



MIAMI COUNTY

# COUNTY ROAD 25-A SPECIAL PLANNING AREA MASTER PLAN



# PLAN

CR25A



COMMUNITY MEETING #2 | DEC 12, 2017

# AGENDA



- ① Introduction (6:30-6:35)
- ② Summary of Information Analysis(6:35-7:30)
- ③ Alternative Evaluation(7:30-7:50)
- ④ Next Steps(7:50-8:00)
- ⑤ Adjourn (8:00)

# PROJECT SCOPE



- Task 1: Project Initiation
- Task 2: Existing Conditions
- **Task 3: Information Analysis & Evaluation**
- Task 4: Public Engagement
- Task 5: Master Plan Development

# PROJECT SCHEDULE



DATE	NAME	DESCRIPTION
9/1/2017	Vision and Implementation Group Meeting #1	Goals and Objectives will be discussed and updated for use in guiding development of the recommendations
10/16/2017	Vision and Implementation Group Meeting #2	Review of Existing Conditions Chapter
11/20/2017	Vision and Implementation Group Meeting #3	Review of Information and Analysis Chapter, Stakeholder Meeting, and Public Forum results
10/23/2017	Public Meeting #1; Public Forum	Existing Conditions Overview and Mapping Exercise
12/18/2017	Public Meeting #2: Open House	Alternative Concept Review
1/22/2018	Vision and Implementation Group Meeting #4	Review of Draft Master Plan Document
1/22/2017	County Planning Commission Meeting	Review of Draft Master Plan Document
1/29/2018	County Commissioner's Meeting	Review of Draft Master Plan Document
2/26/2018	Project Presentation	Final public presentation of project



# DRAFT PROJECT GOALS

# DRAFT PROJECT GOALS



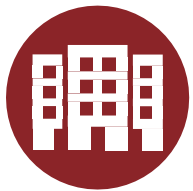
## GOAL 1 | ECONOMY | SCORE = 26

Create a center for employment with a diverse economic base, and build on the access and visibility afforded by the I-75/CR-25A Interchange.



## GOAL 2 | INFRASTRUCTURE | SCORE = 19

Coordinate the extension of, or increase the capacity of, infrastructure facilities to meet future needs of existing and planned development.



## GOAL 3 | ZONING | SCORE = 10 (Tied with Goal 4)

Create easy-to-understand, consistent, and flexible regulations to encourage and enable high-quality development.



## GOAL 4 | RESILIENCY | SCORE = 10 (Tied with Goal 3)

Encourage resilient development practices that can adapt to changes over time and remain viable and an asset for the community.

# DRAFT PROJECT GOALS



## GOAL 5 | ENVIRONMENT | SCORE = 8

Connect and integrate the areas' natural features to future development.



## GOAL 6 | HEALTH | SCORE = 2

Promote an active and healthy lifestyle for residents, workers, and visitors.



## GOAL 7 | MOBILITY | SCORE = 1

Develop a multi-modal and inter-connected transportation network that safely and conveniently transports people and freight.



## GOAL 8 | HOUSING | SCORE = 0

Provide a range of housing choices with convenient access to daily services



# INFORMATION ANALYSIS OVERVIEW



# CONTENTS

- 1 Public Involvement
- 2 Market Analysis
- 3 Green Print & Priority Growth Areas
- 4 Alternative Transportation and Land Use Concepts



# PUBLIC INVOLVEMENT

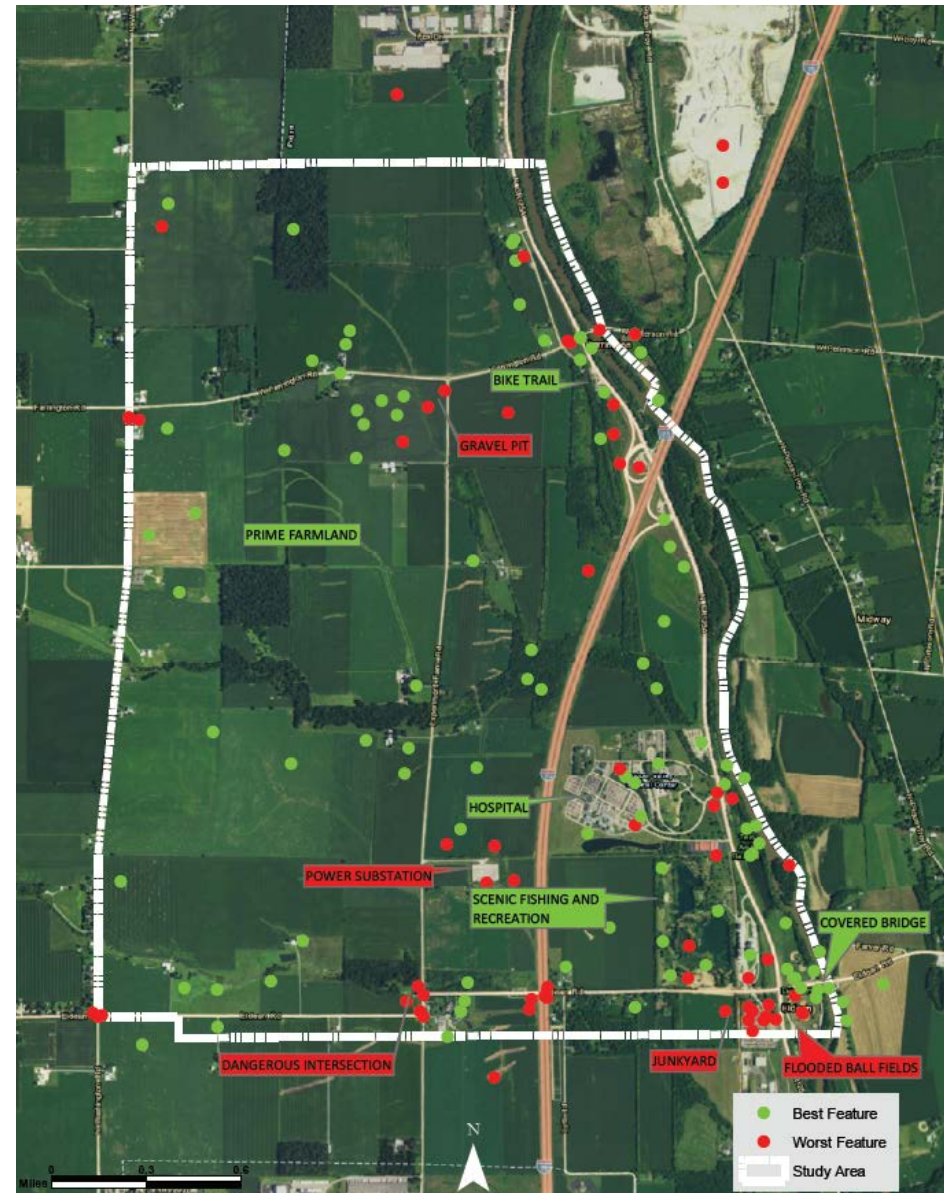


- Three Vision Group Meetings
- Two Public Meetings
- Multiple Stakeholder Meetings



## Best and Worst Places

- **Best:** Prime Farmland, Eldean Bridge, Bike Path, Ponds, Gravel Pit
- **Worst:** Ball Fields, Junkyard, High Volume Intersections



## Response Rate

**173**  
survey responses received

**75%**  
survey completion rate

**122**  
questions included in the  
survey

**9 minutes**  
average time taken to  
complete the survey

## Residence

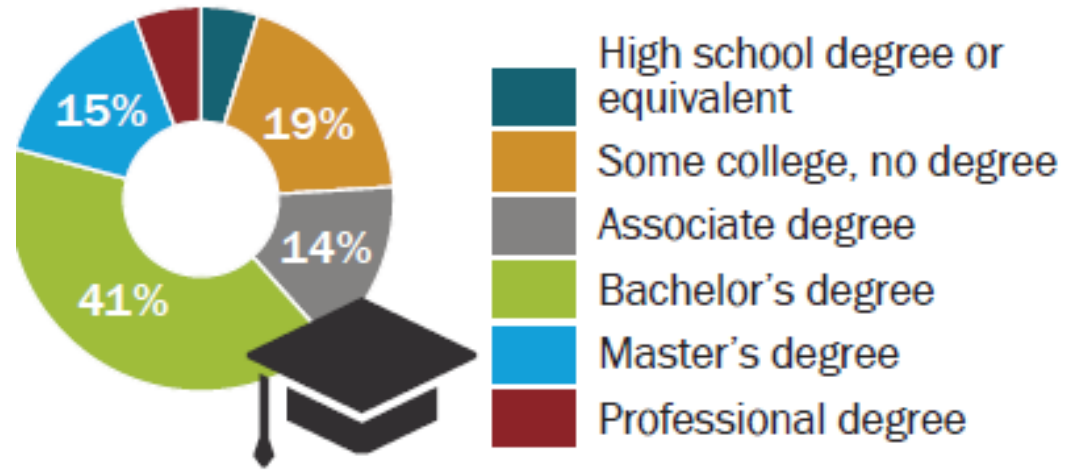
 → **92%**  
lived outside the  
study area

 → **67%**  
lived in Troy

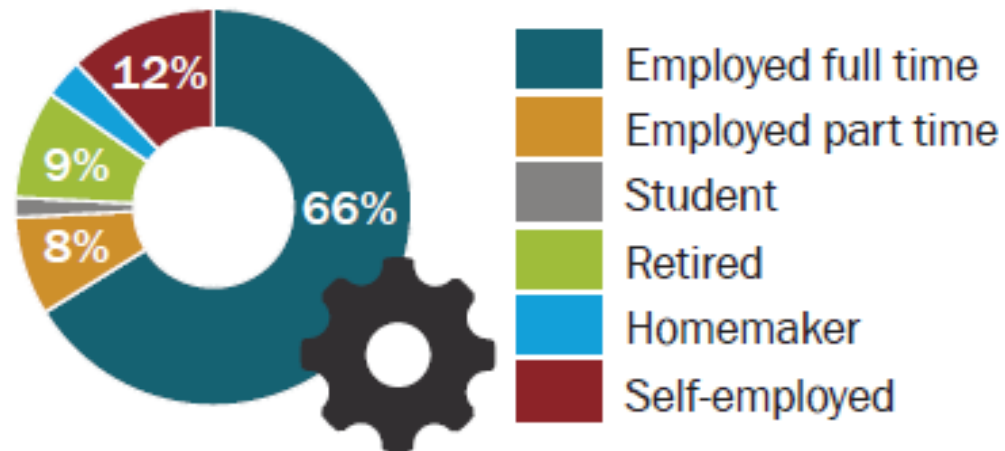
 → **17%**  
lived in Piqua

 → **17%**  
lived in other parts  
of the County

## Education

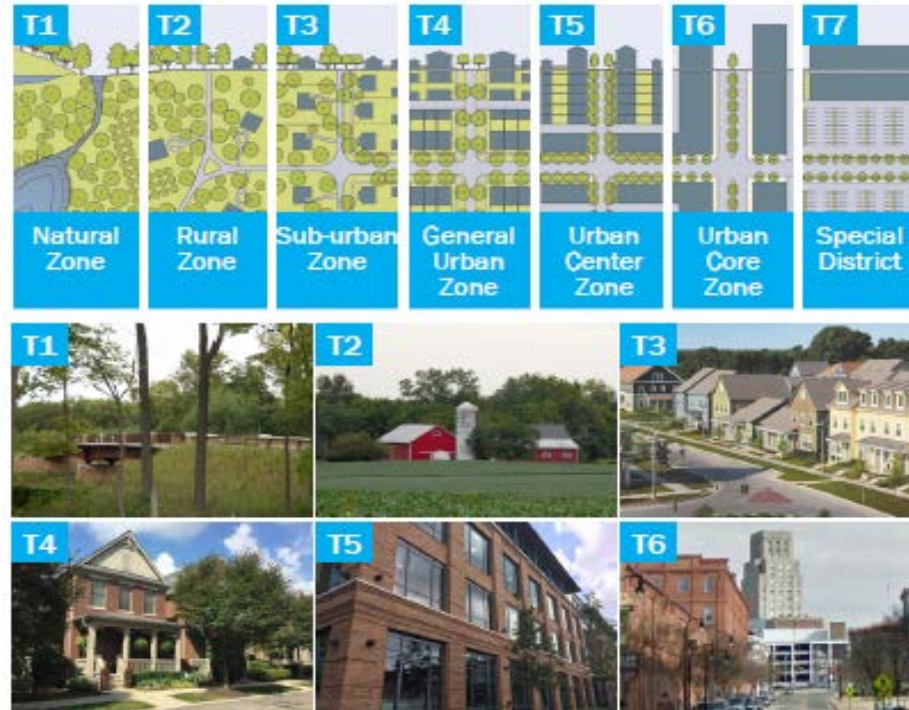


## Employment



# PUBLIC INVOLVEMENT

## Most Preferred a Natural and Rural Environment



Each land use image in the survey was assigned a Transect zone. The scores for each zone are shown below:

1.	Natural (4.25)
2.	Rural (2.64)
3.	Suburban (2.23)
4.	General Urban (1.89)
5.	Urban Center (1.84)
6.	Urban Core (N/A)

## Land Use Scores

Preferred land uses are ranked below, with average scores in parentheses:

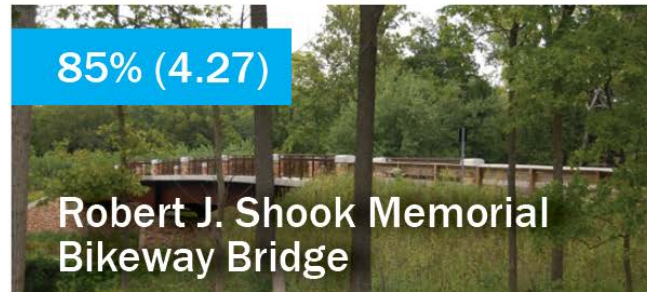
- |    |                         |
|----|-------------------------|
| 1. | Retail/Mixed Use (1.92) |
| 2. | Civic (1.90)            |
| 3. | Residential (1.88)      |
| 4. | Industrial (1.87)       |
| 5. | Office (1.84)           |

## Building Material Scores

The scores for each building material are shown below:

- |    |                 |
|----|-----------------|
| 1. | Wood (1.98)     |
| 2. | Brick (1.89)    |
| 3. | Concrete (1.89) |
| 4. | Mixed (1.87)    |
| 5. | Glass (1.85)    |







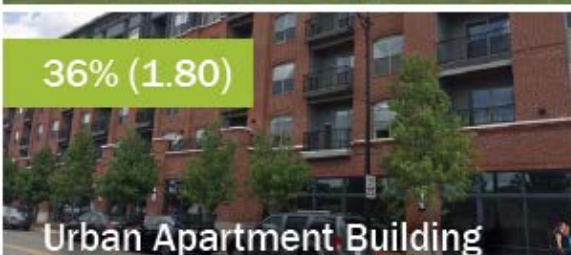



## Most Preferred Setting Scores



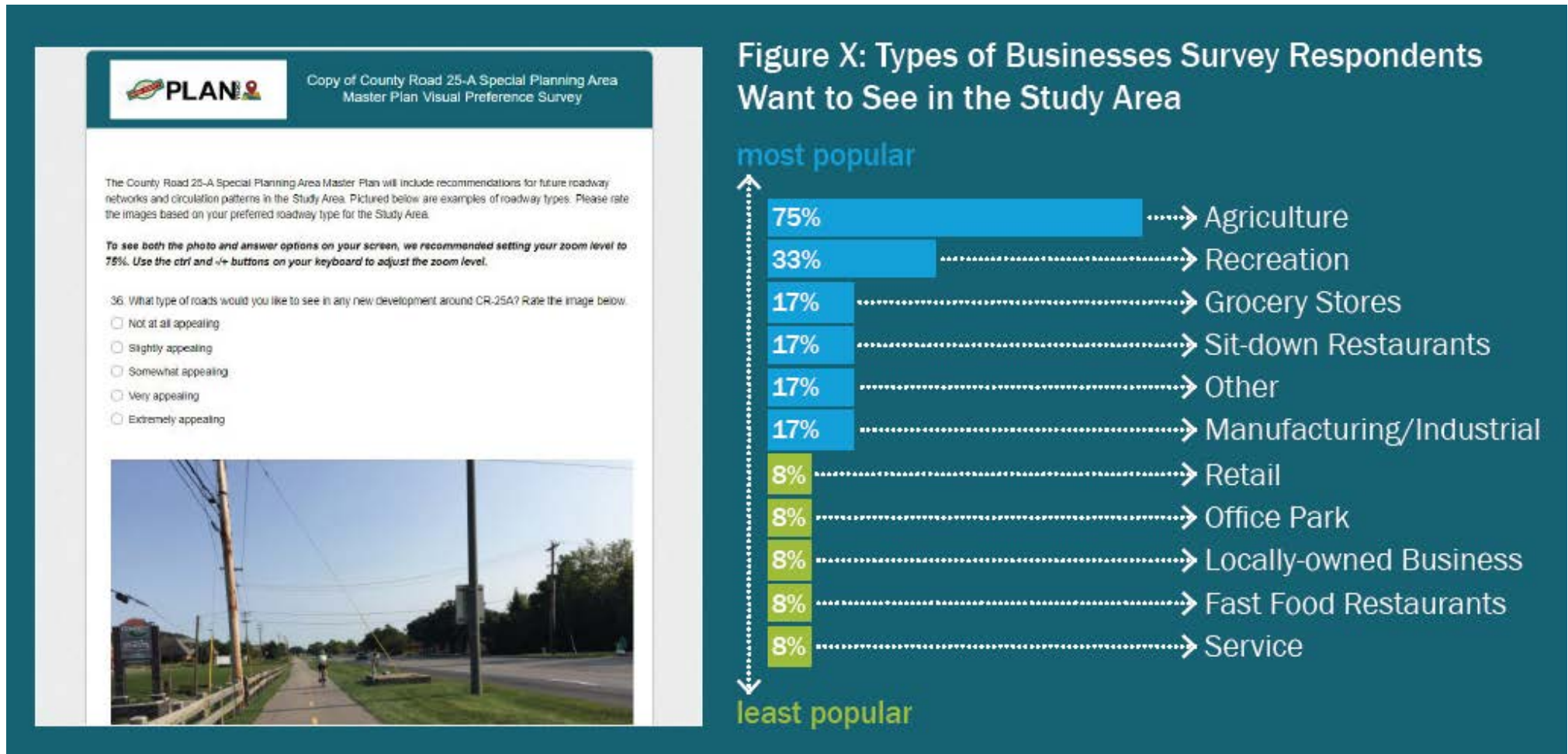


# PUBLIC INVOLVEMENT

## Least Preferred Building Scores

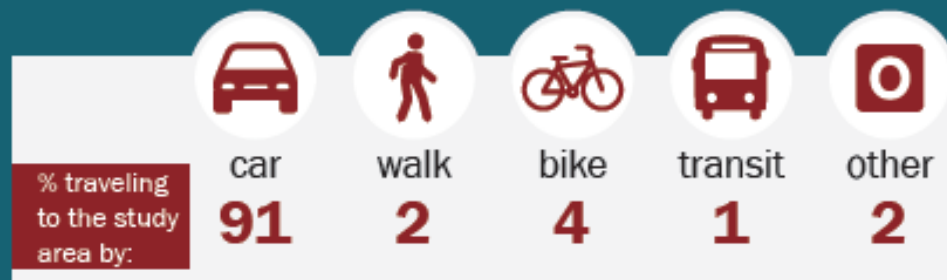
 <p>32% (1.61)</p> <p>Urban Office Building</p>	 <p>35% (1.74)</p> <p>Suburban Retail/Mixed-Use Building</p>
 <p>35% (1.77)</p> <p>Urban Office Building</p>	 <p>36% (1.78)</p> <p>Suburban Multi-Family Attached Residential</p>
 <p>36% (1.78)</p> <p>Rural Office Building</p>	 <p>36% (1.79)</p> <p>Rural Industrial Building</p>
 <p>36% (1.80)</p> <p>Urban Apartment Building</p>	 <p>36% (1.80)</p> <p>Suburban Retail/Mixed-Use Building</p>
 <p>36% (1.81)</p> <p>Suburban Civic Building</p>	 <p>36% (1.82)</p> <p>Suburban Multi-Family Attached Residential</p>

## Types of Businesses Preferred



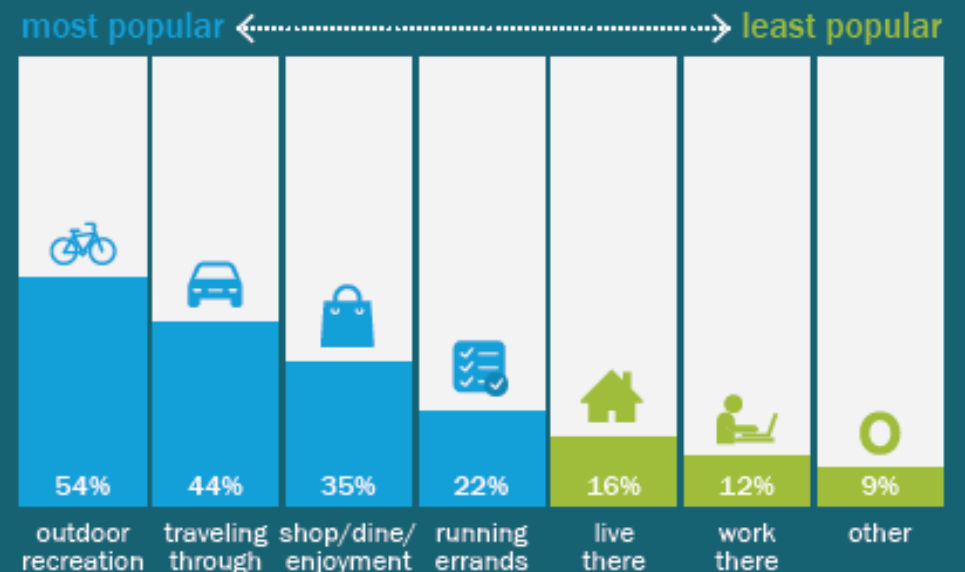
## Means of Travel to Study Area

Figure 30: How Will Survey Respondents Travel to the Study Area



Most of survey respondents will travel to the study area by car in the future, and over half of the respondents will be traveling there for the outdoor recreation. Many others plan to just be passing through in the future.

Figure 31: Why Will Survey Respondents Travel to the Study Area



## Most Like to See

- I enjoy the existing agriculture and do not believe every acre must be developed.
- Leave it as farmland. Let landowners decide what to do with their property.
- There is already great wildlife in the area with the proximity to the bike path.
- Leaving it farm land would be the best improvement.
- Keeping most of its natural habitat.
- Responsibly-planned development is a must to retain natural beauty of river and farmland with new structures and infrastructure.
- I like seeing the farmland and the bike path.
- Leave it as it is.
- Recreation, tourism, health, scenery, sports, family-oriented activity.
- Green space natural space recreational opportunities.

## Why perform market analyses for a plan?

- Provides a benchmark for future performance
- Identifies short- and mid-term opportunities
- Helps align public and private sector goals
- Capitalize on efficiencies and advantages and avoid inefficient allocation of resources

# Market Analyses



Age Restricted Housing

Medical Office

Light Industrial & Warehouse

- Manufacturing
- Transportation and Logistics

Agriculture

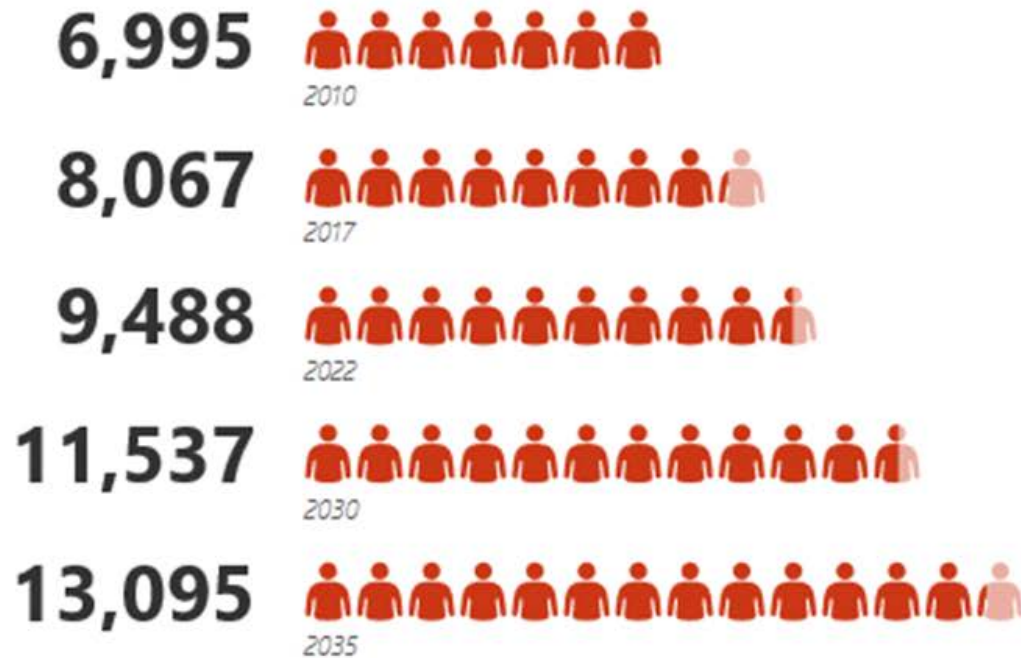
Hospitality & Retail

**Sectors chosen based on compatibility, appropriateness and priorities**

**Local and Regional Data**

**Comparable Similar Midwest Markets**

## MIAMI COUNTY - POPULATION AGE 75+



## Miami County Senior Living Facilities:

- 484 Assisted Living Beds
- 779 Nursing Care Beds

## Koester Pavilion:

- Provides Skilled Nursing Care
- 150 Beds
- Opened in 1977



Based on demand estimates, Miami County could support another **625** Assisted Living beds and **48** Nursing Care beds by 2022



## Comparable Facilities

### StoryPoint of Troy

- Assisted Living
- Independent Living
- Memory Care
- 158 Beds
- Opened in 2017
- 14.5 acres

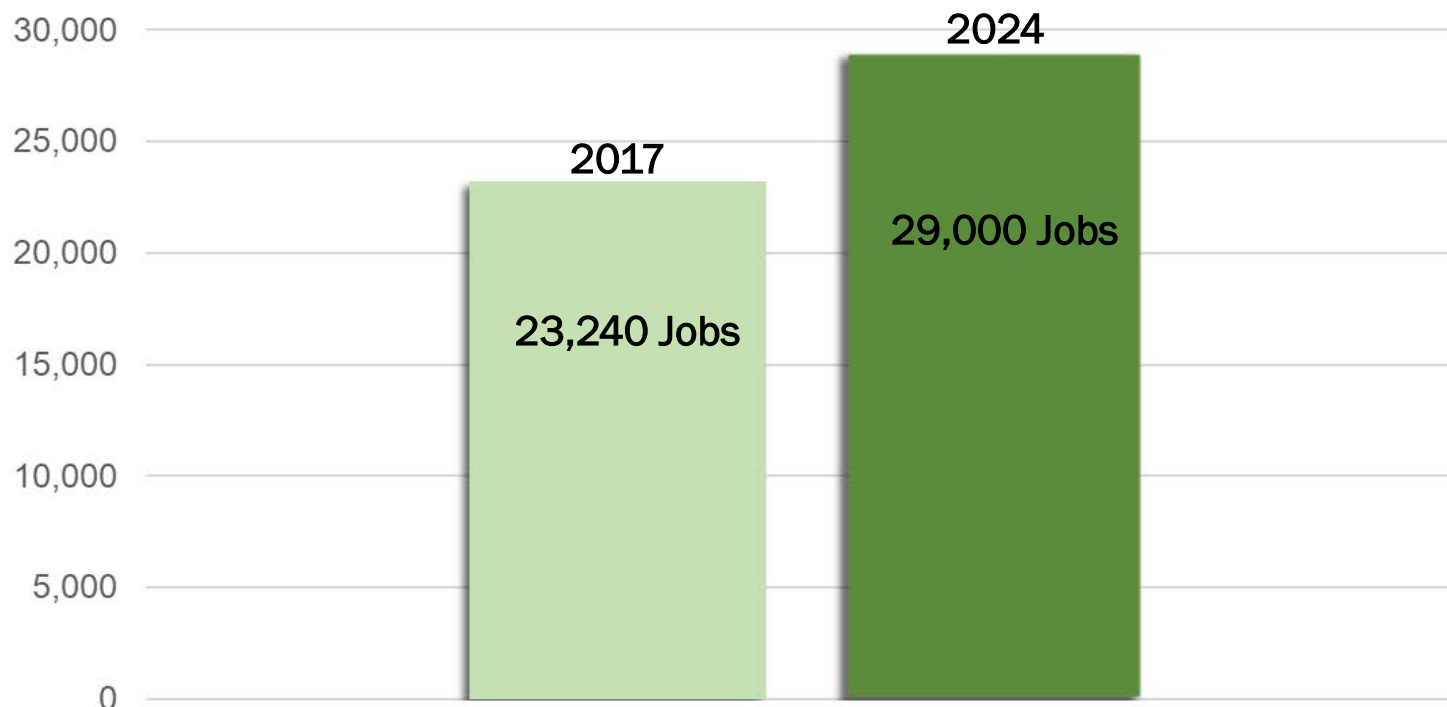


## Brookdale of Piqua

- Assisted Living
- 50 Beds
- Opened in 1997
- 2.9 acres



## Ambulatory Health Care Services Sector Dayton MSA - Projected Job Growth 2017-2024



**Approximately additional 5,800 net jobs by 2024 (+ 25%)**

Source: Ohio Department of Job and Family Services/ U.S. Bureau of Labor Statistics

- Ambulatory Health Care Services industry is top projected growth (percent) sector in the Dayton MSA\*
- Business Types Include:
  - Offices of Physicians
  - Offices of Dentists
  - Outpatient Care Centers
- Miami County projected to add **337** jobs by 2024\*
  - Currently 1,358 jobs; projected increase of 25%
- Approx. **40,000 SF** of Vacant Medical Office space currently in Miami County
- This results in **105,000 SF** of additional space needed to meet future demand and maintain a 10% vacancy rate
- Current medical office inventory in Miami County is **insufficient and in danger of becoming functionally obsolete**

## Medical Office Space Currently for Lease

12,248 SF Medical Office Building in Troy  
3,000 SF Available for Lease  
Asking Rent is \$12.50 per sf per year



Upper Valley Medical Park  
Just south of Upper Valley Medical Center  
33,000 SF Medical Office Building  
17,000 SF Available for Lease  
Asking Rent is \$12.00 per sf per year



## Comparable Medical Office Space

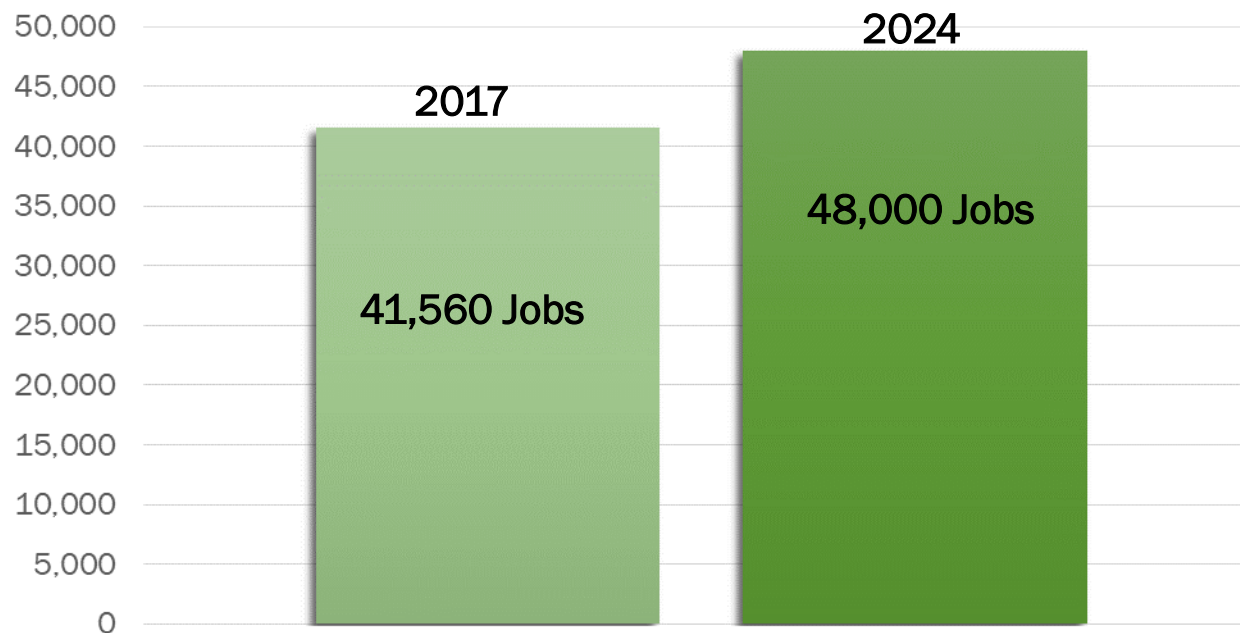
25,888 SF Good Sam Health Center in Huber Heights  
27.2 Acres



10,145 SF Urgent Care in Columbus  
1.2 Acres



## Manufacturing Sector Dayton MSA - Projected Job Growth 2017-2024



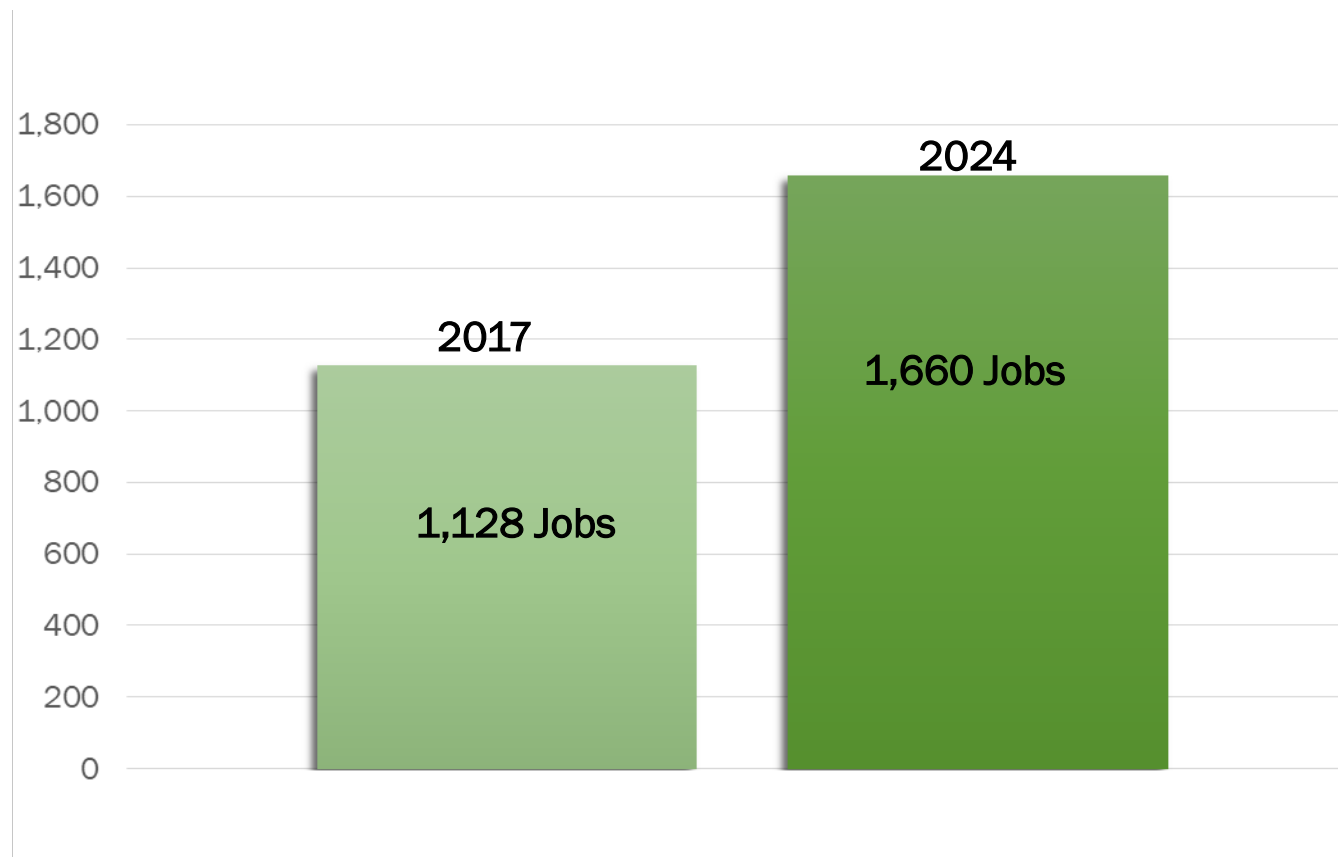
**Approximately additional 6,440 net jobs by 2024 (+ 15.5%)**

Source: U.S. Bureau of Labor Statistics

- **25%** of all Manufacturing Jobs in the Dayton MSA are located in Miami County
- Miami County is projected to add **1,628** Manufacturing jobs by 2024
- This will require approximately **400,000** SF of Manufacturing space
  - ~246 SF per employee today
  - Note: advances in automation could increase the space requirement while decreasing the number of employees



## Non-store Retailers (E-Commerce) Sector Dayton MSA - Projected Job Growth 2017-2024



**Approximately additional 532 net jobs by 2024 (+ 47%)**

Source: U.S. Bureau of Labor Statistics

- E-Commerce is one of the fastest growing business sectors in the world
- Miami County is projected to add **234** E-Commerce jobs by 2024
- Warehouse, Transportation & Logistics are closely tied to E-commerce
- This will require over **1 Million** SF of Warehouse/Distribution Space in the next decade
- Proximity to County Road 25-A/I-75 Interchange is **Ideal** for a Distribution Hub

## Comparable Facilities

### Honda Midwest Consolidation Hub

- 530,000 SF Distribution Hub Located in Troy
- 631 Employees
- Construction Completed in 2007
- 58 acres



## Spectrum Global Brands

- 570,000 SF Distribution Hub Near Dayton International Airport
- 187 Employees
- Construction Completed in 2017
- 39.2 acres



# Additional Considerations



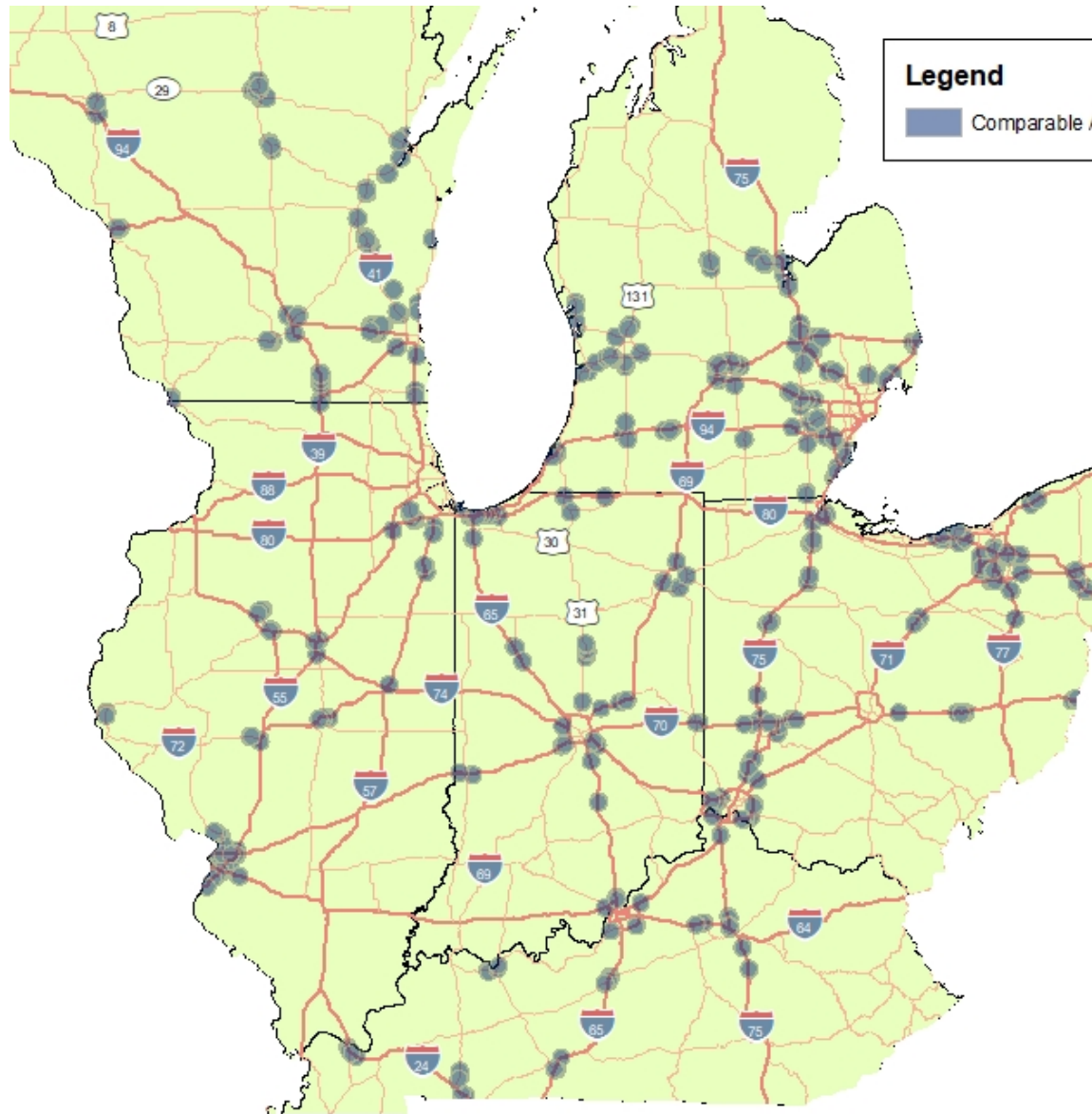
**Agriculture**

**Hotel**

**Restaurant**

**Compatible Retail**

# REGIONAL COMPARATIVE ANALYSIS



# REGIONAL COMPARATIVE ANALYSIS



- 816 areas within the six-state region were selected for comparison
- Over 150 demographic and economic variables were used to compare the Study Area
- Miami County enjoys a distinct comparative advantage within the Industrial and Warehouse/Transportation sectors
- Growth is coming faster than anticipated and if not absorbed by Miami County, it will likely be absorbed by Montgomery, then Shelby

# RECOMMENDATIONS



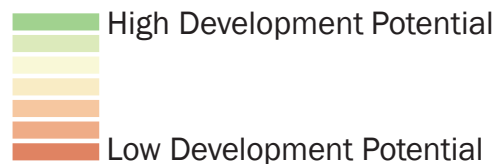
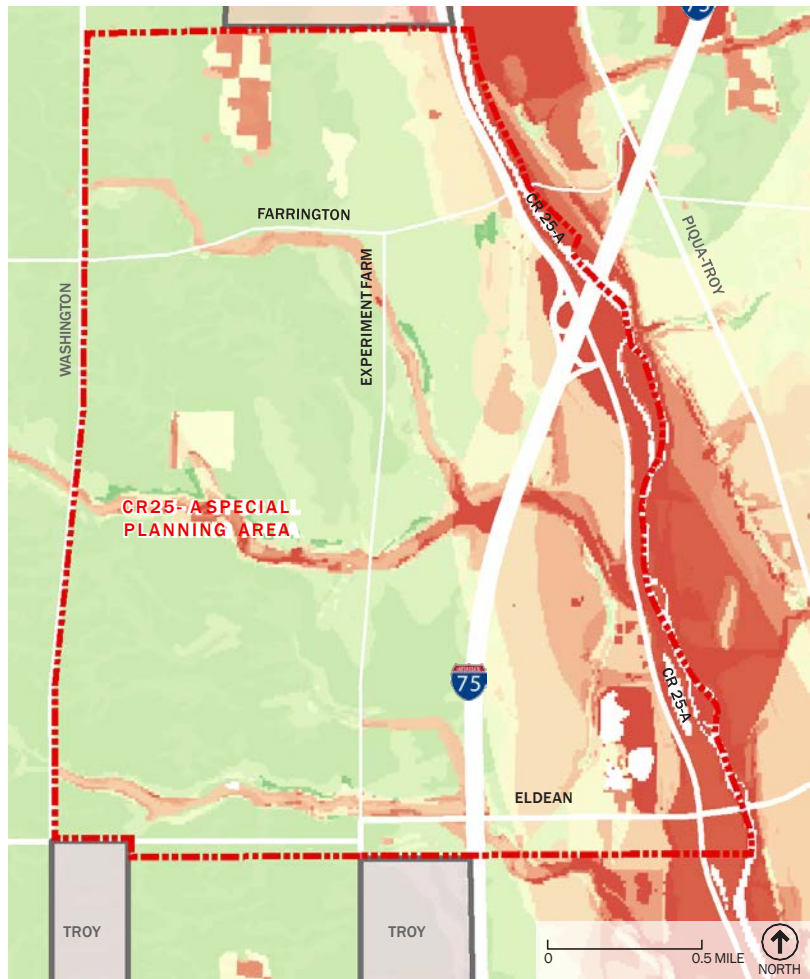
- **Assisted Living Facilities**
- **Medical Office and/or Health Care Facility**
- **Light Manufacturing or Distribution Warehouse Facility**
- Single-Family Residential ill-suited
- Hospitality services are also potential uses, especially if the corridor develops as recommended
- **Agriculture**



# GREEN PRINT AND PRIORITY GROWTH AREAS



## ENVIRONMENTAL SUITABILITY



## RESERVE AND PRESERVE



- Reserve
- Preserve






# PRIORITY GROWTH AREAS



# PLAN CR25A

## PRIORITY GROWTH AREAS

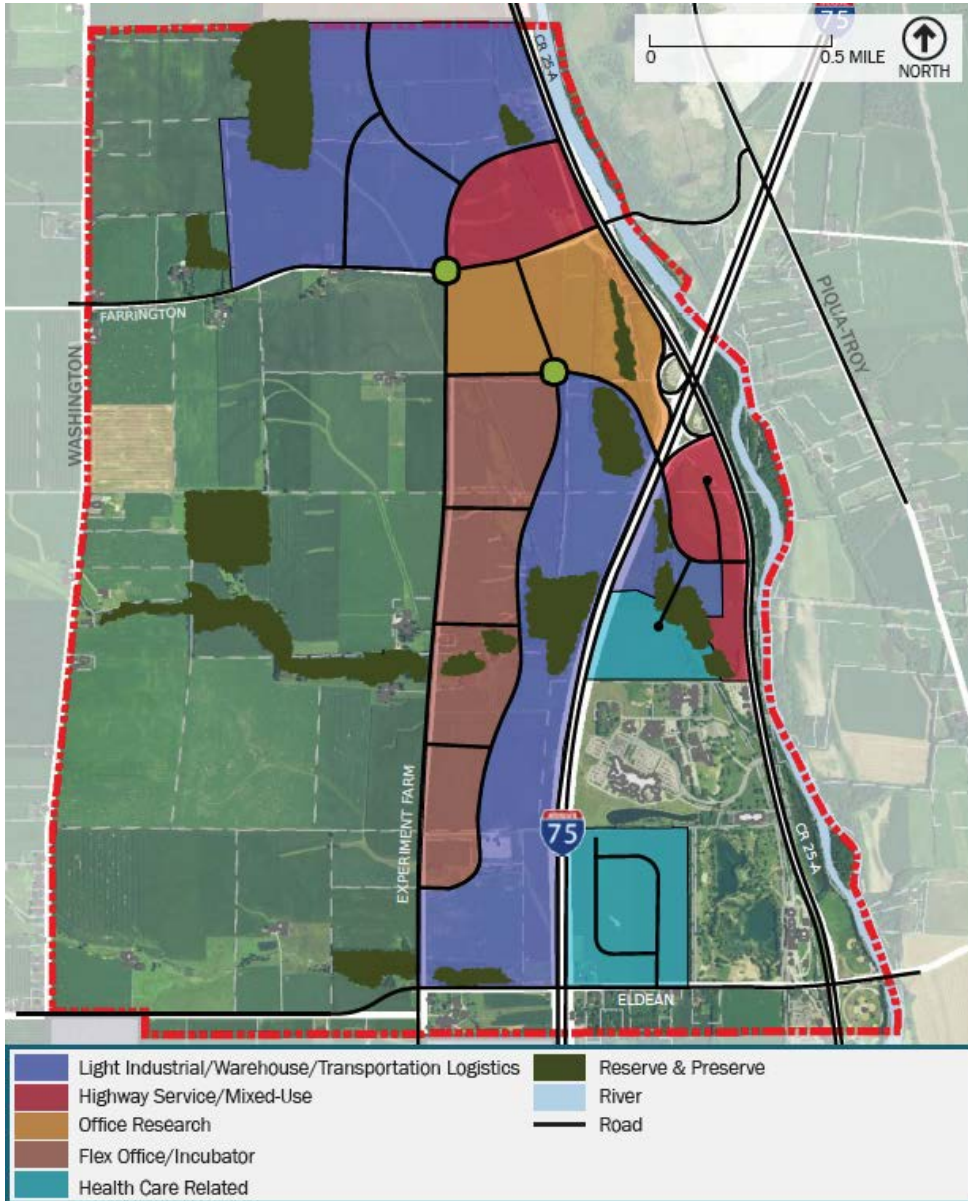


-  Intended Growth
-  Controlled Growth
-  Restricted Growth



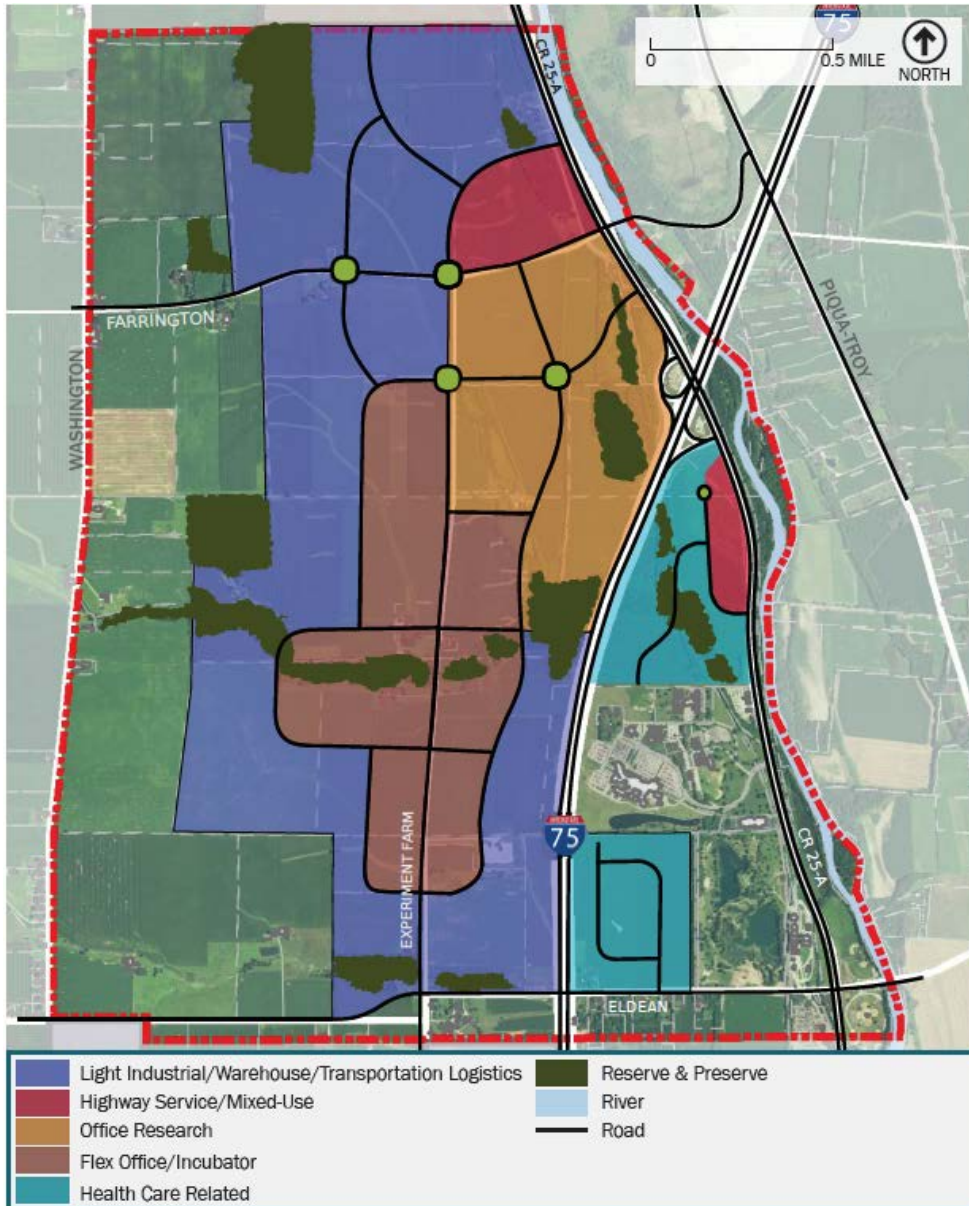
# ALTERNATIVE CONCEPTS

## ALTERNATIVE A



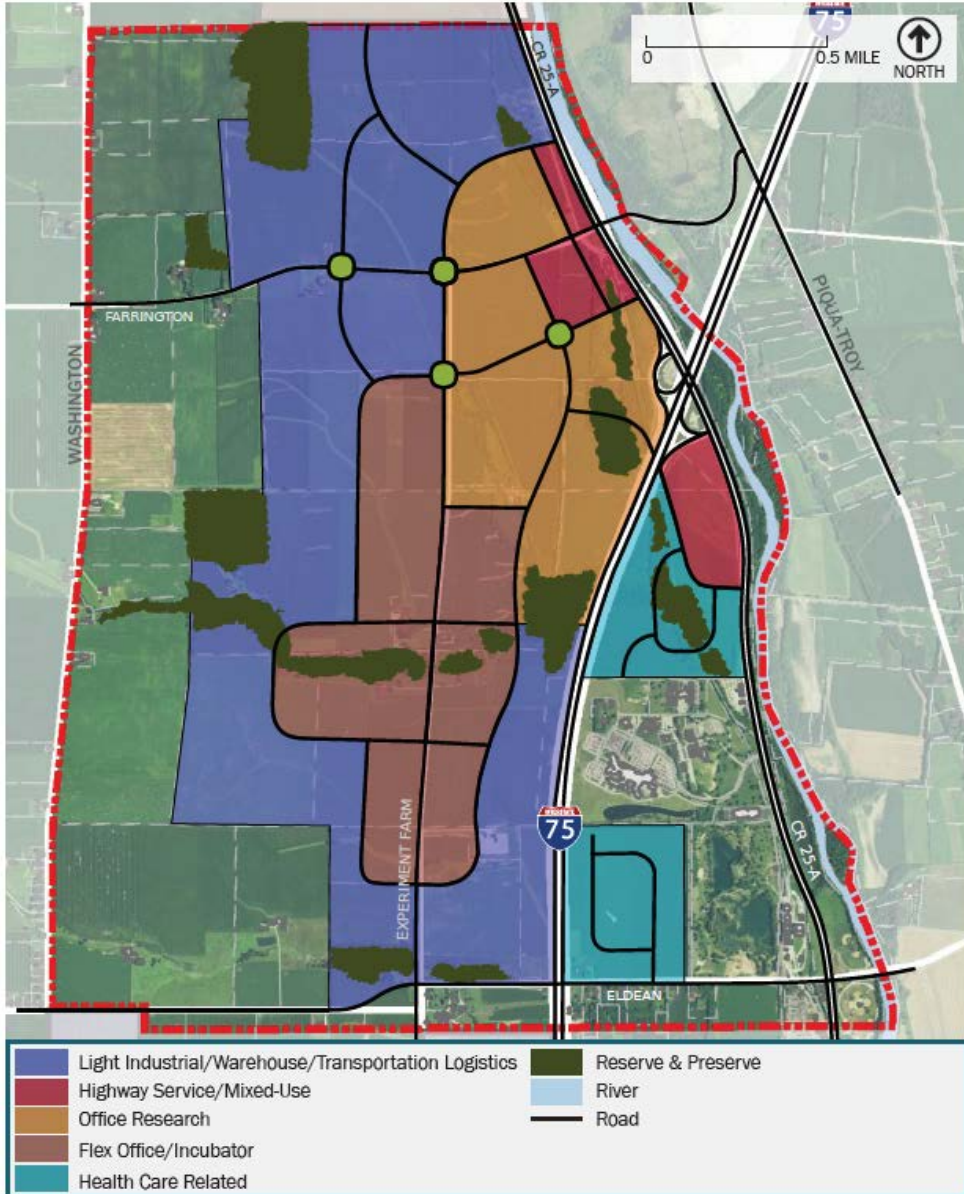
# ALTERNATIVE CONCEPTS

## ALTERNATIVE B



# ALTERNATIVE CONCEPTS

## ALTERNATIVE C



## Review Criteria

- Extent of developed area
- Completeness of transportation network (e.g. links to exiting uses, east-west connector)
- Priority order of growth areas
- Location of different use areas (e.g. larger industrial warehouse at perimeter vs. smaller flex office at center)



**THANK YOU!**