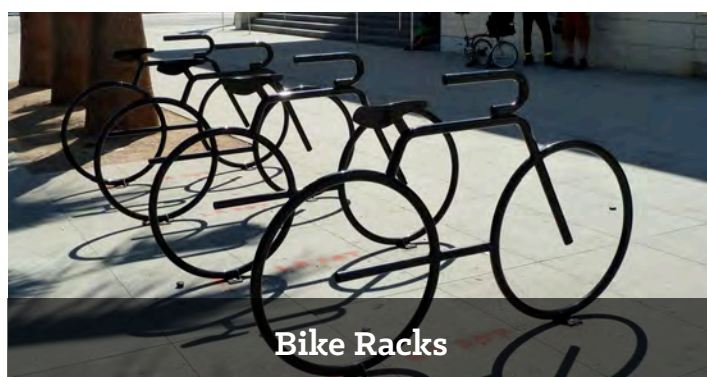
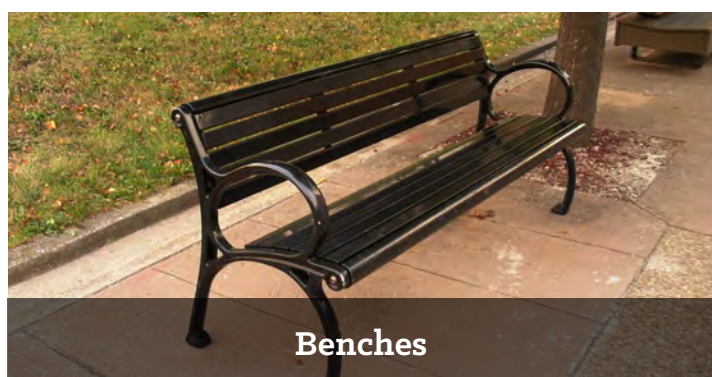
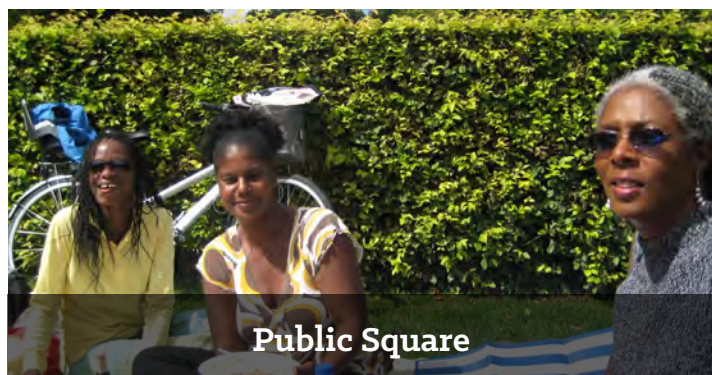


Abutting one of Denver's most blighted neighborhoods, this Campus is a recent public private partnership supporting area residents in identifying neighborhood resources and healthy lifestyle options as well as expanding workforce development efforts.

Potential Public Initiatives

Public Investments

Our discussions with public officials have uncovered several existing public initiatives that could be employed to add value to the project. While a more extensive project-costing exercise will be necessary to pinpoint the most effective areas where public support of the project will be required, the following represents a list of potential areas where public support might be required.





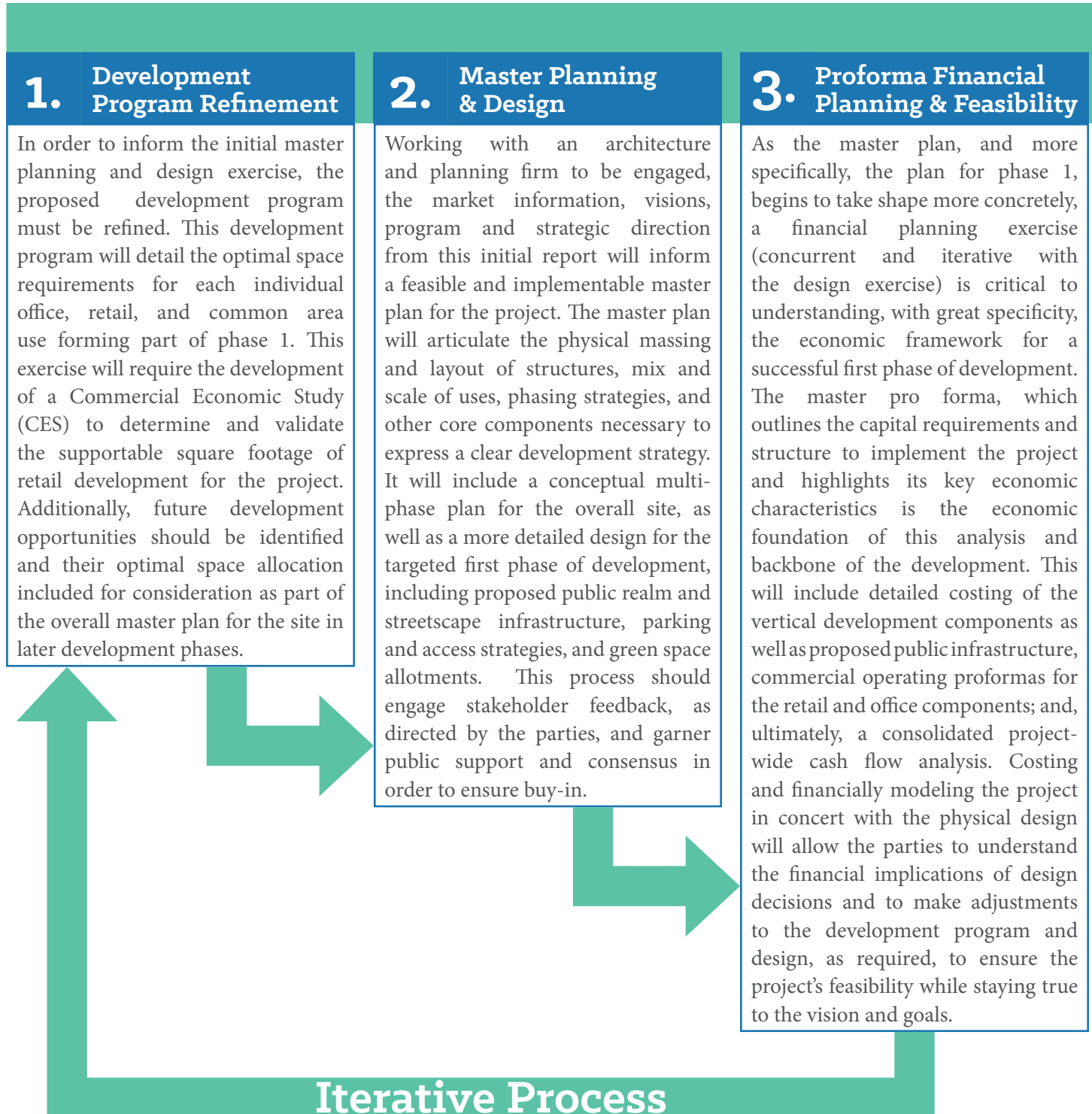


Next Steps



Next Steps

In order to move this project forward, the goals and conceptual vision outlined in this report need to be translated into a physical master plan and phase 1 design, developed iteratively and in conjunction with a financial planning exercise. This is essential in order for all parties to understand the nature of their relative commitments (financial and otherwise) and the development outcomes to be generated from those commitments. Once funding and financing commitments are solidified from all parties, implementation of the development can move forward.



4. Funding & Financing Commitments

Once the physical design and correlated financial picture of the project is well understood, the required levels of investment and funding sources required to move the project forward feasibly will be articulated. The next step is to firm up the relative financial commitments of Baptist Health Care, the City of Pensacola, Escambia County, and any private development partner in order to enable the start of vertical development.

5. Development Implementation

With financing and funding commitments in place, the implementation of the project will begin, taking the first phase of the project from a conceptual plan into a real, built place. Initially, this will include the effort of detailed design development and engineering of the physical buildings and infrastructure, concurrent with site preparation and a targeted leasing process to secure the desired retail businesses for the project. This will also correspond with the public launch of the project, incorporating strategic public relations and marketing efforts to communicate both the how and why this project is being developed, as well as its potential as a significant long-term opportunity for small business owners, local investors, and potential residents.





A photograph of a busy outdoor cafe scene. In the foreground, a large, mature tree with green leaves stands on a sidewalk. Several people are seated at small tables with black metal chairs. Some are looking towards the camera, while others are engaged in conversation. In the background, a building with large glass windows and doors is visible. A group of people is standing near the entrance, and a man in a dark suit is walking towards the right. The scene is set during the day, with natural light illuminating the area.

Appendix

Appendix A: Documents & Information Reviewed

- **Vision 2015 Initiative (Current)**

Greater Pensacola Chamber: Economic Development Website

- **Enterprise Zone Strategic Plan (December 2003)**

Escambia County Neighborhood & Environmental Services Department

- **Escambia Consortium, Florida: 2010-2014 Consolidated Plan & 2011/2012 Annual Plan (August 15, 2011)**

Escambia Consortium

- **Real Property Market Analysis & Recommendations for: Community Maritime Park, Pensacola Deepwater Port & Pensacola International Airport (August 2013)**

CBRE

- **Westside Community Redevelopment Area Plan (April 2007)**

The RMPK Group

- **Brownsville Redevelopment Plan (Updated March 2004)**

Escambia County Community Redevelopment Agency

- **Englewood Community Redevelopment Plan (Updated March 2009)**

IBI Group, Inc.

- **Baptist Health Care - General Information (Current)**

Baptist Health Care Website

- **“Final Report” (Date Unknown)**

Healthplex/Trinity Health Group

- **Baptist Health Care Retail Information (2013)**

Baptist Health Care

- **Baptist Hospital Retail Rent Roll (May 2014)**

Baptist Health Care

- **Baptist Hospital Retail Sales Report (March 2014)**

Baptist Health Care

Appendix B: Key Stakeholder Meetings

Core Project Team

- **Brett Aldridge**
Corporate Director of Business Development and Strategy, Baptist Health Care
- **John Porter**
Vice President Corporate Facilities and Support Services, Baptist Health Care
- **Brian Matson**
Senior Vice President & Chief Strategy & Business Development Officer, Baptist Health Care
- **Eric Olson**
Assistant City Administrator, City of Pensacola
- **Keith Wilkins**
Director of Community & Environmental Department, Escambia County

Key Stakeholders

City of Pensacola

- **Ashton Hayward III**
Mayor
- **Sherry Morris**
Planning Services Administrator
- **Marcie Whitaker**
Housing and Urban Development
- **Helen Gibson**
Chief of Neighborhoods
- **Derrick Owens**
Director of Public Works & Facilities, City Engineer
- **Clark Merritt**
Economic Development Manager, Port of Pensacola

Escambia County

- **Lumon May**
Commissioner, Escambia County
- **Larry Newsom**
Interim County Administrator, Escambia County
- **Clara Long**
Division Manager, Escambia County Community Redevelopment Agency
- **Horace Jones**
Planning Director, Escambia County
- **Randy Wilkerson**
Housing and Urban Development, Escambia County
- **Joy Blackmon**
Public Works Director, County Engineer, Escambia County

Baptist Hospital

- **Barbara Beard**
Director of Behavioral Medicine
- **Karri Humphreys**
Clinical Director Main OR, Anesthesia & GE Lab
- **Shannon Boatwright**
Associate Director of Operations
- **Bryan Taylor**
Neuroscience Service Line Director
- **Liz Callahan**
General Counsel
- **Tara Rollins**
Physician Recruitment
- **Nick Porter**
Human Resources, Benefits
- **Chris Cummings**
Towers Rx Pharmacy
- **Jennifer Yates**
Sodexo Food Services
- **Trisha Morrison**
Gift Shop
- **Son Nguyen**
Subway
- **Tim Wheat**
Subway
- **David Bookman**
Sunshine Café Owner

Pensacola Chamber of Commerce

- **Danita Andrews**
Director of Business Development, Economic Development
- **Scott Luth**
Senior Vice President, Economic Development

Appendix C: SWOT

| S | |
|---|---|
| Strengths | Capitalize |
| Baptist Health Care Network & Downtown Campus | |
| BHC's regional and international reputation for their leadership in cardiology, orthopedics and internal medicine | Create a campus experience that is on par with the level of care (Excellence in Experience) |
| BHC properties all within City jurisdiction (annexed) but still benefits from County grants | Utilize available grants and initiatives to address the both the City's and County's goals |
| 5,500 people on BHC campus at all times with an average income of \$65,000/year (large, captive employee base) | Provide enough diversity and quality of uses to address the needs of Baptist's captive population as a basis for driving the usage of the site and create a vibrant environment that will begin to expand outward |
| Sunshine Café is a popular lunch destination | Incorporate and augment Sunshine Café into the new development if possible |
| BHC is the #1 Private Employer in Pensacola | Create an improved campus experience that is congruent with the stature of BHC in the Pensacola community |
| BHC is a major anchor in the Westside community | Utilize the presence and prominence of BHC as a key driver for the revitalization of the Westside community through the expansion of the BHC campus |
| Quality and culture of BHC organization | Utilize the new development to capture the culture of BHC by providing an extroverted environment that expresses the Hospital's values and aspirations |
| BHC is a member of the Mayo Clinic Care Network | Improve the marketing strategy for representing BHC as part of the Mayo Clinic Care Network to leverage its quality of healthcare services |
| Payroll deduction services for employees | Include payroll deduction option in new retail uses in West Moreno Development |
| Westside Neighborhood | |
| Currently, employees rent in East Hill neighborhood and walk to work | Create an improved pedestrian experience in and around the hospital to encourage walking, and build upon the existing, limited culture of walking |
| Park system nearby | Improve connectivity to the parks through streetscape improvements |
| Tree canopies in the Westside area | Identify, preserve, and expand the presence of tree canopies on the BHC campus to provide shade during the warmer months |
| Strong mayor format of the City, current mayor is pro-development and pro-neighborhood | Include the Mayor in the process to garner his attention and buy-in on the project's vision so that he may assist wherever possible and appropriate |

| S | |
|---|--|
| Strengths | Capitalize |
| City of Pensacola | |
| Downtown Pensacola has a high level of pedestrian activity, which is a great local reference for a walkable neighborhood | Provide an excellent pedestrian experience that complements the growing culture of walkability in Pensacola |
| Heavy Pensacola Navy presence offers a potential user base | Understand and attempt to deliver unmet demands |
| Redevelopment of the Belmont-DeVilliers neighborhood exemplifies a blighted neighborhood in transition, signifying redevelopment momentum moving westward from the downtown | Redevelop the BHC area to affect change in the greater neighborhood to eventually create a synergistic relationship with development momentum moving westward |
| Quality and historical nature of North Hill's building stock | Break down the psychological boundaries that define Baptist campus to reach North Hill so the two areas will eventually be seen as one contiguous urban fabric |

| W | |
|--|--|
| Weaknesses | Buttress |
| Baptist Health Care Network & Downtown Campus | |
| Andrews Institute is not perceived as part of the main BHC Campus | Create opportunities for brand presence on main campus |
| Baptist Hospital's piecemeal development and lack of design identity | Utilize the BHC project to set new design and experience precedents |
| Sense of arrival is lacking | Improve the wayfinding system in and around the hospital |
| Gateways to Hospital are not well established | Improve the streetscape and wayfinding in and around identified access routes to better establish gateways |
| Lack of quality lunch options for BHC employees | Provide an improved mix of restaurant offerings to meet the demand of hospital employees and the surrounding communities |
| Sunshine Café is expensive and closes at 3pm | Create a more active and safe mixed-use neighborhood that encourages evening and weekend activity |
| BHC employees parking in undesignated locations | Improve wayfinding to mitigate the perceived disorganization of the current parking system |
| Wayfinding in and around the hospital is limited | Create and implement an improved wayfinding strategy that offers convenient access to the hospital |

Appendix C: SWOT (cont'd)

| W | |
|---|---|
| Weaknesses | Buttress |
| BHC area stigmatized by blight | Catalyze private investment in the greater Westside area through the BHC development |
| Not enough places to hold informal meetings | Create more gathering places in the public realm and within retail operations |
| Limited lunch break durations of Hospital employees | Explore possibility of lengthening or staggering lunch breaks to allow for more sustained, vibrant campus life |
| Lack of campus life | Create an environment that is inviting, vibrant, inclusive and connected |
| Long lines for valet service discouraging | Improve the parking experience to alleviate the need for valet |
| Lack of workforce/employee housing | Explore the potential for residential uses on and near the Baptist Campus |
| Hospital “back-of-house” operations infringing on public areas | Utilize the BHC project to better orient the hospital campus and designate proper back of house areas |
| Lack of “3 rd places” or informal gathering spaces | Offer a diversity of quality uses that cater to the hospital and surrounding communities, creating a gathering place that is inclusive and vibrant |
| Lack of retail options after 5pm and on weekends | Create a 18-hour, 7-day environment that will cater to the demand of a variety of users |
| Limited retail competition in and around the BHC campus | Provide a greater diversity of quality uses within a vibrant environment |
| Lack of temporary lodging options for patients’ families, visitors and visiting physicians in or around the BHC downtown campus | Explore the potential for a lodge or hotel that can address the needs of hospital visitors and the greater market surrounding the hospital |
| Westside Neighborhood | |
| Blight in neighborhood | Utilize the BHC project to revitalize the neighborhood by addressing various issues at the community, city and regional levels so as to meet the needs of multiple parties and encourage more development over time |
| Wayfinding in and around the hospital’s surrounding community | Create and implement an overall wayfinding strategy that gives all users a sense of location and informs them of proximate uses in the neighborhood |
| Westside TIF has not generated any additional revenue since its adoption in 2007 | Encourage decision makers to redefine their TIF baseline |

| W | |
|--|--|
| Weaknesses | Buttress |
| Lack of quality schools in the area | Catalyze the redevelopment of the community over the long-term with the BHC project to improve all aspects of the Westside neighborhood |
| 20% of land uses in the Westside Development Area is categorized as “Vacant” (2007) | Improve the value of surrounding Westside properties by creating a vibrant, thriving environment for businesses and living at the BHC campus |
| Only 5.42% of the Westside’s zoning is Mixed-Use (2007) | Collaborate with the City’s Department of Planning to amend zoning for appropriate locations that can support mixed-use developments |
| Cervantes Street is a major dividing line in the Westside neighborhood | Catalyze development to the north and south on “E” Street |
| The Westside neighborhood is considered the hardest area to redevelop in Pensacola | Utilize BHC as an anchor use in the Westside neighborhood, catalyzing the area’s redevelopment through the Hospital’s expansion |
| Inconsistent streetlight network | Work with Gulf Power, the City and County to identify opportunities to improve the streetlight network around the BHC campus and the greater Westside area |
| BHC area riddled with shotgun houses and lack of consistency with housing quality | Introduce and encourage an attractive residential typology and begin to propagate throughout the area over time |
| Grocery options around the BHC area are only expensive (Ever’man) or of low quality (AC Groceries) | Explore the potential of including a proportionately sized market at the BHC site |
| Perception of Safety in neighborhood is poor | Create an environment conducive to a safe experience and provide a mix of quality uses to attract a critical mass of people |
| Inconsistent sidewalk network, no one knows where to focus efforts | Leverage BHC private investment by focusing streetscape improvement efforts on main access portals to new development |
| Pensacola | |
| Downtown Pensacola lacks residential density | Explore the potential for residential uses at the BHC site and begin to build a stronger diversity of residents and offerings |
| Demand for rental units by young professionals in downtown Pensacola | Create a supply of market-rate rental options at the BHC site to attract young professionals seeking to live near downtown |
| Negative population growth in Pensacola | Revitalize the Westside area through a catalytic BHC development, creating an improved overall environment for socioeconomic prosperity within Pensacola city limits |

Appendix C: SWOT (cont'd)

| O | |
|--|---|
| Opportunities | Strategy |
| Baptist Health Care Network & Downtown Campus | |
| Many employees buy lunch 5 times a week | Leverage this behavior pattern as demand for an improved diversity of retail uses |
| Kupfrian's Park history of the Hospital campus | Leverage this history to build an authentic identity for the BHC campus, contributing to the story of the hospital |
| Baptist Hospital is located within the Enterprise Zone | Identify initiatives and funding opportunities within the Enterprise Zone that may be applicable to the BHC project and apply |
| Towers Rx underperforming | Consider relocating and recasting Pharmacy use to new development |
| BHC Campus is geographically in the middle of many redevelopment efforts by both the City and County, yielding a variety of incentives and initiatives for redevelopment | Leverage the BHC site to utilize funding opportunities from both the City and County to catalyze development within the Westside neighborhood and beyond |
| Brownfield redevelopment opportunities | Examine BHC properties to indentify potential parcels qualified for brownfield redevelopment assistance from the Environmental Protection Agency and other organizations |
| BHC's proximity to Downtown | Create synergy between redevelopment areas, with the long-term expectation that the two urban fabrics will connect |
| Westside Neighborhood | |
| Both the City and County have a vested interest in improving the conditions of the Westside, Englewood and Brownsville neighborhoods | Target initiatives and incentives to both address City and County goals, and garner support from both entities to build and improve the BHC project site and surrounding area |
| Well kept, larger homes on "E" and "A" streets north of West Moreno Street | Enhance the corridors that connect to the Baptist neighborhood with wayfinding and streetscape improvements |
| Mixture of incomes and quality of housing in the Westside area | Galvanize the neighborhood by promoting neighborhood identity and new amenities |
| The Westpoint Heritage Neighborhood Association is not very active right now | Utilize the BHC project to galvanize and jump-start the Westpoint Heritage neighborhood association |
| City of Pensacola | |
| Habitat for Humanity and their recent focus on neighborhood revitalization | Identify opportunities to include Habitat for Humanity in improving the BHC area |

| O | |
|--|---|
| Opportunities | Strategy |
| Efforts to establish neighborhood identity by the City | Utilize the BHC project as an opportunity to create a neighborhood with the Hospital as the heart of the area |
| City and County interest in improving the streetscapes within their respective CRA areas | Target streetscape initiatives to improve the roadways and sidewalks leading up to and the hospital |
| City interest in connecting northern Pensacola to southern Pensacola | Utilize the BHC project as an opportunity to catalyze the revitalization of “E” Street and expand redevelopment momentum from the hospital down to the Pensacola waterfront |
| Mayor’s objectives for (1) moving prosperity westward and (2) creating healthier communities | Help achieve both these goals with the BHC project |
| City’s objective to connect north and south, and the County’s objective to expand development north and west | Utilize the BHC project to achieve both these objectives |
| Public Utilities currently has in excess of 7,000 streetlights and is retrofitting existing lights with LEDs | Identify the opportunities for an improved streetlight network in and around the BHC site to collaborate with Gulf Power, City and County to strategically install more lighting in the Westside neighborhood |
| City Planning initiatives: Tree Fund Program, Sidewalk programs, multimodal transportation programs, wayfinding and signage programs | Identify and apply for applicable programs to help fund the BHC project and achieve the goals of the City |
| City Planning Department is comprehensively examining zoning framework to aid redevelopment opportunities | Examine and identify zoning conflicts that may inhibit the BHC from accomplishing its vision and goals, then develop a discourse with the Planning Department to resolve these issues |
| Recent amendments to City’s permitted accessory uses that allow for retail to be developed with larger office or multi-family projects | Leverage these amendments and improve upon them to create a vibrant mixed-use project at BHC |
| Escambia County | |
| County interest in expanding redevelopment momentum from the downtown westward and to the north | Utilize the BHC project as an opportunity to expand redevelopment momentum into the Westside neighborhood |
| County would like to redevelop main roadways to ensure high level of walkability | Identify “E” Street as a main roadway and secure funding and buy-in from the county to improve it |
| County Programs: Local Option Sales Tax, Safe Walking School Program | Identify and apply for applicable programs to help fund the BHC project and achieve the goals of the County |

Appendix C: SWOT (cont'd)

| O | |
|--|--|
| Opportunities | Strategy |
| County CRA incentives: Commercial Façade Grant, Sign Improvement Grant, Enterprise Zone Grants, Neighborhood Sign Grant, Home Rehabilitation Programs, Enhanced Neighborhood Protection Zone, Neighborhood Restoration Program | Identify and apply for applicable programs to help fund the BHC project and achieve the goals of the County |
| HUD incentives: First-time home buyer program, housing rehabilitation, affordable housing, community development building grant (CDBG) | Identify and apply for applicable programs to help fund the BHC project and achieve the goals of the HUD |
| County CRA manages streetlighting in all its districts and has incurred some costs of operation to reduce crime | Work with City and County CRAs to achieve consensus on an approach to installing more streetlights in the Westside neighborhood, beginning with the BHC campus/project |

| T | |
|--|--|
| Threats | Mitigation |
| Westside Neighborhood | |
| High crime rates in the study area | Create a critical mass of people through a vibrant environment that operates 18-hours a day, ultimately reducing crime through the presence of people |
| Stormwater | Include stormwater management and mitigation efforts into the master plan for new development |
| Presence of abandoned and unsafe structures in the Westside area | Stimulate market demand by the creation of a walkable urban core |
| Commercial uses along Pace Boulevard are disappearing | Create a better economic climate through an enhanced mix of uses on the BHC site to improve the overall marketplace in the Westside area |
| City of Pensacola | |
| Competition from Sacred Heart | Rather than trying to dominate the Pensacola market, acknowledge that competition is good and focus on the downtown market |
| The retail strength of the “Cordova Triangle” | Create a district that complements and contrasts the Cordova Triangle by forging a stronger district in the Westside and downtown |
| Lack of funding for maintaining infrastructure improvements | Target infrastructure improvements that will enhance the commercial core and require minimal ongoing funding |
| Escambia County | |
| County focusing on redeveloping the Pace Boulevard Corridor | Demonstrate the benefits of targeted investment in a walkable core rather than in an arterial road that will require too much investment for limited benefit |

Appendix D: Employee Survey Results

Question 1: At about what time do you most often do the following?

| Answer Options | 12:00 AM - 6:00 AM | 7:00 AM - 12:00 PM | 1:00 PM - 6:00 PM | 7:00 PM - 12:00 AM | Response Count |
|--|--------------------|--------------------|-------------------|--------------------|----------------|
| Arrive at work | 38 | 178 | 9 | 15 | 240 |
| Leave work | 30 | 14 | 165 | 30 | 239 |
| Take your longest break of the work day/ night (e.g. lunch/dinner) | 20 | 143 | 64 | 0 | 227 |

Question 2: Please indicate the approximate number of times PER MONTH that you currently do the following?

| Answer Options | Never | Between 1 & 5 times | Between 6 & 10 times | Between 11 & 20 times | More than 20 times | Response Count |
|--|-------|---------------------|----------------------|-----------------------|--------------------|----------------|
| Eat lunch on BHC Campus | 20 | 64 | 16 | 55 | 47 | 202 |
| Eat breakfast on BHC Campus | 82 | 73 | 18 | 8 | 15 | 196 |
| Have a drink after work with friends or colleagues | 134 | 58 | 6 | 1 | 0 | 199 |
| Eat dinner out before arriving home | 85 | 79 | 25 | 9 | 2 | 200 |

Question 3: Please rate the most important factor when deciding where to eat a meal on the BHC Campus?

| Answer Options | Extremely Important | Very Important | Somewhat Important | Not Important | Rating Average | Response Count |
|--------------------------------|---------------------|----------------|--------------------|---------------|----------------|----------------|
| Location/Convenience | 118 | 52 | 17 | 6 | 3.46 | 193 |
| Anticipated expense (cost) | 107 | 52 | 34 | 3 | 3.34 | 196 |
| Menu or product list | 103 | 71 | 20 | 2 | 3.40 | 196 |
| Payroll Deduction availability | 51 | 40 | 34 | 69 | 2.38 | 194 |

Question 4: Where do you prefer the following services to be located?

| Answer Options | Close to home | Close to work | Along your commute | Other | Response Count |
|--|---------------|---------------|--------------------|-------|----------------|
| Dry cleaning | 87 | 30 | 59 | 20 | 196 |
| Your children's day care or school | 65 | 30 | 29 | 51 | 175 |
| Your primary bank or credit union | 77 | 73 | 45 | 6 | 201 |
| Your primary pharmacist | 73 | 96 | 31 | 2 | 202 |
| Your primary grocery store | 141 | 16 | 41 | 2 | 200 |
| Your favorite cafe or coffee shop | 67 | 62 | 46 | 19 | 194 |
| Your favorite place to meet friends or colleagues after work | 61 | 46 | 53 | 34 | 194 |
| If you selected "other" please clarify | | | | | 57 |

Question 5: Please rate your likelihood of using the following retail establishments on a regular basis (at least once a week) if they were located on the BHC Campus.

| Answer Options | Not likely at all | Somewhat likely | Very likely | Extremely likely | N/A | Rating Average | Response Count |
|---|-------------------|-----------------|-------------|------------------|-----|----------------|----------------|
| Scrub/Uniform Store | 73 | 29 | 25 | 33 | 36 | 2.11 | 196 |
| Clothing and Accessories | 87 | 59 | 39 | 12 | 3 | 1.88 | 200 |
| Florist | 79 | 73 | 28 | 10 | 7 | 1.84 | 197 |
| Standard Retail Merchandise (e.g., books, sports equipment) | 78 | 62 | 40 | 13 | 4 | 1.94 | 197 |
| Personal Services (i.e. Hair Cut, Manicure, Massage) | 80 | 52 | 47 | 21 | 3 | 2.05 | 203 |
| Neighborhood Conveniences and Services | 53 | 61 | 50 | 31 | 4 | 2.30 | 199 |
| Sit-Down Restaurant or Bar | 42 | 62 | 63 | 29 | 4 | 2.40 | 200 |
| Bank or Credit Union | 42 | 49 | 52 | 55 | 2 | 2.61 | 200 |
| Gym/Workout Facility | 40 | 47 | 47 | 64 | 4 | 2.68 | 202 |
| Delivery Food | 33 | 53 | 65 | 46 | 3 | 2.63 | 200 |
| General Store/ Convenience Market | 30 | 53 | 74 | 41 | 3 | 2.64 | 201 |
| Café/Coffee Shop | 23 | 56 | 54 | 63 | 3 | 2.80 | 199 |
| Fast-Food/Take-Out | 22 | 54 | 72 | 53 | 2 | 2.78 | 203 |
| Pharmacy | 18 | 52 | 49 | 77 | 5 | 2.94 | 201 |

Appendix D: Employee Survey Results (cont'd)

Question 6: Please describe how the following amenities would impact your BHC campus experience.

| Answer Options | Don't know | Negatively impact | No impact | Some positive impact | Very positive impact | Response Count |
|------------------------------------|------------|-------------------|-----------|----------------------|----------------------|----------------|
| Improved sidewalks | 6 | 0 | 25 | 61 | 106 | 198 |
| Improved streetlighting | 1 | 0 | 12 | 53 | 134 | 200 |
| Outdoor shaded seating areas | 3 | 1 | 24 | 72 | 102 | 202 |
| A cluster of shops and restaurants | 1 | 3 | 23 | 72 | 102 | 201 |
| A day care center | 21 | 1 | 96 | 29 | 50 | 197 |
| A gym or workout facility | 8 | 1 | 37 | 62 | 94 | 202 |

Question 7: What is your gender?

| Answer Options | Response Percent | Response Count |
|----------------|------------------|----------------|
| Female | 76.0% | 152 |
| Male | 24.0% | 48 |

Question 8: Which of the following best describes your age range?

| Answer Options | Response Percent | Response Count |
|----------------|------------------|----------------|
| 18-25 | 3.4% | 7 |
| 26-34 | 13.3% | 27 |
| 35-45 | 27.6% | 56 |
| 46-60 | 46.3% | 94 |
| over 60 | 9.4% | 19 |

Question 9: Which of the following best describes your job function?

| Answer Options | Response Percent | Response Count |
|------------------------------------|------------------|----------------|
| Clinician or Physician | 4.0% | 7 |
| Nursing | 22.6% | 40 |
| Technician | 12.4% | 22 |
| Hospital Administration/Management | 59.3% | 105 |
| Custodial | 0.0% | 0 |
| Food/Beverage | 1.7% | 3 |
| Other (please specify) | | 26 |

Appendix E: Visitor Survey Results

Question 1: Have you utilized the following retail establishments on Baptist Campus on this or any previous visit, and if so, how would you rate your experience?

| Answer Options | Did not use | Poor | Fair | Average | Good | Excellent | Response Count |
|-----------------|-------------|------|------|---------|------|-----------|----------------|
| Cafeteria | 30 | 1 | 5 | 10 | 34 | 16 | 96 |
| Subway | 35 | 1 | 1 | 9 | 30 | 20 | 96 |
| Vending Machine | 38 | 2 | 2 | 14 | 29 | 10 | 95 |
| Coffee Shop | 60 | 1 | 1 | 7 | 12 | 15 | 96 |
| Tower Pharmacy | 66 | 0 | 0 | 1 | 12 | 16 | 95 |
| Gift shop | 68 | 0 | 0 | 3 | 11 | 13 | 95 |
| Sunshine Café | 85 | 0 | 0 | 0 | 2 | 9 | 96 |

Question 2: How important were the following factors in deciding where to eat a meal on Baptist Campus?

| Answer Options | N/A | Not Important | Somewhat Important | Very Important | Response Count |
|----------------------------|-----|---------------|--------------------|----------------|----------------|
| Location/Convenience | 21 | 11 | 25 | 35 | 92 |
| Anticipated expense (cost) | 20 | 9 | 39 | 24 | 92 |
| Menu or product list | 21 | 13 | 25 | 32 | 91 |

Question 3: How important were the following factors in deciding where to shop for non-food items on Baptist Campus?

| Answer Options | N/A | Not Important | Somewhat Important | Very Important | Response Count |
|----------------------------|-----|---------------|--------------------|----------------|----------------|
| Location/Convenience | 50 | 5 | 20 | 17 | 92 |
| Anticipated expense (cost) | 50 | 7 | 13 | 22 | 92 |
| Menu or product list | 52 | 4 | 12 | 23 | 91 |

Appendix E: Visitor Survey Results (cont'd)

Question 4: Baptist is considering creating a walkable, mixed-use retail environment just across the street from the hospital that would include small shops, eateries, and some daily conveniences, along with an outdoor public space with benches, shade trees, and green space. How do you think this type of addition would impact the overall campus experience?

| Answer Options | Response Percent | Response Count |
|------------------|------------------|----------------|
| Don't Know | 5.2% | 5 |
| Negatively | 1.0% | 1 |
| No impact | 3.1% | 3 |
| Slightly improve | 15.6% | 15 |
| Greatly improve | 75.0% | 72 |

Question 5: When visiting the Baptist Campus, how likely would you be to visit the following retail types if they existed?

| Answer Options | Not likely | Somewhat likely | Very Likely | Definitely | Response Count |
|--|------------|-----------------|-------------|------------|----------------|
| Fast-food/take-out | 15 | 11 | 35 | 32 | 93 |
| Sit-down restaurant or bar | 16 | 21 | 30 | 27 | 94 |
| Drug store or pharmacy | 28 | 18 | 26 | 21 | 93 |
| Neighborhood conveniences and services | 32 | 21 | 22 | 18 | 93 |
| Florist | 34 | 24 | 18 | 16 | 92 |
| Delivery food | 36 | 8 | 22 | 27 | 93 |
| Standard retail merchandise | 36 | 29 | 10 | 18 | 93 |
| Clothing/Accessories/Gifts | 44 | 22 | 14 | 11 | 91 |
| Personal services (e.g. hair cut, mani/pedi) | 62 | 17 | 8 | 5 | 92 |

Question 6: Specifically, what other types of retail establishments do you think that Baptist is currently lacking? (n/a or irrelevant answers excluded)

| Answer Options | Response Count |
|-----------------------|-----------------------|
| Fast Food | 14 |
| Food Diversity | 5 |
| Convenience Store | 4 |
| Restaurant | 4 |
| Better Gift Shop | 3 |
| Clothing Stores | 2 |
| Doughnut Shop | 2 |
| Florist | 2 |
| Gift Store Options | 2 |
| Ice Cream | 2 |
| Library | 2 |
| Delivery | 1 |
| Drug Store | 1 |
| Dry Cleaning | 1 |
| Eating Places | 1 |
| Cold Cut Stand | 1 |
| Fresh Veggies | 1 |
| General Store | 1 |
| Hardees | 1 |
| Religion Retail | 1 |
| Sandwich Shop | 1 |
| Shops | 1 |
| Sweet Shop | 1 |
| Smoothie King | 1 |

Appendix E: Visitor Survey Results (cont'd)

Question 7: Approximately how much do you spend on non-medical items and goods per visit (or per day if multi-day patient) to the Baptist Campus?

| Answer Options | Response Percent | Response Count |
|----------------|------------------|----------------|
| More than \$40 | 5.4% | 5 |
| \$30 > \$40 | 7.6% | 7 |
| \$20 > \$30 | 10.9% | 10 |
| \$10 > \$20 | 23.9% | 22 |
| \$0 > \$10 | 17.4% | 16 |
| none | 34.8% | 32 |

Question 8: If lodging (hotel/motel) existed on or adjacent to the Baptist Campus, how likely would you, or someone close to you, be to utilize it on a future visit under similar circumstances?

| Answer Options | Response Percent | Response Count |
|-----------------|------------------|----------------|
| Impossible | 7.6% | 7 |
| Not likely | 44.6% | 41 |
| Somewhat likely | 22.8% | 21 |
| Very Likely | 16.3% | 15 |
| Definitely | 8.7% | 8 |

Question 9: What is your gender?

| Answer Options | Response Percent | Response Count |
|----------------|------------------|----------------|
| Female | 69.6% | 64 |
| Male | 30.4% | 28 |

Question 10: What is your age?

| Answer Options | Response Percent | Response Count |
|----------------|------------------|----------------|
| under 18 | 1.1% | 1 |
| 18-24 | 3.3% | 3 |
| 25-44 | 17.8% | 16 |
| 45-54 | 24.4% | 22 |
| 55-64 | 28.9% | 26 |
| Over 64 | 24.4% | 22 |

Appendix F: Patient Survey Results

Question 1: Have you utilized the following retail establishments on Baptist Campus on this or any previous visit, and if so, how would you rate your experience?

| Answer Options | Did not use | Poor | Fair | Average | Good | Excellent | Response Count |
|-----------------|-------------|------|------|---------|------|-----------|----------------|
| Cafeteria | 38 | 1 | 0 | 5 | 17 | 6 | 67 |
| Coffee Shop | 47 | 0 | 1 | 2 | 10 | 6 | 66 |
| Subway | 46 | 0 | 0 | 5 | 9 | 6 | 66 |
| Gift shop | 45 | 0 | 1 | 4 | 5 | 9 | 64 |
| Sunshine Café | 56 | 0 | 2 | 0 | 2 | 5 | 65 |
| Tower Pharmacy | 47 | 0 | 0 | 1 | 10 | 8 | 66 |
| Vending Machine | 48 | 0 | 1 | 5 | 7 | 3 | 64 |

Question 2: How important were the following factors in deciding where to eat a meal on Baptist Campus?

| Answer Options | N/A | Not Important | Somewhat Important | Very Important | Response Count |
|----------------------------|-----|---------------|--------------------|----------------|----------------|
| Location/Convenience | 26 | 2 | 13 | 26 | 67 |
| Anticipated expense (cost) | 26 | 7 | 19 | 15 | 67 |
| Menu or product list | 26 | 5 | 15 | 21 | 67 |

Question 3: How important were the following factors in deciding where to shop for non-food items on Baptist Campus?

| Answer Options | N/A | Not Important | Somewhat Important | Very Important | Response Count |
|----------------------------|-----|---------------|--------------------|----------------|----------------|
| Location/Convenience | 32 | 5 | 10 | 17 | 64 |
| Anticipated expense (cost) | 34 | 3 | 11 | 15 | 63 |
| Menu or product list | 32 | 2 | 15 | 14 | 63 |

Appendix F: Patient Survey Results (cont'd)

Question 4: Baptist is considering creating a walkable, mixed-use retail environment just across the street from the hospital that would include small shops, eateries, and some daily conveniences, along with an outdoor public space with benches, shade trees, and green space. How do you think this type of addition would impact the overall campus experience?

| Answer Options | Response Percent | Response Count |
|------------------|------------------|----------------|
| Don't Know | 6.1% | 4 |
| Negatively | 0.0% | 0 |
| No impact | 4.5% | 3 |
| Slightly improve | 16.7% | 11 |
| Greatly improve | 72.7% | 48 |

Question 5: When visiting the Baptist Campus, how likely would you be to visit the following retail types if they existed?

| Answer Options | Not likely | Somewhat likely | Very Likely | Definitely | Response Count |
|---|------------|-----------------|-------------|------------|----------------|
| Sit-down restaurant or bar | 16 | 15 | 21 | 15 | 67 |
| Fast-food/take-out | 16 | 11 | 22 | 18 | 67 |
| Delivery food | 21 | 12 | 11 | 23 | 67 |
| Clothing/Accessories/Gifts | 31 | 15 | 14 | 7 | 67 |
| Florist | 17 | 21 | 15 | 13 | 66 |
| Standard retail merchandise (e.g., books, sports equipment) | 22 | 12 | 15 | 18 | 67 |
| Personal services (e.g. hair cut, mani/pedi, tanning salon, massage) | 39 | 8 | 4 | 15 | 66 |
| Drug store or pharmacy | 15 | 17 | 20 | 14 | 66 |
| Neighborhood conveniences and services (e.g., dry cleaner, print shop, general store) | 26 | 14 | 12 | 14 | 66 |

Question 6: Approximately how much do you spend on non-medical items and goods per visit (or per day if multi-day patient) at the Baptist Campus?

| Answer Options | Response Percent | Response Count |
|----------------|------------------|----------------|
| More than \$40 | 9.4% | 6 |
| \$30 > \$40 | 10.9% | 7 |
| \$20 > \$30 | 7.8% | 5 |
| \$10 > \$20 | 23.4% | 15 |
| \$0 > \$10 | 9.4% | 6 |
| none | 39.1% | 25 |

Question 7: If lodging (hotel/motel) existed on or adjacent to the Baptist Campus, how likely would you, or someone close to you, be to utilize it on a future visit under similar circumstances?

| Answer Options | Response Percent | Response Count |
|-----------------|------------------|----------------|
| Impossible | 10.6% | 7 |
| Not likely | 34.8% | 23 |
| Somewhat likely | 15.2% | 10 |
| Very Likely | 24.2% | 16 |
| Definitely | 15.2% | 10 |

Question 8: What is your gender?

| Answer Options | Response Percent | Response Count |
|----------------|------------------|----------------|
| Female | 44.6% | 29 |
| Male | 55.4% | 36 |

Question 9: What is your age?

| Answer Options | Response Percent | Response Count |
|----------------|------------------|----------------|
| under 18 | 1.5% | 1 |
| 18-24 | 0.0% | 0 |
| 25-44 | 10.4% | 7 |
| 45-54 | 17.9% | 12 |
| 55-64 | 34.3% | 23 |
| Over 64 | 35.8% | 24 |

Appendix G.1: Zone A Employee Information

Business-Facts: Workplace Population 2014

Polygon 1: BAPTIST HOSPITAL PLANNING, Total

| Business Description | Total Establishment | Total Employees | Employees Per Establishment |
|---|---------------------|-----------------|-----------------------------|
| Total Businesses | 266 | 6,579 | 25 |
| Private Sector | 230 | 3,710 | 16 |
| Public Administration | 32 | 2,853 | 90 |
| Agriculture, Forestry, Fishing and Hunting | 1 | 3 | 5 |
| Mining, Quarrying, and Oil and Gas Extraction | 0 | 0 | 0 |
| Utilities | 0 | 3 | 12 |
| Construction | 13 | 138 | 10 |
| Manufacturing | 5 | 123 | 25 |
| Wholesale Trade | 7 | 90 | 13 |
| Transportation and Warehousing | 3 | 244 | 81 |
| Information | 1 | 24 | 17 |
| Real Estate and Rental and Leasing | 5 | 67 | 15 |
| Professional, Scientific, and Technical Services | 12 | 68 | 6 |
| Management of Companies and Enterprises | 0 | 0 | 0 |
| Administrative, Support, Waste Mgmt remediation Services | 9 | 112 | 12 |
| Educational Services | 7 | 283 | 39 |
| Healthcare and Social Assistance | 69 | 1,734 | 25 |
| Arts, Entertainment, and Recreation | 4 | 147 | 37 |
| Retail Trade | 26 | 250 | 10 |
| Motor Vehicle and Parts Dealers | 5 | 34 | 8 |



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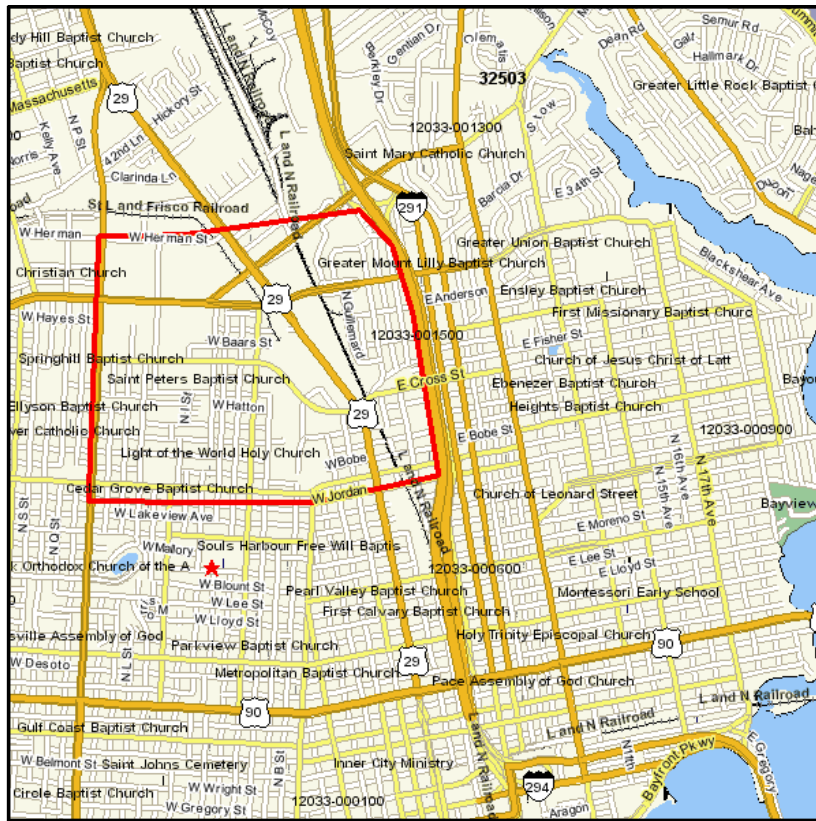
Prepared By:

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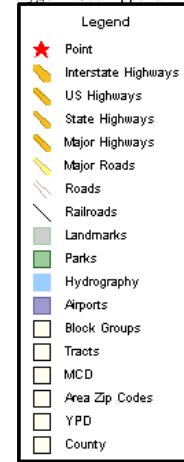
Prepared For:

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Area Map



BAPTIST HOSPITAL PLANNING,
1000 W MORENO ST
PENSACOLA, FL 32501-2316
Coord: 30.428810, -87.231966
Polygon - See Appendix for Points



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Appendix G.2: Zone B.1 Employee Information

Business-Facts: Workplace Population 2014

Polygon 1: BAPTIST WILKINS 2, Total

| Business Description | Total Establishment | Total Employees | Employees Per Establishment |
|---|---------------------|-----------------|-----------------------------|
| Total Businesses | 243 | 2,414 | 10 |
| Private Sector | 226 | 2,232 | 10 |
| Public Administration | 4 | 160 | 37 |
| Agriculture, Forestry, Fishing and Hunting | 0 | 1 | 7 |
| Mining, Quarrying, and Oil and Gas Extraction | 0 | 0 | 0 |
| Utilities | 0 | 2 | 12 |
| Construction | 45 | 207 | 5 |
| Manufacturing | 2 | 303 | 171 |
| Wholesale Trade | 6 | 36 | 6 |
| Transportation and Warehousing | 4 | 109 | 26 |
| Information | 3 | 19 | 6 |
| Real Estate and Rental and Leasing | 8 | 18 | 2 |
| Professional, Scientific, and Technical Services | 32 | 137 | 4 |
| Management of Companies and Enterprises | 0 | 0 | 0 |
| Administrative, Support, Waste Mgmt remediation Services | 18 | 81 | 5 |
| Educational Services | 0 | 23 | 59 |
| Healthcare and Social Assistance | 57 | 1,077 | 19 |
| Arts, Entertainment, and Recreation | 1 | 6 | 6 |
| Retail Trade | 21 | 92 | 4 |
| Motor Vehicle and Parts Dealers | 1 | 8 | 6 |



Prepared On: Wed Jul 23, 2014

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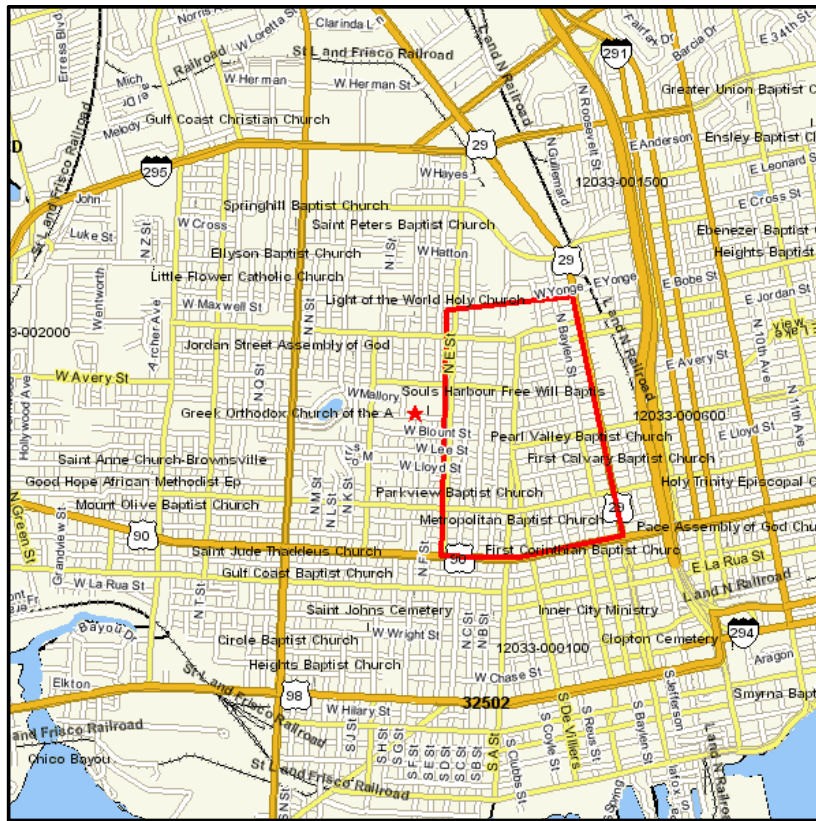
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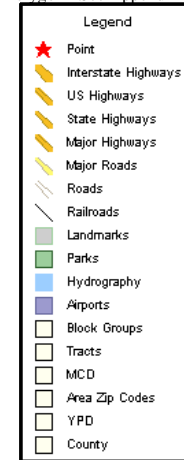
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Area Map



BAPTIST WILKINS 2,
1000 W MORENO ST
PENSACOLA, FL 32501-2316
Coord: 30.428810, -87.231966
Polygon - See Appendix for Points



0 miles 0.35 0.69



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Appendix G.3: Zone B.2 Employee Information

Business-Facts: Workplace Population 2014

Polygon 1: BAPTIST WILKINS 3, Total

| Business Description | Total Establishment | Total Employees | Employees Per Establishment |
|---|---------------------|-----------------|-----------------------------|
| Total Businesses | 289 | 2,780 | 10 |
| Private Sector | 262 | 2,186 | 8 |
| Public Administration | 24 | 552 | 23 |
| Agriculture, Forestry, Fishing and Hunting | 0 | 0 | 0 |
| Mining, Quarrying, and Oil and Gas Extraction | 0 | 0 | 0 |
| Utilities | 0 | 21 | 58 |
| Construction | 10 | 56 | 6 |
| Manufacturing | 5 | 49 | 11 |
| Wholesale Trade | 3 | 26 | 8 |
| Transportation and Warehousing | 2 | 7 | 5 |
| Information | 6 | 164 | 29 |
| Real Estate and Rental and Leasing | 9 | 161 | 18 |
| Professional, Scientific, and Technical Services | 117 | 550 | 5 |
| Management of Companies and Enterprises | 0 | 0 | 0 |
| Administrative, Support, Waste Mgmt remediation Services | 8 | 72 | 9 |
| Educational Services | 4 | 49 | 11 |
| Healthcare and Social Assistance | 15 | 249 | 16 |
| Arts, Entertainment, and Recreation | 4 | 31 | 8 |
| Retail Trade | 16 | 107 | 7 |
| Motor Vehicle and Parts Dealers | 0 | 2 | 4 |



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West Moreno District
Reconnaissance & Strategic Assessment
September 2014