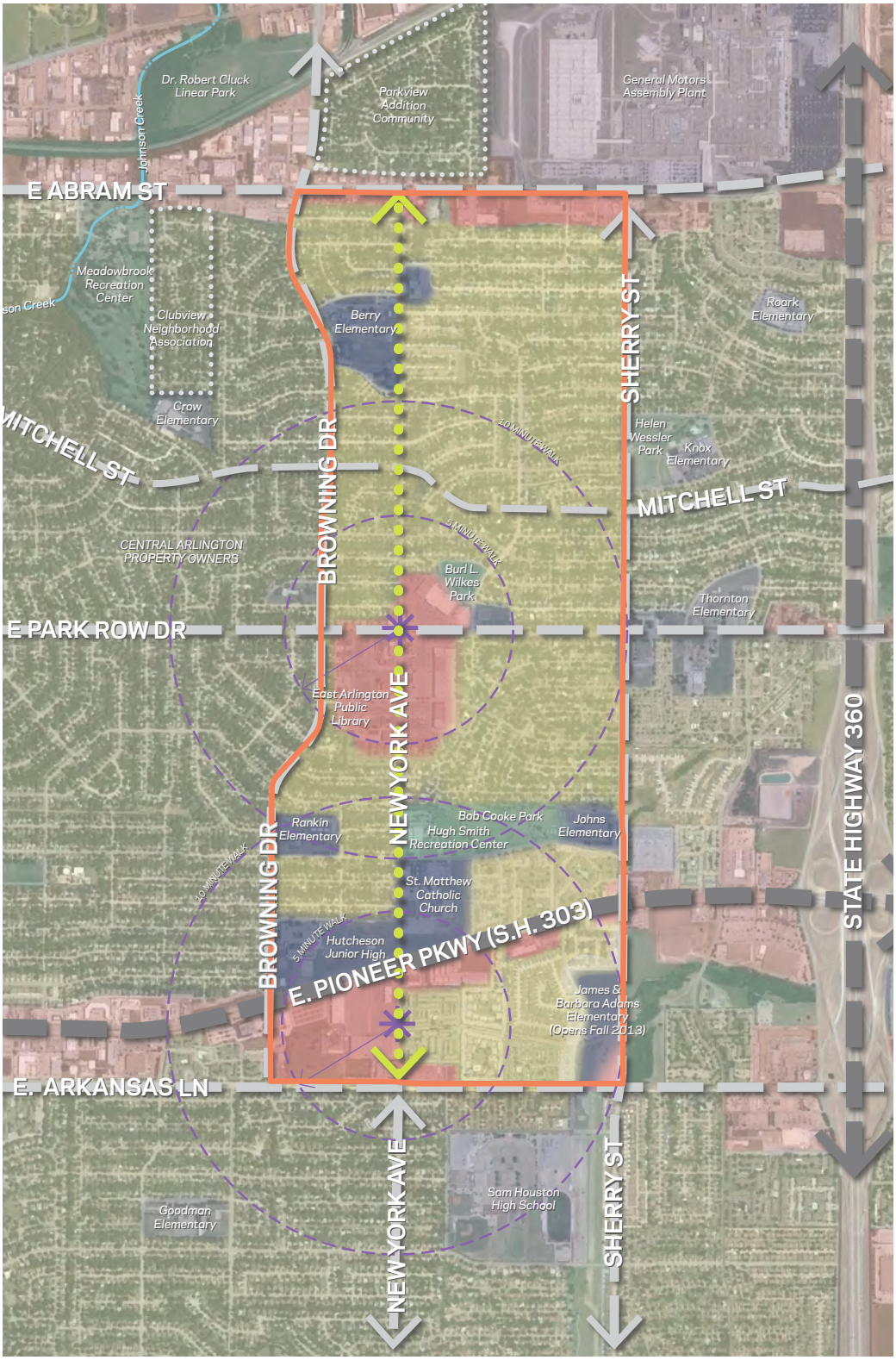
# NEW YORK AVENUE
# CORRIDOR STRATEGY

ARLINGTON

SEPTEMBER 2013



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**CITY OF ARLINGTON, TEXAS**
**SEPTEMBER 2013**

# ACKNOWLEDGMENTS

Numerous individuals including City of Arlington elected and appointed officials, City Staff, members of the New York Avenue Corridor Advisory Committee, key stakeholders and citizens provided knowledge, assistance and insight throughout the process of developing the vision and strategy for the New York Avenue Corridor. Specific contributions of the following are greatly appreciated:

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# INTRODUCTION

## *PROJECT BACKGROUND*

The New York Avenue Corridor is a key north-south linkage between Arlington's Entertainment District, the Great Southwest Industrial District, the General Motors Assembly Plant, and the IH-20 employment center. The corridor is at the center of East Arlington, which was Arlington's first suburban neighborhood. Developed primarily during the 1950's and 1960's, the corridor consisted of desirable single family neighborhoods, new apartment and townhome developments, quality neighborhood schools and churches serving multiple denominations.

The Park Plaza Shopping Center, at the corner of E. Park Row Drive and New York Avenue, was a modern suburban shopping center with grocery stores, restaurants, department stores (including Titche's and J.C Penney) and a movie theater. Park Plaza has been described by long-time local residents as the heart of East Arlington. It was the place where neighbors could see neighbors, and was easily accessible from the surrounding neighborhoods by automobile, bicycle or foot.

By the 1970's and 1980's, the newness had faded along the corridor and many newer suburban neighborhoods began to develop in other parts of Arlington. While new commercial development was still occurring in parts of the corridor along E. Pioneer Parkway (SH 303), key anchors vacated the Park Plaza Shopping Center, choosing to move to newer malls in the area. As concerns began to arise in the area related to the community's appearance, several neighbors joined together to form East Arlington Renewal. Working closely together, the residents and the City moved several initiatives forward to enhance the quality of life in the East Arlington area, including adopting the City's first Sector Plan in 1997.

Today the New York Avenue Corridor is made up of a rich, culturally diverse population base. While much has been done since the early 1980's to improve the area, recognizing that additional opportunities exist for reinvestment and redevelopment along the corridor, in March 2012 the City Council established this area as a priority for the 2012 work program.

## *STUDY AREA*

The New York Avenue Corridor Study Area is approximately 430 acres, and is bounded by E. Abram Street on the north, E. Arkansas Lane on the south, Sherry Street on the east and Browning Drive on the west (see Figure 1.1). Primary streets within the Study Area include New York Avenue, E. Mitchell Street, E. Park Row Drive and E. Pioneer Parkway (SH 303). The length of New York Avenue within the Study Area is approximately two miles, with approximately 3,000 feet of the roadway having commercial frontage on at least one side of the road.

In addition to this Study Area, both a Project Area and Trade Area have been established to support the analysis of market conditions. The Project Area includes the properties that could influence redevelopment initiatives within the Study Area and is bounded by Division Street (SH 180) on the north, SH 360 on the east, E.

*Figure 1.1 New York Avenue Study Area*

Timberview Lane on the south and S. Collins Street on the west (see Figure 1.2). This area consists of approximately 8150 parcels covering approximately 3000 acres. The Trade Area is that area from which land uses and products will capture and compete for a share of market demand. The Trade Area is described in more detail on page 21 of this report.

### *PURPOSE AND OBJECTIVES*

The New York Avenue Corridor Strategy is intended to identify key goals and generate ideas from a variety of stakeholders within the corridor in order to form a comprehensive vision and implementation strategies to maximize the corridor's potential for reinvestment and redevelopment.

Key objectives of the strategy include:

- Supporting the formulation of strong neighborhoods by building community pride and encouraging reinvestment in existing residential and institutional properties
- Creating a functional corridor for all users (residents, business owners, consumers, commuters) that adds value and improved quality of life to the adjacent neighborhoods and the City as a whole
- Providing the necessary guidance to direct public and private investments in the corridor in a manner that leverages additional resources.

These objectives formed the foundation for all discussion with the community related to the desired vision for the New York Avenue Corridor.

### *VISION PROCESS*

The process of establishing, documenting and confirming the community's vision for the New York Avenue Corridor began in October 2012. At that time, the consultant team began the process of reviewing existing physical and market conditions within the Study, Project and Trade Areas. This analysis provided an understanding of locations within the Study Area that had the best potential for infill and redevelopment activities, as well as the types of development that could potentially occur in the corridor based upon supportable market.

Following that analysis, the study team embarked on a multi-part journey with corridor stakeholders (property owners, area business owners, residents, organizations, elected and appointed officials, and key individuals in the private development community) to identify aspirations and desires for the future of the corridor. The direction received by the consultant team through extensive conversations with these individuals and groups became the basis for the overall vision for the corridor.

Input to facilitate the creation of a vision was achieved through a variety of means. A New York Avenue Corridor advisory committee was created to provide direction and feedback to the consultant team throughout the vision process. The committee consisted of 17 individuals representing several institutions in the region and the corridor. The kickoff meeting with this group included a driving tour to facilitate open dialogue related to opportunities and constraints within the corridor. In total, this group met on four occasions to debate key issues and to guide the corridor vision.

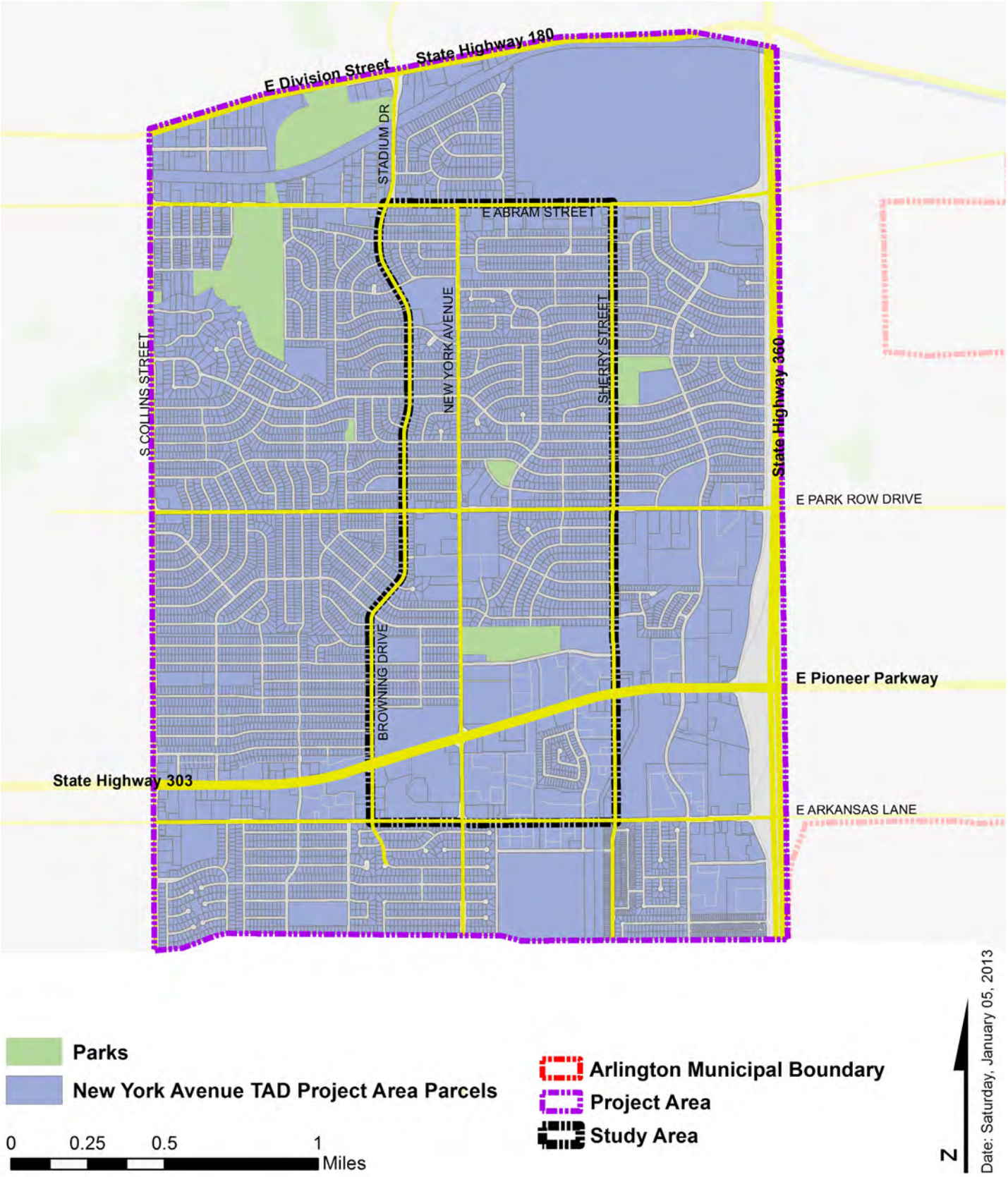


*Figure 1.2 New York Avenue Project Area*

In early January of 2013, interviews were conducted with major property owners, area developers, local lending institutions and leaders from the East Arlington Renewal community group to understand their thoughts related to opportunities and constraints along the corridor. Additionally, a survey was conducted online and at the first open house so that any interested individuals could participate in the visioning process. Forty-six people provided feedback through the survey. Survey results are included in Appendix i.

An open house was held on January 12, 2013 to educate participants on the findings from the existing conditions and market analyses, and to receive input related to the desired vision for the corridor. A second open house was held on March 23, 2013 to gather input on a preliminary vision framework for the corridor, and to confirm that the preliminary vision accurately represented the community's vision. The final framework plan and implementation strategies for the corridor were then presented to the community in a final open house on June 1, 2013.

A great deal of effort was expended to encourage a high level of public input at each of the open houses. Over 2,100 post cards were sent to individual property owners within the Study Area to announce each open house, and additional flyers announcing the open houses were posted at the Senior Recreation Center, the East Arlington Library, and at individual businesses along the corridor. The City also located electronic message centers along the corridor prior to each open house to provide an additional mechanism for encouraging attendance. All post cards and flyers advertising the open houses were prepared in English, Vietnamese, and Spanish to reflect the differing language needs of the stakeholders in this multi-cultural corridor.

At the open houses, the surveys that were prepared to solicit stakeholder input were available in English, Vietnamese and Spanish, and interpreters were present at each event to provide Spanish, Vietnamese and Sign Language interpretations during presentations and breakout discussions. Additionally, all open houses were held on Saturday mornings in order to provide the greatest opportunity for the majority of residents, property owners, and business owners to attend. The result of these efforts was a high level of input from interested stakeholders with over 60 participants at the first open house, over 80 at the second, and over 70 at the final event.

The Arlington City Council Community and Neighborhood Development Committee was also briefed on three occasions to update them on project progress and to gather their feedback. Finally, the Arlington Planning and Zoning Commission and the Arlington City Council each received a final briefing in early June 2013 to update them on project findings and to answer specific questions. A more detailed reporting of the feedback received from the community in the survey and the open house can be found in appendix i and iii, of this report.

*New York Avenue Open House*

# PHYSICAL CONDITIONS

### *EXISTING LAND USE*

Existing land uses in an area can be an indicator of the overall health of a community. Too much of the same use constructed during a similar timeframe can erode the desirability and marketability of an area, resulting in flat or decreasing property values. Additionally, a healthy mix of uses is necessary to provide the housing stock, employment, shopping, schools, services, and recreational needs that create healthy communities.

The predominant land use within the New York Avenue Corridor Study Area is single family residential, with the majority of the housing stock dating back to the 1950's and 1960's (see Figure 2.1). Institutional uses consisting of schools, churches and City facilities including the Senior Recreation Center, the East Arlington Branch Library and the East Arlington Police Service Center are also prevalent in the area. These institutional uses are located throughout the Study Area and have played an important role in creating a sense of community for area residents. Together, these uses support strong neighborhoods and are depicted as a neighborhood use on the existing land use exhibits.

Major commercial development exists in a neighborhood center at the intersection of New York Avenue and E. Park Row Drive, in a strip development pattern along the south side of E. Pioneer Parkway (SH 303), and on the south side of E. Abram Street. Multi-family residential is primarily focused in the southeast quadrant of the Study Area. The majority of the properties in the Study Area are developed, with the major undeveloped parcels being located along E. Abram Street and E. Arkansas Lane.

While the core land use mix in the Study Area supports a healthy sense of community, opportunities exist to upgrade the commercial uses to align with current retail standards, expand the retail choices for area residents, and to broaden the spectrum of residential types and configurations to create more choice for existing and new residents in the area.

### *EXISTING ZONING*

Existing zoning can be a deterrent to achieving a desired outcome for a corridor if it is not aligned with the community vision or market. For the most part, the existing zoning within the Study Area is in-line with the uses that exist in the area. The predominant zoning category that exists is R (Residential) which allows single family detached dwelling uses on minimum 7,200 square foot lots (see Figure 2.2). In addition to the single family homes that exist within the Study Area under this category, many of the institutional uses such as churches and schools that occur along the corridor are located on parcels with this designation. The majority of existing apartment complexes are zoned MF22 (Multi-Family) which a maximum of 22 units per acre.

The larger commercial areas located at New York Avenue and E. Park Row Drive, and along E. Pioneer Parkway (SH 303) are zoned CS (Com-

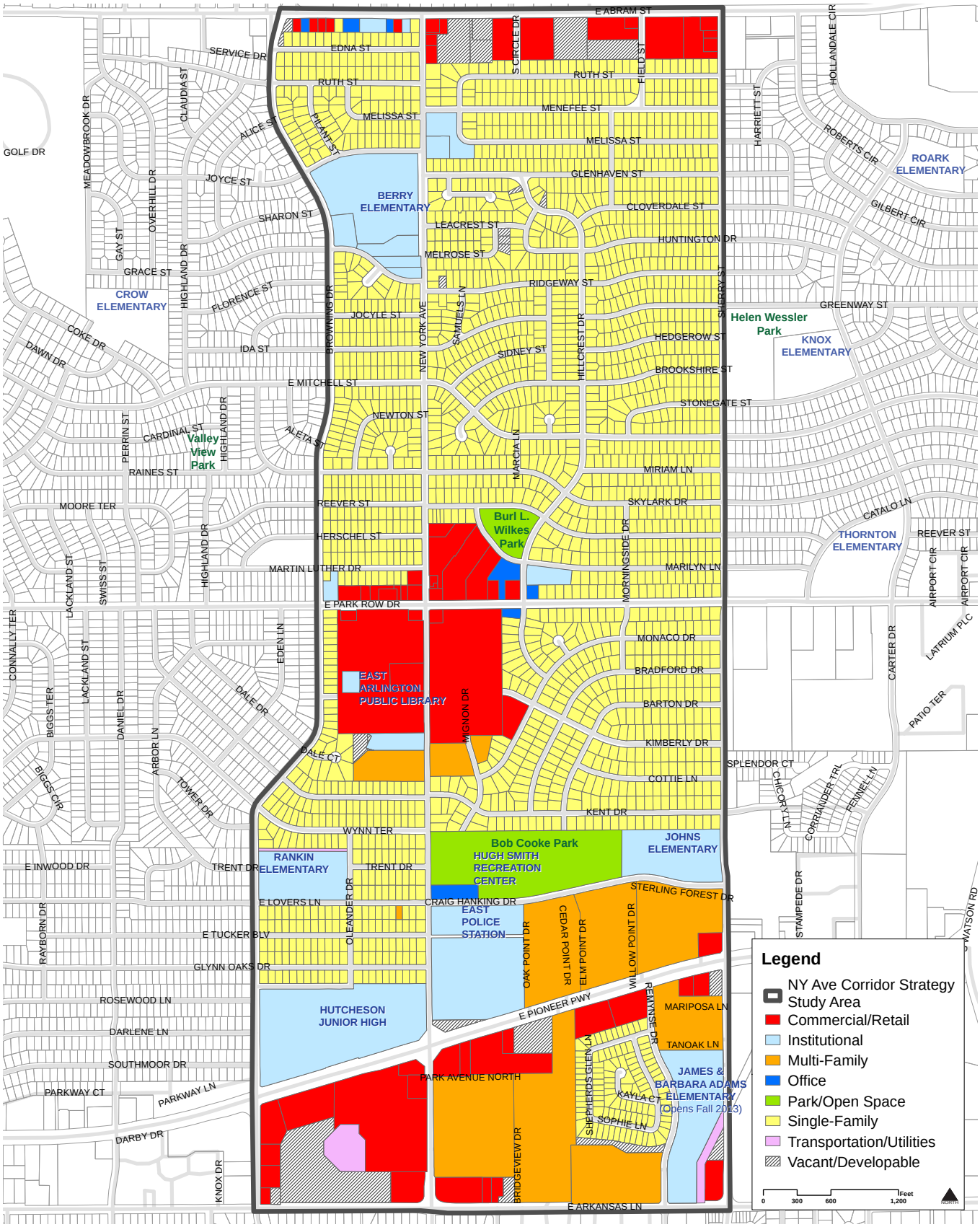


*Figure 2.1 Existing Land Use*

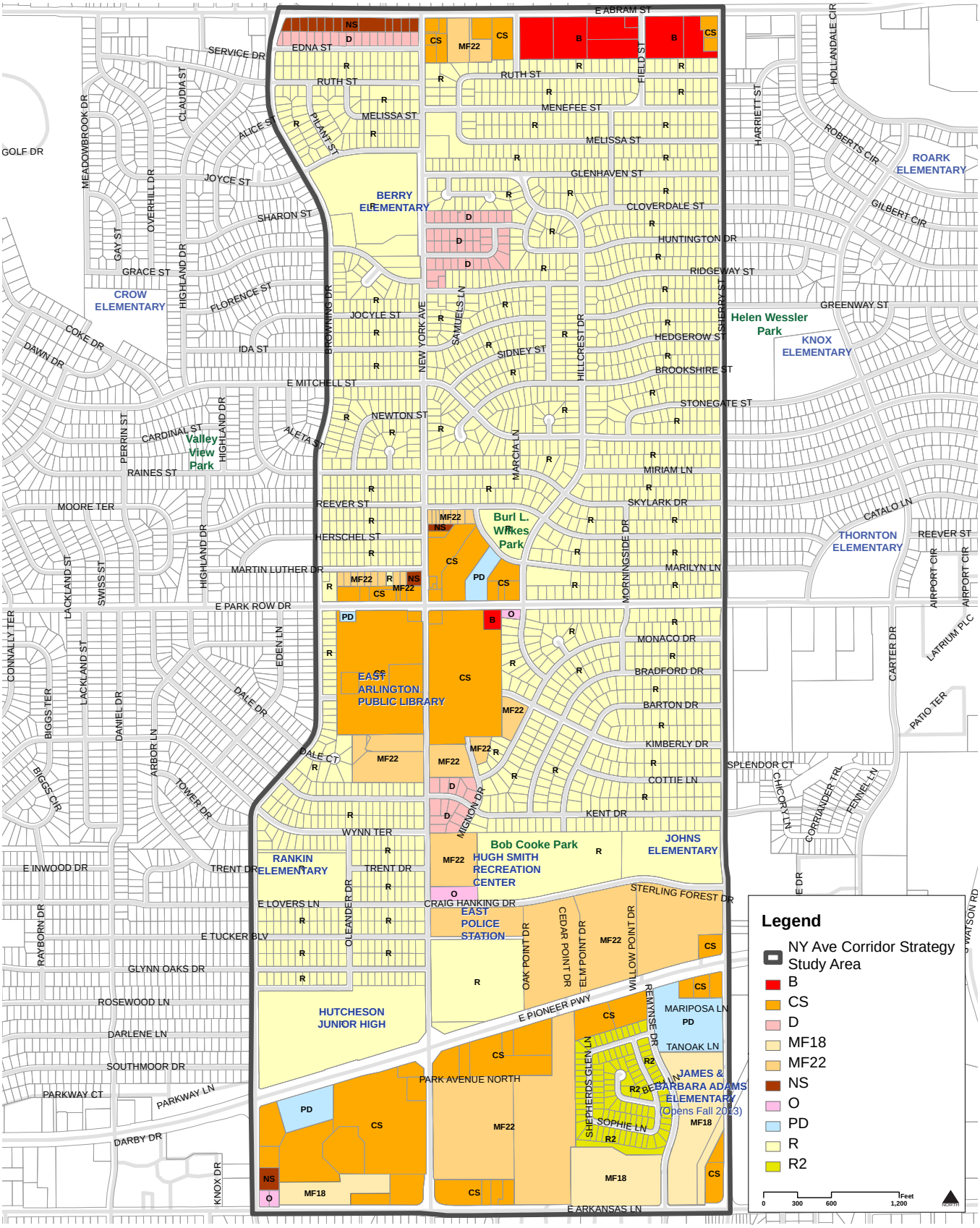


*Figure 2.2 Existing Zoning*

munity Service) which allows for a wide range of retail and office uses. Along E. Abram Street, the commercial zoning includes NS (Neighborhood Service), CS and B (Business). The B zoning category allows all of the uses allowed in the CS category, plus additional uses including minor auto repair, motor vehicle sales, pawn shops and warehouses.

In general, the existing zoning in the Study Area supports the uses that will be a part of the future vision for the area. In limited areas, however, it will likely be necessary to re-zone key parcels to accommodate the desired vision for targeted parcels in the corridor, or to exclude some uses that are currently allowed but not supportive of the future vision for the area.

### *EXISTING PARCEL SIZE*

The ability to accommodate significant change in the development pattern of corridors is typically dependent upon parcel size. One of the largest roadblocks to corridor revitalization is the existence of small parcels with fragmented ownership. This condition can severely limit the ability to redevelop at a scale that can change market perceptions related to a corridor. Within the Study Area, 18 parcels are larger than five acres and 16 parcels are between two and five acres. While some of these parcels contain parks, schools and churches which are important anchors for the surrounding neighborhoods, several contain underutilized commercial centers or are vacant (see Figure 2.3). Overall, the existing parcel sizes favorably contribute to the ability to accommodate new development within the New York Avenue Corridor.

### *EXISTING STRUCTURES*

The configuration of buildings, the sizes of their footprints and the spaces that they enclose can have a direct correlation ON the perceived aesthetic quality of an area, as well as the desirability for businesses to locate in the area. Developments with large expanses of parking located at the front of buildings with minimal landscaping are configured for consumers to arrive by car, walk directly into a business, and then depart. This approach to retail development was the norm in the 1950's and 1960's, but is not desired by quality retailers today who want to attract consumers to get out of their cars and peruse multiple establishments.

The existing character of the New York Avenue Corridor Study Area is indicative of a 1950's suburban development pattern (see Figure 2.4). The majority of buildings are one story and have footprints that are less than 2,000 square feet. In the major commercial areas, the buildings are set back a great distance from the roadways with parking located in front of the buildings. This configuration negatively impacts the overall street character. Opportunities exist for the reconfiguration of these areas through infill development or redevelopment. This would create a more vibrant street life, a more walkable corridor, a more visually pleasing environment, and a better business climate.

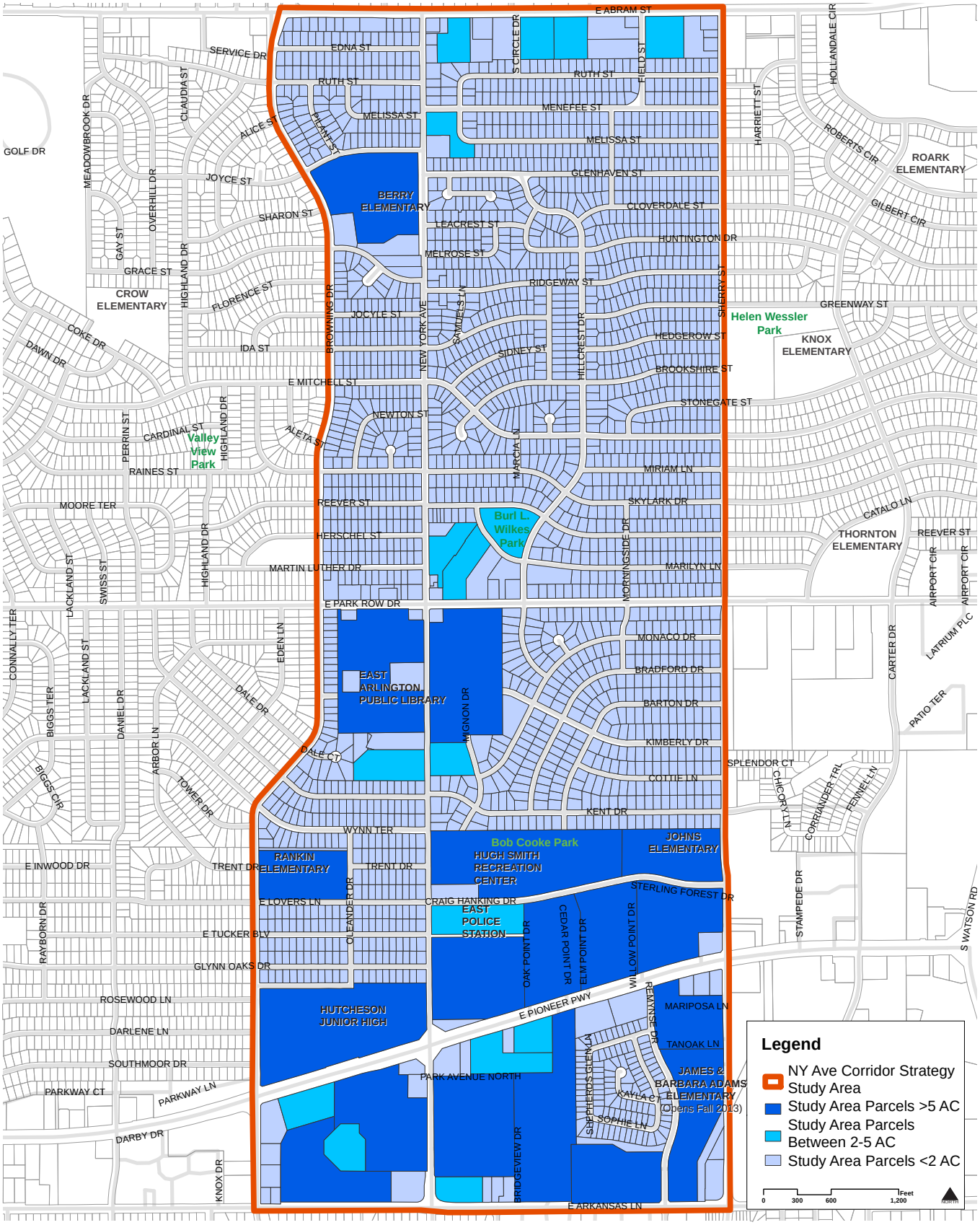


*Figure 2.3 Existing Parcel Size*

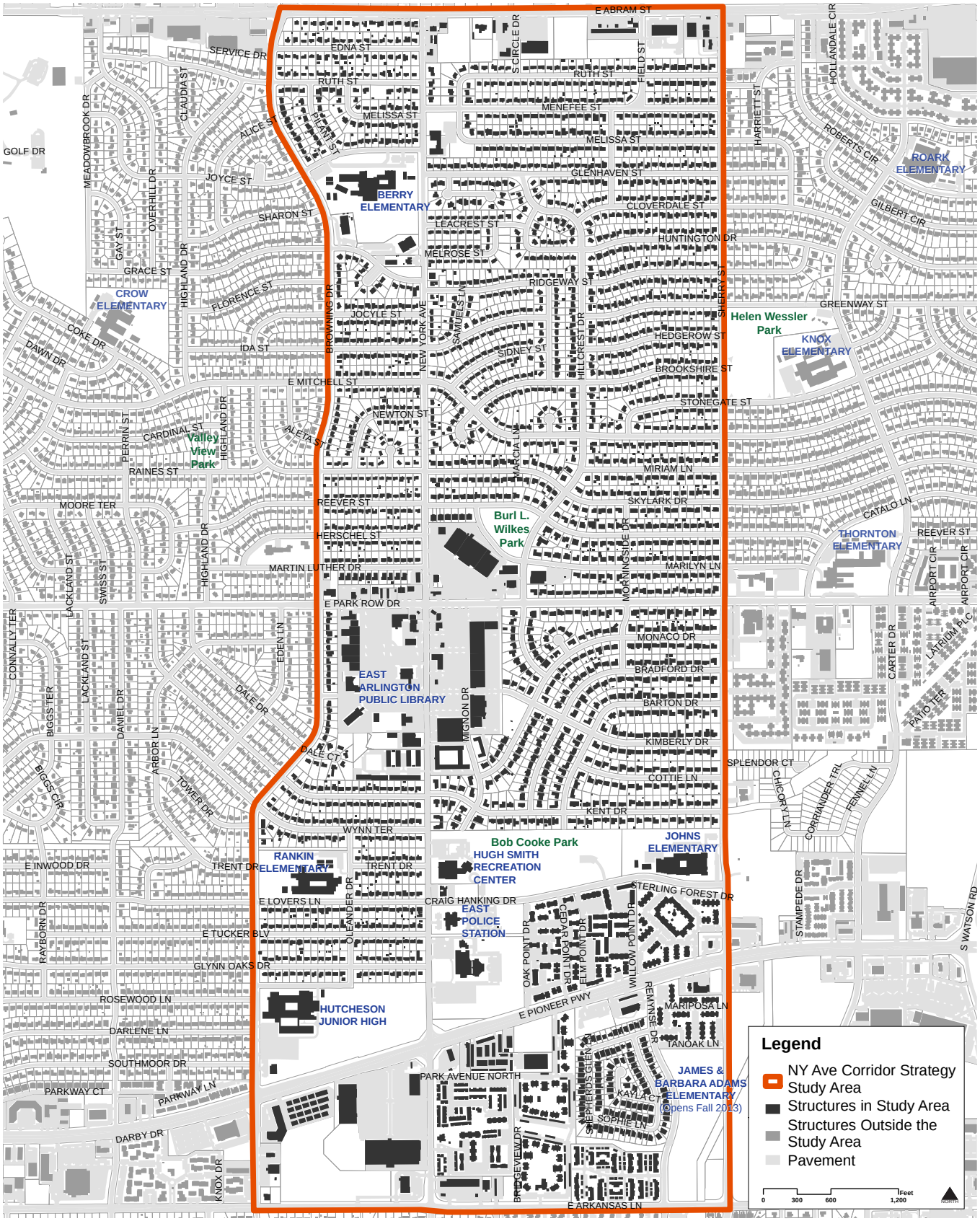


*Figure 2.4 Existing Structures*

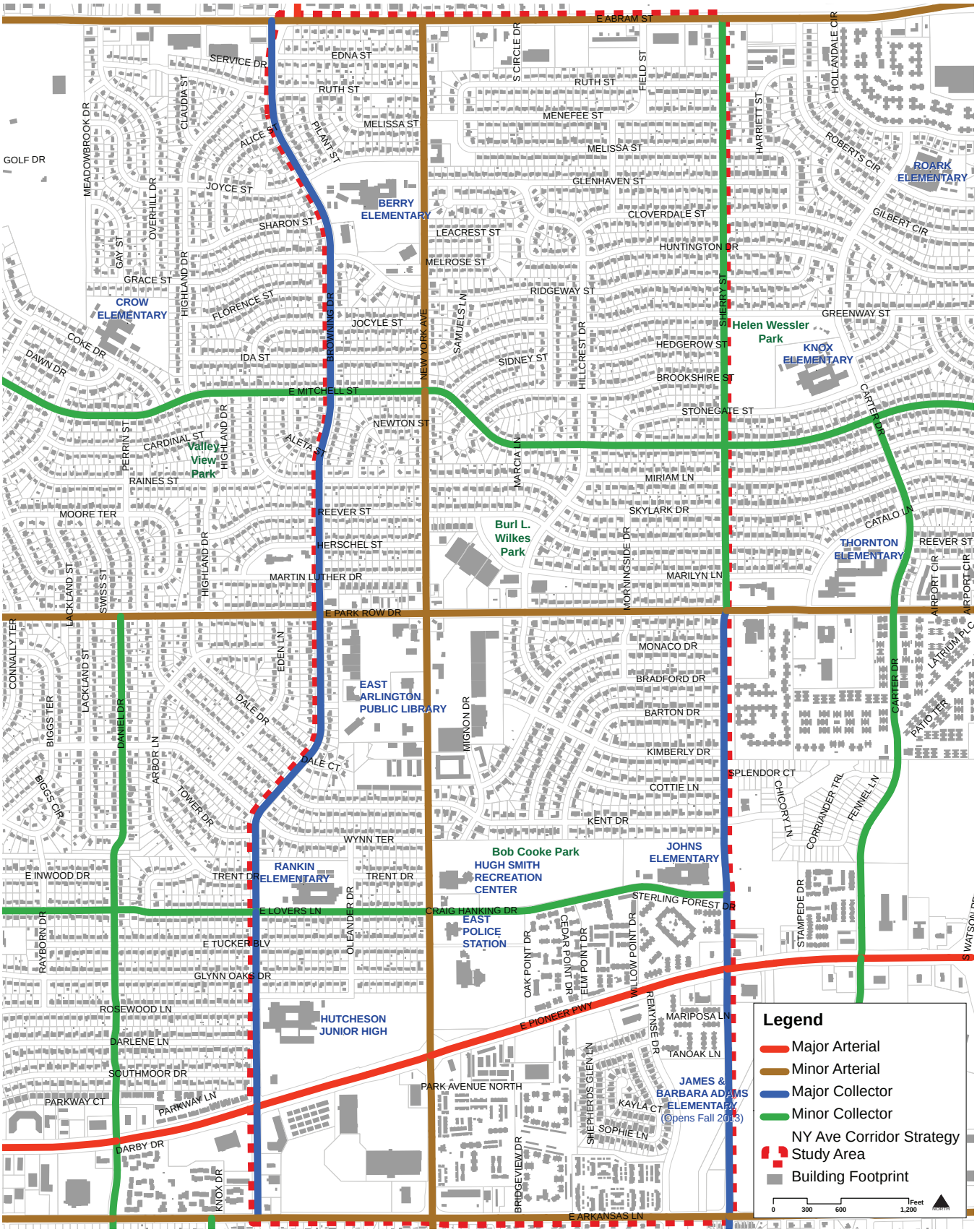


*Figure 2.5 Existing Streets*

### *EXISTING STREETS*

Streets have traditionally been designed with the mobility of vehicles as the primary focus. However, the successful redevelopment of corridors must address all functions of the street, including social and economic activity, and a variety of transportation mode choices necessary to satisfy the needs of the surrounding community. Within the Study Area, New York Avenue is classified as a minor arterial (see Figure 2.5). It currently operates as a three-lane undivided roadway between E. Abram Street and E. Park Row Drive and transitions to a four-lane undivided roadway south to E. Arkansas Lane. In this area, New York Avenue carries between 13,000 and 16,000 vehicles per day. Traffic congestion is not a significant issue in this area, given the nearby alternate north-south routes and the sufficient capacity on New York Avenue. Based on travel demand projections completed for the 2011 Thoroughfare Development Plan Update, no capacity improvements will be needed along New York Avenue in the near future as growth within the City continues. This provides flexibility to focus on improving other design characteristics of the corridor to complement the surrounding built environment and benefit all roadway users.

One of the largest constraints in the improvement of any existing roadway is the available right-of-way. North of E. Park Row Drive, New York Avenue has approximately 60'-62' of right-of-way with a wider streetside zone adjacent to the three lanes of travel. However, south of E. Park Row Drive, the right-of-way narrows to approximately 50' with very narrow streetside width. In these conditions, it is important to prioritize desired design elements and emphasize those that will meet the vision of the corridor.

### *EXISTING BICYCLE / PEDESTRIAN ACCESS*

The thoroughfares within the Study Area have a predominantly auto-centric design, with little attention given to pedestrians and bicycles. There are existing sidewalks along a large portion of New York Avenue, but in many parts there is no buffer from the vehicle travelway, and the width is limited by utility poles or adjacent fence lines (see Figure 2.6). Sidewalks are missing on the southern segment of the New York Avenue/Park Row Drive intersection which is an important link from the intersection crosswalks. There is also a lack of shading and pedestrian-scale lighting in most areas. Some of the adjacent residential streets have seen recent improvements to sidewalks and curb ramps. However, the sidewalk conditions vary along New York Avenue and many pedestrian facilities at intersections do not conform to Americans with Disabilities Act design guidelines.

Currently, there are no on-street bicycle facilities within the Study Area, but the City's planned bicycle network includes routes that will connect to many of the neighborhoods and schools within the Study Area. Areas east and west of New York Avenue will be connected with bike routes

*New York Avenue Existing Street and Sidewalk Conditions*

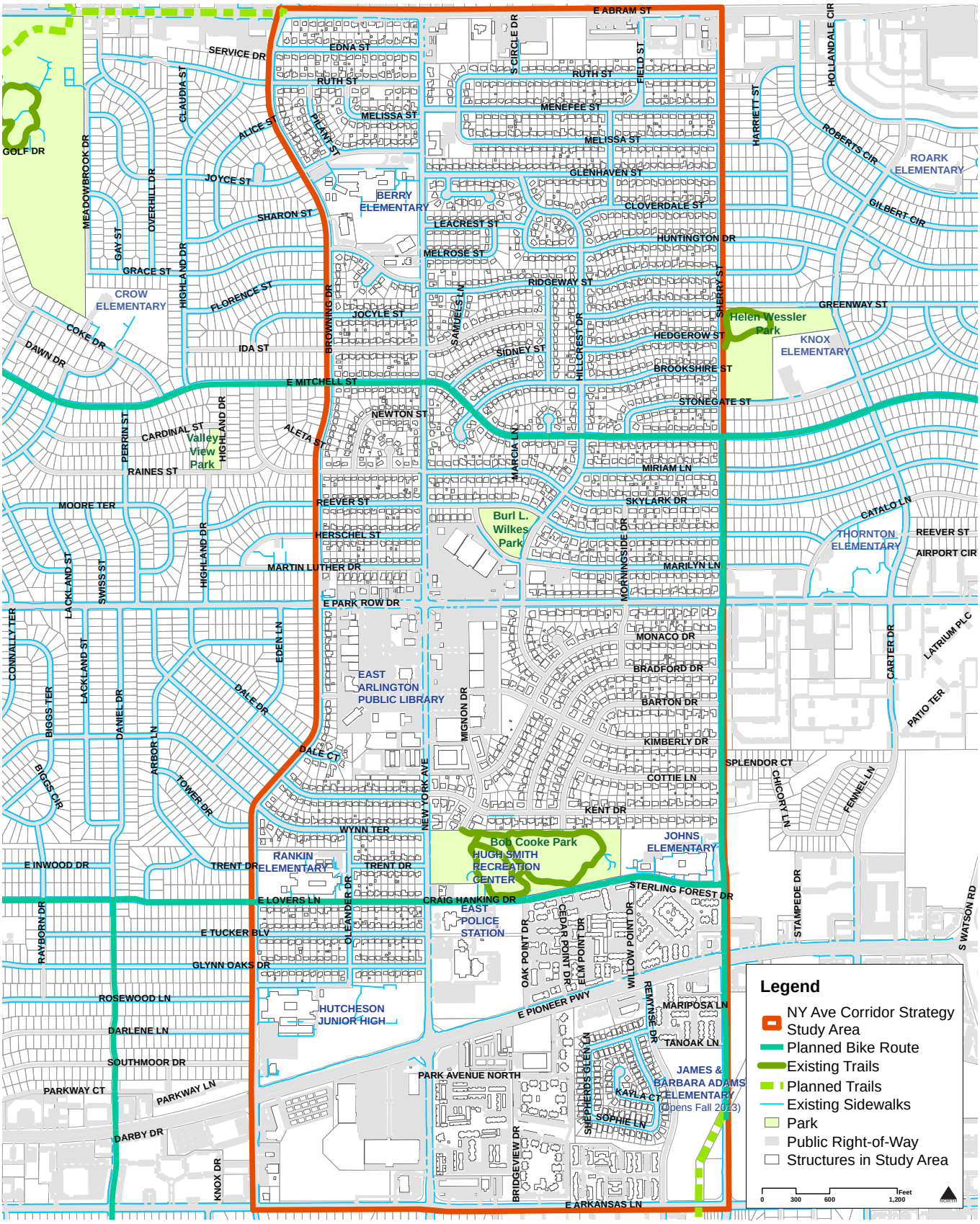


*Figure 2.6 Existing Bicycle / Pedestrian Access*

on E. Mitchell Street, Lovers Lane and Craig Hanking Drive. In addition, a bike route on Sherry Street will provide a designated north-south route alternative.

### PROPERTY OWNERSHIP GEOGRAPHY

In any redevelopment area, a strong presence of local property ownership is desirable. This usually indicates a higher degree of attention paid to the investment as compared to a parcel that is part of a larger portfolio. As shown, Arlington property owners control 83% of Project Area (the larger area of influence that affects the Study Area) parcels, representing over 61% of the total acreage (see Figure 2.7). Three percent of the properties are owned by out-of-state interests, and those properties represent 17% of the total Project Area. The majority of these properties are located along E. Pioneer Parkway (SH 303) and E. Arkansas Lane, and contain Multi-Family uses. A total of 88% of properties representing 70% of the total Project Area are owned by local interests (Arlington, Grand Prairie, Dallas and Fort Worth). Overall, this is a good indicator for redevelopment efforts, as local ownership tends to be more "vested" in community-wide revitalization.

### PROPERTY TENURE

Tenure of property ownership could be an indicator of an owner's "basis" in his property. Generally, the longer a property is owned, the lower the basis or initial investment in the property, as outstanding loans are more likely to be paid in full. This can be a measure of an owner's willingness to reinvest, or even sell, their property. As shown, approximately 25% of the parcels in the Project Area were acquired within the last 10 years (see Figure 2.8). Several of the parcels, many of which are churches and schools, had no reported sale date recorded in the Tarrant Appraisal District's records.

### PROPERTY UTILIZATION

Perhaps the most effective measure of an area's ripeness for redevelopment is the economic utilization of existing property. This measure calculates the ratio of improvement value to total value, showing where land values may have a disproportionate impact on total value. As such, these properties often become targets for redevelopment or assembly for new development. As shown, the Project Area includes a number of properties, most located along primary and secondary arterials, which are considered to be underutilized (see Figure 2.9). Again, this underscores the preponderance of lower-value parcels and improvements throughout the corridor, typical of an area ripe for redevelopment and revitalization.

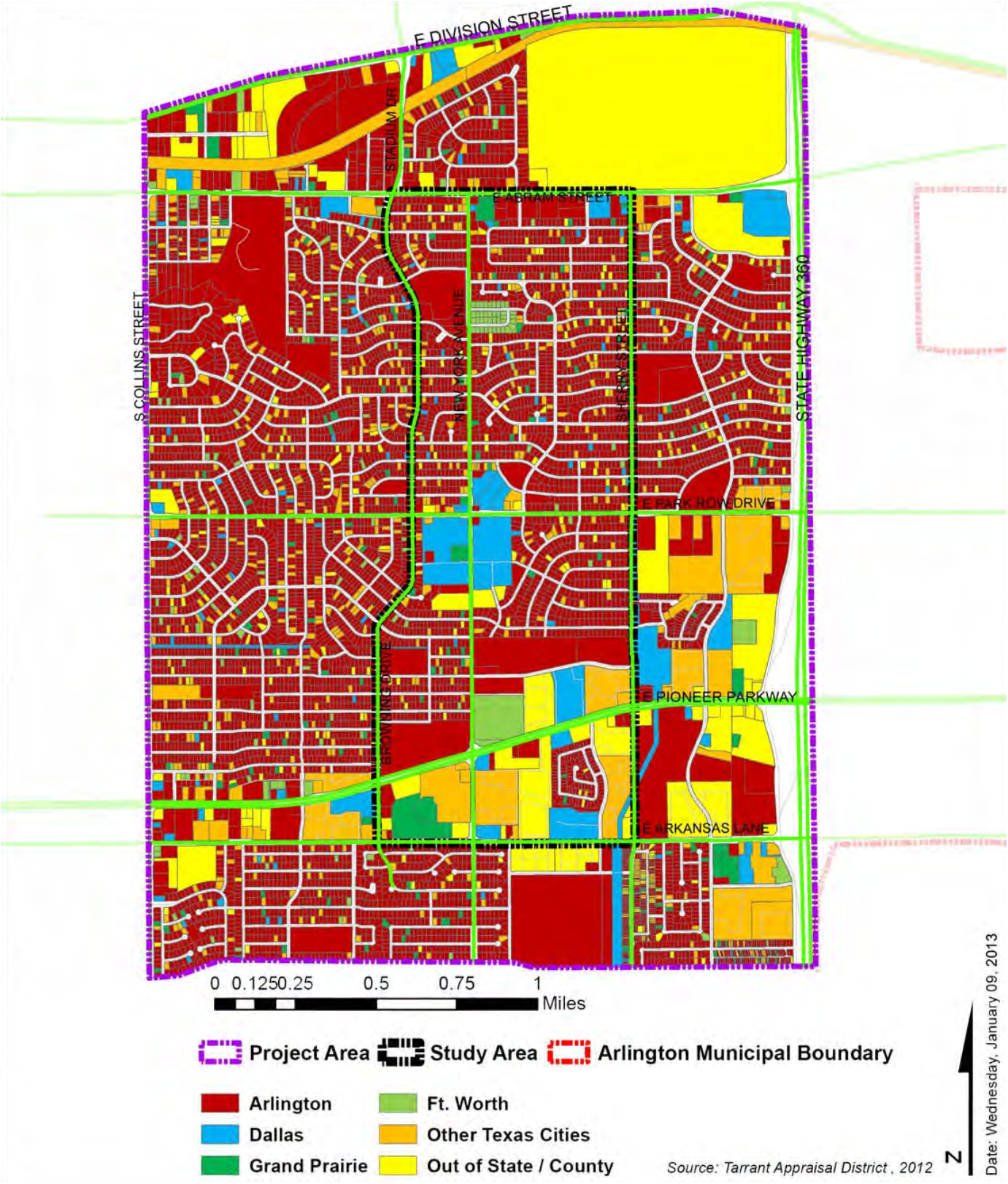


*Figure 2.7 Property Ownership Geography*

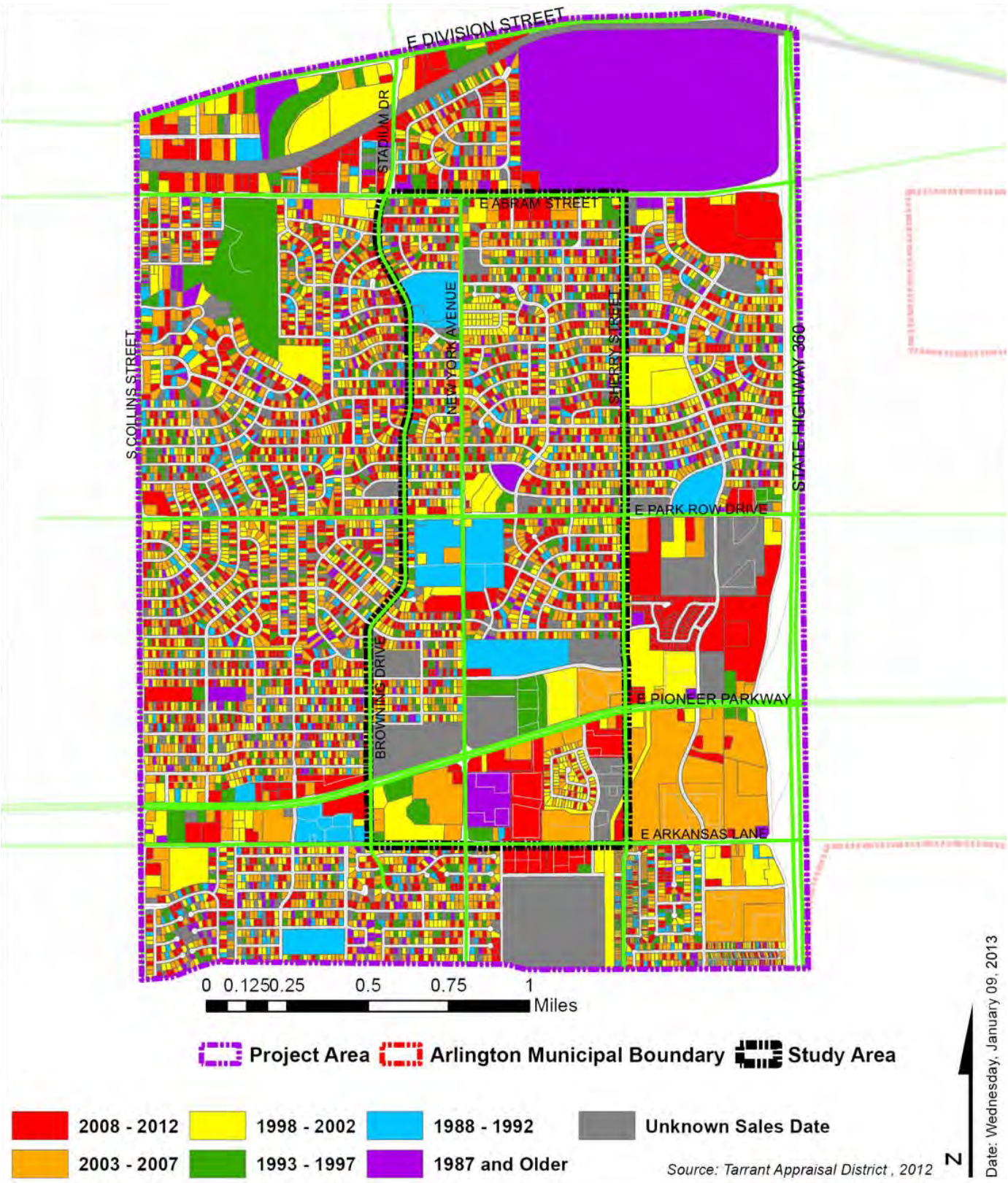


*Figure 2.8 Property Tenure*

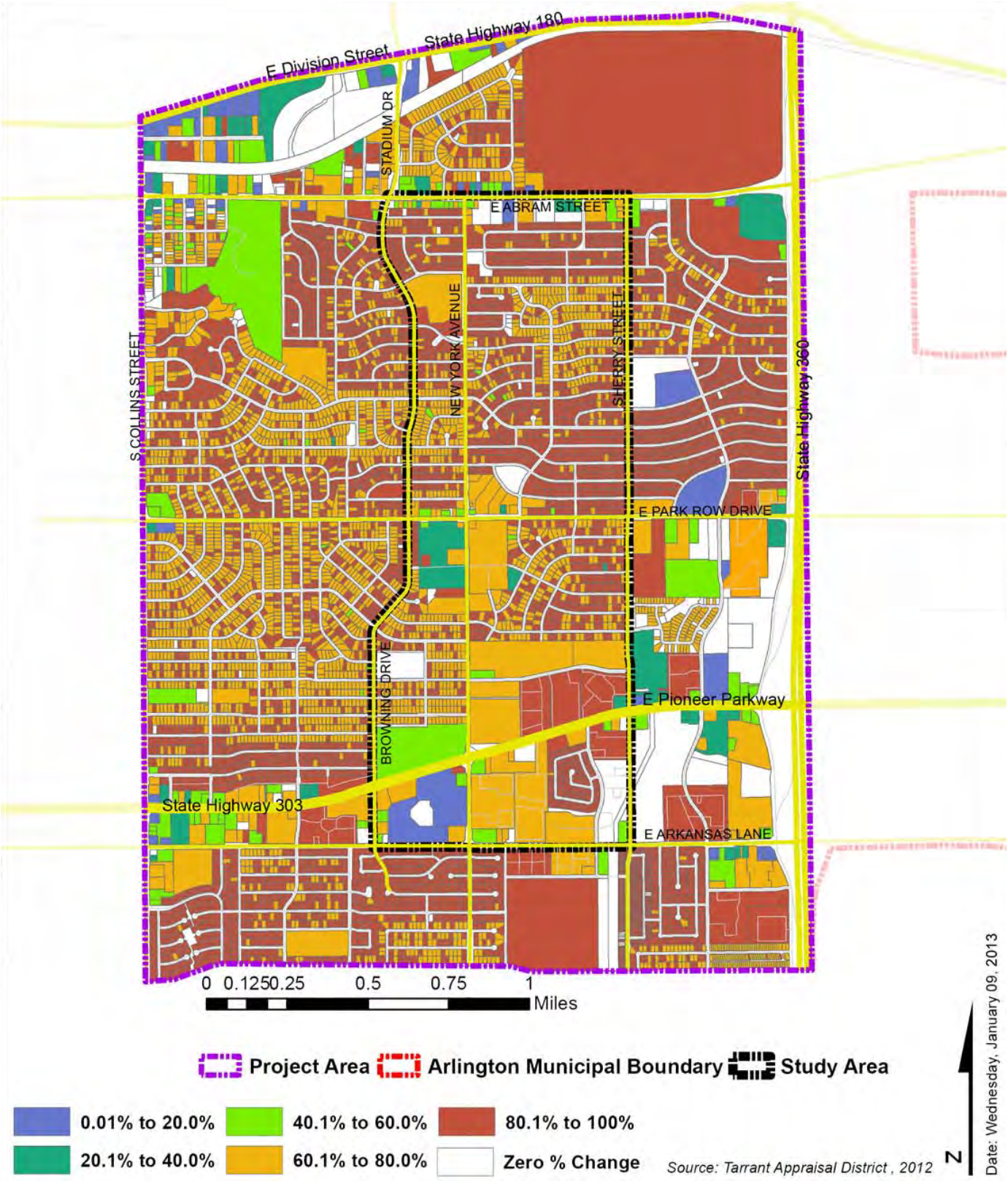


*Figure 2.9 Property Utilization*

### *CONCLUSION*

In summary, very few physical constraints exist within the Study Area that will inhibit reinvestment activities. In fact, several factors make key sites within the New York Avenue Corridor ripe for reinvestment. Vacant parcels along key roadway corridors with great visibility and traffic counts, and key retail parcels that are underutilized, with local ownership and with positive owner tenure provide substantial capacity for infill development and redevelopment.

Specifically, three areas were identified as "Opportunity Sites" with key indicators supporting reinvestment / redevelopment. The parcels on the Southeast corner of New York Avenue and E. Abram Street have local ownership and are significantly underutilized, with three of the parcels being vacant and others having a low improvement to land value ratio. The parcels on the Southeast corner of E. Park Row Drive and New York Avenue have local ownership, favorable tenure (acquisition prior to 1992), and are underutilized with a 40%-60% improvement to land value ratio. Finally, the parcels on the north side of E. Arkansas Lane, west of New York Avenue have local ownership, favorable tenure (acquisition prior to 2002) and are significantly underutilized, with the largest parcel being vacant. The vision for each of these sites and proformas are detailed in the Vision section of this document.

In some cases, zoning changes may be necessary to accommodate the envisioned development, but those changes can be targeted to key properties. Additionally, some infrastructure improvements will also be needed to improve the overall quality of streets in the area to ready the environment for private sector reinvestment.

# MARKET CONDITIONS

Planning for the strategic redevelopment of the New York Avenue Corridor requires an understanding of its physical limitations, as well as its market. The market analysis portion of the Strategy, summarized here, focused on identifying market opportunities within the City of Arlington and a larger representative trade area. The purpose of the market analysis in the context of a redevelopment effort such as this is fourfold:

- Provide a "reality check" for the conceptual planning effort;
- Ensure that recommendations are grounded in market and economic reality;
- Set the stage for implementation; and
- Provide an accurate and independent "story" to tell potential development and investor audiences.

The analysis showed that there is market demand in the surrounding trade area and that, with strategic public and private reinvestment and supportive policies, the New York Avenue Corridor could be successfully positioned to capitalize on select niche and destination opportunities.

### *LEVELS OF GEOGRAPHY*

Study Area: that area which is the subject of this redevelopment strategy (E. Arkansas Lane, Browning Drive, Sherry Street and E. Abram Street)

Project Area: that area which includes properties which could influence redevelopment initiatives within the Study Area (East Division Street / SH180, SH360, E. Mayfield Road, S. Collins Street)

Trade Area: that area from which land uses and products will capture and compete for a share of market demand (N.E. Green Oaks Boulevard, W. Green Oaks Boulevard, Interstate 20, President George Bush Turnpike (SH161).

### *Trade Area*

The information below presents an overview of current and future conditions in the Trade Area surrounding the corridor (see Figure 3.1). The New York Avenue Trade Area was defined based on the following factors:

- Physical barriers;
- Location of possible competition;
- Proximity to population and employment;
- Zoning;
- Market factors;
- Drive times; and
- Spending and commuting patterns.

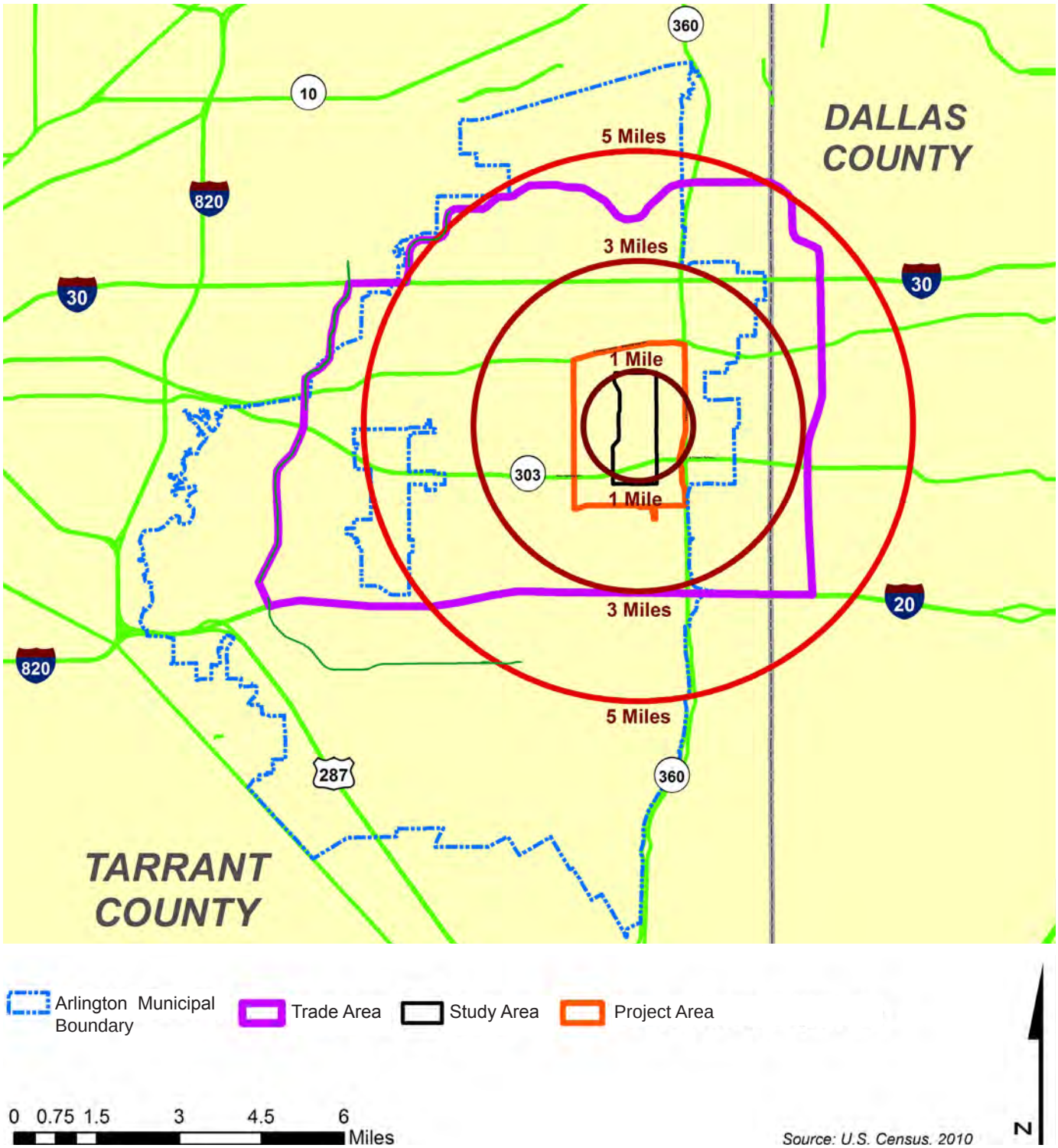


*Figure 3.1 Trade Area Map*

### *ECONOMIC AND DEMOGRAPHIC INDICATORS*

Economic and demographic characteristics in a market are indicators of overall trends and economic health which may affect private and public sector investment. The following maps and tables highlight select trends expected to affect development and redevelopment demand within the New York Avenue Study Area, Project Area and Trade Area over the next several years.

The following summarizes demographic characteristics for the Project Area as compared to the City of Arlington and the North Texas (see Figure 3.2).

- The Project Area and City are projected to grow at slower rates than the North Texas overall.
- The Project Area has a higher share of renter-occupied households and still shows a higher average household size than either the City or the North Texas.
- The Project Area skews younger than either the City or the North Texas, with a greater share of school-aged children.
- Education levels and household and per capita incomes in the Project Area are considerably lower than in the City and North Texas overall. The Project Area also contains a higher concentration of lower-income (<$25,000) households.
- The Project Area has a higher concentration of Hispanic residents than either the City or North Texas, and a similar concentration of African-American and Asian-American residents.

Figures 3.3 through 3.13 illustrate geographic distributions of some of the demographic indicators described above. These exhibits are useful in determining where concentrations of potential buyers/renters might exist for various housing products or potential customers for retail and service establishments.

| | New York Avenue Project Area | City of Arlington | North Texas |
|---|---|---|---|
| **2012 Population** | 48,661 | 367,450 | 5,197,317 |
| **2012 Households** | 15,118 | 133,700 | 2,475,000 |
| **Annual Household Growth (2012-2022)** | 0.6% | 1.0% | 1.8% |
| **Average Household Size** | 3.16 | 2.72 | 2.73 |
| **Percent Non-Family Households** | 29% | 32% | 31% |
| **Percent Renters** | 50% | 43% | 38% |
| **Percent Age 65+** | 7% | 8% | 9% |
| **Percent Age 0 - 19** | 34% | 31% | 30% |
| **Median Age** | 29.9 | 32.1 | 33.8 |
| **Percent w 4-yr College Degree** | 8% | 28% | 29% |
| **Percent Self-Employed (16+)** | 5% | 6% | 6% |
| **Median Household Income** | $38,300 | $52,100 | $53,600 |
| **Per Capita Income** | $13,600 | $25,000 | $26,800 |
| **Percent with Income <$25K** | 29% | 21% | 21% |
| **Percent with Income $100K+** | 4% | 20% | 23% |
| **Percent Hispanic (of any race)** | 58% | 27% | 27% |
| **Percent African-American** | 15% | 19% | 14% |
| **Percent Asian-American** | 6% | 7% | 14% |

Data for 2010, unless noted
Source: U.S. Census Bureau; North Central Texas Council of Governments; Claritas, Inc.; & Ricker | Cunningham.

*Figure 3.2 Demographic Summary Table*

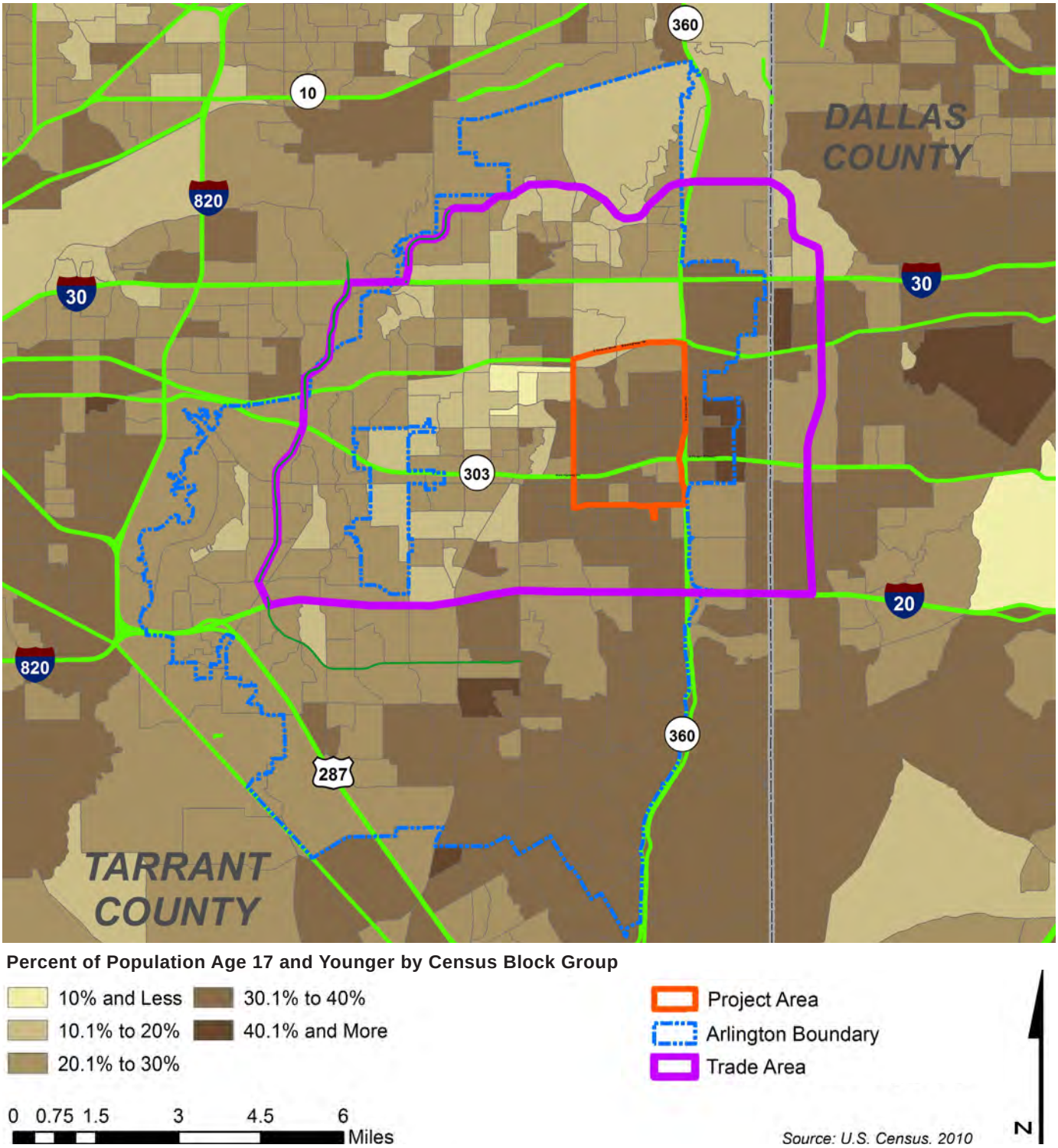


*Figure 3.3 Percent of Population Age, 17 and Younger*

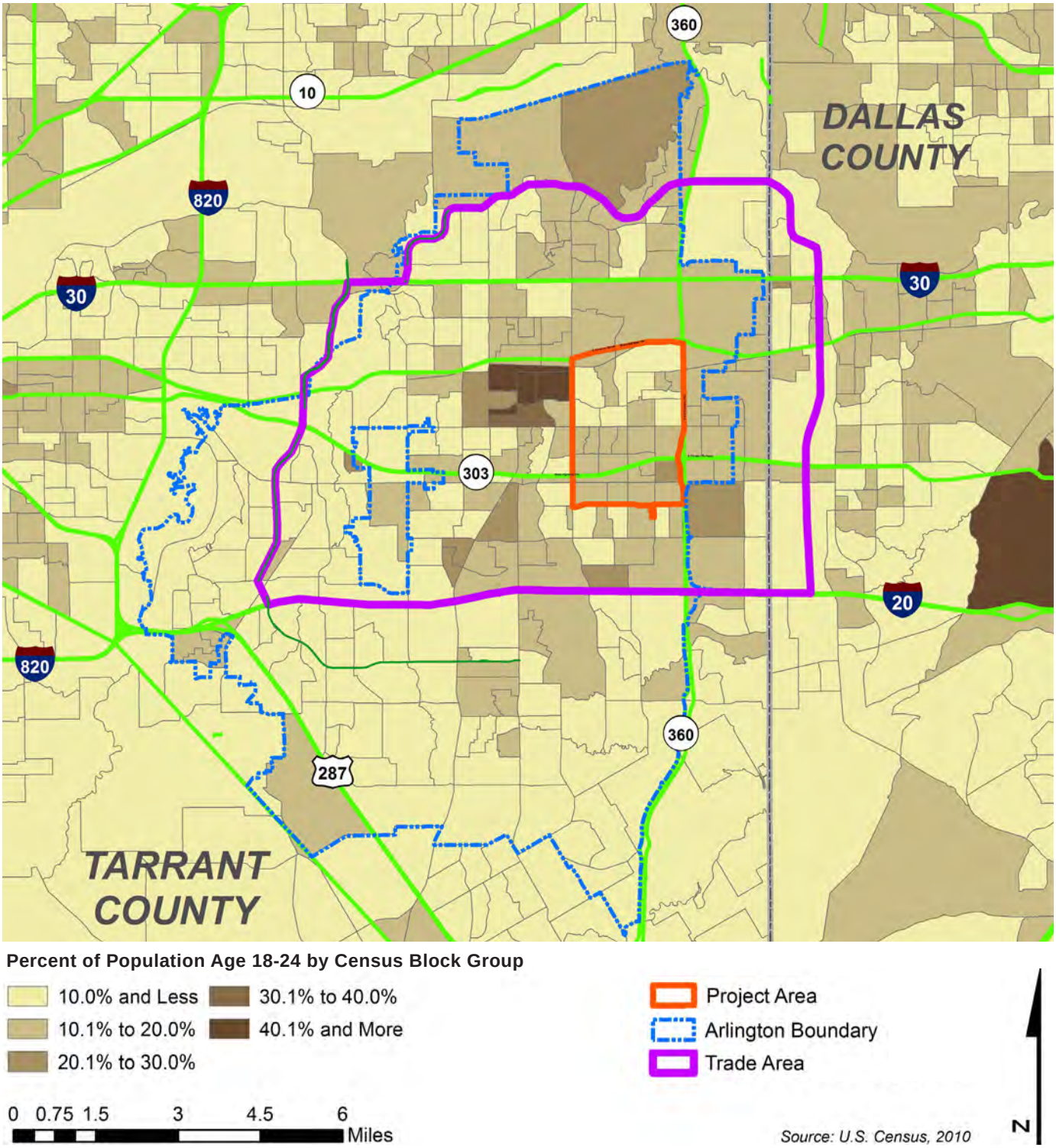


*Figure 3.4 Percent of Population Age, 18-24*

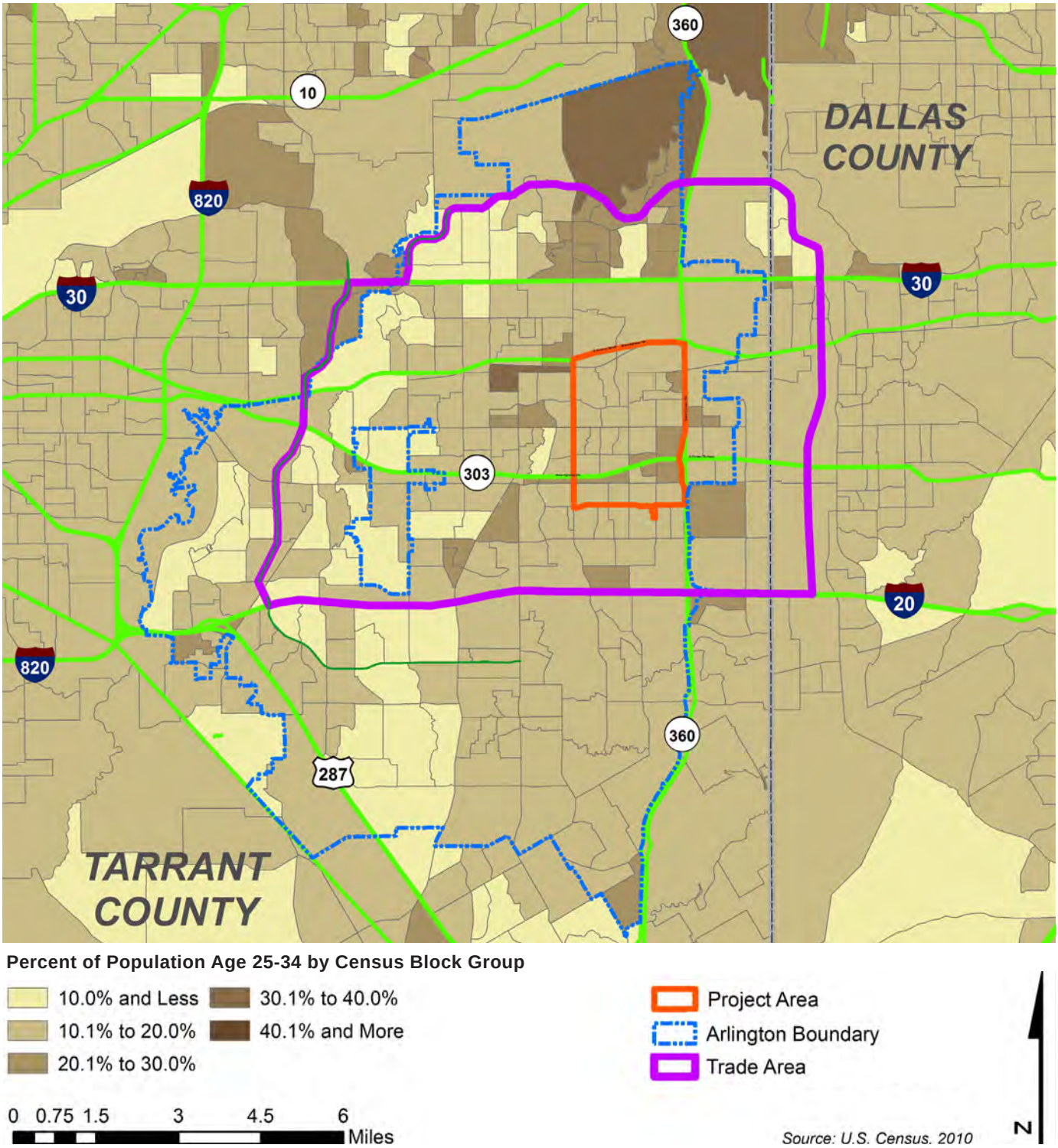


*Figure 3.5 Percent of Population Age, 25-34*

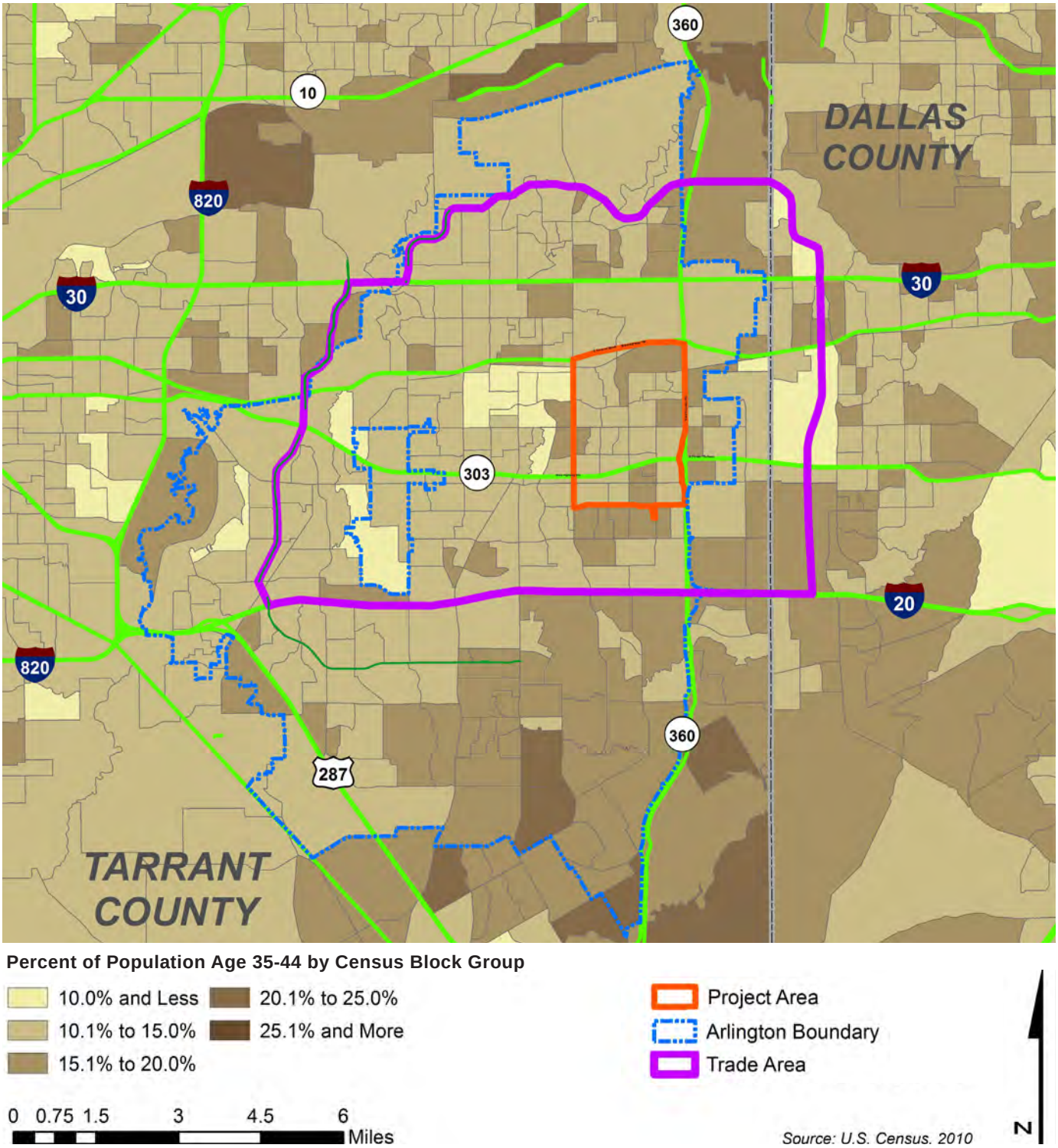


*Figure 3.6 Percent of Population Age, 35-44*

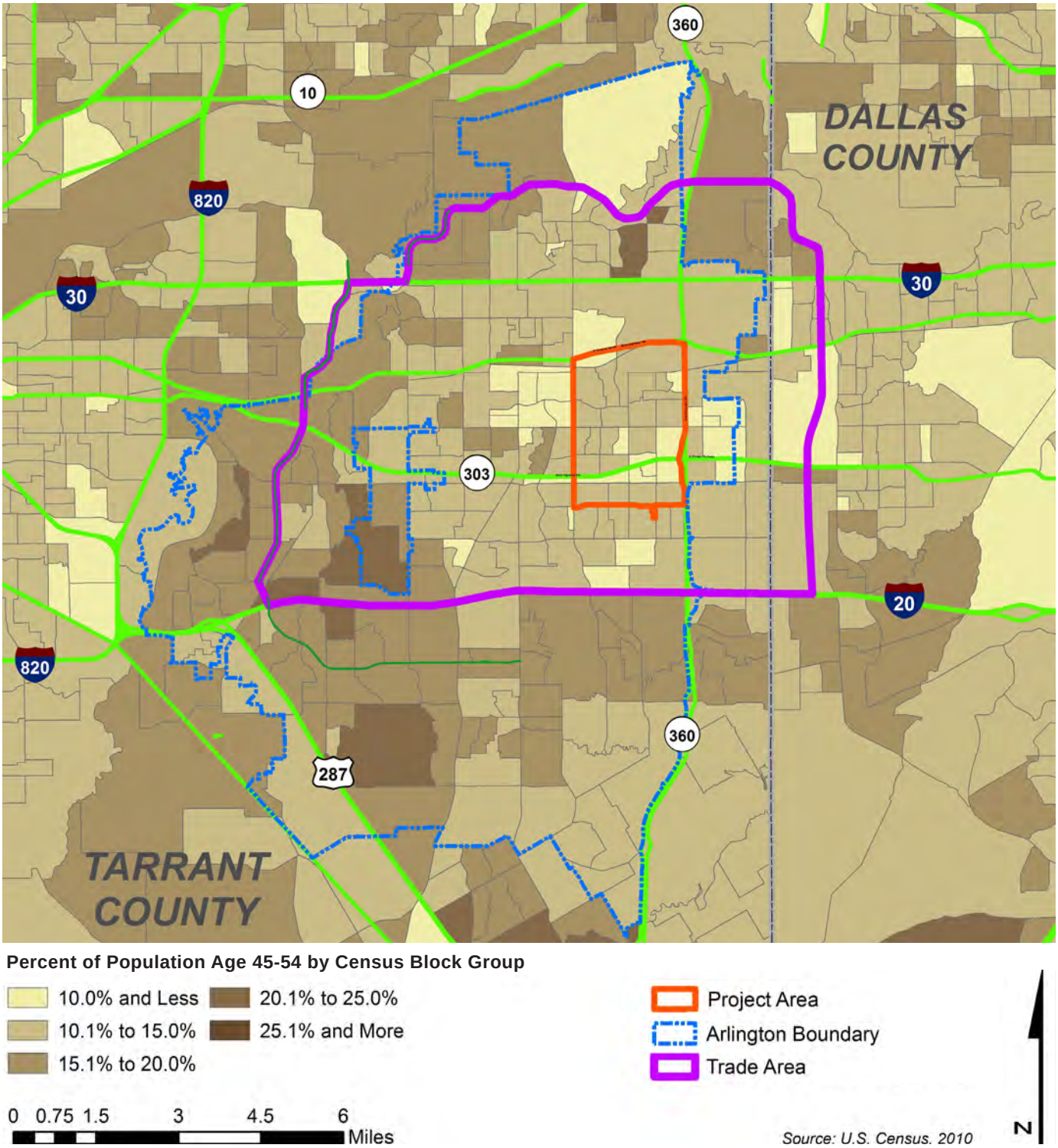


*Figure 3.7 Percent of Population Age, 45-54*

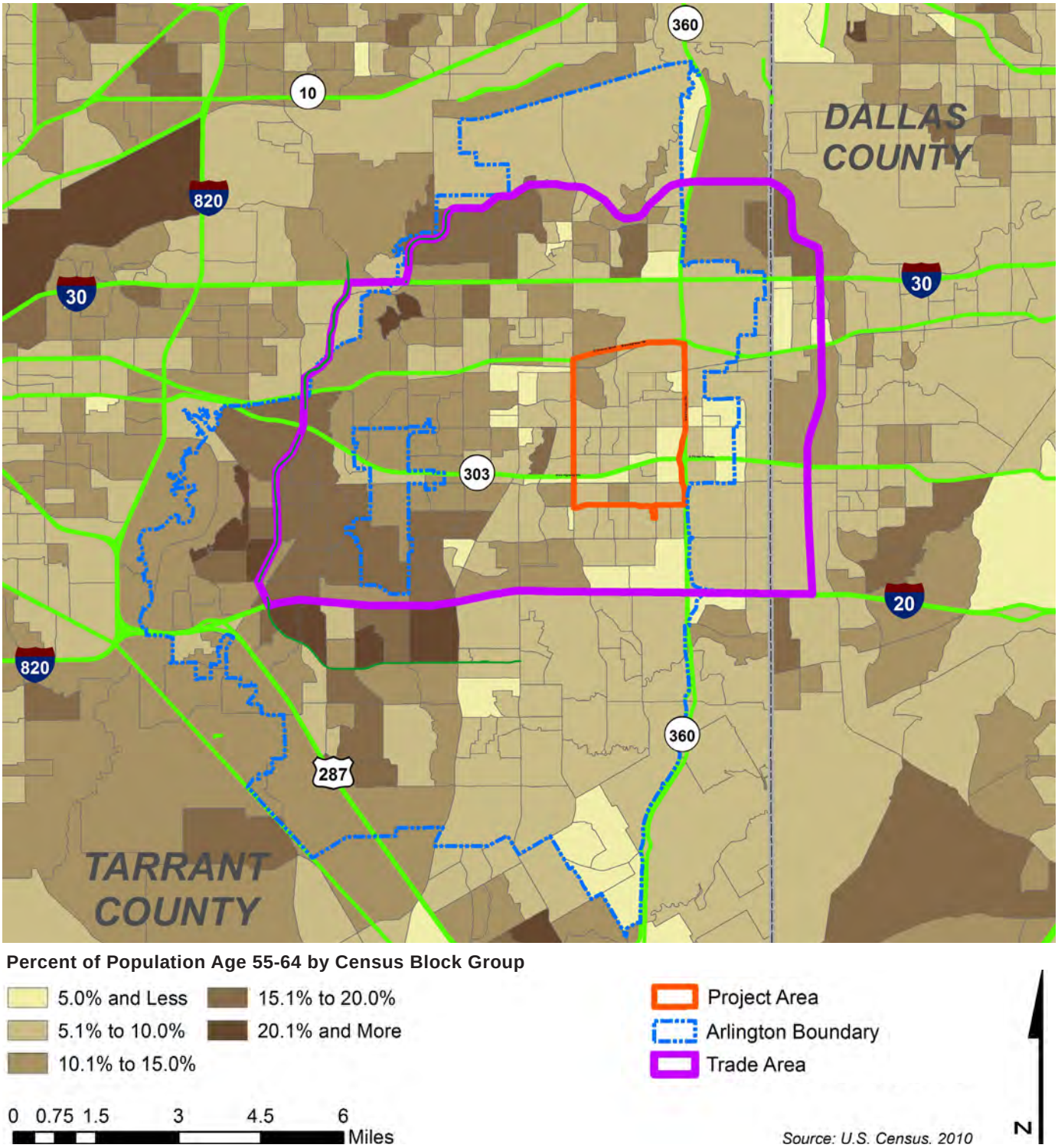


*Figure 3.8 Percent of Population Age, 55-64*

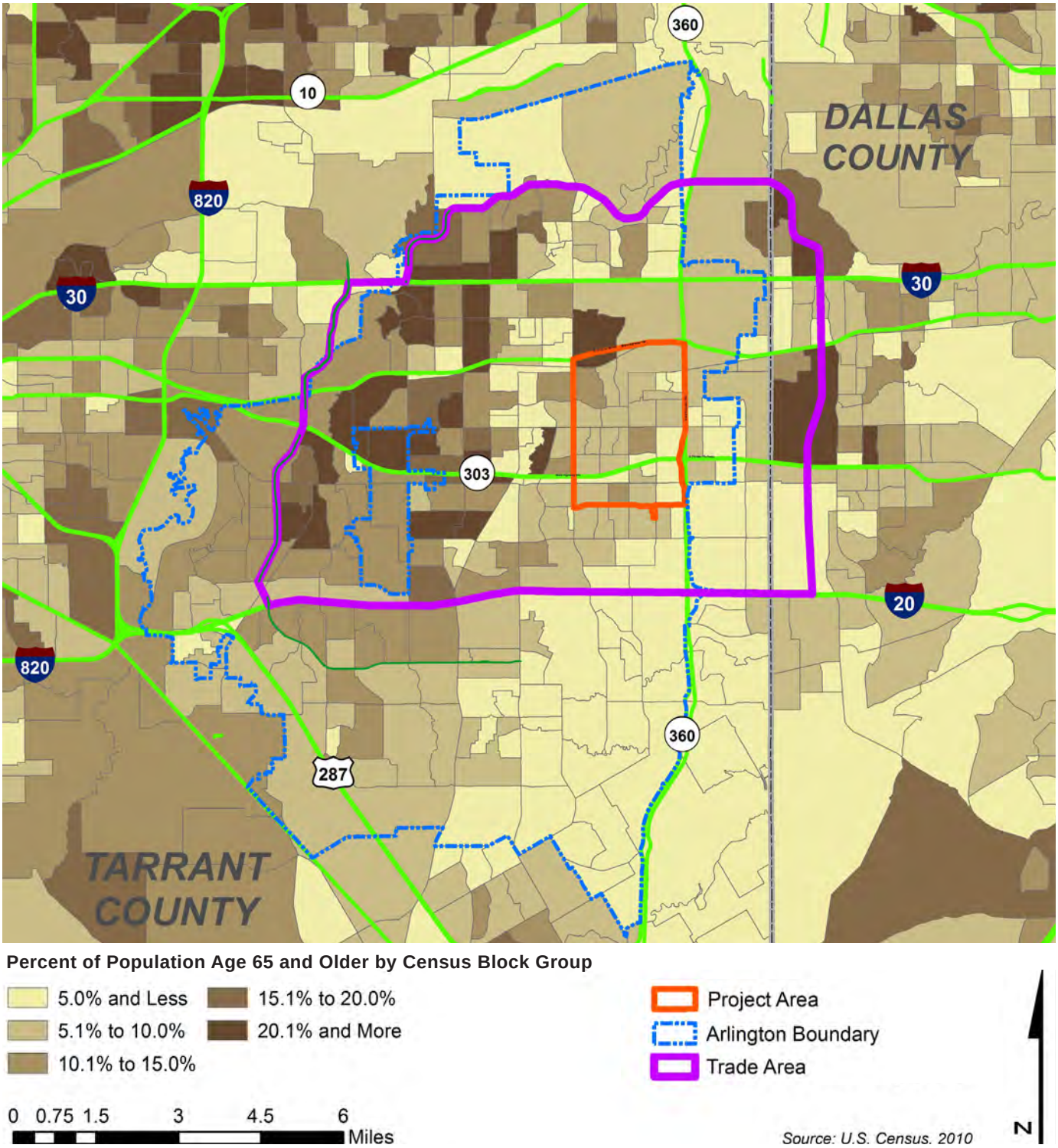


*Figure 3.9 Percent of Population Age, 65 and Older*

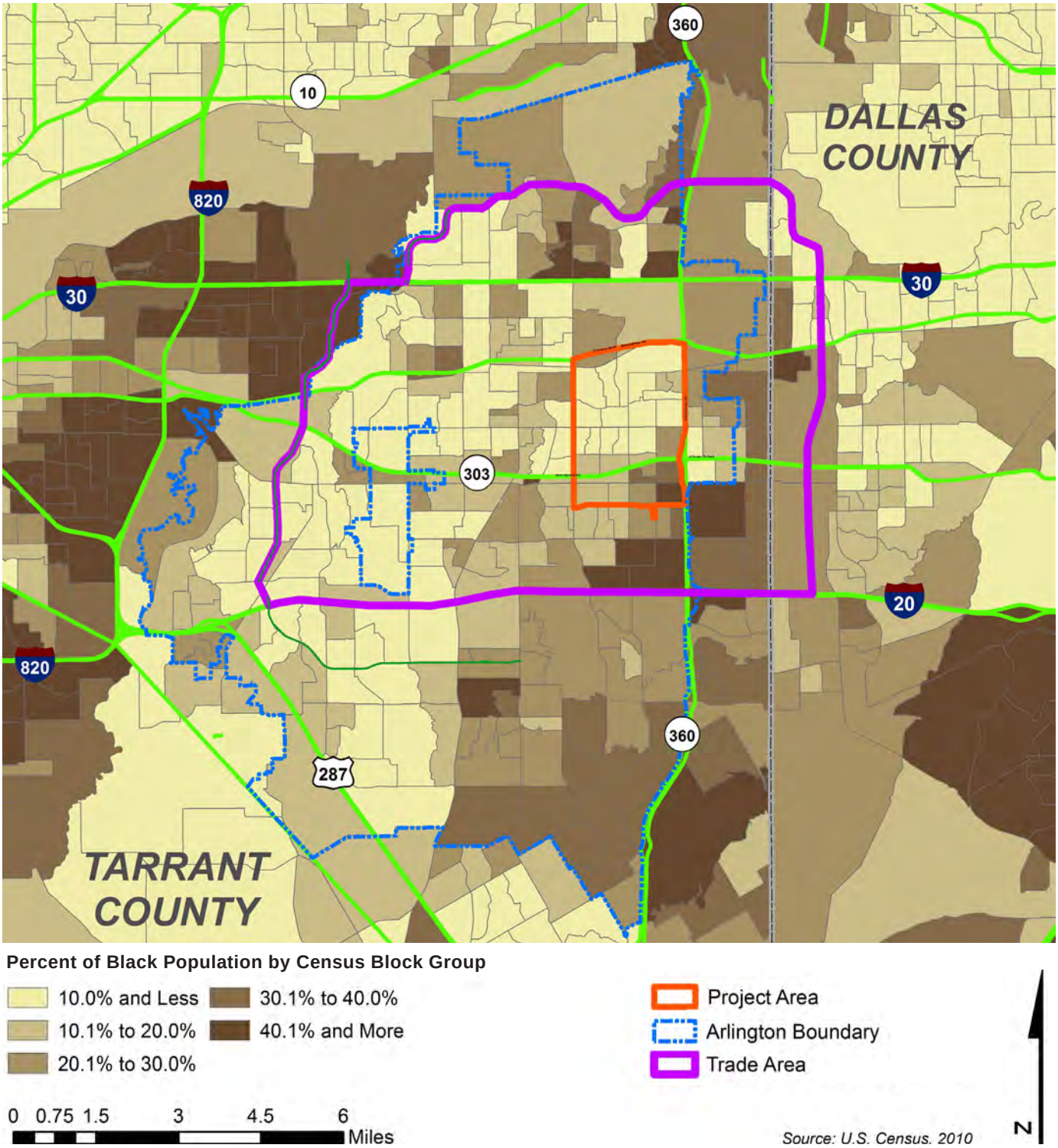


*Figure 3.10 Percent of Black Population*

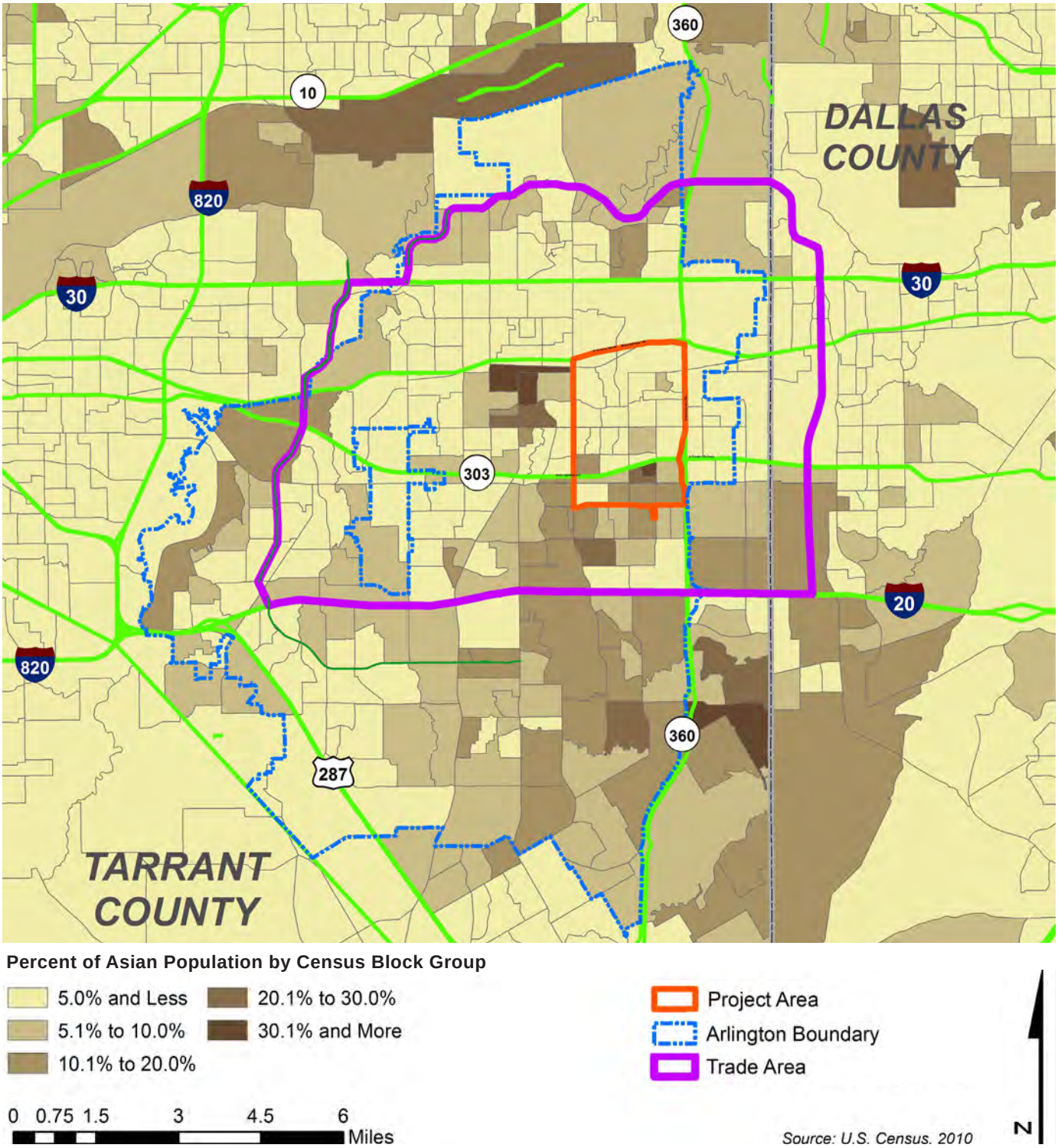


*Figure 3.11 Percent of Asian Population*

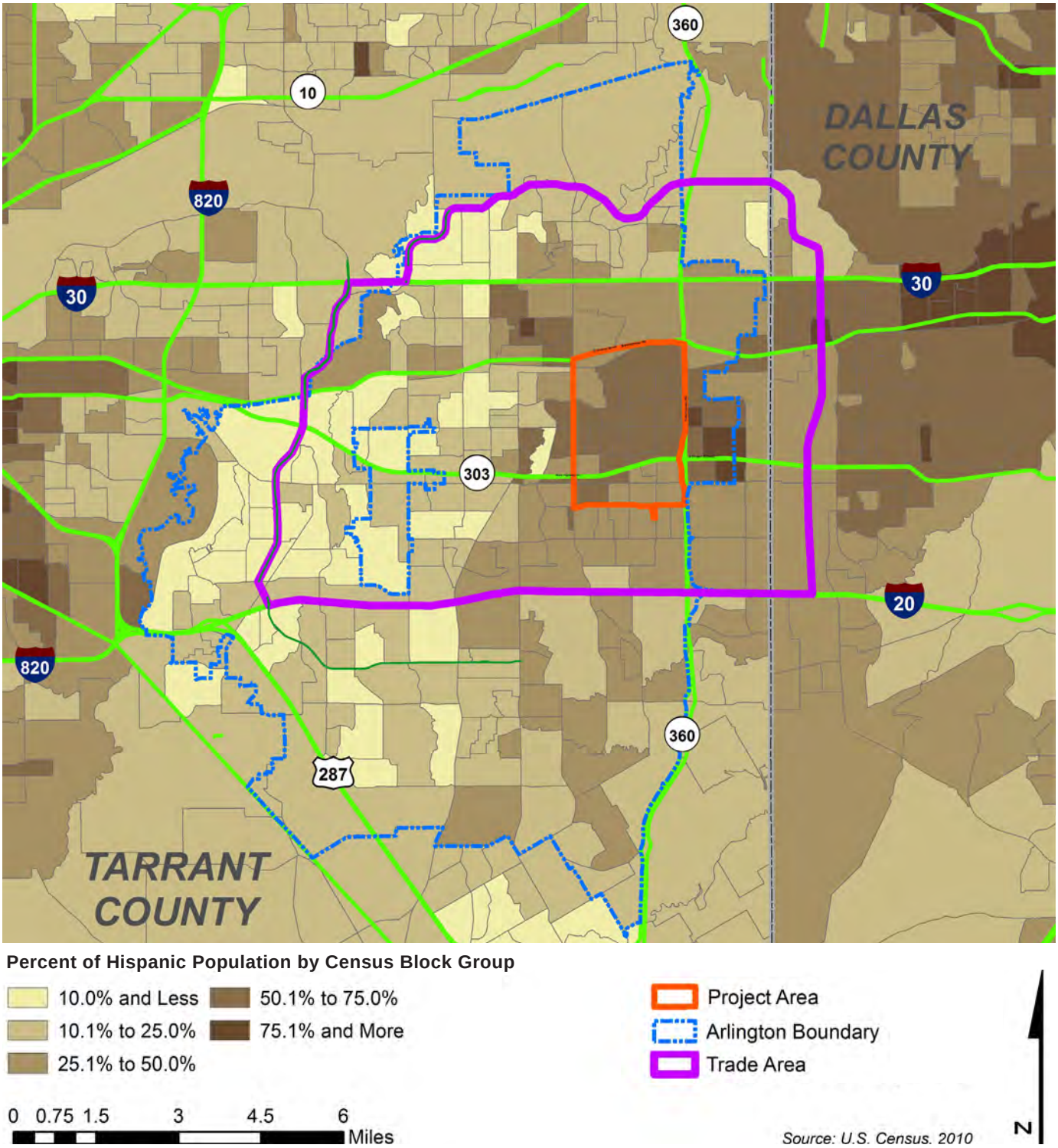


*Figure 3.12 Percent of Hispanic Population*

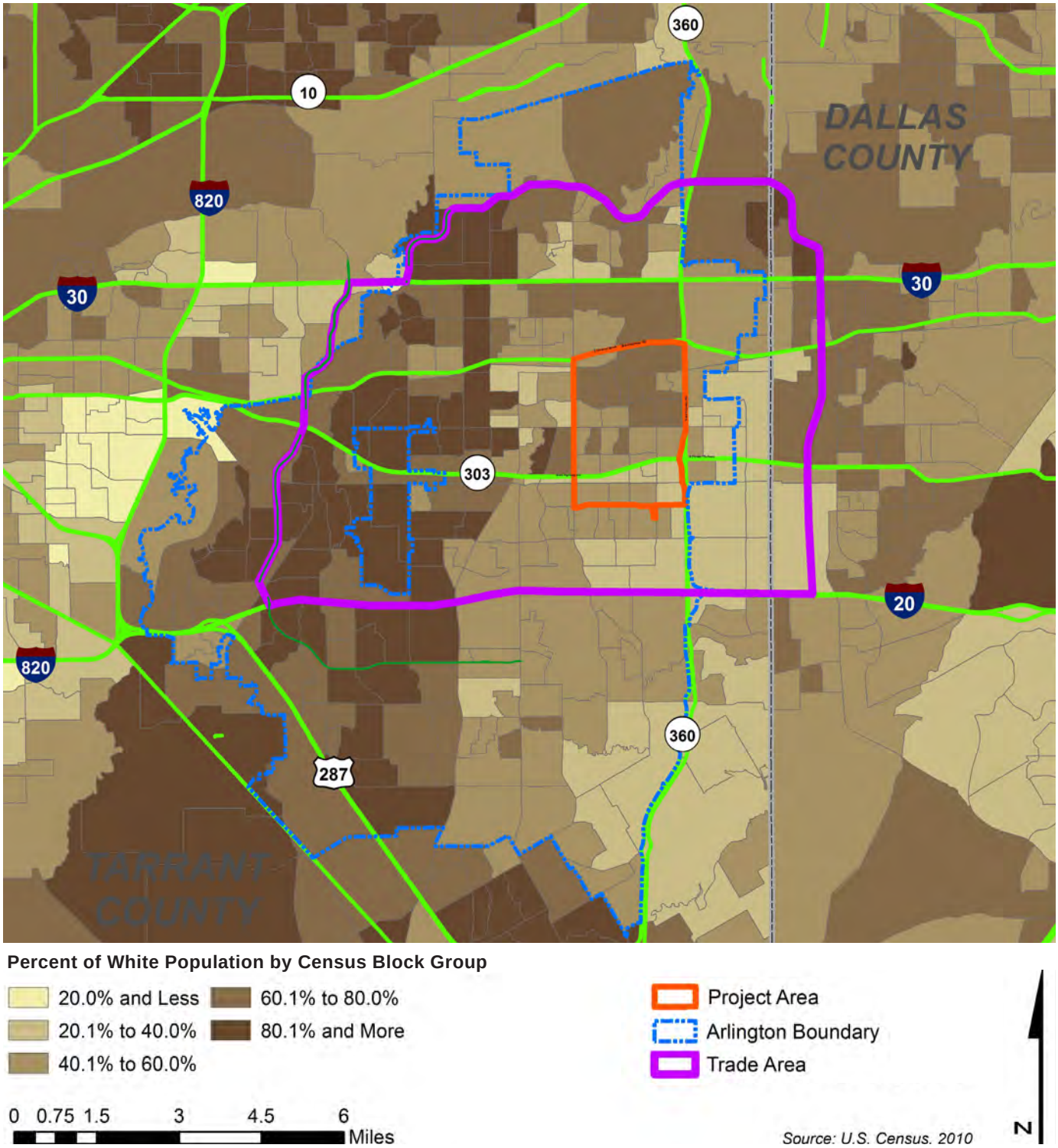


*Figure 3.13 Percent of White Population*

## PSYCHOGRAPHIC PROFILE

Psychographics is a term used to describe the characteristics of people and neighborhoods which, instead of being purely demographic, speak more to attitudes, interests, opinions and lifestyles. PRIZM (Claritas, Inc.) is a leading system for characterizing neighborhoods and the local workforce into one of 65 distinct market segments.

Commercial retail developers are interested in understanding a community's psychographic profile, as this is an indication of its resident's propensity to spend across select retail categories. Residential developers are also interested in understanding this profile as it tends to suggest preferences for certain housing product types.

Trade Area psychographics groups are further segregated in Figure 3.14 by "lifestyle." Lifestyle groups reflect household affluence, head of householder age, and household composition. As shown, the majority of Trade Area households fall into the "Younger Years" and "Family Life" lifestyle groups.

| Lifestyle Segment | Area Households | % of Total Households | State of Texas Index=100* |
|---|---|---|---|
| New Beginnings | 11,542 | 9.8% | 420 |
| Young Influentials | 8,364 | 7.1% | 382 |
| City Startups | 8,176 | 6.9% | 503 |
| Boomtown Singles | 5,668 | 4.8% | 339 |
| Home Sweet Home | 4,448 | 3.8% | 199 |
| **Younger Years Subtotal** | **38,198** | **32.4%** | **--** |
| Family Thrifts | 9,416 | 8.0% | 254 |
| White Picket Fences | 9,062 | 7.7% | 306 |
| Blue-Chip Blues | 5,092 | 4.3% | 151 |
| Upward Bound | 4,517 | 3.8% | 122 |
| Kids and Cul-de-Sacs | 4,123 | 3.5% | 112 |
| **Family Life Subtotal** | **32,210** | **27.3%** | **--** |
| Middleburg Managers | 3,388 | 2.9% | 169 |
| Sunset City Blues | 3,122 | 2.6% | 144 |
| Pools and Patios | 2,661 | 2.3% | 272 |
| Second City Elite | 2,641 | 2.2% | 172 |
| Old Glories | 2,565 | 2.2% | 170 |
| **Mature Years Subtotal** | **14,377** | **12.2%** | **--** |
| **Total Top Segments** | **84,785** | **71.8%** | **--** |
| **Total Trade Area** | **118,004** | **100.0%** | **--** |

* Indicates concentration of this segment relative to U.S. average. A segment index of 200 would mean that this group contains 2 times the concentration of households compared to the average U.S. community.

Source: Claritas, Inc. and Ricker | Cunningham.

*Figure 3.14 Top Prism Segments by Lifestyle Group*

## DEVELOPMENT CLIMATE

During the latter part of 2008, new real estate development throughout the United States nearly ceased to exist. In the years that followed, the nature of real estate evolved from what it was in earlier decades. Successful real estate development now requires a paradigm shift in underlying evaluation metrics. This, the new face of real estate, is being driven by multiple factors including: limited development capital; technology; changing demographics and psychographics (lifestyle segmentation data); and better-informed municipal policies.

Every year, the Urban Land Institute and PricewaterhouseCoopers release their Emerging Trends in Real Estate publication, an annual forecast of commercial real estate based on interviews with developers and investors. The following are trends and opportunities identified in the 2012 publication that could influence real estate development over the near- and mid-terms in and around the Trade Area.

### Development Trends

- Generation "Y", individuals aged 15 to mid-30s, a larger group than Baby Boomers, are more frugal, comfortable in smaller spaces, and desiring of living units convenient to work, shopping and recreation / entertainment districts supporting continued growth in mixed-use environments.

- Generation "X" – now between 31 and 46 – are redefining the "givens" of the past several decades – they want equal parts traditionalism, work and leisure – but gravitating around the home – smaller, higher-quality homes.

- Two age segments prefer low-maintenance housing options (e.g., downtown apartments and condos, townhomes and rowhouses, flats and co-ops) – individuals and couples ages 18 to 34 and empty nesters age 55 and over. These two segments comprise 46% of the Trade Area population.

- Over the last several years and into the near term, consumers will seek ways to save on gas – shortening the desire to commute to work and shopping. This will generate more opportunities in urban infill and downtown markets.

- Urbanity in the suburbs (not just walkable new urbanist design, but active programming of space to encourage active lifestyles) will continue to be in demand as many consumers continue to be "priced out" of downtown locations.

- Ethnic retailing, non-store click and mortar (smart phones) concepts, and experience show rooms will dominate the retail field.

- Big box retailers will continue to deliver new boutique stores, particularly in inner-city locations.

### Real Estate Opportunities

- Residential Product Opportunities
  - Women (as a target market)
  - Downtown (urban and infill rental and ownership)
  - Workforce
  - Low-Maintenance
  - Senior

- Retail Product Opportunities
  - Ethnic Retailing
  - Central Cities
  - Lifestyle Centers

- Employment and Education Product Opportunities
  - Traditional Office Space – in smaller increments
  - Convertible Spaces
  - Education Facilities
  - Third Places

## *MARKET DEMAND*

An analysis of the current performance of real estate products within an overall market, as well as competitive projects within a trade area, provides an indication of whether a property or area may be ready for new redevelopment. It also helps to identify potential gaps in the market -- niches that new redevelopment could fill. In addition, in order to identify potential future market opportunities given the Study Area's competitive position and prevailing market conditions, market demand estimates were prepared for residential, retail, and office land uses over the next 10 years. The following information which follows presents a summary of current demand conditions for competitive land uses within the New York Avenue Trade Area.

### *Residential Demand*

Demand for Trade Area residential units is a function of newly formed households, whether they arise through natural increase or net in-migration. As shown in Figure 3.15, the New York Avenue Trade Area is expected to experience demand for approximately 20,124 new housing units by 2022. Assuming the ratio of rental to owner-occupied units remains at 40%, this would translate into demand for 7,900 new rental units and 12,200 new ownership units.

### *Attached Ownership*

Of the 11,900 total units of for-sale housing demand by households earning over $15,000, approximately 35% or 4,200 units could be attached (condo, townhome, rowhouse, loft, etc.). Assuming a reasonable 8% capture rate (market share) of attached units, the Study Area could absorb approximately 334 new attached units by 2022. Figure 3.16 summarizes demand for attached ownership units.

### *Rental*

The New York Avenue Trade Area is expected to support 5,900 total units of rental housing demand by households earning over $15,000. At an 8% capture rate, the Study Area could absorb approximately 478 new rental units by 2022. Figure 3.17 summarizes demand for rental units.

### *Retail/Restaurant/Service Demand*

Future demand for retail/restaurant/service space is determined by the potential level of retail expenditures in a given trade area from two sources: those dollars spent by trade area residents outside the trade area, or "leakage"; and those generated by new household growth. Figure 3.18 summarize the calculations of both of these sources of retail demand. For each major retail category, current household retail expenditures (demand) are compared to current retail sales (supply) in the Trade Area to determine if there is a retail "surplus" (supply exceeds demand) or "leakage" (demand exceeds supply). Figure 3.18 shows that "leakage" exists in four retail categories: electronics and appliances; food and beverage (grocery) stores; miscel-

## Residential Demand

| Residential Demand Analysis | | | | | |
|---|---|---|---|---|---|
| New York Avenue Trade Area | Households | 2012 | 237,866 | | |
| 10-yr Demand Estimates | | 2017 | 247,534 | Annual Growth Rate | 0.80% |
| | | 2022 | 257,595 | | |
| | Household Growth (2012-22) | | 19,729 | Adjust for 2nd homes, demolition, vacancy | 2.0% |
| | Adjusted Unit Requirement | | **20,124** | % Rental | 40% |

| Annual Household Income Range (2010 dollars) | Approximate Rent Range | Supportable Home Price Range | Current Households in Income Bracket | New Households by Income Bracket | Trade Area Demand from New Households (10-yr) Total Units | Estimated % Rental | Total Rental Units | Total Ownership Units |
|---|---|---|---|---|---|---|---|---|
| up to $15K | up to $375 | up to $75K | 12% | 11% | **2,214** | 90% | 1,992 | 221 |
| $15-25K | $375 - $625 | $75 to $100K | 12% | 11% | **2,214** | 75% | 1,660 | 553 |
| $25-35K | $625 - $875 | $100 to $150K | 14% | 13% | **2,616** | 60% | 1,570 | 1,046 |
| $35-50K | $875 - $1,000 | $150 to $200K | 19% | 19% | **3,824** | 40% | 1,529 | 2,294 |
| $50-75K | $1,000+ | $200 to $250K | 20% | 21% | **4,226** | 18% | 761 | 3,465 |
| $75-100K | $1,000+ | $250 to $350K | 10% | 11% | **2,214** | 12% | 266 | 1,948 |
| $100-150K | $1,000+ | $350 to $500K | 9% | 10% | **2,012** | 8% | 161 | 1,851 |
| $150K and up | $1,000+ | $500K and up | 4% | 4% | **805** | 3% | 24 | 781 |
| **Totals** | | | **100%** | **100%** | **20,124** | **40%** | **7,963** | **12,161** |

Source: NCTCOG; U.S. Census; Claritas, Inc.; and Ricker|Cunningham.

*Figure 3.15 Residential Demand*

## Attached Demand

| Annual Household Income Range | Approximate Home Price Range | Trade Area For-Sale Demand | Estimated % Single Family Attached | Single Family Attached Demand | Attainable Capture Rate | Attainable New York Avenue Capture (units) |
|---|---|---|---|---|---|---|
| $15-25K | $75 to $100K | 553 | 35% | 194 | 8% | 15 |
| $25-35K | $100 to $150K | 1,046 | 35% | 366 | 8% | 29 |
| $35-50K | $150 to $200K | 2,294 | 35% | 803 | 8% | 64 |
| $50-75K | $200 to $250K | 3,465 | 35% | 1,213 | 8% | 97 |
| $75-100K | $250 to $350K | 1,948 | 35% | 682 | 8% | 55 |
| $100-150K | $350 to $500K | 1,851 | 35% | 648 | 8% | 52 |
| $150K and up | $500K and up | 781 | 35% | 273 | 8% | 22 |
| **Totals** | | **11,939** | **35%** | **4,179** | **8%** | **334** |

Note: Assumes Townhome/Condo development stabilizes at 35% of all ownership demand

Source: NCTCOG; U.S. Census; Claritas, Inc.; and Ricker|Cunningham.

*Figure 3.16 Attached Demand*

## Rental Demand

| Annual Household Income Range | Approximate Rent Range | Trade Area Rental Demand | Attainable Capture Rate | Attainable New York Avenue Capture (units) |
|---|---|---|---|---|
| $15-25K | $375 - $625 | 1,660 | 8% | 133 |
| $25-35K | $625 - $875 | 1,570 | 8% | 126 |
| $35-50K | $875 - $1,000 | 1,529 | 8% | 122 |
| $50-75K | $1,000+ | 761 | 8% | 61 |
| $75-100K | $1,000+ | 266 | 8% | 21 |
| $100-150K | $1,000+ | 161 | 8% | 13 |
| $150K and up | $1,000+ | 24 | 8% | 2 |
| **Totals** | | **5,971** | **8%** | **478** |

Source: NCTCOG; U.S. Census; Claritas, Inc.; and Ricker|Cunningham.

*Figure 3.17 Rental Demand*

## Retail/Restaurant/Service Demand

| Retail Category | Estimated 2012 Household Retail Demand | Estimated 2012 Retail Sales (Supply) | Estimated 2012 Retail Void (Leakage) | Estimated Retail Sales/s.f. | New Retail Space Needed to Recapture Void/Leakage | Annual Household Growth Rate (2012-2022) | Net New Household Retail Demand | New Retail Space Needed for Household Growth | Total 10-Year New Trade Area Retail Demand (s.f.) | Estimated New York Avenue Capture Rate | Estimated New York Avenue Retail Capture (s.f.) |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Furniture & Home Furnishings | $60,867,838 | $168,007,764 | $0 | $200 | 0 | 0.8% | $5,048,519 | 25,243 | 25,243 | 15% | 3,786 |
| Electronics & Appliance | $71,539,275 | $56,433,092 | $15,106,183 | $225 | 67,139 | 0.8% | $5,933,633 | 26,372 | 93,510 | 15% | 14,027 |
| Bldg Materials, Garden Equipment | $265,311,284 | $408,280,785 | $0 | $300 | 0 | 0.8% | $22,005,530 | 73,352 | 73,352 | 15% | 11,003 |
| Food & Beverage (Grocery) | $448,968,420 | $400,353,147 | $48,615,273 | $375 | 129,641 | 0.8% | $37,238,477 | 99,303 | 228,943 | 15% | 34,342 |
| Health & Personal Care | $195,573,941 | $161,880,186 | $33,693,755 | $325 | 103,673 | 0.8% | $16,221,354 | 49,912 | 153,585 | 15% | 23,038 |
| Clothing and Accessories | $164,998,515 | $310,709,799 | $0 | $225 | 0 | 0.8% | $13,685,358 | 60,824 | 60,824 | 15% | 9,124 |
| Sporting Goods,Hobby, Book, Music | $62,125,557 | $192,020,799 | $0 | $225 | 0 | 0.8% | $5,152,837 | 22,901 | 22,901 | 15% | 3,435 |
| General Merchandise | $451,108,772 | $485,467,547 | $0 | $300 | 0 | 0.8% | $37,416,003 | 124,720 | 124,720 | 15% | 18,708 |
| Miscellaneous Stores | $82,757,124 | $83,045,169 | $0 | $200 | 0 | 0.8% | $6,864,067 | 34,320 | 34,320 | 15% | 5,148 |
| Foodservice & Drinking Places | $376,149,749 | $432,962,316 | $0 | $325 | 0 | 0.8% | $31,198,729 | 95,996 | 95,996 | 15% | 14,399 |
| **Total** | **$2,179,400,475** | **$2,699,160,604** | **$97,415,211** | | **300,452** | | **$180,764,506** | **612,942** | **913,395** | **15%** | **137,009** |

Source: Claritas, Inc.; Urban Land Institute; and Ricker|Cunningham.

*Figure 3.18 Retail/Restaurant/Service Demand*

laneous stores; and health and personal care. The remaining categories currently have retail surpluses. Projected demand from new household formation over the next ten years is determined by multiplying growth in households with that portion of household income typically spent on general retail and service purchases. This figure also shows the level of demand by retail category that will be generated by new household formation.

Finally, the figure shows that there is considerable "leakage" in the Trade Area for the retail categories identified above. The level of "leakage" estimated in current retail categories is approximately $97.4 million in retail spending, which could support an additional 300,000 square feet of space. This indicates a substantial "void" in the current market for these retail store types.

Fig. 3.18 shows that an additional $180.7 million in retail spending is anticipated from new household growth. Applying a reasonable market capture rate of 15%, the corridor could absorb approximately 137,000 square feet of new retail/restaurant/service space over the next 10 years.

### *OFFICE DEMAND*

Demand for new office space is derived from two primary sources: expansion of existing industry and the relocation of new companies into the market. Employment projections by industry classification for the Trade Area were used to estimate demand over the next 10 years. Assuming an overall 1.5% sustained annual employment growth rate, the Trade Area should add approximately 24,168 new jobs between 2012 and 2022. Assuming differing levels of office space needed across various industry categories, the analysis revealed demand for nearly 1.4 million square feet of new office space over this period. At a relatively modest 5% capture rate, the corridor could absorb approximately 74,000 square feet of new office space by 2022 (See Figure 3.19).

### *INDUSTRIAL DEMAND*

Demand for new industrial space is also derived from the same two primary sources as office space: expansion of existing industry and the relocation of new companies into the market. Employment projections by industry classification for the Trade Area were used to estimate demand over the next 10 years. Again, assuming an overall 1.5% sustained annual employment growth rate, the Trade Area should add approximately 24,168 new jobs between 2012 and 2022. Assuming the different levels of industrial space needed across various industry categories, the analysis revealed demand for nearly 3.6 million square feet of new industrial space over this period. Using the same 5% capture rate as office space, the corridor could absorb approximately 178,000 square feet of new industrial space by 2022 (See Figure 3.20).

### *DEMAND SUMMARY*

Figure 3.21 summarizes potential New York Avenue Corridor absorption of land uses over the next 10 years.

### *DEMAND IMPLICATIONS*

#### ***Residential***

- Over the past five years, there has been a slight shift in the North Texas to more higher-density housing products, e.g., townhomes, condominiums and apartments. However, this growing townhome/condominium market has largely occurred in more urban portions of the

## Office Demand

| Industry Category | Estimated 2012 Employees | Estimated Growth Rate 2012-2022 | Estimated 2022 Employees | Estimated New Employees | Estimated % in Office Space | Estimated Net New Office Employees | Sq Ft per Office Employee | Estimated 10-yr Office Demand | Estimated New York Avenue Capture Rate | Estimated New York Avenue Office Capture (s.f.) |
|---|---|---|---|---|---|---|---|---|---|---|
| Natural Resources, Mining and Construction | 9,969 | 1.5% | 11,569 | 1,600 | 40% | 640 | 200 | 128,028 | 5% | 6,401 |
| Manufacturing | 15,450 | 1.5% | 17,931 | 2,480 | 5% | 124 | 200 | 24,804 | 5% | 1,240 |
| Trade, Transportation and Utilities | 34,477 | 1.5% | 40,012 | 5,535 | 10% | 553 | 200 | 110,698 | 5% | 5,535 |
| Information | 2,243 | 1.5% | 2,603 | 360 | 80% | 288 | 200 | 57,624 | 5% | 2,881 |
| Financial Activities | 9,395 | 1.5% | 10,903 | 1,508 | 90% | 1,357 | 200 | 271,492 | 5% | 13,575 |
| Professional and Business Services | 17,727 | 1.5% | 20,573 | 2,846 | 80% | 2,277 | 200 | 455,357 | 5% | 22,768 |
| Educational and Health Services | 19,633 | 1.5% | 22,785 | 3,152 | 20% | 630 | 200 | 126,079 | 5% | 6,304 |
| Leisure and Hospitality | 16,125 | 1.5% | 18,714 | 2,589 | 10% | 259 | 200 | 51,775 | 5% | 2,589 |
| Other Services | 5,347 | 1.5% | 6,205 | 858 | 30% | 258 | 200 | 51,504 | 5% | 2,575 |
| Government | 20,173 | 1.5% | 23,412 | 3,239 | 30% | 972 | 200 | 194,317 | 5% | 9,716 |
| **Totals** | **150,540** | **1.5%** | **174,708** | **24,168** | **--** | **7,358** | **200** | **1,471,678** | **5%** | **73,584** |

Source: NCTCOG; U.S. Census; and Ricker|Cunningham.

*Figure 3.19 Office Demand*

## Industrial Demand

| Industry Category | Estimated 2012 Employees | Estimated Growth Rate 2012-2022 | Estimated 2022 Employees | Estimated New Employees | Estimated % in Industrial Space | Estimated Net New Industrial Employees | Sq Ft per Industrial Employee | Estimated 10-yr Industrial Demand | Estimated New York Avenue Capture Rate | Estimated New York Avenue Industrial Capture (s.f.) |
|---|---|---|---|---|---|---|---|---|---|---|
| Natural Resources, Mining and Construction | 9,969 | 1.5% | 11,569 | 1,600 | 20% | 320 | 400 | 128,028 | 5% | 6,401 |
| Manufacturing | 15,450 | 1.5% | 17,931 | 2,480 | 80% | 1,984 | 400 | 793,733 | 5% | 39,687 |
| Trade, Transportation and Utilities | 34,477 | 1.5% | 40,012 | 5,535 | 90% | 4,981 | 400 | 1,992,565 | 5% | 99,628 |
| Information | 2,243 | 1.5% | 2,603 | 360 | 20% | 72 | 400 | 28,812 | 5% | 1,441 |
| Financial Activities | 9,395 | 1.5% | 10,903 | 1,508 | 5% | 75 | 400 | 30,166 | 5% | 1,508 |
| Professional and Business Services | 17,727 | 1.5% | 20,573 | 2,846 | 10% | 285 | 400 | 113,839 | 5% | 5,692 |
| Educational and Health Services | 19,633 | 1.5% | 22,785 | 3,152 | 10% | 315 | 400 | 126,079 | 5% | 6,304 |
| Leisure and Hospitality | 16,125 | 1.5% | 18,714 | 2,589 | 5% | 129 | 400 | 51,775 | 5% | 2,589 |
| Other Services | 5,347 | 1.5% | 6,205 | 858 | 10% | 86 | 400 | 34,336 | 5% | 1,717 |
| Government | 20,173 | 1.5% | 23,412 | 3,239 | 20% | 648 | 400 | 259,090 | 5% | 12,954 |
| **Totals** | **150,540** | **1.5%** | **174,708** | **24,168** | **--** | **8,896** | **400** | **3,558,423** | **5%** | **177,921** |

Source: NCTCOG; U.S. Census; and Ricker|Cunningham.

*Figure 3.20 Industrial Demand*

## Demand Summary

| Land Use Type | Trade Area Demand (10 Year) | New York Avenue Corridor: Market Share Low | Market Share High | 10-Year Absorption (Units/SF) Low | 10-Year Absorption (Units/SF) High |
|---|---|---|---|---|---|
| **Residential (Units):** | | | | | |
| Single Family Attached (Ownership) | 6,937 | 4% | 6% | 277 | 416 |
| Multi-Family (Rental) | 10,939 | 4% | 6% | 438 | 656 |
| **Residential Total** | **17,876** | | | **715** | **1,073** |
| **Non-Residential (SF):** | | | | | |
| Retail | 1,375,149 | 4% | 6% | 55,006 | 82,509 |
| Employment | 5,030,101 | 4% | 6% | 201,204 | 301,806 |
| **Non-Residential Total** | **6,405,250** | | | **256,210** | **384,315** |

Source: Ricker|Cunningham.

*Figure 3.21 Demand Summary*

North Texas, particularly Dallas and Fort Worth. As a central suburb to North Texas, Arlington in general, and the Study Area in particular, have unique opportunities to be logical targets for urban housing.

***Retail***

- While there is a healthy degree of retail "leakage" occurring in the New York Avenue Trade Area (enough to support a sizable amount of new space), the recent closings of major national retailers (and potentially more to come in 2013), as well as the significant amount of underutilized or obsolete space, could characterize the Trade Area as a fragile retail market. This is a market perception that could be a challenge in attracting new retailers and new formats to the corridor.

- The New York Avenue Trade Area is likely underserved by newer retail formats and product mixes. This concept of being "under-stored" is not uncommon in older suburban communities. The Trade Area currently represents a relatively homogenous retail market. In association with the increased diversity of housing products and targeted demographic groups, it could accommodate a wider variety of retail product types and formats.

***Office/Industrial***

- Arlington's position as an established employment center and its central location in North Texas make it a potential "midtown" location for office space. The corridor has a twofold opportunity to capitalize on these existing office markets, while at the same time, offering "niche" opportunities for secondary office locations providing less expensive space in a "closer-in" urban environment.

- The corridor could also provide a home for local service office users, and even "incubator" space for new and expanding businesses in the local economy. These opportunities will be best served by flexible space which could accommodate office and service uses.

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# COMMUNITY DESIRES

Community desires were ascertained through a number of methods, as detailed on page 3-5 of this report, including stakeholder interviews, Advisory Committee exercises, a survey and facilitated discussions at public open houses. Participants in these processes were asked a series of open-ended questions related to their perceptions of the Study Area today, and key elements that they would like to see as part of a future vision (see Appendix iii). The following summarizes the specific questions asked of participants in the vision process, as well as specific responses received from the community categorized by topic.

## *CORRIDOR CHARACTER*

To establish a baseline for the future vision, the community was asked to write a short phrase or sentence describing how they view the character of the corridor today. Key themes derived from their responses were:

- Old and rundown / old and worn
- Dated – not keeping up with styles
- Little to no landscaping standards met
- Not aesthetically pleasing
- Signage is busy
- Lack of City Code enforcement - too much trash in homeowner yards
- Poor street/sidewalks
- Eyesore to Arlington
- Bad streets
- Tired, busy, maybe exhausted
- HELP!
- Tremendous potential!

With this input related to the perceptions of the current corridor condition, the community was then asked to write a phrase or sentence describing the character of the corridor as they would like it to be in 2020. Among the comments received were:

- Extensive redevelopment. First commercial, then residential
- Superior schools
- Cleaner, walkable and a large number of trees added
- A community feel
- Sidewalks, parking lots, buildings well maintained.
- Robust, exciting, updated, refreshed, revitalized
- Medical facilities
- Great place to visit
- Code enforcement - bury electrical lines - maintained sidewalks
- WORLD CLASS!

In addition to these comments related to the specific questions asked about corridor character, the following general comments were provided:

- Too much social service
- Businesses good – ugly signs
- Braums (desired)
- Appears hodge-podge / no consistency in signage
- More police officers
- Need to stop cutting down trees – residential and commercial
- Kids art and theater center (desired)
- Abandoned or open, parking, signage

*New York Avenue Open House*

- Biggest asset - located ½ way between Dallas & Fort Worth
- HEB or other grocery store (Desired)
- Rundown apartments with crime
- Less cement
- Parks and gazebos within parking areas (like Highlands) Town Square

### *BUSINESS AND ACTIVITIES – 2020*

To establish an understanding of the types of development desired in the corridor, the community was asked to envision the corridor in 2020 and to explain what they would do at various times of the day. The following summarizes the community responses:

In the morning…
- Café with outdoor seating
- People walking/exercising/hanging out in parks and playgrounds
- Grocery shopping
- Physicians/urgent care
- Bank
- Medical Needs
- Walking trails – outdoor activities

At lunchtime…
- Diverse restaurants, especially Asian
- Multiple options to walk to in plaza and a place to park.
- Restaurants along E. Abram Street
- Lunch at the food court in "International Market"
- Outdoor café

In the afternoon…
- Movies
- Game places
- Indoor children play areas
- Theater and art venue
- Art movies
- World class restaurants, wineries, bakeries that reflect the diversity in our community

In early evening…
- World class restaurants, wineries, bakeries that reflect the diversity in our community
- Mom and pop, not chain restaurants
- Bowling and movies (outdoor!)
- Doctor urgent care (like Care Now)
- Mainstream grocery (south of tracks) west of Collins
- Shopping/eating at "International market/ food court"
- Parks
- Fine restaurant w/ attractive outdoor seating, perhaps a built-in patio area

Late night…
- 24 hour restaurants, or at least 2 am
- Same as early evening

Additionally, the community was asked to describe specific new developments they would like to see in the corridor in 2020. Their responses included:

- Fed Ex/Kinkos or comparable mail/print shop
- Outdoor musical venue (thinking Magnolia on the Green in Fort Worth) – series
- Braums!
- Grocery Store – HEB
- Vision for the future – retirement living - be able to stay within community as you age

*New York Avenue Open House*

### *CONNECTIONS*

To better understand the community's perceptions of the infrastructure improvements needed to support the future corridor vision, the community was asked how the corridor should use connections to make it a location of choice for businesses and organizations. Responses included:

- Put bike facilities in place to connect UT Arlington to this corridor (Prefer off-street trail. Students would visit businesses.)
- Wide sidewalk on New York Avenue
- Left turn lanes
- Pedestrian crossing signals
- Street lighting
- Improve sidewalk quality
- Improve roadway quality (specifically Abram!)
- Smooth area where driveways meet streets (cars often hang over sidewalk and users have to go in street)
- Greenway Street – traffic speeding - speed bumps might be good solution
- Trolley system from hotels to this area as a destination… And also to events at stadiums
- Sidewalks to Berry Elementary On Browning and New York could be improved
- Young population – transit to keep them here
- Crumbling sidewalks on side streets
- Pedestrian signals with count down timers (at big intersections)

### *PHYSICAL AMENITIES*

Finally, to better understand the community's desires related to amenities that had the potential to enhance future development, the community was asked what amenities would make the area a more appealing place to spend time. Responses included:

- Family oriented entertainment
- Vocational school – training
- Outdoor movies
- Medical facilities
- Median on NY Ave w/ landscape
- Open space that can be used for parks, trails that can be used for other purposes later
- More retail stores – Hallmark, Drug Store, Grocery, Bookstore
- Art and Theater for kids/adults
- Community outdoor area – replace concrete in parking lots

*New York Avenue Open House*

# VISION

As described previously in this report, the first step in establishing a vision for the New York Avenue Corridor was to review physical conditions in order to establish existing opportunities and constraints related to specific properties in the Study Area. This process identified the location of specific properties throughout the corridor that have the best potential to accommodate new development or reinvestment in existing structures. At the same time, existing market conditions were reviewed in order to understand what types of development had the best potential to be supported within the Study Area. Finally, the community was engaged to identify overall aspirations for the future corridor, as well as specific details related to the types of businesses and overall character the community would like to see achieved in the area.

The Framework Plan aligns the opportunities identified for specific locations within the corridor with the types of development supported by the real estate market and with community desires. Without a site that can physically accommodate development, market support for that development and community support, it is very unlikely that new investment will take place within the corridor. The Framework Plan also strives to balance short-term opportunities that can be achieved with minimal investment with longer-term vision elements that may require public or private sector initiatives. The overall Framework Plan is made up of Land Use, Transportation and Urban Design components.

## *LAND USE FRAMEWORK*

The Land Use Framework identifies the multiple land uses that will support the overall vision established for the New York Avenue Corridor, as well as the types and character of the buildings that will constitute the majority of the future built environment. Within the corridor, three key Opportunity Sites were identified based upon a detailed analysis of existing physical conditions within the Study Area (see Figure 5.1). Opportunity Site A is located at the Southeast intersection of New York Avenue and E. Abram Street, Opportunity Site B is located at the southwest intersection of E. Park Row Drive and New York Avenue and Opportunity Site C is located at the southwest intersection of E. Pioneer Parkway (SH 303) and New York Avenue. The vision for each of these Opportunity Sites is described in more detail on pages 65-69 of this report. It is important to note that major development changes from what exists today are focused on commercial areas and vacant properties, and not on residential neighborhoods.

Multiple building types were identified by the community to support the future vision established for the Study Area. The building types included neighborhood supporting buildings (including single family residential, churches and schools), townhomes, multi-family, live-work, mixed-use, retail, and office. The community's preferences related to each building type were documented and preferred buildings in each category were identified. Figures 5.2 and 5.3 identify the preferred buildings identified for each category. It is important to note that the precedent images

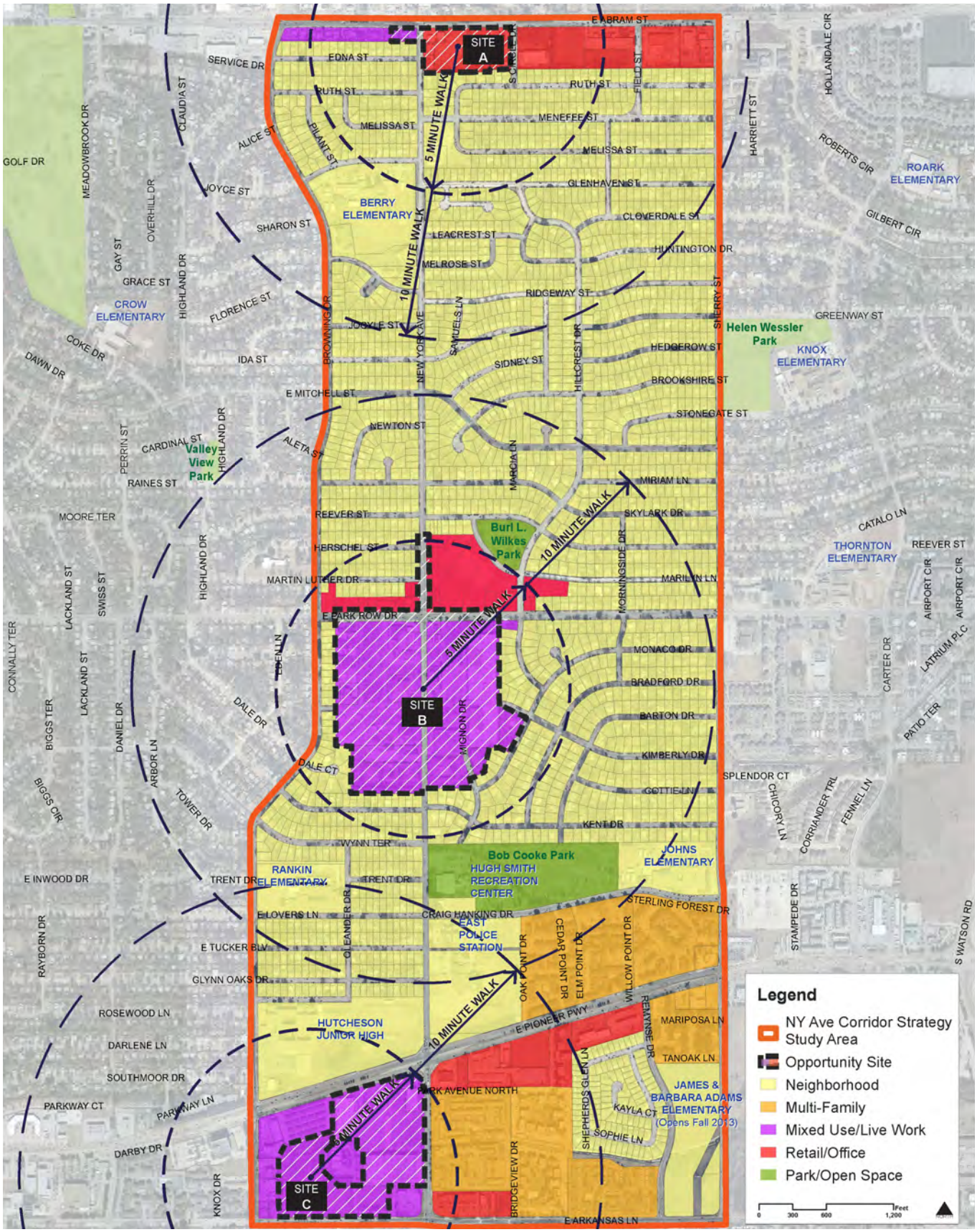



*Figure 5.1 Land Use Framework*

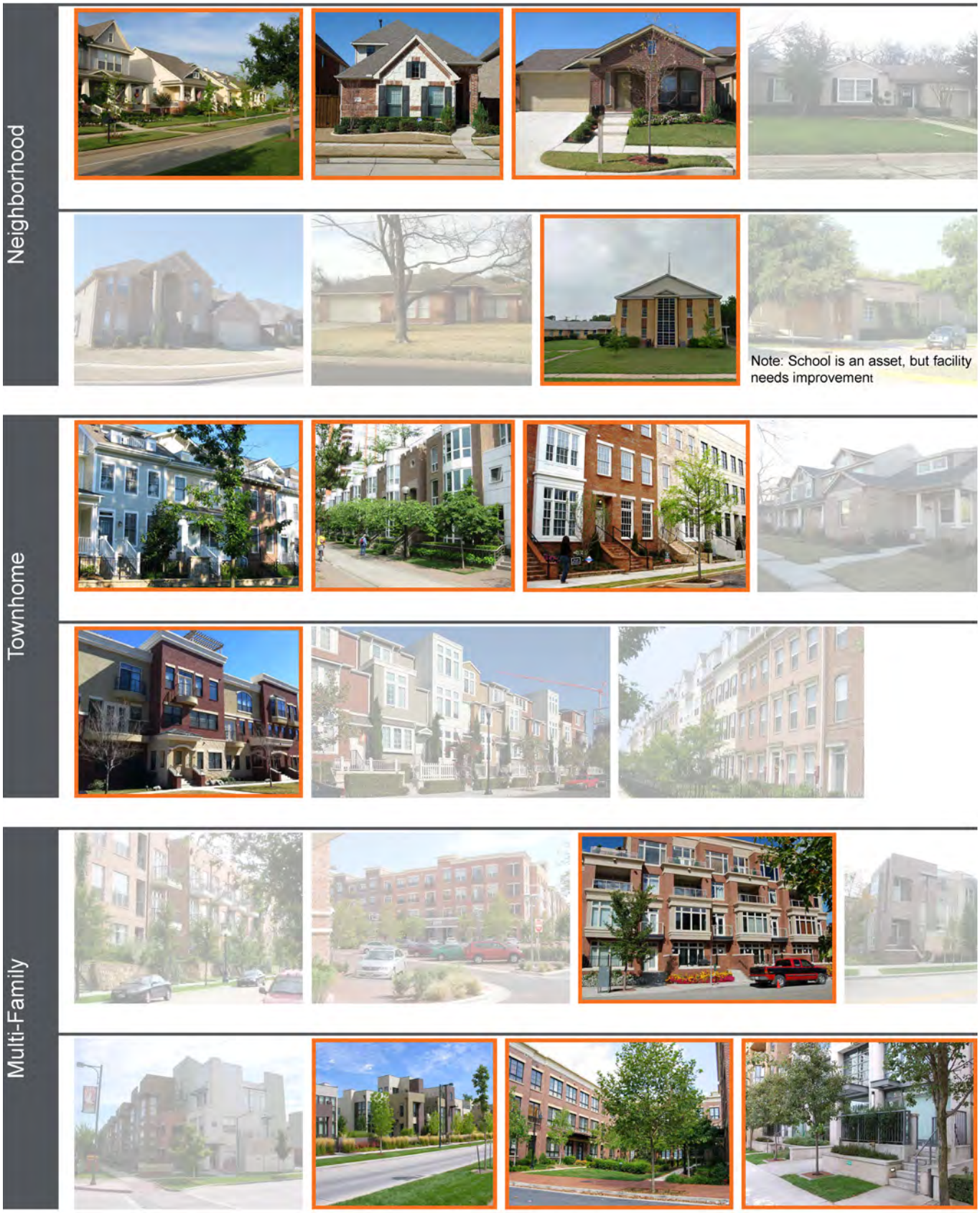



*Figure 5.2 Preferred Building Types*

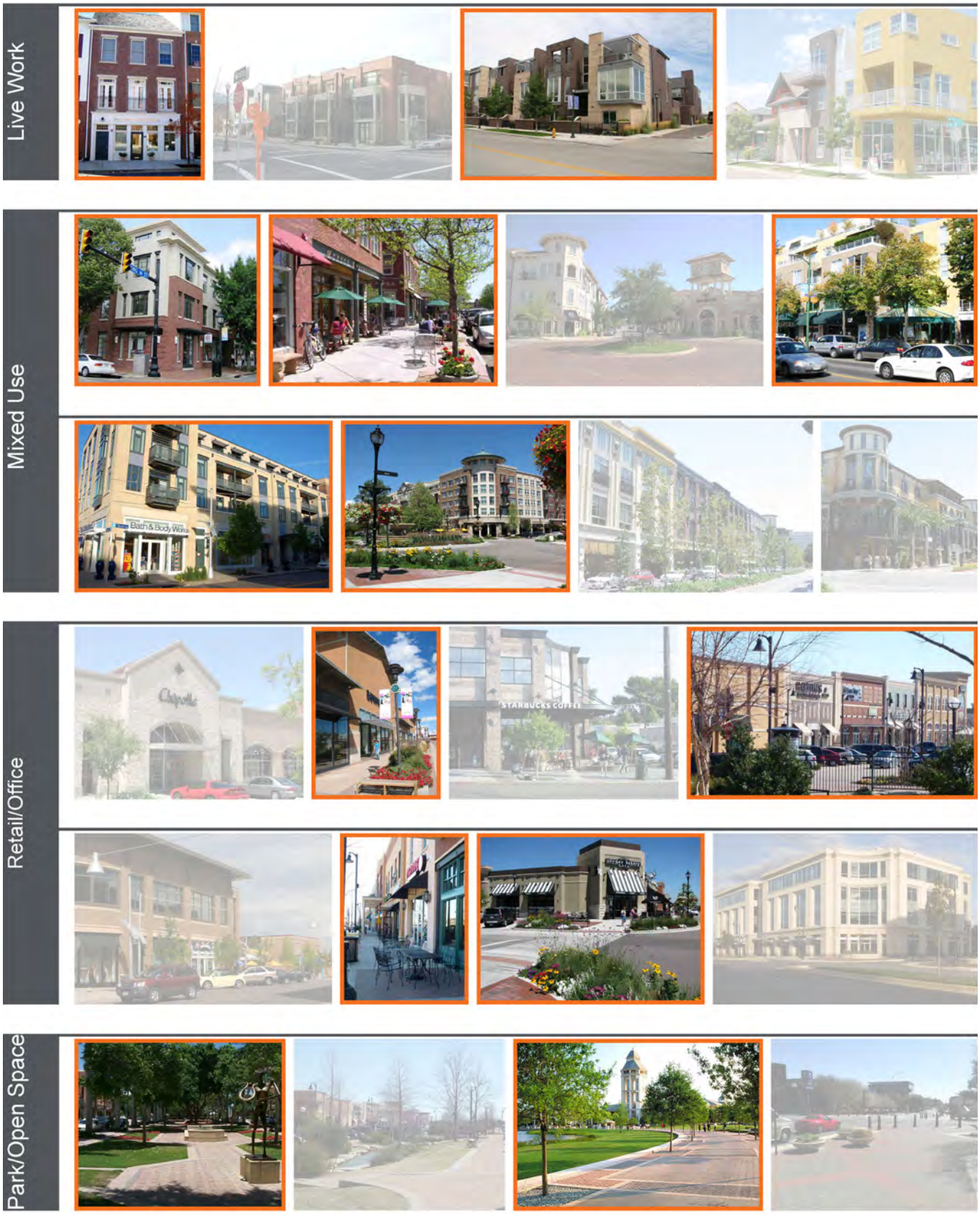



*Figure 5.3 Preferred Building Types*

identified to support each specific category are not intended to suggest specific architectural styles or building materials, but are intended to suggest building form, the types of activities that would occur within the building and the building's relationship to the surrounding public realm.

### *TRANSPORTATION FRAMEWORK*

Citizens of Arlington and numerous stakeholders expressed a strong desire to create a signature street for East Arlington. The Transportation Framework achieves this with improvements along New York Avenue that address mobility, safety and aesthetic issues (see Figure 5.4). As this Study Area redevelops, it is essential to have street standards that appropriately serve the corridor and match the vision for the adjacent Opportunity Sites. For New York Avenue, four roadway cross-sections were developed that incorporate a variety of mobility and streetscape improvements within the existing available right-of-way. New York Avenue terminates at E. Abram Street, which limits the corridor as a major north-south route. Additionally, traffic volumes are not expected to significantly increase in the near future. Therefore, mobility improvements are recommended to focus on providing safe and effective multi-modal access to the revitalizing commercial areas, as well as to the surrounding neighborhoods and schools.

From E. Abram Street to E. Park Row Drive, New York Avenue is recommended to remain three lanes with a center two-way left-turn lane (see Figure 5.7). The addition of brick pavers in the center turn lane and at selected crosswalks will provide a tactile driving surface, help calm traffic speeds and provide safe crosswalks to encourage pedestrian use. At targeted locations where cross street access would not be affected, landscaped islands may be installed to enhance the visual identity of the corridor (see

*New York Avenue Open House*

Figure 5.5 and 5.6 for before and after images). South of E. Park Row Drive, New York Avenue is recommended to remain four lanes. To provide for better pedestrian access through the entire corridor, a wider sidewalk on the east streetside is recommended for areas where right-of-way is available. This may be achieved through coordination with property owners to install new sidewalks in constrained areas south of E. Park Row Drive. Street trees and pedestrian-scale lighting are also recommended to provide an attractive definition to the street edge and create a sense of comfort for pedestrians by physically separating them from adjacent motor vehicles.

Three additional roadway cross-sections are provided as guides for internal access to the Opportunity Sites (see Figures 5.8, 5.9 and 5.10). Kimberly Drive can be transformed as a signature two-lane divided east-west connection through Opportunity Site B with a landscaped median, angled parking, and wide pedestrian ways. Internal two-lane undivided access drives within the Opportunity Site should provide wide pedestrian ways with landscaped buffers, lighting or street furniture to buffer from adjacent parking.

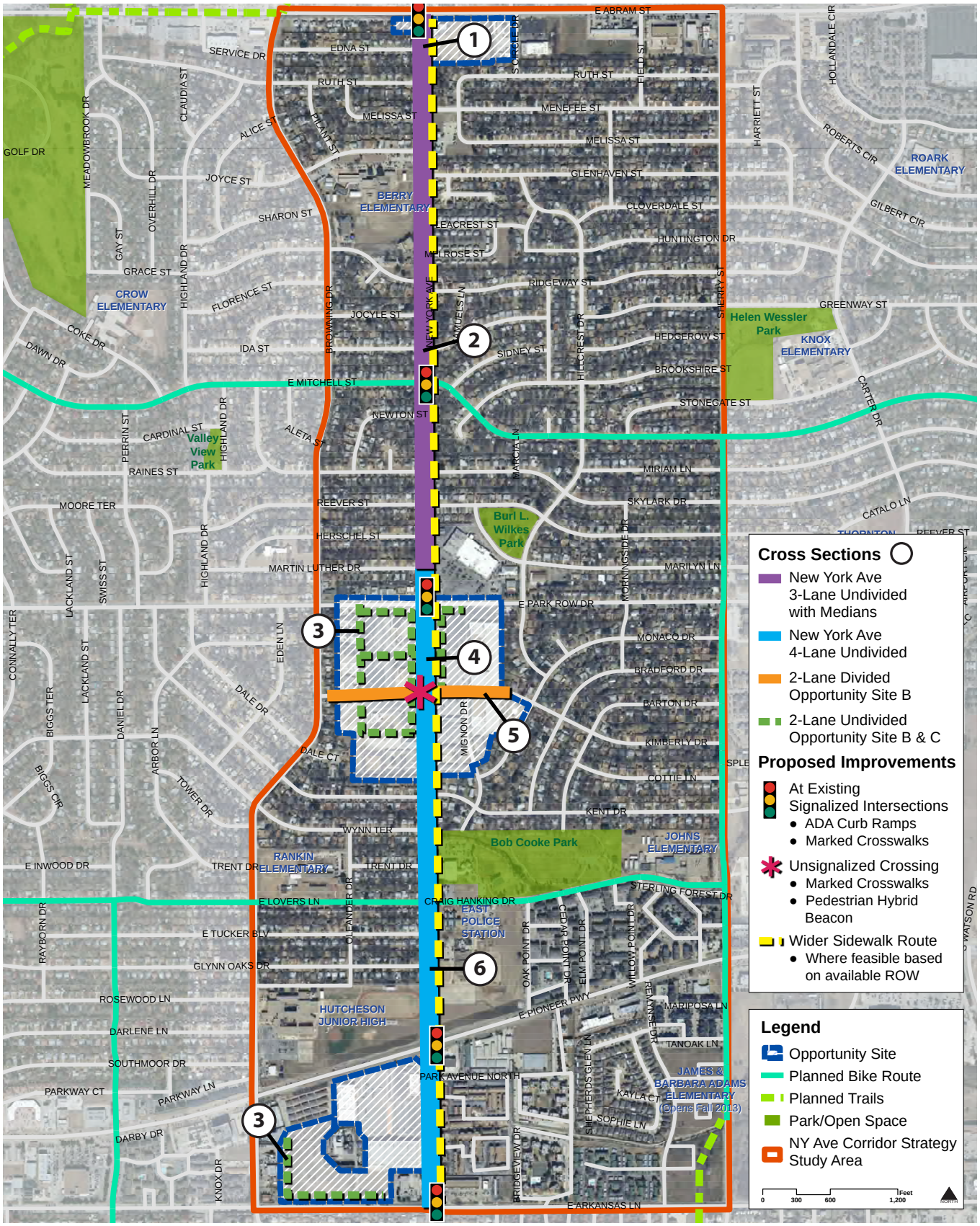



*Figure 5.4 Transportation Framework*

Improvements at signalized intersections, including E. Abram Street, E. Mitchell Street, E. Park Row Drive and E. Pioneer Parkway (SH 303), are recommended to include pavement treatments and greater visibility of marked crosswalks. As sidewalks are improved throughout the corridor, curb ramps should be replaced to meet Americans with Disabilities Act design standards. The unsignalized intersection of New York Avenue and Kimberly Drive has been identified as a location for pedestrian crossing improvements (see Figure 5.11). As redevelopment of the commercial properties occurs, increased pedestrian activity is expected south of the E. Park Row Drive signal, and the number of crossings at unmarked locations should be minimized. Measures to increase driver awareness of the Kimberly Drive intersection may include signage, marked crosswalks, and a pavement treatment. To encourage further use of this location, an enhanced crossing can be introduced with a pedestrian-activated rectangular rapid flashing beacon.

*Figure 5.5 New York Avenue Existing Condition*

*Figure 5.6 New York Avenue with Proposed Landscape Island*

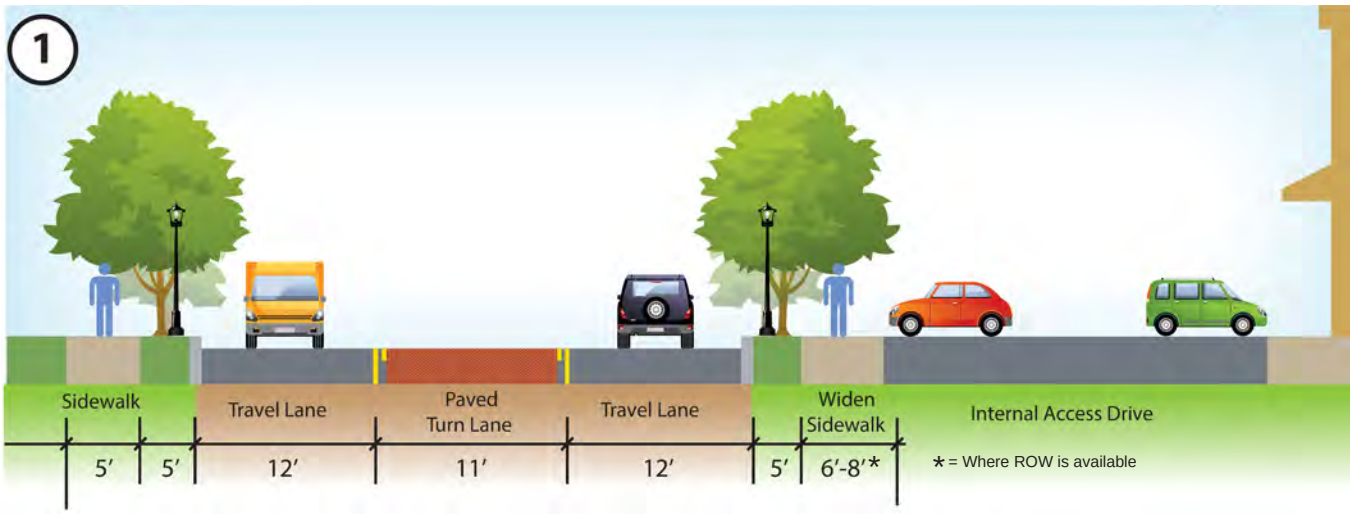



*Figure 5.7 (bottom) New York Avenue - E. Abram Street to E. Park Row Drive*

*Figure 5.8 Internal Road Section - Opportunity Site B*

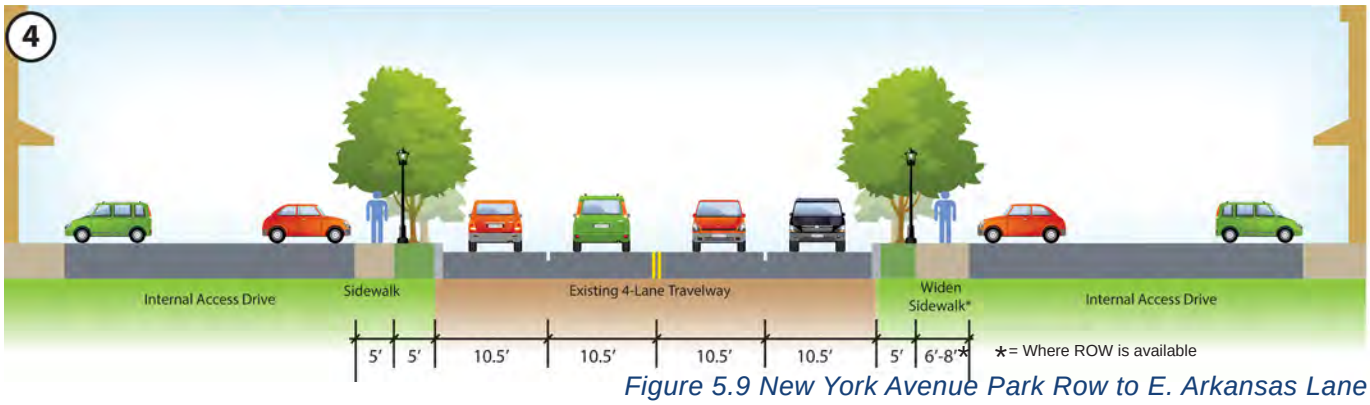



*Figure 5.9 New York Avenue Park Row to E. Arkansas Lane*

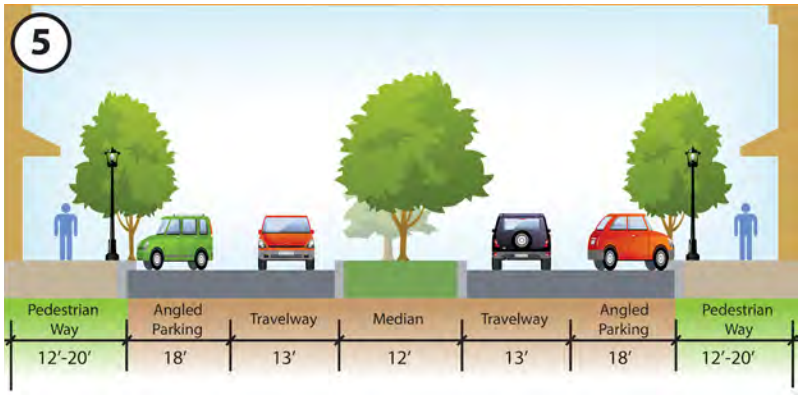



*Figure 5.10 Internal Road Section Kimberly Lane - Opportunity Site B*

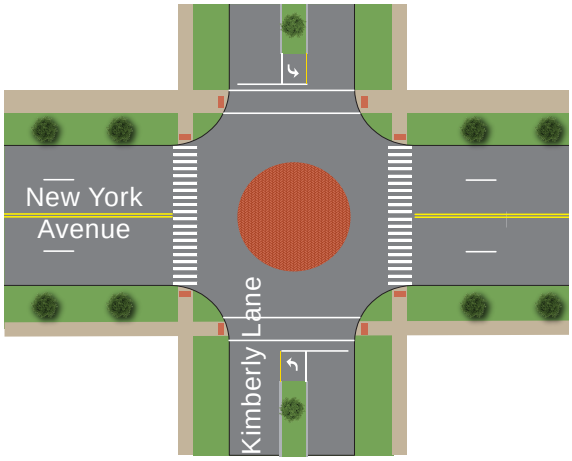



*Figure 5.11 Kimberly Lane Intersection and New York Avenue*

### *URBAN DESIGN FRAMEWORK*

The Urban Design Framework identifies locations in the New York Avenue Corridor that have opportunities to become gateways into the corridor. Four locations were identified as having the potential to be developed as gateways into the New York Avenue Corridor including the intersections of E. Abram Street and New York Avenue, E. Pioneer Parkway (SH 303) and New York Avenue, Browning Drive and E. Park Row Drive and Hillcrest Drive and E. Park Row Drive (see Figure 5.12).

Additionally, the Urban Design Framework identifies two key corridors that could be “themed” in a consistent manner to establish a unique character. This “theming” would be accomplished within the public realm through the use of architectural elements, special landscape and hardscape treatments, specialty signage and public art. The following text explains the two themes recommended for the Study Area.

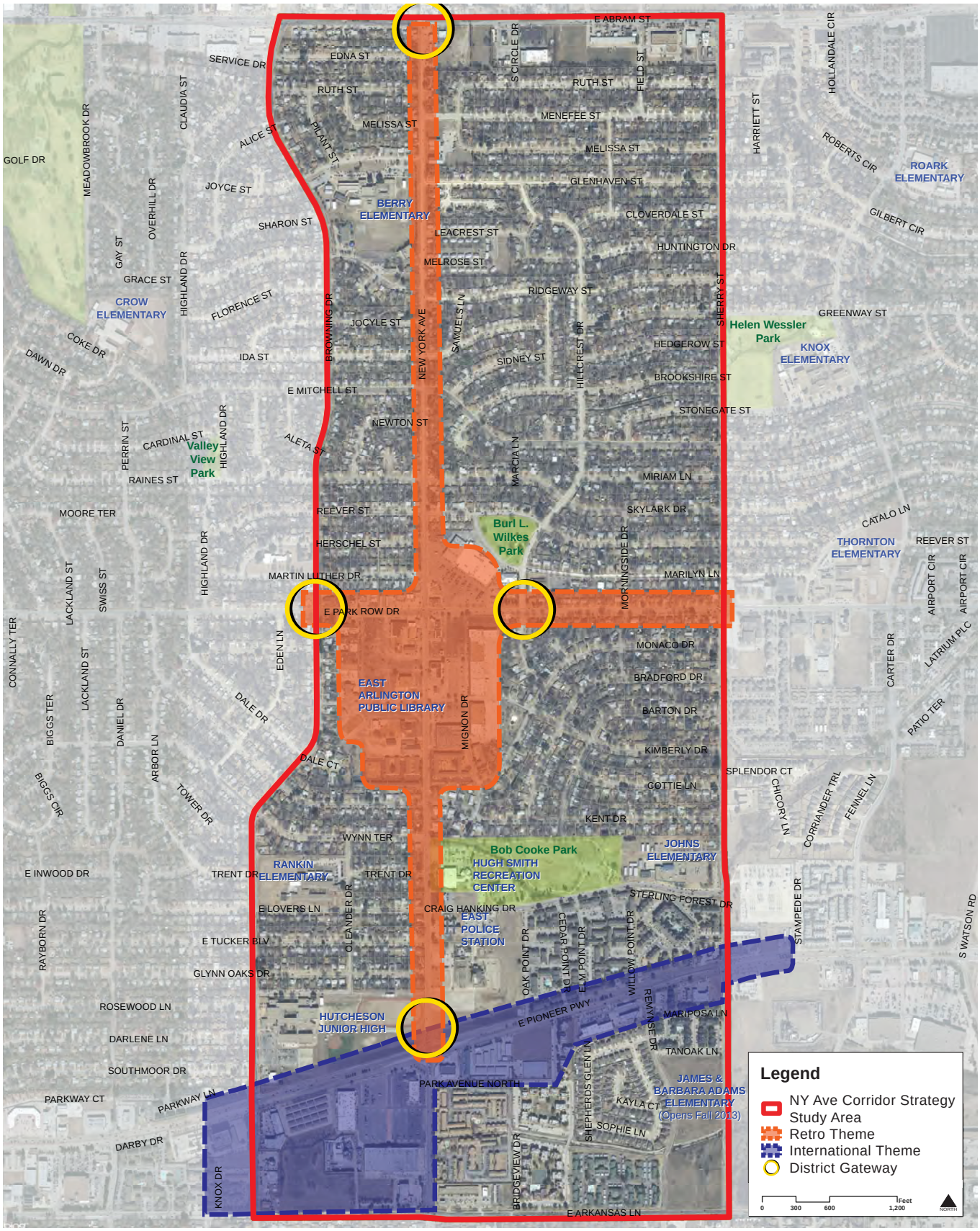



*Figure 5.12 Urban Design Framework*

### *Retro Theme*

The majority of the New York Avenue Study Area is recommended to have a retro urban design theme. As previously indicated in this report, the corridor was first developed in the 1950's and many of the residents were employed at the new General Motors Assembly Plant located nearby. The Retro Theme aims to represent and incorporate the history of the area into the urban design elements. Iconic elements from this time period included sporty automobiles with bright paint colors and an abundance of chrome, and neon signage advertising retail establishments, restaurants and motels. Some of the same materials were prevalent in one of the biggest icons from the era which was the local diner. Strong geometric patterns were common on the ground plane, with tables and chairs incorporating chrome and bright colored coverings, and even incorporated neon lights in juke boxes (see Figure 5.13).

While it is not recommended that urban design and streetscape elements representing the Retro Theme be a literal interpretation of these iconic 1950's elements, some aspects of design during this time period are recommended. In areas where enhanced paving materials will be incorporated, it is recommended that they have bold geometric patterns and be two shades of the same color or two complementary colors. Streetscape furnishings including lights, benches, bollards and tree grates are recommended to have a flat black finish. The detailing of metal furnishings should have strong curvilinear elements incorporated into the design. Finally, opportunities for incorporating neon light elements as recurring public art pieces should be explored throughout the areas recommended to receive the Retro Theme. Figure 5.14 provides representative examples of the types of streetscape elements recommended for the areas that will incorporate the Retro Theme.

## Retro Precedents

## Urban Design Elements

Neon Public Art

Street Furnishings Reminiscent of Chrome Elements

Ground Plane Concrete with Geometric Pattern

*Figure 5.13 (left) Retro Theme Precedents*
*Figure 5.14 (right) Retro Theme Streetscape*

### *International Theme*

The area along E. Pioneer Parkway (SH 303) is recommended to have an International urban design theme. The International Theme is intended to celebrate the multi-cultural diversity that is unique to the Study Area. Today, the New York Avenue Corridor Study Area has attracted individuals from a number of cultural backgrounds. The community felt strongly that cultural diversity was one of the corridor's greatest assets that should be celebrated. The portion of the Study Area along E. Pioneer Parkway (SH 303) has transitioned in recent years into a corridor of predominately international businesses. While currently the majority of these businesses are Asian-oriented, through the process of interviewing key stakeholders, an opportunity was identified to create a more diverse international corridor along E. Pioneer Parkway (SH 303) from the Study Area east to SH160 in Grand Prairie. The vision for the International Theme is one of multiple cultures and nations coming together within the corridor. Icons identified to support this theme included multiple materials and palettes (see Figure 5.15).

In areas where enhanced paving materials will be incorporated, it is recommended that the paving have a random pattern in stamped, tinted concrete to be reminiscent of Roman roads. Streetscape furnishings including lights, benches, bollards and tree grates are recommended to reference the circle, which represents fulfillment, oneness, perfection and unity in multiple Asian cultures. Flags or banners representing multiple nations / cultures are also intended to be a part of the streetscape palette. Figure 5.16 provides representative examples of the types of streetscape elements recommended for the areas that will incorporate the International Theme.

*Figure 5.15(left) International Theme Precedents*
*Figure 5.16 (right) International Theme Streetscape Elements*

## *OPPORTUNITY SITES*

Opportunity Site plans provide a snapshot of possible future development scenarios for three strategic areas within the New York Avenue Corridor. The three Opportunity Sites were identified through an analysis of existing conditions with a focus on location of owners, tenure of ownership and utilization. The snapshots explore how redevelopment of the areas could occur as related to potential locations of buildings, parking and open space, uses that could be combined within the areas to create synergies, and the overall development character that could be created in each area. Specific uses for each site were selected based upon expressed community desires and supporting market in the Trade Area. Within each Opportunity Site, economic feasibility of the envisioned development, potential implementation strategies, and additional value leveraged for each dollar invested in the specific areas was identified. The Opportunity Site plans represent one of multiple scenarios that could occur within each of the areas depending on market needs and responses to the site opportunities. The location of buildings and the land uses identified should be viewed as having the potential to occur in any number of locations or configurations within the Study Area.

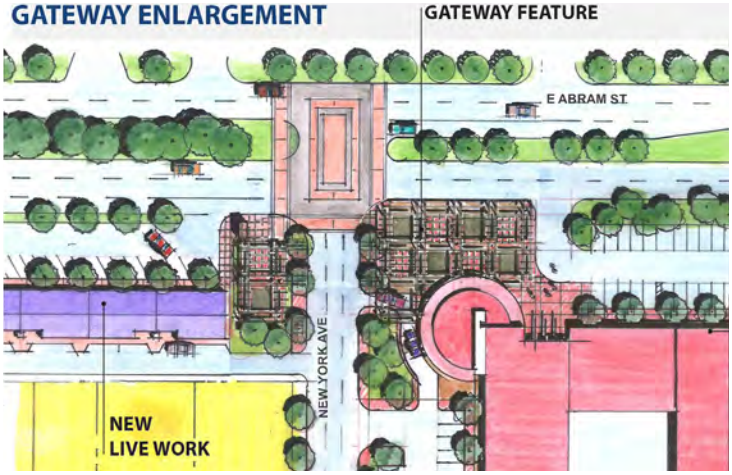
### *Opportunity Site 'A'*

The scenario generated for Opportunity Site A envisions a new commercial development located at the intersection of E. Abram Street and New York Avenue, the northern gateway to the corridor (see Figure 5.17). On the southeast corner of the intersection, seven parcels make-up the Opportunity Site. Four of those parcels are either vacant or underutilized (having an improvement to total property value of less than 50%). The visibility created through traffic volumes on E. Abram Street, and orientation of this site make it a very good candidate for neighborhood supporting retail with many of the uses desired by community stakeholders. Smaller retail establishments could be located facing New York Avenue with establishments that could support the desire for informal gathering places such as coffee shops, ice cream shops or other businesses that facilitate impromptu visits with neighbors. To the east of the hard corner, the site could accommodate a neighborhood market, again supporting one of the key desires expressed by the community.

On the southwest corner of the intersection, four parcels make up the Opportunity Site. All four of these parcels are categorized as underutilized. The structures on these parcels are single family residential, but have been converted over the years to commercial uses with the front yards being transformed into parking lots. The vision for these sites is that of live/work development which would allow the same types of commercial and office uses on the ground floors of the buildings as exist on the sites today, while also allowing residential units on the second floors of the buildings. These buildings would provide a more appropriate and more aesthetic transition between E. Abram Street and the single family neighborhood to the south. The proforma prepared for this Opportunity Site estimates an added value to the community of $10 million and can be found in Appendix iv.

### *Opportunity Site 'B'*

The scenario generated for Opportunity Site B envisions a new mixed-use development located at the intersection of E. Abram Street and New York Avenue (see Figure 5.18). On the south-



*Gateway Concept*

*New Retail (Grocer) - E. Abram Street*

*New York Avenue Gateway*

*Figure 5.17 Opportunity Site 'A'*

west corner of the intersection, six parcels make-up the Opportunity Site. The largest of these parcels is extremely underutilized (having an improvement to total property value of less than 40%). Additionally, the City owns one of the six parcels in the area. The existing retail buildings on the site were constructed in the 1950's and 1960's, and the configuration of the buildings, the size of the floor plates and ceiling heights make them unattractive to the types of retailers that the community envisions in the area. Several factors make this site a good candidate for redevelopment including the limited number of parcels and owners that would be needed to participate in the redevelopment, the potential for public / private partnerships incorporating the City-owned library site, and the existing direct access from the site to the surrounding neighborhood.

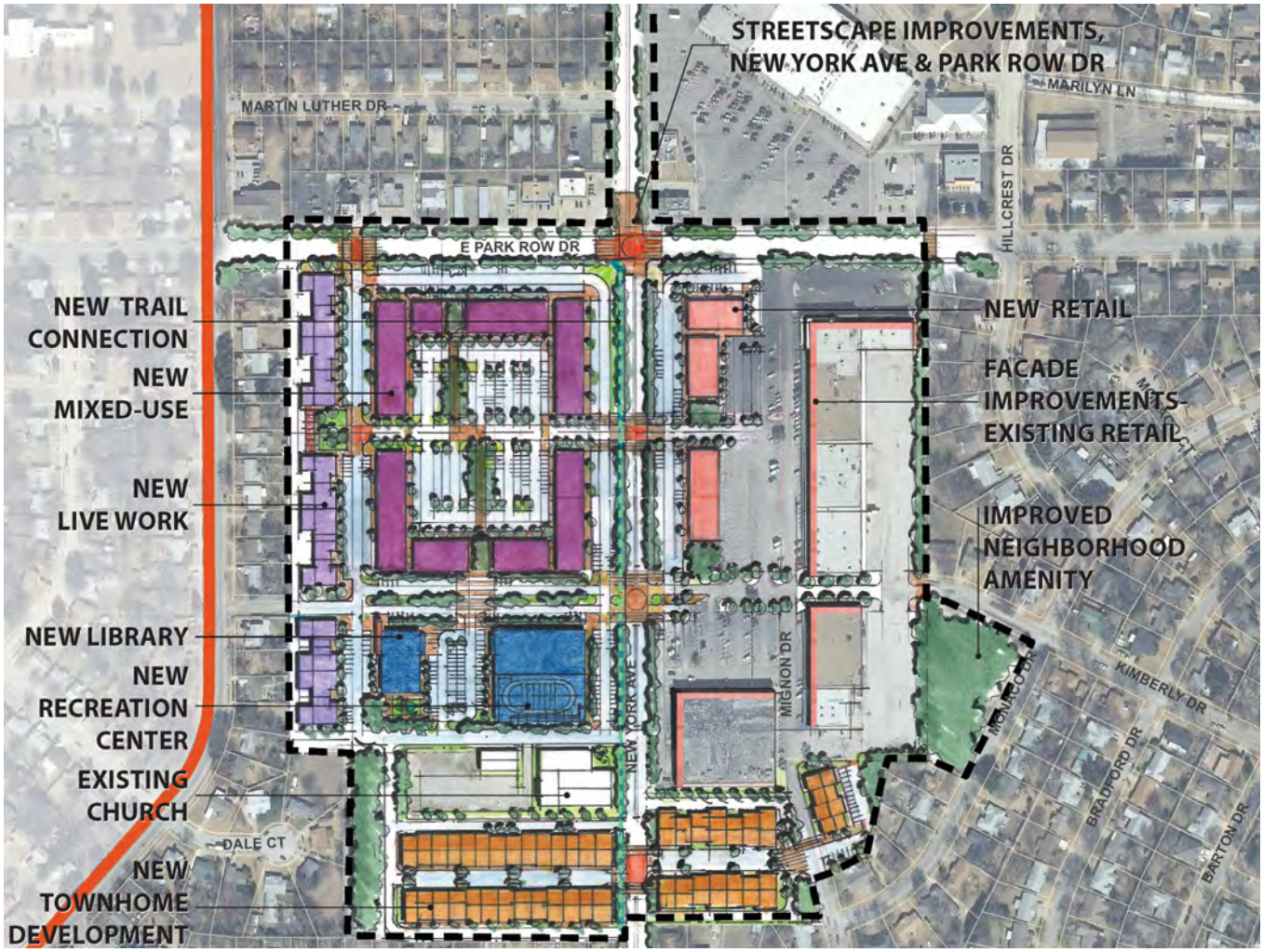
In the visioning process, the Advisory Committee and the community agreed that this site is the "heart" of East Arlington. It was historically the location of many of the stores, restaurants and activities in East Arlington that provided a sense of pride and belonging to its residents. Because of this tie to the past, the community felt strongly that a civic component, including a redeveloped library and a new recreation center could be an anchor for this site. The existing library and recreation center are extremely important to the residents of East Arlington, providing community gathering space, programs for seniors and after school programs for school-age children. However, the program needs in the area have outgrown the capacity of the existing aging facilities.

The community also expressed a strong desire to locate neighborhood supporting businesses within the corridor, including restaurants, coffee shops, ice cream shops, and others which would re-create the places that will again provide the sense of pride and belonging that is currently lacking. Finally, the community had a strong desire to see significant change through major renovation or redevelopment to the La Jolla apartment complex. The complex has recently exhibited several issues related to crime and code violations, and was believed by residents to portray a negative image for East Arlington.

In the Opportunity Site scenario for this area, Kimberly Drive, which currently has very poor definition due to the surrounding parking lots, would become a pedestrian-oriented retail street providing a strong visual and physical connection to the adjacent neighborhood. On the north side of this street, mixed-use development consisting of ground floor retail with two floors of residential above would provide new energy to this part of the corridor, while also providing locations for many of the neighborhood supporting businesses desired by the community. The two blocks created by this new development would have an internal street to provide access to surface parking.

On the south side of the new retail street (Kimberly Drive), new civic uses are envisioned in the form of a recreation center, library and civic plaza. This area would form a strong anchor for hosting local community gatherings. Along the western edge of this site, live/work units would provide a clean transition to the single family residential uses that exist immediately to the west of the site. The parcels furthest south in this development and across New York Avenue to the east, which are the current sites of the La Jolla Apartments, would be transformed into a new townhome development.

On the southeast corner of the intersection, the existing retail center is envisioned to receive reinvestment in the form of façade improvements, as well as the enhancement of Kimberly Drive with the addition of trees, curbs and sidewalks.



*New Recreation Center - Kimberly Drive*

*New Recreation Center, Library, Mixed-Use*

*Figure 5.18 Opportunity Site 'B'*

Finally, a parcel of property on the corner of Kimberly Drive and Monaco Drive that once was the location of a privately owned neighborhood pool and playground is thought to be a great candidate for a public park to provide an additional amenity to the surrounding community. The proforma prepared for this Opportunity Site estimates an added value to the community of $49 million and can be found in Appendix iv.

***Opportunity Site 'C'***

The scenario generated for Opportunity Site C envisions a senior housing development located along E. Arkansas Lane west of New York Avenue (see Figure 5.19). One parcel makes up the Opportunity Site which is currently vacant. One challenge to developing the site is the existing gas well site located immediately to the north.

Throughout the visioning process, the community expressed a strong desire to be able to "age in place." With limited housing options existing in the Study Area geared towards seniors, an appropriate site needed to be located on which multiple senior housing products could be supported. This site is an ideal location for senior housing due to the close proximity to supporting retail uses and the size of the vacant parcel available for development.

In order to create an amenity for the future development and to provide an appropriate buffer between the existing gas well site and future residential development, a heavily landscaped area would be provided immediately adjacent to the gas well site. It is envisioned to contain water features, outdoor dining, and walking paths. Adjacent to this amenity area, a building consisting of senior apartments with supporting food services and concierge services would provide for the needs of active seniors. A limited quantity of senior cottage housing for independent living is also envisioned. A strong pedestrian connection to the retail center located to the north of this site could be provided by creating a covered "galleria" through the existing building with smaller-scale retail along the edge. Within the retail site to the north, it is envisioned that the façade improvements that have already been made to several of the existing businesses would be expanded to the remaining businesses in the retail center.

Building upon this early phase development, future phases of supporting uses are envisioned for the mini warehouse site to the north of the amenity area, for the existing gas well site as it reaches the end of its lifespan, and for the retail uses along Browning Street (see Figure 5.20). Improvements to these sites could include additional senior apartments, senior cottages and new medical office development to provide for a majority of the needs of residents living within the development in a walkable environment. The proforma prepared for this Opportunity Site estimates an added value to the community of $16 million and can be found in Appendix iv.

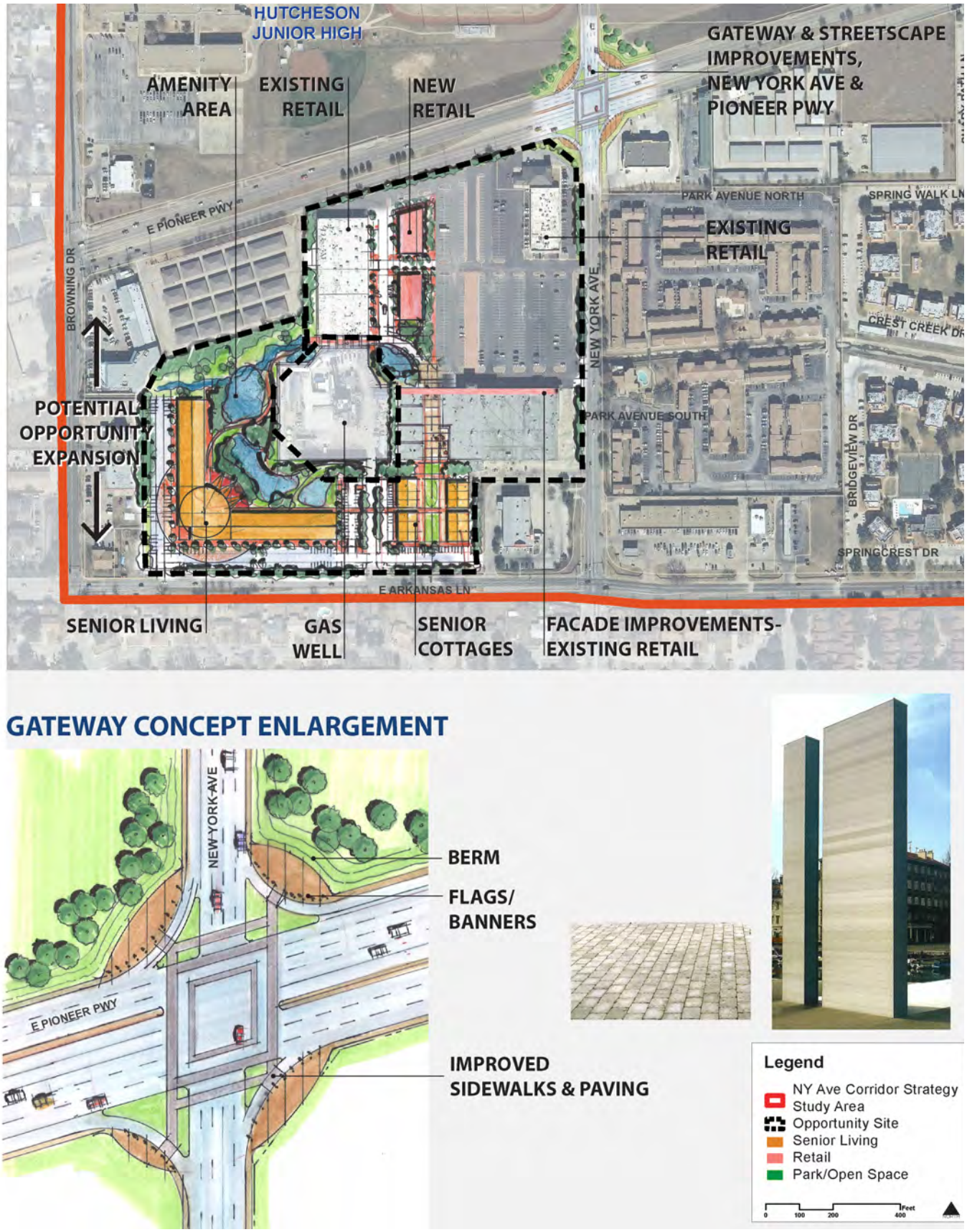



*Figure 5.19 Opportunity Site 'C'*

*Senior Living - E. Arkansas Lane*

*Senior Cottages*

*Figure 5.20 Opportunity Site 'C' - Future Phase*

## OPPORTUNITY SITE MARKET TEST

In order to determine the financial impacts of these Opportunity Sites, a market "test" was completed to ensure that recommended land use types would be supportable in the Trade Area. A reasonable capture rate for the Trade Area demand is 5%-10%. As shown, the total number of residential units and retail/restaurant/service commercial square feet suggested for the Opportunity Sites appears to represent a reasonable market capture of Trade Area demands.

### *Market Test*

| | Opportunity Concept Development Programs | Total Program Units and Square Feet | Trade Area 10-Year Demand | Opportunity Concept % of Trade Area Demand |
|---|---|---|---|---|
| **Opportunity Concept A** | | | | |
| Abram at New York Avenue | Live/Work Units | 10 | 4,179 | 0.2% |
| | Loft Living | 0 | 5,971 | 0.0% |
| | Retail/Restaurant/Service Commercial | 54,000 | 913,395 | 5.9% |
| **Opportunity Concept B** | | | | |
| Park Row at New York Avenue | Live/Work Units | 68 | 4,179 | 1.6% |
| | Loft Living | 142 | 5,971 | 2.4% |
| | Ground Floor Flex Square Feet* | 86,600 | -- | -- |
| | Retail/Restaurant Square Feet | 27,000 | 913,395 | 3.0% |
| | Library/Recreation Center | 71,000 | -- | -- |
| **Opportunity Concept C** | | | | |
| Pioneer at New York Avenue | Senior Cottages | 12 | 4,179 | 0.3% |
| (International Marketplace) | Senior Living | 123 | 5,971 | 2.1% |
| | Retail/Restaurant Square Feet | 13,000 | 913,395 | 1.4% |
| **Total Opportunity Concepts** | | | | |
| | **Live/Work or Senior Cottages** | **90** | **4,179** | **2.2%** |
| | **Loft Living** | **265** | **5,971** | **4.4%** |
| | **Retail/Restaurant Square Feet** | **94,000** | **913,395** | **10.3%** |

* Could be retail, service, office, residential or other.
Source: Ricker|Cunningham and Jacobs Inc.

*Figure 5.21 Market Test*

### *ECONOMIC GAPS*

For urban infill projects, it is not unusual to have economic "gaps" (project costs are higher than project value) of between 20% and 50%. These gaps typically represent the higher cost of property acquisition in an infill environment, as well as the difference between prevailing market conditions and desired real estate products. In quantifying the economic gaps associated with the Opportunity Sites, the following steps were completed:

- estimated development value that could be created from each potential product type, based on current and future market conditions in Arlington and the North Texas;
- prepared build-out economic analyses for each project; and
- estimated project costs.

This analysis resulted in project "gaps" for each of the Opportunity Sites. The largest gap was for Opportunity Site B, which includes the library/recreation center concept. Because these public uses do not typically generate revenue in excess of operating expenses, they only contribute to the cost side of the equation. If the City were to construct the library/recreation center facilities, it would significantly contribute to Opportunity Site B's economic "gap" reducing it to approximately 15%. Opportunity Site A and C resulted in gaps of 18% and 24%, respectively (See Fig. 5.22).

Several variables affect economic feasibility (both negatively and positively): land cost; building density; rehab vs. new construction costs; parking requirements; premiums on rents and sale prices; and "place-making" potential (amenities, connections, public spaces). The goal in redevelopment is to balance variables in an aesthetically and economically responsible manner.

### *POTENTIAL CONTRIBUTIONS TO GAPS*

Once the project "gaps" were quantified, estimated potential "contributions to gap" were identified. "Gap filling" measures considered included:

- Land Acquisition/Writedown
- Site Improvements Contribution (infrastructure, parking)
- Property Tax TIRZ (25 years)
- Sales Tax Sharing (380 Loan)
- Public Improvement District (20 Years)
- Property Tax Abatement (10 Years)
- Development Fee Waivers (Roadway, Water)
- Federal/State/Local Grants
- Streamlined Development Approval Process
- Tax Credit Equity (LIHTC, Historic, New Market)

As shown in Figure 5.22, economic gaps could be filled with a combination of measures outlined above. <u>These measures shown in Figure 5.23 are illustrated only to provide examples of potential funding contributions to gaps and are not the recommended funding contributions for each Opportunity Site.</u> Potential contributions could

*Economic Gaps*

| Project Indicator | Opportunity Site Concepts | | |
|---|---|---|---|
| | Opportunity A: Abram at New York Avenue | Opportunity B: Park Row at New York Avenue | Opportunity C: Pioneer at New York Avenue |
| **Private Sector Investment** | | | |
| **Development Sq Ft:** | | | |
| Project Land Area (Acres) | 7.75 | 45.00 | 15.00 |
| Retail/Restaurant | 54,000 | 113,600 | 13,000 |
| Office/Employment | 0 | 71,000 | 0 |
| Residential (Rental) | 0 | 127,800 | 110,700 |
| Residential (For-Sale) | 18,000 | 122,400 | 14,400 |
| **Total Private Development** | **72,000** | **434,800** | **138,100** |
| **Floor Area Ratio** | **21%** | **22%** | **21%** |
| **Total Project Value (@ Build-Out)** | **$9,956,250** | **$49,054,500** | **$15,595,915** |
| **Total Project Costs (@ Build-Out)** | **$12,115,650** | **$73,777,680** | **$20,571,446** |
| **Project Margin/(Gap)** | **($2,159,400)** | **($24,723,180)** | **($4,975,531)** |
| **Project Margin/(Gap) %** | **-18%** | **-34%** | **-24%** |

*Potential Contributions to Gaps*

| Project Indicator | Opportunity Site Concepts | | |
|---|---|---|---|
| | Opportunity A: Abram at New York Avenue | Opportunity B: Park Row at New York Avenue | Opportunity C: Pioneer at New York Avenue |
| **Potential Contributions to Gap** | | | |
| Land Acquistion/Writedown | $0 | $0 | $0 |
| Site Improvements Contribution | $936,403 | $2,801,400 | $801,925 |
| Supportable TIRZ (25 Years) | $1,700,000 | $6,800,000 | $2,200,000 |
| Sales Tax Sharing (380 Loan -- 20 Yrs) | $1,200,000 | $2,500,000 | $300,000 |
| Public Improvement District (20 Years) | $0 | $0 | $0 |
| Property Tax Abatement (10 Years) | $0 | $0 | $0 |
| Development Fee Waivers | $0 | $0 | $0 |
| Federal/State/Local Grants | $0 | $0 | $0 |
| Streamlined Development Approval Process | $0 | $0 | $0 |
| **Total Contributions to Gap** | **$3,836,403** | **$12,101,400** | **$3,301,925** |
| **Project Margin/(Gap) % After Contributions** | **14%** | **-17%** | **-8%** |

** These measures are illustrated only to provide examples of potential funding contributions to gaps and are not the recommended funding contributions for each Opportunity Site*

*Figure 5.22 Economic Gaps*
*Figure 5.23 Potential Contributions to Gaps*

offset the gaps estimated for Opportunity Site A and Opportunity Site B (with the City investing in the new library/recreation center). The gap for Opportunity Site C would likely require additional contributions, such as a land acquisition or writedown.

### *LEVERAGED INVESTMENT*

One of the primary objectives of corridor revitalization is to leverage public investment to encourage private investment. As noted, public sector entities should expect a healthy return on any public investment made. The opportunity concepts summarized herein have the potential to effectively leverage a high degree of private investment. As shown, in total, the Opportunity Sites have the potential to generate approximately $106.5 million in new private investment from the $19.2 million in new public investment in the New York Avenue Corridor, leveraging public investment at an average 5.5:1 ratio.

*LEVERAGED INVESTMENT*

| Opportunity Project | Total Private Investment | Total Public Investment* | Leverage Ratio** |
|---|---|---|---|
| Opportunity A: Abram at New York Avenue | $12,100,000 | $3,800,000 | 3.2 |
| Opportunity B: Park Row at New York Avenue | $73,800,000 | $12,100,000 | 6.1 |
| Opportunity C: Pioneer and New York Avenue | $20,600,000 | $3,300,000 | 6.2 |
| **Totals** | **$106,500,000** | **$19,200,000** | **5.5** |

* Reflects both "direct" and "indirect" public investment.

** Reflects amount of private investment generated for every $1 dollar in public investment.

Source: Jacobs Inc. and Ricker | Cunningham.

*Figure 5.24 Leveraged Investment*

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# BARRIERS TO INVESTMENT

The following discussion summarizes both research and input gained from representatives of the community during interviews and group discussions conducted during the planning process. Interviewees included property owners, developers, institutional representatives, neighborhood representatives and other members of the "delivery system"[1] who were selected for the breadth of their experience and familiarity with the New York Avenue Corridor Study Area. All conversations focused on opportunities and challenges to investment and reinvestment in area.

Experience has shown that an understanding of challenges or barriers to investment, and the issues which perpetuate them, is critical to effectively arrive at recommendations designed to "ready an area for investment" and position key Opportunity Sites. As expected, many of the issues are in direct conflict with the City's ability to advance the expressed vision. In addition, whereas many were raised by stakeholders rather than discovered by the consultant team, they include both perceptions and realities. Regardless of which they are, they are all relevant and considered in the context of identifying key implementation strategies.

The observations which follow are grouped into broad categories -- physical, market, financial, regulatory, organizational and political. Experience in many markets has shown that opportunities to be capitalized on, and challenges to be overcome, tend to fall within one of these categories. The successful implementation of any redevelopment strategy largely depends on the accurate identification of both opportunities and challenges, as well as the political will to share this information with the community and collectively define a market-based strategy (vision) for the near- and long-term.

### *PHYSICAL CHALLENGES*

Comments regarding New York Avenue's physical environment primarily fell under the headings of aesthetics / beautification, aging or inadequate infrastructure, underutilized properties, and a lack of connections, both within neighborhoods and along the corridor, and beyond the Study Area. Most participants agreed that the overall Study Area is not as visually attractive as it used to be and that contributors included the presence of overhead utilities, deteriorating and inconsistent fencing and vacant and under-utilized properties and buildings. Infrastructure issues primarily centered on road conditions, the incomplete system of sidewalks, and mature trees. In addition, many individuals cited a general lack of pedestrian connections and "walkability" within the Study Area, as well as a lack of mobility to access areas outside the neighborhood. Participants spoke about the need for better transit to/from the Study Area and more choices for alternative modes of transportation (pedestrian, bike).

1 The "delivery system" includes those individuals and organizations which affect delivery of a project or product to the market.

### *MARKET CHALLENGES*

Comments related to the market were largely aimed at existing perceptions of the Study Area, e.g., lack of commercial diversity, disproportionate number of rental and affordable housing units and absentee property ownership that were driving to other locations. Some participants felt that perceptions, more than market realities, were having the greatest impact on investment choices. Note: Based on the market analysis completed as part of the planning effort, these participants were accurate.

The Study Area's housing stock was the subject of many participants' comments, but the real concern was with the number of owner vs. renter occupied units and the corresponding impact that had on maintenance. While many felt that East Arlington offers an affordable housing location for area residents, they also believed that there are too many housing units within a narrow (and low) price band. Another concern related to housing was the existing concentration of substandard rental housing. Increased home ownership in the Study Area was viewed by most participants as a critical factor in improving the Area's overall image, as was diversifying the type of products available for individuals at different life stages.

Related to the Study Area's housing stock and correspondingly, resident profile, was the one-dimensional nature of the commercial space and its users. Most participants admitted that the majority of their shopping was done outside the Study Area. Further, they seemed to understand that limited choices for shopping and services in the Study Area correspondingly affected the attractiveness of the area as a housing location. In addition to shopping and service options, many participants mentioned a need for more entertainment options, particularly for families, as well as medical services for the elderly.

Finally, the lack of employment opportunities in the Study Area was another area of concern. Some comments focused on the need for new businesses and the lack of opportunities for neighborhood residents within existing businesses. A common perception seemed to be that employers in the Study Area typically looked outside the neighborhood for employees. Job training and expanded education efforts were seen as vital to the Study Area's future, particularly for its young people.

### *FINANCIAL CHALLENGES*

As noted in the market challenges above, there was a general feeling among participants in the process that the investment community had overlooked East Arlington. Not surprisingly, participants with the strongest opinions around financial feasibility were those in the development and financial communities. Individuals from these groups cited the Study Area's below-market rental rates and sale prices and overall perception as factors which impacted near-term financial feasibility. In contrast, existing business and property owners within the Study Area described a relatively stable business environment, though noted that financial incentives would be needed in order to upgrade the overall physical appearance of existing structures. In addition, many believed that the City should play a large and leading role in improvements to the public realm. While there was some debate as to whether the City had a clear financial commitment to a long-term revitalization effort in East Arlington, many participants believed there was.

### *REGULATORY CHALLENGES*

Discussions around regulatory issues were primarily focused on inconsistencies in zoning and development standards, the need to increase code enforcement efforts to "clean up" the area, and an increased police presence to address safety concerns. Most participants agreed that the Study Area contains a mix of uses, regardless of zoning (use by right) and that more consistent design standards would be essential going forward. Stricter code enforcement was raised as a way to improve the Study Area's overall appearance while motivating property owners (both residential and non-residential) to reinvest. Finally, most participants agreed that incentives and public commitment to sustained investment would be essential in order for property owners to be willing to incur any financial risk. The issue of public safety elicited a range of comments. Many participants felt that while the police had increased their presence with their substation in the central portion of the Study Area that additional patrols might be necessary in order lower crime rates. Once this information was shared with representatives of the City's police department, it was discovered that crime rates were actually down in the area, and that the real issue was more perception than reality. Implementation strategies related to this issue will involve ensuring accurate information is readily available.

### *ORGANIZATIONAL CHALLENGES*

East Arlington is well-represented by advocacy organizations in support of neighborhood initiatives, including East Arlington Renewal, several ethnic chambers, the schools and various churches. As in any community that is fortunate enough to have such a broad range of partners, the challenge becomes managing the roles of each to avoid duplication. Many of the participants' comments regarding organizational challenges centered on the necessity for greater coordination between these groups and the City. The overall perception seemed to be that many groups are doing good work individually, but not necessarily in a synergistic way with an eye toward a single outcome.

The other key organizational challenge cited by participants was the lack of a single unified leadership entity within the Study Area that had the resources to partner in the delivery of financial resources and advocate for private investment. Again, several individuals and organizations were mentioned as community "leaders" or advocates, but the lack of a single "voice" with appropriate resources was seen as a critical factor in raising East Arlington on the City's agenda.

## *CONCLUSION*

As stated earlier, an understanding of challenges or barriers, and the issues which perpetuate them, is critical to arrive at recommendations designed to “ready an area” or community for investment. This is equally true whether the challenges are being perpetuated by perception or reality. All of the input presented here were the opinions of those individuals who agreed to participate. Research completed by the consultant team focused on confirming or refuting these comments to the extent that they informed recommendations regarding implementation of an investment strategy for the Study Area. Regardless of whether the comments made were based in fact, processes like these inevitably highlight the need for greater communication between the public and private sectors and greater education of many audiences. The essential element in every story of successful revitalization over the past decade was partnerships. Whereas partnerships are based on trust and trust is built on communication, this will be paramount going forward.

# IMPLEMENTATION

*"We all should know that diversity makes for a rich tapestry and we must understand that all the threads of the tapestry are equal in value no matter what their color." Maya Angelou*

The implementation strategy for revitalization of the New York Avenue Corridor (as reflected in the framework illustration) is to promote early investment in strategic Opportunity Sites, while stabilizing and enhancing existing uses – commercial, residential and institutional; and, as multifaceted as the "barriers" to this type of initiative, so too are the solutions. Whereas the national trend of stagnating and declining urban corridors is evident not just in Arlington, but throughout the United States, there is much to be learned from those communities that both succeeded and failed to revitalize these essential places within their communities. What we now know is that infill redevelopment projects are more complicated and take longer than "Greenfield" or fringe development for a whole host of reasons. Among the most pervasive challenges are:

- assembly of property;
- comparatively high land costs (speculation);
- regulations and public policies may be less relevant for their environment (suburban vs. urban);
- susceptibility to comparatively high levels of public scrutiny;
- may require structured parking and therefore, higher construction costs; and,
- perceptions at these sites being greater risk as their market may as yet be "unproven."

Simply put, the private sector cannot and will not do it alone. These projects require the participation of both the public and private sectors along with shared support for aggressive recruitment of niche opportunities.

For their part, it will be the public sector's responsibility to "level the investment and regulatory playing fields." Private investment alone will not fill the financial "gap" created by these irregularities. Rather, it will move elsewhere. The public-private partnership should exist between what the market can do on its own and what the community needs or desires (the vision). Private capital will only follow public commitment in these arenas.

### *STRATEGY FRAMEWORK*

As the illustration here shows, numerous entities are necessary for revitalization efforts to succeed and each one has a distinct role. Duplication of efforts alone can be enough to derail an otherwise successful initiative, as can be too narrow an interpretation of feasibility. As explained earlier in this document, as well as throughout the planning process, an essential component to advancing catalyzing investment opportunities is an understanding of the distinction between

market feasibility and financial feasibility. While the framework and concept elements presented here are grounded in market reality, many lack the financial feasibility necessary to attract private sector interest. As is the case with most early revitalization initiatives, there is market demand, but until the area is adequately "primed" for investment, financial feasibility will lag behind. An element of the analysis completed as part of this process involved testing the impact of various strategies designed to address "financial gaps." What this showed was that: no one solution will fill the financing gap. While resources are needed early in the redevelopment process, the necessity for them should subside as project costs and revenues become sufficient to attract private investment. In addition, project economics may be as impacted by indirect forces as they are direct forces. For example, any new investment will require some guarantee that initiatives will be on-going to stabilize the investment climate of the entire Study Area by enhancing the risk-reward relationship.

For these reasons, the implementation strategy assumes a two-pronged approach – promotion of investment in the Opportunity Sites and completion of actions to stabilize and enhance the entire area.

### *STRATEGY PRINCIPLES*

The approach and actions identified to move the vision for the New York Avenue Corridor forward were selected based on a foundation of guiding principles. These principles, while general in nature, were considered to be representative of community interests, the City's existing policy framework, and stakeholder input. They include:

- Partnerships with the City, neighborhood organizations, schools, churches, chambers, and other government entities will be vital;
- Public commitment will lead with a goal towards strategically leveraging private investment and to this end capital investments will begin at the intersections and along roadways;
- Aesthetic improvements will be as important as functional improvements and physical improvements will reflect the values and culture of the people in the area; and
- Commitment to the vision will be long-term.

### ***Partnerships***

*"Cities and counties are rapidly applying their experiences with public-private partnerships learned over the last few decades to redevelopment initiatives – experiences on how to most effectively combine the strengths and resources of both the public and private sectors."* Urban Land Institute (ULI)

Underlying all of the principles above is an understanding and acceptance that neither the public nor private sector can successfully advance the vision on its own. Also, partnerships will take many forms. As the entity with the largest and longest-term interest and responsibility, the public sector must have strong involvement and a visible presence, as well as offer continuing leadership, incentives, and capital to future projects. The private sector will bring experience, access to private funding, and a willingness to balance risk and return. As the lead entity, it will be up to the public sector to clarify partnership

expectations; define partnership responsibilities; understand risk; take the lead; and, fill "gaps." According to the authors of, "Ten Principles for Successful Public-Private Partnerships," "public-private partnerships are considered "creative alliances" formed between a government and private entities to achieve a common purpose." Going forward, the public sector should seek from its private sector development partner:

- Experience implementing infill projects;
- Comfort with public scrutiny;
- Understanding of the public process and microscopic view of a project with public participation;
- Knowledge of the project types desired;
- Successful track record;
- Financial stability; and
- Equity or an equity and debt source in place.

**10 Principles for Successful Public-Private Partnerships (ULI)**

1. Prepare Properly for Public-Private Partnerships
2. Create a Shared Vision
3. Understand Your Partners and Key Players
4. Be Clear on the Risks and Rewards for All Parties
5. Establish a Clear and Rational Decision-Making Process
6. Make Sure All Parties Do Their Homework
7. Secure Consistent and Coordinated Leadership
8. Communicate Early and Often
9. Negotiate a Fair Deal Structure
10. Build Trust as a Core Value

In turn, the private sector development partner will seek from its public sector partner:

- Political will;
- Stable City Council / Planning Commission;
- Community support;
- Community and business alignment;
- Favorable (or at least neutral) media;
- Financial means (examples);
- Urban renewal;
- Bonding capacity;
- Land control; and
- Other needed incentives and mechanisms

The roadmap for moving the New York Avenue Corridor vision towards reality is based on the assumption that the City will move forward in partnership with many groups. In addition to developers, it will be essential for the City to establish partnerships with non-profits and institutions,

service organizations, neighborhood groups and other public entities. Through this approach, the City will be in a much stronger position to ensure that development is accomplished in a way that balances private investment objectives with community sustainability.

### Strategic Investment

Given the declining appearance of the Study Area and the reality that comes with limited resources, capital investments should be strategically located (wherever possible) to leverage early investment and advance the vision. As discussed earlier, the approach to revitalization of the New York Avenue Corridor is rooted in the experience of similar environments and comparable markets which shows why initiatives should be focused in Opportunity Sites or "nodes" (often intersections) rather than distributed. To this end and regardless of whether improvements are necessary to increase capacity or improve aesthetic appeal, a phasing plan should be developed and criteria applied in order to identify early priority areas.

### Aesthetic Improvements

The framework elements and concepts for the New York Avenue Corridor include combinations of multi-use commercial, office, residential, and civic spaces supported by formal and informal open and community spaces. As evidenced by other successful redevelopment initiatives, these amenities and open spaces are critical as they communicate the identity of the place and indirectly enhance property values. To this end, they should either reflect the culture of the people in the area, or those they intend to serve.

Whether necessary or an amenity, improvements should be completed at a higher standard than what currently exists. Place-making or identity-building comes with a price, but redevelopment initiatives will not succeed without it. Changing market perceptions will be as important as changing building materials. Having said this, however, placing additional financial burdens associated with construction of public spaces and higher design standards on pioneering initiatives can create a scenario whereby development economics render the project financially infeasible and prevent it from moving forward. Conversely, a declining commercial site without minimum standards is a highly risky endeavor where new investment is largely unprotected. While the City must establish standards, it must recognize the financial challenges of the private sector and make available off-setting financial solutions.

### Long-Term Vision

As the entity to initiate this New York Avenue Corridor Strategy, the City has the largest and longest-term interest in the Study Area. To this end, it must be involved near- and long-term in advancing the vision and, where appropriate, participate in new investment and reinvestment.

Whereas the market analysis indicated that the trade area in which the Study and Project Areas compete could support more development than the Opportunity Sites could accommodate over the next 10 years, a market opportunity clearly exists. However, market capture rates, timing, and the character of development which occurs will be largely dependent on the City's willingness to play multiple roles in the predevelopment, development and post development processes.

Experience has shown that when a market opportunity exists but investment is not occurring (or is occurring in a manner inconsistent with the community vision), barriers will exist. The

market analysis illustrated that there is a market for new products and combinations of products, however, to-date this type of development has chosen to go elsewhere. With the City's involvement and commitment to eliminating barriers, it is highly likely that new investment ("right" investment or in other words investment that is desired), will begin occurring within the Study Area sooner rather than later. Without the City's involvement, it is highly unlikely that investment consistent with the vision will occur in any reasonable period of time, if ever. Rather, market share will continue to be lost to other locations that are simply easier, less expensive and / or actively being promoted, targeted or incentivized.

***Promoting Investment (in Opportunity Sites)***

A critical step in moving the Strategy forward will be defining the methods by which the City is willing to actively participate in advancing catalyst investment. Within the discussion which follows, several issues are raised for consideration.

As explained earlier, the City has the largest and longest-term interest in the Study Area. To this end, it must be involved in advancing the vision for the area and where appropriate, participate in new investment and reinvestment. The method by which a City participates can be simple or complex ranging from marketing and promotion to financing and development.

Possible approaches identified for the City of Arlington to promote and / or pursue possible investment partners include:

1) packaging the market information prepared as part of this effort and making it available when interested parties approach the City regarding opportunities in the area; and
2) packaging the market information prepared as part of this effort and making it part of a developer request (open or targeted) to solicit their interest in identifying potential investment opportunities in the area.

As described, the first approach would involve developing marketing and promotion materials (essentially re-packaging information provided as part of the planning effort), yet rely on interested parties to contact the City and complete their own due diligence to determine if a local partnering opportunity exists. This type of approach is less costly, uses fewer public resources, and generally produces results more slowly and over a protracted period of time.

The second approach would also involve preparing marketing materials that describe the community vision and opportunities that exist, yet also include packaging these materials in a developer request designed to recruit those developers willing and able to advance the desired type of investment. Through this approach the City would proactively engage potential development partners and possibly facilitate partnership discussions with local private, public, institutional and non-profit partners.

Under the latter scenario, the City could also elect to retain the services of a real estate expert with established developer relationships to assist in preparing promotional materials, preparing developer solicitations, recruiting potential developer interests, addressing select due diligence issues and potentially representing the City in negotiations related to project incentives.

Regardless of which approach the City chooses to pursue or promote investment, it must first determine the following:

- Define the range of City roles it is willing to consider (knowing it may and likely will be different for each effort);

- Assign actions (as part of the strategy) to City departments and partner organizations, monitor their progress and report to the public on a regular basis; and

- Continue to meet with property owners (both those that participated in the planning process, as well as those that did not) to share the market information and discuss available resources to encourage investment.

The development strategy, or approach to promoting investment, is a critical decision for municipal bodies to make early in the redevelopment process. It should be a decision that is influenced by the desired product types, types of development entities required, availability of resources, and select short- and long-term goals.

### Stabilizing and Enhancing (Actions)

In addition to leveraging the public's investment near-term, effective revitalization and repositioning of the area will be dependent on a series of actions designed to capitalize on market opportunities and overcome barriers - effectively "readying the environment for investment." The City will need to advance key actions through one or more of the following roles: regulator, advocate, marketer / promoter, facilitator, financier, and/or partner. While many actions have been put forth here, key to the successful implementation of the strategy will be the continued identification and implementation of actions tailored to the unique issues and circumstances that may arise. This long-term and iterative approach has been proven to sustain the on-going participation of all of the partners in the process – public, private sectors and special-interest. Through continued monitoring, the City will send the message that the area remains a priority and that efforts are on-going and making positive strides.

To this end, the actions which follow while tailored to address what is currently known about opportunities and barriers should in no way be considered complete or final. They are a stepping off point from which to move forward. Note that they are organized by the category of barrier they are intended to address or overcome. Finally, all of the actions are also presented in greater detail in the matrix located in the Appendix section of this report along with more information about who the lead entity might be to address the action, the City's role, necessary resources, and timing.

### PHYSICAL

- Implement roadway and streetscape improvements as proposed in the Strategy

- Initiate a public art program to build on the area's cultural diversity

- Develop policy to assist with dilapidated residential fencing adjacent to arterial streets

- Develop and complete facility study for the Library/Recreation Center complex

- Work with the Parks and Recreation Department to identify future neighborhood and pocket parks in the area

- Create public realm standards from the Strategy's recommendations

### *MARKET*

- Create development incentive packages which supports the Strategy's recommendations
- Work with the area Chambers to market the Strategy's recommended programs and policies
- Work with the Police department to overcome negative perceptions regarding safety and crime

### *FINANCIAL*

- Consider establishing a Tax Increment Investment Zone (TIRZ) that encompasses the retail areas as well as portions of other revenue generating areas
- Initiate housing policies to address housing related concerns. Consider establishing a Community Development Corporation. Promote existing Housing and Rehab and Home Improvement Incentive Programs.

### *REGULATORY*

- Promote land uses that support the Strategy's vision and community desires
- Support Implementation of Opportunity "A" Concept
- Support Implementation of Opportunity "B" Concept
- Support Implementation of Opportunity "C" Concept
- Engage residents, business owners, and apartment property managers to address property maintenance issues;

### *ORGANIZATIONAL*

- Work with the school district to promote the area's assets including unique offerings within the school system.
- Promote a multi-jurisdictional international corridor along Pioneer Parkway
- Work with neighborhood organizations, civic organizations and area churches to assist in organizing the community for special events; and

### *OTHER*

- Conduct periodic reviews of the New York Avenue Corridor Strategy.

## *CONCLUSION*

Many urban centers, corridors, and established neighborhoods that have undergone publicly-initiated revitalization initiatives are emerging as regional destinations in cities throughout the nation. In virtually every success story, redevelopment and new development within these areas has been the result of a holistic approach involving nurturing and growing each diverse segment of the economy, eliminating barriers to investment, and marketing positive changes through an overall image of vitality. This experience has proven that as varied as the markets are within these community centers, so too are the required solutions. Communities can no longer rely on a single economic engine to propel their future nor can these challenging environments rely on a single project or initiative. Multiple efforts are required, including projects, programs and policies, all designed to "ready the environment for investment" and make the public sector an effective partner.

Revitalization of urban corridors has proven to be a good idea for the following reasons:

- Enhances quality-of-life
- Provides public places
- Sustains the marketplace
- Captures local dollars
- Recaptures commerce
- Protects property values
- Creates an identity

The New York Avenue Corridor Strategy provides a roadmap to move the City's and stakeholders' vision towards reality and to ensure that redevelopment of the area be accomplished in a way that balances private investment objectives with community sustainability. The series of actions / strategies summarized herein will capitalize on market opportunities and overcome barriers to investment. Ultimately, the City of Arlington, its Council, Planning and Zoning Commission, staff and citizenry will have to support a final course of action for change. The information presented here is designed to provide a range of actions for consideration and sound decision-making. Ultimately success will depend on:

- Promotion of market opportunities
- Removal of physical and perceived barriers
- Education (public, property owners, developers, lenders, regulators and consumers)
- Equalization of economic risk vs. return
- Public-private solutions
- Project support and encouragement

# APPENDIX

## I. SURVEY RESULTS

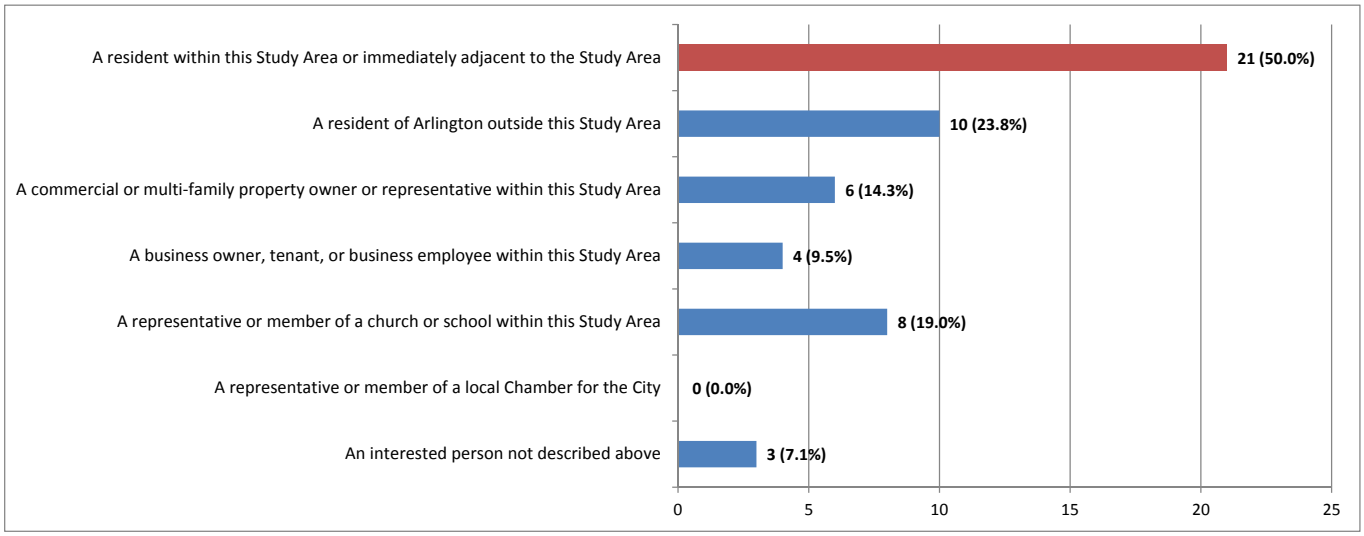
**New York Avenue Corridor Strategy**
***Project Survey Results*** ***1-28-13***

1. What is your street name?
   Response Count: 39
   Answered Question: 39
   Skipped Question: 7

- Mitchell
- Plum Lane
- Joyce St
- Gilbert Circle
- shepherds glen ln
- Mariposa
- Arkansas- coming soon JPS facility
- Castle Rd.
- Circle
- Highland Drive
- Pioneer Parkway
- Pioneer Street
- Skylark Dr.
- Heathercrest
- Marshalldale
- Mitchell
- Park Row and New York
- Kent Drive
- Circle Drive
- Swiss Street
- Joyce Street
- Oriole Drive
- New York Avenue
- New York Avenue
- Martin Luther
- Menefee Street
- Arkansas Lane
- Pioneer Parkway
- Parkview
- Skylark Drive
- Kent Drive
- Herschel
- Center Street
- Menefee Street
- Wynn Terrace
- Brookshire Street
- Ridgeway
- Ruth Street
- Janann Ave
- New York Avenue

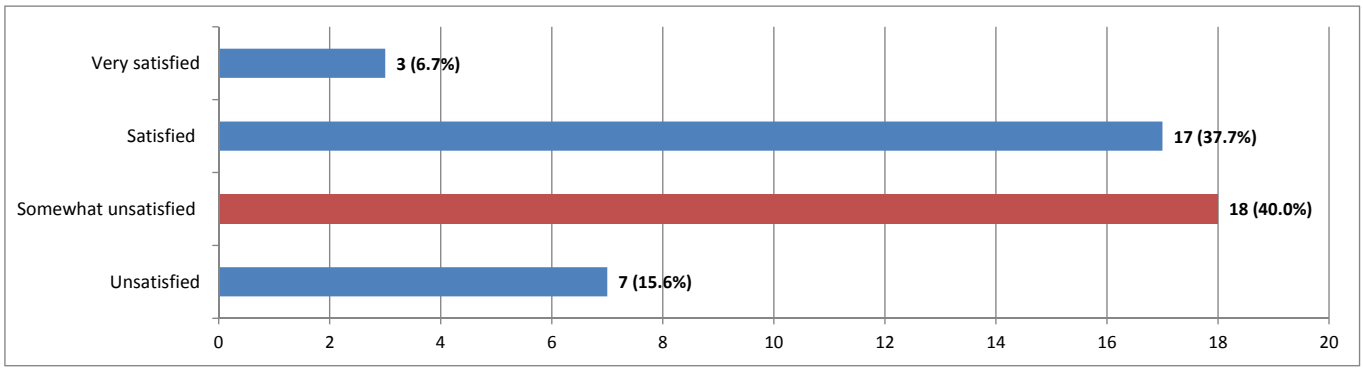
2. I Am: (circle all that apply)

Answered Question: 42
Skipped Question: 4



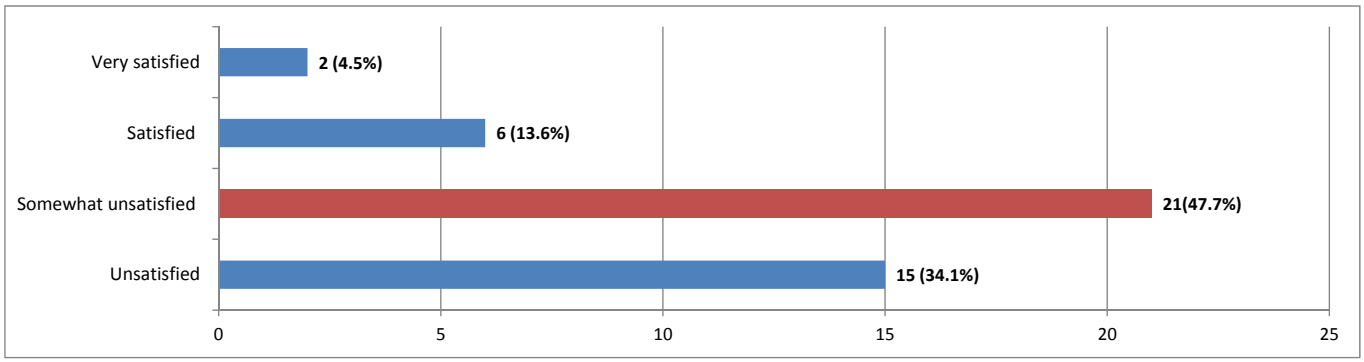

3. How satisfied are you with the current single family residential development in the Study Area?

Answered Question: 45
Skipped Question: 1



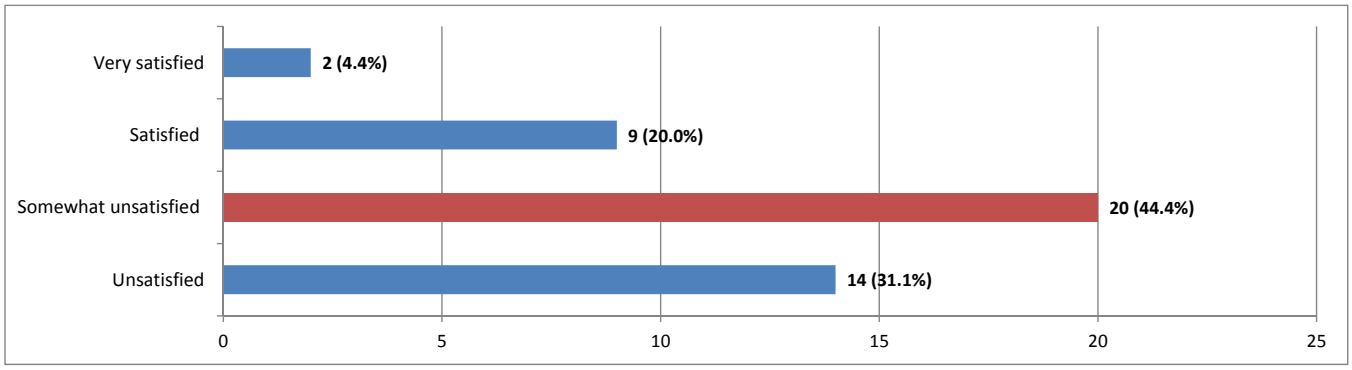

4. How satisfied are you with the current multi-family residential (duplex, townhomes, apartments) development in the Study Area?

Answered Question: 44
Skipped Question: 2



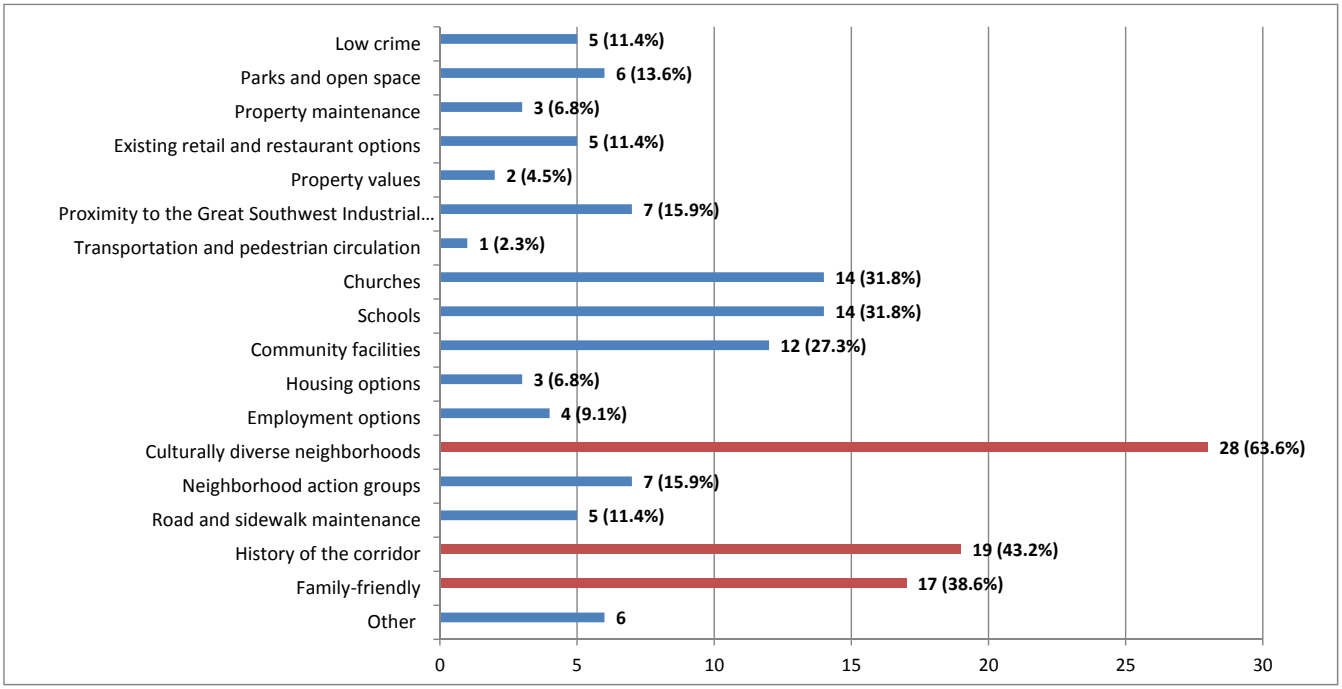
5. How satisfied are you with the current commercial (business) development in the Study Area?

Answered Question: 45
Skipped Question: 1




6. What do you currently consider the greatest strengths of the Study Area? (Choose three)

Answered Question: 44
Skipped Question: 2

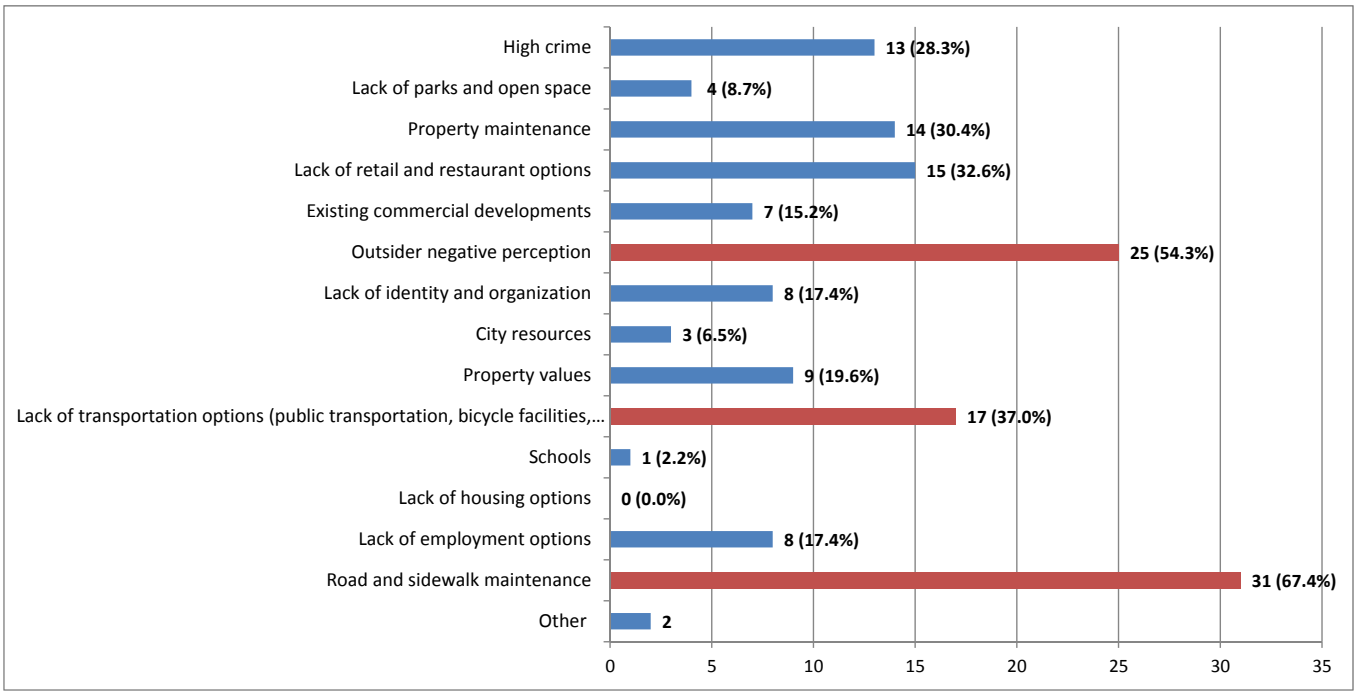



Other Responses (6):

- Proximity to highways, downtown, and stadiums
- This is a high crime area, and mostly rental properties. This means that most residents are transients! We need for people to purchase homes and become vested in this community!
- Great Library
- The potential for growth opportunities for all of the above
- Location
- Awareness of any after school increased educational center for our kids/tutorial programs.

7. What do you currently consider the greatest challenges of the Study Area? (Choose three)

Answered Question: 46
Skipped Question: 0




8. In regards to the in the Study Area, please rate the following as excellent, good, fair, poor, or no opinion by selecting the most appropriate column.

Answered Question: 46
Skipped Question: 0

| Answer Options | Excellent | Good | Fair | Poor | No Opinion | Total Response Count |
|---|---|---|---|---|---|---|
| Street maintenance | 1 (2.2%) | 4 (8.9%) | 14 (31.4%) | 15 (55.6%) | 1 (2.2%) | 45 |
| Sidewalks | 0 (0.0%) | 4 (9.3%) | 19 (44.2%) | 18 (41.9%) | 2 (4.7%) | 43 |
| Commercial property maintenance | 0 (0.0%) | 5 (11.9%) | 22 (52.4%) | 15 (35.7%) | 0 (0.0%) | 42 |
| Corridor landscaping | 1 (2.6%) | 4 (10.3%) | 15 (38.5%) | 19 (48.7%) | 0 (0.0%) | 39 |
| Residential property maintenance | 0 (0.0%) | 5 (11.9%) | 22 (52.4%) | 14 (33.3%) | 1 (2.4%) | 42 |
| Law enforcement (Police) | 7 (16.3%) | 24 (55.8%) | 6 (14.0%) | 1 (2.3%) | 5 (11.6%) | 43 |
| City services | 3 (7.0%) | 21 (48.8%) | 13 (30.2%) | 3 (7.0%) | 3 (7.0%) | 43 |
| Open space and parks | 4 (9.3%) | 13 (30.2%) | 14 (32.6%) | 9 (20.9%) | 3 (7.0%) | 43 |
| Community Center | 4 (9.4%) | 20 (45.5%) | 14 (31.8%) | 3 (6.8%) | 3 (6.8%) | 44 |

9. How important are the following to have in the Study Area? Please check the most appropriate column.

Answered Question: 46
Skipped Question: 0

| Answer Options | Very Important | Important | Unimportant | Very Unimportant | No Opinion | Total Response Count |
|---|---|---|---|---|---|---|
| Improved sidewalks | **28 (63.6%)** | 16 (36.4%) | 0 (0.0%) | 0 (0.0%) | 0 (0.0%) | 44 |
| Improved roads | **33 (71.7%)** | 13 (28.3%) | 0 (0.0%) | 0 (0.0%) | 0 (0.0%) | 46 |
| Attractive streetscape | **20 (46.5%)** | **20 (46.5%)** | 3 (7.0%) | 0 (0.0%) | 0 (0.0%) | 43 |
| Additional single-family homes | 4 (9.5%) | 14 (33.3%) | **18 (42.9%)** | 2 (4.8%) | 4 (9.5%) | 42 |
| Additional multi-family units/townhomes | 1 (2.4%) | 11 (26.2%) | **16 (38.1%)** | 9 (21.4%) | 5 (11.9%) | 42 |
| Availability of government services (library, recreation center, post office) | 21 (46.7%) | **22 (48.9%)** | 2 (4.4%) | 0 (0.0%) | 0 (0.0%) | 45 |
| Availability of shopping and restaurant services (retail, grocery, restaurant) | **23 (51.1%)** | 19 (42.2%) | 3 (6.7%) | 0 (0.0%) | 0 (0.0%) | 45 |
| Availability of office and medical services (doctors, dentists) | **23 (51.1%)** | 18 (39.1%) | 4 (8.9%) | 0 (0.0%) | 0 (0.0%) | 45 |
| Availability of educational services (adult education and training services, trade schools, continuing education) | **23 (51.1%)** | 15 (33.3%) | 6 (13.3%) | 0 (0.0%) | 1 (2.2%) | 45 |
| Employment opportunities | **23 (50.0%)** | 18 (39.1%) | 4 (8.7%) | 1 (2.2%) | 0 (0.0%) | 46 |
| Open space and parks | 13 (28.3%) | **31 (67.4%)** | 2 (4.3%) | 0 (0.0%) | 0 (0.0%) | 46 |
| Creating an identity for the corridor | **20 (45.5%)** | **20 (45.5%)** | 3 (6.8%) | 0 (0.0%) | 1 (2.3%) | 44 |
| Public art | 12 (27.3%) | **15 (34.1%)** | 12 (27.3%) | 3 (6.8%) | 2 (4.5%) | 44 |
| Creating a cultural destination | 15 (33.3%) | **17 (37.8%)** | 10 (22.2%) | 2 (4.4%) | 1 (2.2%) | 45 |
| Mixed use developments (places where people can shop, live and work in one location) | 18 (41.9%) | **19 (44.2%)** | 5 (11.6%) | 1 (2.3%) | 0 (0.0%) | 43 |
| Public transportation | **21 (45.7%)** | 16 (34.8%) | 6 (13.0%) | 2 (4.3%) | 1 (2.2%) | 46 |
| Bicycle facilities | 13 (29.5%) | **20 (45.5%)** | 8 (18.2%) | 2 (4.5%) | 1 (2.3%) | 44 |

10. What do you believe should be the primary focus in the Study Area? (Choose one)

Answered Question: 46
Skipped Question: 0

| Answer Options | Response Percent | Response Count |
|---|---|---|
| Attracting new retail development | 8.7% | 4 |
| Creating a pedestrian-friendly corridor | 6.5% | 3 |
| Attracting major employers and companies | 10.9% | 5 |
| Creating a distinctive identity for the area that can be marketed | 23.9% | 11 |
| Having better physical amenities, like parks or plazas | 0.0% | 0 |
| Attracting new residential housing (single family, duplex, townhomes, apartments) | 4.3% | 2 |
| Code enforcement for residential and commercial properties | 6.5% | 3 |
| Creating a better appearance for the corridor like street and sidewalk improvements and landscaped medians and street trees | 21.7% | 10 |
| Reducing crime | 15.2% | 7 |
| Creating organized festivals and community events for the area | 0.0% | 0 |
| Moving traffic more smoothly through the corridor | 2.2% | 1 |
| Other (please specify) | | 1 |

**Other Responses (1):**

- Encourage families to purchase single family dwelling

11. What is the Study Area's single greatest asset/quality?

- La Cercanía a los estadios y la facilidad del acceso al 360 (The proximity to the stadiums and the access to Highway 360)
- Parks and schools
- cultural diversity
- The diversity of the culture in my neighborhood.
- I believe that the diverse cultures makes this Study Area unique because it provides many riches different backgrounds. This allows students to acquire certain abilities of dealing with people who are culturally different than they are.
- centralized location in DFW metroplex
- Neighborhood groups/People that want to make change
- LOTS OF LOW VALUE PROPERTY
- Diversed culture
- Our location near the Entertainment District and 360.
- It has good bones - the original neighborhood was well-planned.
- the library
- multi cultural community
- culturally diverse
- Diversity of our neighborhoods and businesses
- diversity
- New York/Park Row
- People - friendly neighbors who care for others
- Location is the greatest asset. East access to the University, entertainment district, and freeway.
- Affordable Real Estate
- History and Community
- que todo es importante pero la prioridad debe de estar en el futuro de nuestros hijos. (Everything is important but the priority should be the future of our children)
- History
- The close proximity to businesses
- Improved sidewalks
- Cultural Diversity
- You want input from the arlington affected - too bad many affected groups are not present today.
- Central location
- Location
- Cultural Diversity
- The diverse ethnicities and backgrounds within the area.
- Diversity of People
- Long term home owners
- Family/Commercial
- Location in the metroplex
- Giving the public a chance to be herd.
- Schools

12. What is one thing you would like to see in the Study Area?

- Una Calle Pavimentada y Paresa sin baches (A paved road and smooth without potholes)
- Improved roads
- a Walmart Neighborhood Market
- More senior friendly businesses and activities. Safer areas for the kids, more options for affordable entertainment.
- I would like to see an organized, well supervised recreation center that can assist the student population in teaching leadership skills.
- public transportation
- Better Commercial Buildings.
- Direct driving connection north and south. New york abruptly ends at abram and browning is not very good for through traffic
- People buying homes to live in , not to rent!
- Bring more employment opportunity
- We need an identity. We have Downtown, Entertainment District, Southwest Industrial - we need something for East Arlington. I would also like to see monthly events at the Library or Hugh Smith with ice cream or food trucks that would help fill the hole of our lost Brahms. It would also help get the kids out of trouble.
- Existing retail property filled and refurbished
- parking lots and roads are awful to drive on
- less crime
- anything NEW, new apartments, houses, recreation center, library
- More medical uses and adult supervised living facility.
- improved infrastructure
- Less social services concentration
- Cleanliness overall
- Bigger, nicer public area - IE the library needs to be expanded and would be a great place for a large public plaza.
- Less cement parking lots - more landscaping
- mas educacion ,mas control enla delincuencia (More education, more crime control)
- Grocery Store
- More parks and recreation facilities
- Employment Opportunities, Open Space and Parks
- More family-friendly activities
- Definite and real improvements done - not just stated as being "on the list". Like fixing East Abrams by Spring.
- Amusement
- More like Lincoln Square
- Community meeting places (shopping, dining, etc.)
- More restaurants/other businesses reflecting the diverse culture of the area
- City code enforcement
- More code enforcement
- More Commercial Development
- Redevelopment
- Some action taken, after being herd.
- Bike trails/paths

13. How would you preserve the Study Area's history and culture?

- Nunca Cambiarle el nombre "New York" (Never change the name New York)
- Festivals
- Maybe have a multicultural area at the rec center and library. Hold different activities celebrating each culture.
- I would like to emphasize the parts of history and culture that exist.
- inclusive cultural centers
- Continue to build cultural restaurants and shopping.
- Not interested in preserving history of area  or culture
- There is no history or culture that is worth saving, unless you wish to preserve the little gang banger culture!
- Creating a culture districts like little Italy, little Saigon, little Spanish Steps, little China Town, little soul, ...
- Something like a theatre that would allow for international films or expanding the library to allow for community events.
- No opinion
- I don't really understand the question... do you mean hispanic culture?
- keep the older houses but fix up where needed - playup the multicultural aspect of the area
- creating an entry way that is visible similar to what Pantego did with the arch
- I don't know
- apoyando a nuestros hijos para asi ellos no pierdan ese conocimiento.(Supporting our children so they do not lose the understanding (knowledge))
- create an identity
- Not worried
- Create or build relationships with local churches to get small groups to give input on cultural desires and assets that can be displayed, enjoyed or incorporated into festivals.
- I really think this area is ready for a new identity. Three lined streets with bike and walking lanes would be great.
- Celebrate it - festival
- Form a 501 c3 to promote like Downtown Arlington.
- Reminders
- I would "fuse" the old with the new by that I mean that the identity of the study area should remain the same, but it should evolve over time in accordance with the trends in the area.
- "neighborhood" museum/study center
- Preserve historical sites (I think this has been done pretty well) in original period style - even if use is different. Major need - clean up yards!
- Info on plaques

14. What kind of businesses are missing within the Study Area?

- Bancos y oficinas de doctor (Banks and Dr. Offices)
- Big businesses
- medical clinic, quality senior housing
- retail and dining
- I think that we could benefit from businesses like major stores such as a Wal-Mart/Target. I feel that it is important to have corporate offices so that it sets examples of goals to the population.
- healthcare
- Larger competitive grocery stores
- Family owned and operated
- Medical facility
- Retail and restaurant options. Unique shops and restaurants that are not chains and make this area unique.
- Decent grocery stores.
- restaurants
- a fitness facility
- Medical offices
- hard and soft goods retailers, service uses (medical clinics, dentists, salons, etc.)
- Retail/Bank at New York/Park Row
- Grocery stores that speak English
- I would like to see more places that have good food, outdoor areas to meet and nice landscaping.
- Professional Services
- Hallmark Store, Coffee Shop, Braums, HEB Grocery
- Grocery Store
- por ahorita creo esta bien ( I think it's okay for right now)
- I don't think there are any businesses in particular. If anything, I feel that there are too many convenience stores in the area.
- Medical Services, Parks
- physical / healthcare
- I miss a regular grocery store like Tom Thumb - but this is not a major need really - maybe really needed medical "care now" ect.
- Medical services
- National chain retail grocery stores
- Family (multi-cultural) dining and shopping
- More restaurants/businesses reflecting the diverse culture of the area
- Major Grocery
- entertainment (ex. the movie theatre was not replaced with anything)
- Super Market
- Retail
- Private sector business.

15. Any additional comments, concerns or recommendations?

- La ampliacion del corredor desde la calle Park Row hasta yegar a la Calle Abram (Expanding the street from Park Row to Abram Street)
- I would like to see high expectations set for the population to follow. It will not be easy and it will take some of everybody. One thing is for sure, the law needs to be enforced not just when remembered but it needs to be consistent. We want this new area to build on. It would be sad to see it go another way after all the effort that has been done to improve it.
- Crime rate, additional sidewalks for pedestrians and bikers, clean up, renew building.
- Any money spent should be used for demolition of dilapidated commercial and multifamily units or legal fees to enforce code requirements
- We have problems with people renting houses who do not maintain the property, they do not care about the appearance of the property or the neighborhood
- We need to fix our roads and market our area. Roads have to be fixed before we can do anything. It looks like the City hasn't invested in this area since GM and we need help from the City. Once we fix the roads, we can start marketing ourselves as a regional destination that people can visit after Ranger and Cowboy games.
- I have to drive through on new york to get to work and it is okay on some parts of the road, but others are going to kill my car. It would be nice to have something I would want to stop at besides the library or parks and rec center...
- I have lived here since February 1985 and have seen this area change very slowly. Some improvements with streets and sidewalks, some improvements with public areas, apartments have aged. I would like to see a redevelopment of existing apartment to mixed use and landscape requirements applied to all existing commercial properties.
- I would like to see a theatre and arts center for our East Arlington residents. Also, take up excess cement in parking lots and build parking/gazebo/community area.
- solo que falta mas organizacion con respecto alas escuelas que haiga transporte y mas escuelas.(Need more organization with respect to the schools, more transportation and more schools)
- I don't think that there are enough programs in pace for the community's youth.
- Please let us know plans and concerns so we can pray over resources, implementation, alignment = God's purposes for His children (all ages) environment and goods.
- Major concerns: 1. East Abrams being fixed as nice as West Abrams. 2. Code Enforcement of Cleanliness of property and upkeep - mainly rental homes!
- Increase in predatory lending establishments
- If this come to fruition, where will the funding come from? New business owners?
- My most concern is safety of our kids, and giving our kids the best chances to succeed in the future.
- No

## II. PSYCHOGRAPHICS

### New Beginnings

Filled with young , single adult, New Beginnings is a magnet for adult in transition. Many of its residents are twentysomething singles and couples just starting out on their career paths—or starting over after recent divorces or company transfers. Ethnically diverse—with nearly half its residents Hispanic, Asian or African-American—New Beginnings households tend to have the modest living standards typical of transient apartment dwellers.

**Lifestyle Traits**

- Go to the movies 4+ times/month
- Read Jet
- WWE Magazine (wrestling)
- Jerry Springer TV
- Kia Spectra

**Demographic Traits**

| | |
|---|---|
| Ethnic Diversity: | Black, White Asian, Hispanic |
| Presence of Kids: | Family Mix |
| Age Ranges: | Age <45 |
| Education Levels: | Some College |
| Employment Levels: | White Collar, Mix |
| Homeownership: | Renters |
| Urbanicity: | Suburban |
| Income: | Downscale |
| Income Producing Assets: | Low |

## Young Influentials

Once known as the home of the nation's yuppies, Young Influentials reflects the fading glow of acquisitive yuppiedom. Today, the segment is a common address for young, middle-class singles and couples who are more preoccupied with balancing work and leisure pursuits. Having recently left college dorms, they now live in apartment complexes surrounded by ball fields, health clubs and casual-dining restaurants.

**Lifestyle Traits**

- Play racquetball
- Buy rap music
- Vibe magazine
- King of the Hill in syndication
- Mazda 3

**Demographic Traits**

| | |
|---|---|
| Ethnic Diversity: | White, Black, Asian, Mix |
| Presence of Kids: | HH w/o Kids |
| Age Ranges: | Age <45 |
| Education Levels: | College Grad |
| Employment Levels: | White Collar, Mix |
| Homeownership: | Renters |
| Urbanicity: | Suburban |
| Income: | Midscale |
| Income Producing Assets: | Below Avg. |

**City Startups**

In City Startups, young, multi-ethnic singles have settled in neighborhoods filled with cheap apartments and a commercial base of cafés, bars, laundromats and clubs that cater to twentysomethings. One of the youngest segments in America--with ten times as many college students as the national average--these neighborhoods feature low incomes and high concentrations of Hispanics and African-Americans.

**Lifestyle Traits**

- Go snowboarding
- Play soccer
- Jane magazine
- Late Night with Conan O'Brien
- Suzuki Aerio

**Demographic Traits**

| | |
|---|---|
| Ethnic Diversity: | White, Black, Asian, Mix |
| Presence of Kids: | HH w/o Kids |
| Age Ranges: | Age <45 |
| Education Levels: | Some College |
| Employment Levels: | White Collar, Mix |
| Homeownership: | Renters |
| Urbanicity: | Second City |
| Income: | Low Income |
| Income Producing Assets: | Low |

**Boomtown Singles**

Affordable housing, abundant entry-level jobs and a thriving singles scene--all have given rise to the Boomtown Singles segment in fast-growing satellite cities. Young, single and working-class, these residents pursue active lifestyles amid sprawling apartment complexes, bars, convenience stores and laundromats.

**Lifestyle Traits**

- Go snowboarding
- Watch Fuse Network
- The Source magazine
- Futurama TV
- Nissan Sentra

**Demographic Traits**

| | |
|---|---|
| Ethnic Diversity: | White, Black, Asian, Mix |
| Presence of Kids: | HH w/o Kids |
| Age Ranges: | Age <45 |
| Education Levels: | Some College |
| Employment Levels: | WHITE COLLAR, Service, Mix |
| Homeownership: | Mix, Renters |
| Urbanicity: | Second City |
| Income: | Lower-Mid |
| Income Producing Assets: | Below Avg. |

**Home Sweet Home**

Widely scattered across the nation's suburbs, the residents of Home Sweet Home tend to be upper-middle-class married couples living in mid-sized homes with few children. The adults in the segment, mostly between the ages of 25 and 54, have gone to college and hold professional and white-collar jobs. With their upscale incomes and small families, these folks have fashioned comfortable lifestyles, filling their homes with toys, TV sets and pets.

**Lifestyle Traits**

- Go mountain biking
- Eat at Quizno's
- Inc. magazine
- Smallville TV
- Saturn Vue SUV

**Demographic Traits**

| | |
|---|---|
| Ethnic Diversity: | White, Black, Asian, Mix |
| Presence of Kids: | HH w/o Kids |
| Age Ranges: | Age <55 |
| Education Levels: | College Grad |
| Employment Levels: | Professional |
| Homeownership: | Mostly Owners |
| Urbanicity: | Suburban |
| Income: | Upper-Mid |
| Income Producing Assets: | Above Avg. |

**Family Thrifts**

The small-city cousins of inner-city districts, Family Thrifts contain young, ethnically diverse parents who have lots of children and work entry-level service jobs. In these apartment-filled neighborhoods, visitors find the streets jam-packed with babies and toddlers, tricycles and basketball hoops, Daewoos and Hyundais.

**Lifestyle Traits**

- Buy rap music
- Eat fast food
- Vibe magazine
- Toon Disney channel
- Kia Spectra

**Demographic Traits**

| | |
|---|---|
| Ethnic Diversity: | White, Black |
| Presence of Kids: | HH w/Kids, Hispanic |
| Age Ranges: | Age <45 |
| Education Levels: | High School Grad |
| Employment Levels: | WHITE COLLAR, Service, Mix |
| Homeownership: | Mix, Renters |
| Urbanicity: | Second City |
| Income: | Lower-Mid |
| Assets: | Low |

**White Picket Fences**

Midpoint on the socioeconomic ladder, residents in White Picket Fences look a lot like the stereotypical American household of a generation ago: young, middle-class, married with children. But the current version is characterized by modest homes and ethnic diversity—including a disproportionate number of Hispanics and African-Americans.

**Lifestyle Traits**

- Own a treadmill
- Eat at Carl's Jr
- Baby Magazine
- Toon Disney Channel
- Mitsubishi Montero Sport

**Demographic Traits**

| | |
|---|---|
| Ethnic Diversity: | White, Black, Asian, Hispanic |
| Presence of Kids: | HH w/Kids |
| Age Ranges: | 25-44 |
| Education Levels: | Some College |
| Employment Levels: | BLUE COLLAR, Service, Mix |
| Homeownership: | Mix, Owners |
| Urbanicity: | Second City |
| Income: | Midscale |
| Income Producing Assets: | Moderate |

**Blue-Chip Blues**

Blue-Chip Blues is known as a comfortable lifestyle for young, sprawling families with well-paying blue-collar jobs. Ethnically diverse--with a significant presence of Hispanics and African-Americans--the segment's aging neighborhoods feature compact, modestly priced homes surrounded by commercial centers that cater to child-filled households.

**Lifestyle Traits**

- Shop at Lerner
- Read baby magazines
- Parenting magazines
- Children's TV channels
- Isuzu Ascender

**Demographic Traits**

| | |
|---|---|
| Ethnic Diversity: | White, Black, Asian, Hispanic |
| Presence of Kids: | HH w/Kids |
| Age Ranges: | Age 25-44 |
| Education Levels: | Some College |
| Employment Levels: | BLUE COLLAR, Service, Mix |
| Homeownership: | Mix, Owners |
| Urbanicity: | Suburban |
| Income: | Midscale |
| Income Producing Assets: | Below Avg. |

**Upward Bound**

More than any other segment, Upward Bound appears to be the home of those legendary Soccer Moms and Dads. In these small satellite cities, upscale families boast dual incomes, college degrees and new split-levels and colonials. Residents of Upward Bound tend to be kid-obsessed, with heavy purchases of computers, action figures, dolls, board games, bicycles and camping equipment.

**Lifestyle Traits**

- Take a skiing vacation
- Go to the zoo
- Family Fun magazine
- Nickelodeon TV
- Toyota Sequoia SUV

**Demographic Traits**

| | |
|---|---|
| Ethnic Diversity: | White, Asian, Hispanic, Mix |
| Presence of Kids: | HH w/Kids |
| Age Ranges: | Age 35-54 |
| Education Levels: | College Grad |
| Employment Levels: | White Collar, Mix |
| Homeownership: | Mostly Owners |
| Urbanicity: | Second City |
| Income: | Upscale |
| Income Producing Assets: | Above Avg. |

**Kids & Cul-de-Sacs**

Upscale, suburban, married couples with children--that's the skinny on Kids & Cul-de-Sacs, an enviable lifestyle of large families in recently built subdivisions. With a high rate of Hispanic and Asian Americans, this segment is a refuge for college-educated, white-collar professionals with administrative jobs and upper-middle-class incomes. Their nexus of education, affluence and children translates into large outlays for child-centered products and services.

**Lifestyle Traits**

- Shop at The Disney Store
- Go to Chuck E. Cheese
- Parenting magazines
- Nickelodeon TV
- Nissan Armada SUV

**Demographic Traits**

| | |
|---|---|
| Ethnic Diversity: | White, Asian, Hispanic, Mix |
| Presence of Kids: | HH w/Kids |
| Age Ranges: | Age 25-44 |
| Education Levels: | College Grad |
| Employment Levels: | White Collar, Mix |
| Homeownership: | Mostly Owners |
| Urbanicity: | Suburban |
| Income: | Upper-Mid |
| Income Producing Assets: | Above Avg. |

### Middleburg Managers

Middleburg Managers arose when empty-nesters settled in satellite communities which offered a lower cost of living and more relaxed pace. Today, segment residents ten to be middle-class and over 45 years old, with solid managerial jobs and comfortable retirements, indoor gardening and refinishing furniture.

**Lifestyle Traits**

- Play Bingo
- Do Needlepoint
- Saturday Evening Post
- Hollywood Squares TV
- Mercury Sable

**Demographic Traits**

| | |
|---|---|
| Ethnic Diversity | Mostly White |
| Presence of Kids: | HH w/o Kids |
| Age Ranges: | 45-46 |
| Education Levels: | White Collar, Mix |
| Employment Levels: | Mostly Owners |
| Homeownership: | Midscale |
| Urbanicity: | Second City |
| Income: | Midscale |
| Income Producing Assets: | Above Avg. |

**Sunset City Blues**

Scattered throughout the older neighborhoods of small cities, Sunset City Blues is a segment of Lower-middle-class singles and couples who have retired or are getting close to it. These empty-nesters tend to own their homes but have modest educations and incomes. They maintain a low-key lifestyle filled with newspapers and television by day, and family-style restaurants at night.

**Lifestyle Traits**

- Belong to a veteran's club
- Eat at casual/buffet restaurant
- CBS Sunday Night Movie TV
- Price is Right TV
- Mercury Grand Marquis

**Demographic Traits**

| | |
|---|---|
| Ethnic Diversity: | White, Black, Mix |
| Presence of Kids: | Mostly w/o Kids |
| Age Ranges: | 65+ |
| Education Levels: | High School Grad |
| Employment Levels: | Mostly Retired |
| Homeownership: | Homeowners |
| Urbanicity: | Second City |
| Income: | Lower-Mid |
| Income Producing Assets: | Above Avg. |

**Pools & Patios**

Formed during the postwar Baby Boom, Pools & Patios has evolved from a segment of young suburban families to one for mature, empty-nesting couples. In these stable neighborhoods graced with backyard pools and patios--the highest proportion of homes were built in the 1960s residents work as white-collar managers and professionals, and are now at the top of their careers.

**Lifestyle Traits**

- Shop at high-end department stores
- Buy 1950s nostalgia music
- Sunset magazine
- American Experience TV
- Mercury Mariner SUV

**Demographic Traits**

| | |
|---|---|
| Ethnic Diversity: | White, Asian, Mix |
| Presence of Kids: | HH w/o Kids |
| Age Ranges: Age | 45-64 |
| Education Levels: | College Grad |
| Employment Levels: | Professional |
| Homeownership: | Mostly Owners |
| Urbanicity: | Suburban |
| Income: | Upper-Mid |
| Income Producing Assets: | High |

**Second City Elite**

There's Money to be found in the nation's smaller cities, and you're most likely to find it in Second City Elite. The residents of these satellite cities tend to be prosperous executives who decorate their $200,000 homes with multiple computers, large-screen TV sets and an impressive collection of wines. With more than half holding college degrees, Second City Elite residents enjoy cultural activities—from reading books to attending theater and dance productions.

**Lifestyle Traits**

- Order from Readers' Digest
- Travel domestically by rail
- Inc. magazine
- Washington Week TV
- Toyota Avalon

**Demographic Traits**

| | |
|---|---|
| Ethnic Diversity: | Mostly White |
| Presence of Kids: | HH w/o Kids |
| Age Ranges: | 45-64 |
| Education Levels: | Graduate Plus |
| Employment Levels: | White Collar, Mix |
| Homeownership: | Mostly Owners |
| Urbanicity: | Second City |
| Income: | Upscale |
| Income Producing Assets: | Elite |

### Old Glories

Old Glories are the nation's downscale suburban retirees, Americans aging in place in older apartment complexes. These racially mixed households often contain widows and widowers living on fixed incomes, and they tend to lead home-centered lifestyles. They're among the nation's most ardent television fans, watching game shows, soaps, talk shows and newsmagazines at high rates.

**Lifestyle Traits**

- Play bingo
- Belong to a veterans' club
- Saturday Evening Post
- Daytime TV
- Chrysler Sebring Sedan

**Demographic Traits**

| | |
|---|---|
| Ethnic Diversity: | White, Black, Asian, Mix |
| Presence of Kids: | Mostly w/o Kids |
| Age Ranges: | Age 65+ |
| Education Levels: | High School Grad |
| Employment Levels: | Mostly Retired |
| Homeownership: | Mix, Owners |
| Urbanicity: | Suburban |
| Income: | Downscale |
| Income Producing Assets: | Below Avg. |

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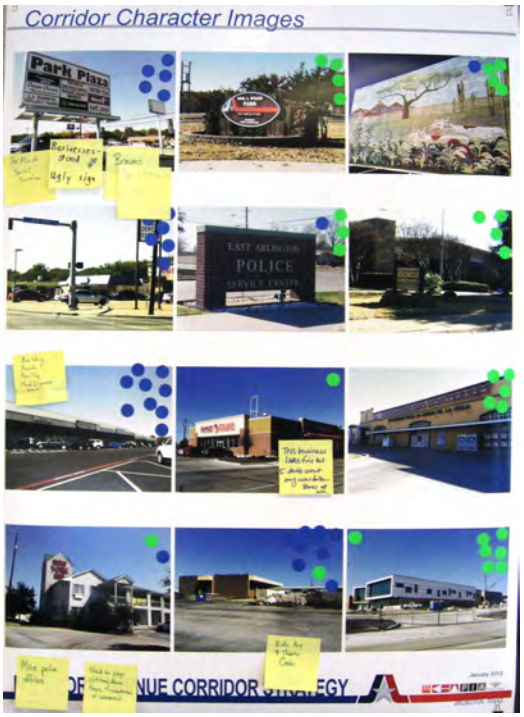
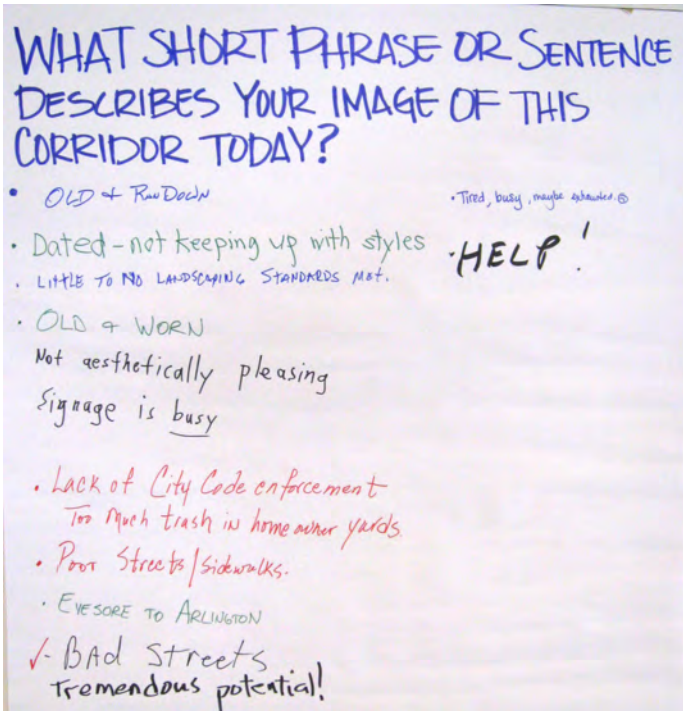
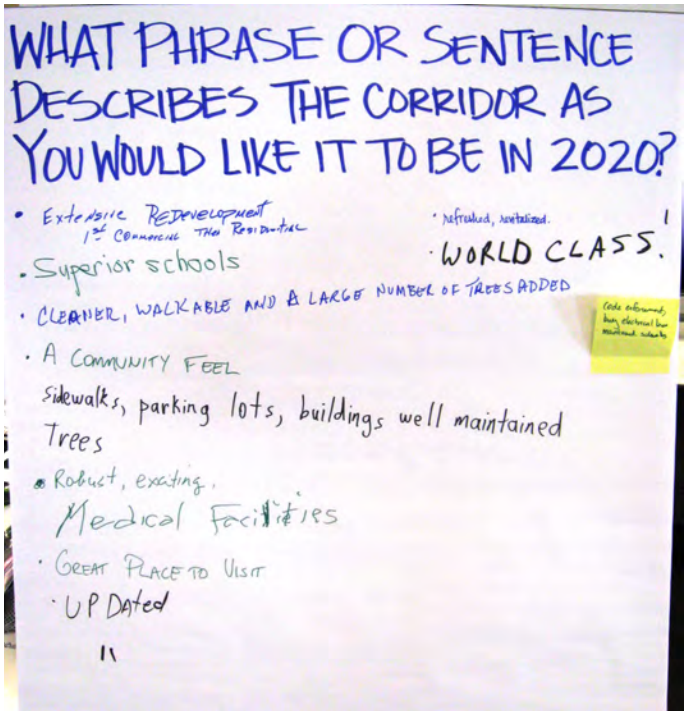
## *III. PUBLIC MEETING COMMENT BOARDS*

### *January 12, 2013 Open House*





## MORNING

Cafe w/ outdoor seating ✓
people walking / exercising / hanging out in parks and playgrounds

✓ Grocery Shopping

✓ Physicians \ urgent care
" "
BANK

✓ Medical Needs

Walking trails - Outdoor Activities

## LUNCHTIME

Diverse restaurants ✓, especially Asian. Multiple options can walk to in a plaza. Place to park.

Restaurants along E Abram

+ lunch at The Foodroom "in International Market"

Outdoor Cafe

## AFTERNOON

SAME

Movies

Game places

Indoor children play areas

Theater + Art venue

Art Movies -

## EARLY EVENING

yes, yes
WORLD CLASS RESTAURANTS, WINERIES, BAKERIES THAT REFLECT THE DIVERSIT IN OUR COMMUNITY

I second the above and mom & pop, not chain restaurants.

Bowling & Movies (outdoor!)

Movies

✓ Doctor Urgent Care (like Cure Now)

mainstream grocery (South of tracks) West of Collins

✓ Shopping / Eating at "International market / Foodroom"

PARKS

## LATE NIGHT

24 hour restaurants, or at least 2 am (ish) !!

SEE EARLY EVENING

## NEW SINCE 2012

FedEx / Kinkos or comp. mail / print shop

Outdoor musical venue / (Drinking Magnolia on the Green series in Fort Worth)

✓ Braums!
✓ Grocery Store - HEB
" " "

VISION FOR FUTURE (USES)

- Retirement living
- Be able to stay within community as you age

Existing Aerial

HOW SHOULD THIS CORRIDOR USE CONNECTIONS (WALKING, BIKING, DRIVING) TO MAKE IT A LOCATION OF CHOICE FOR BUSINESSES AND ORGANIZATIONS?

- Put bike facilities in place to connect UT Arlington to this corridor. Prefers off-street trail. Students would visit businesses.

x Wide Sidewalk on New York

* Left turn Lanes

* Pedestrian Crossing Signals

x Street Lighting

- Some type of trolley/bus system to get people from point A to point B. Esp. in the future when more intense ~~uses~~ uses are present.

- Improve sidewalk quality
- " roadway " (specifically Abram!)
- Smooth area where driveways meet street (cars often hang over sidewalk & users have to go into street)
- Greenway St. - 2100/2200 block - traffic speeding (can't pull out of driveway, children - one has been hit) - residents want to slow cars - they think speed bumps may be good solution

- TROLLEY SYSTEM FROM HOTELS TO THIS AREA AS A DESTINATION... AND ALSO TO EVENTS AT STADIUMS.

- Sidewalks to Berry Elem. on Browning & New York could be improved

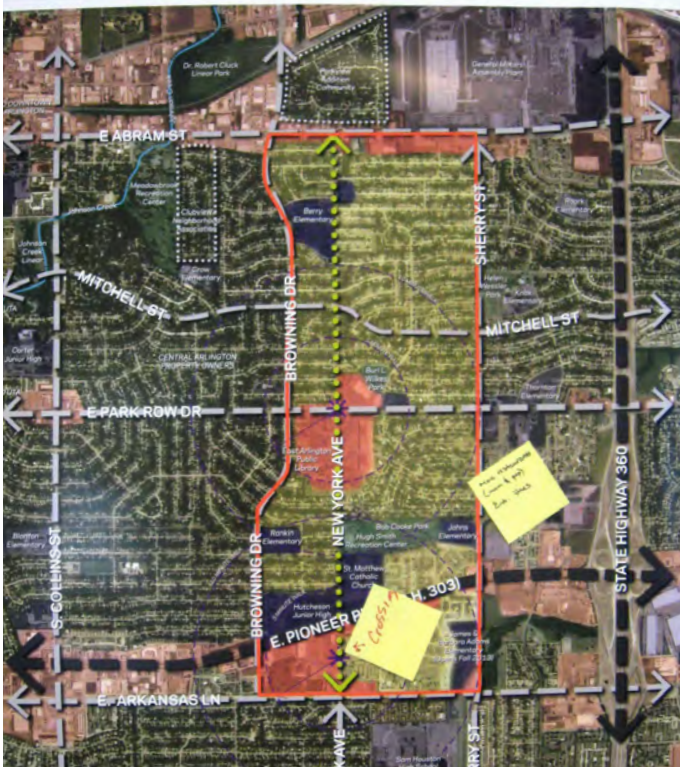
- Young pop. - transit to keep them here

- Crumbling sidewalks on side streets

- Pedestrian signals w/ count down timers (at big intersections [Collins]).

Connections 2

Connections

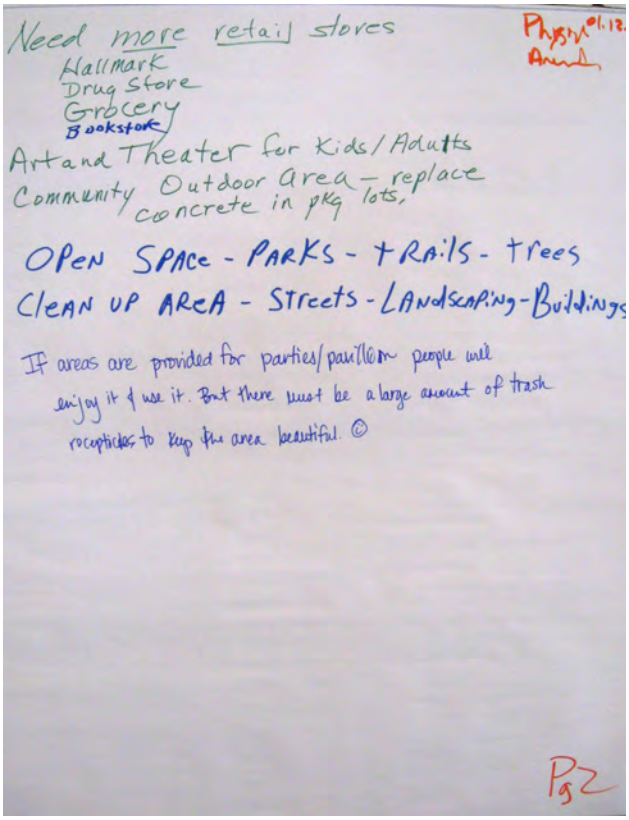



- WHAT AMENITIES WILL MAKE THIS AREA A MORE APPEALING PLACE TO SPEND TIME?
- WHAT SORTS OF AMENITIES WOULD YOU USE HERE?

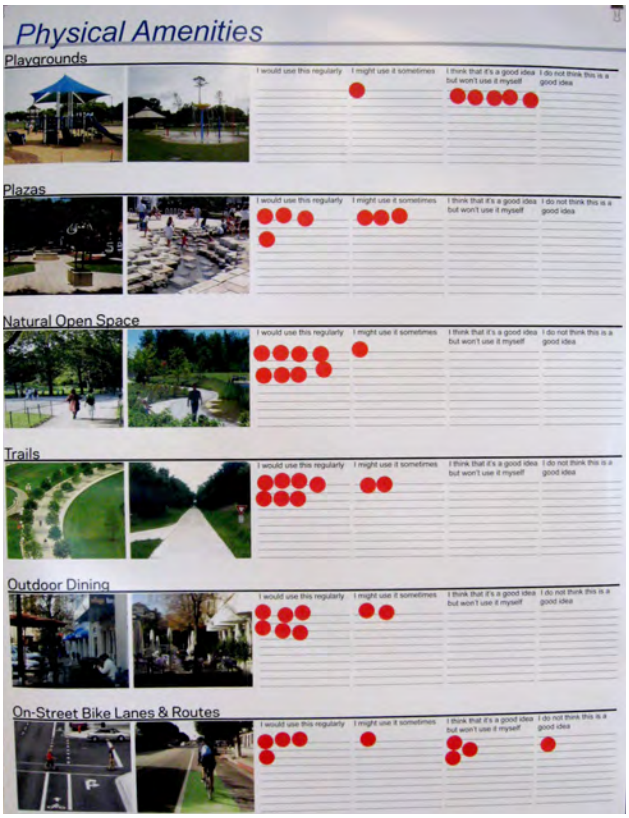
01/22/2013 Physical Planning

- Family Oriented ~~Adult~~ Entertainment
- VOCATIONAL SCHOOL - TRAINING
  - TO MIRROR JOB OPPORTUNITIES IN AREA PRESENT AND FUTURE
  - CURRENT 50% DROP OUT RATE 76010
- Outdoor Movies
- Medical facilities
  - Seniors
  - Insured.
- Median on NY Ave. w/ Landscape
- WE NEED OPEN SPACE THAT CAN BE USED FOR PARKS, TRAILS THAT CAN BE USED FOR OTHER PURPOSES LATER. WE NEED TO THINK ABOUT LAND BANKING.

Pg 1

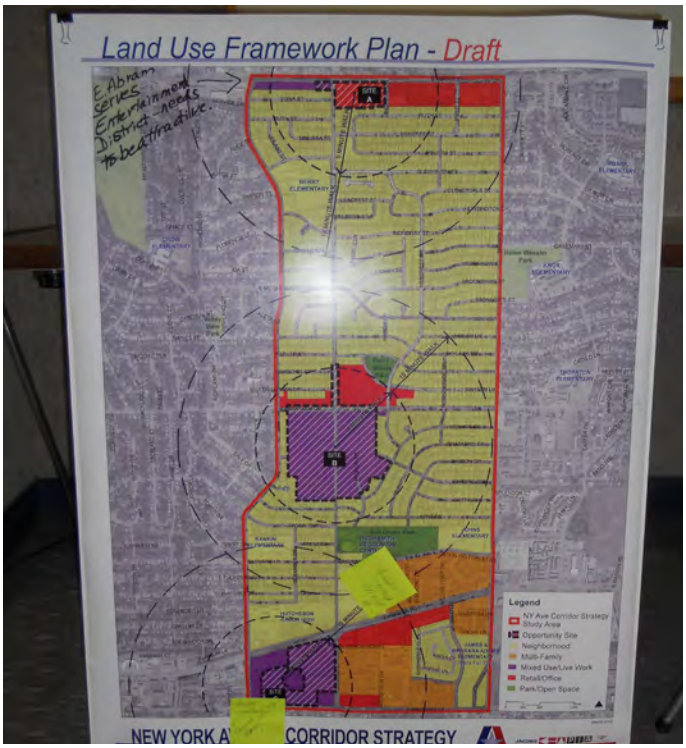

Need more retail stores
Hallmark
Drug Store
Grocery
Bookstore
Art and Theater for Kids/Adults
Community Outdoor area - replace concrete in pkg lots,
OPEN SPACE - PARKS - TRAILS - trees
CLEAN UP AREA - STREETS - LANDSCAPING - BUILDINGS
If areas are provided for parties/pavilion people will enjoy it & use it. But there must be a large amount of trash receptacles to keep the area beautiful. ©
Pg 2

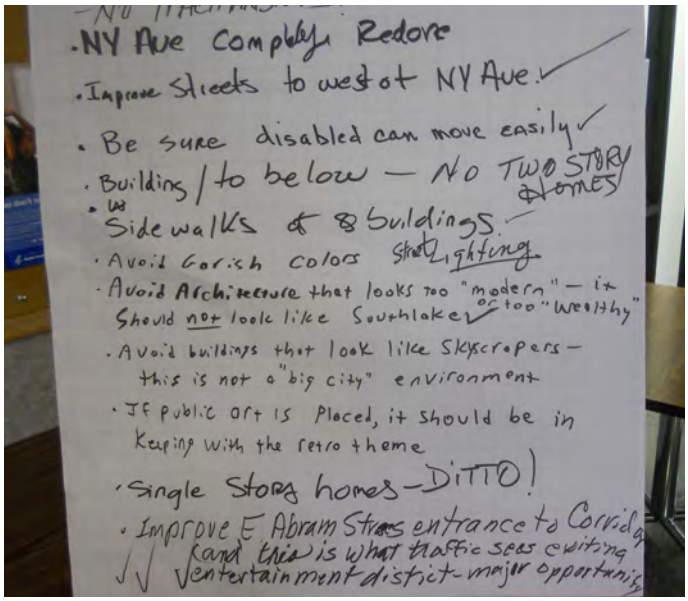
Physical Amenities
Playgrounds
Plazas
Natural Open Space
Trails
Outdoor Dining
On-Street Bike Lanes & Routes

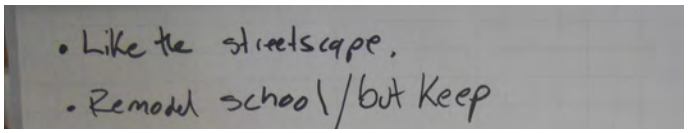

Physical Amenities
Playgrounds
Plazas
Natural Open Space
Trails
Outdoor Dining
On-Street Bike Lanes & Routes

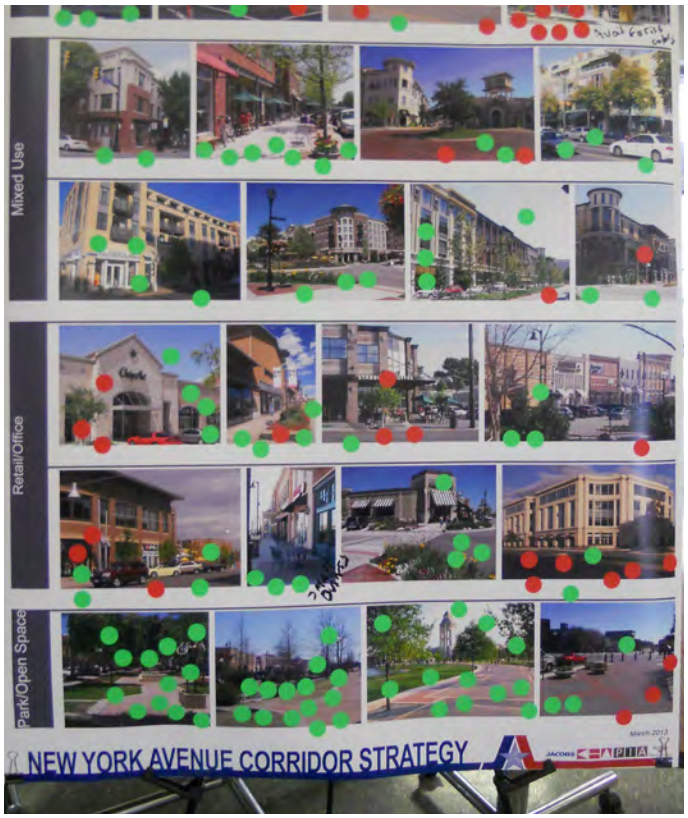
sidewalks
OPEN SPACE NEED LAND BANKING
OPEN SPACE NEED LAND BANKING
OPEN SPACE NEED LAND BANKING
Redevelop this Area
OPEN SPACE NEED LAND BANKING
Legend
NY Ave Corridor Strategy Study Area

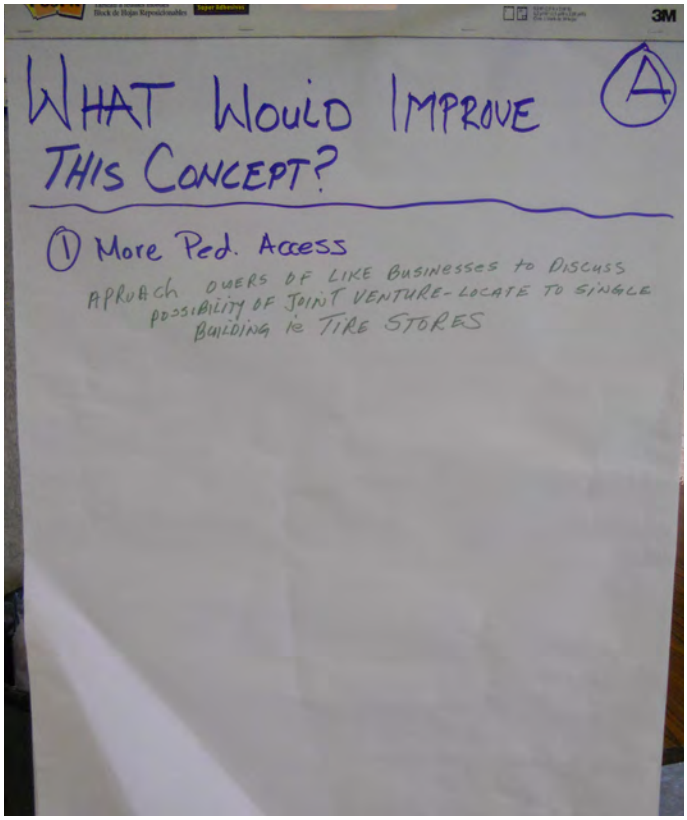
### *March 23, 2013 Open House*

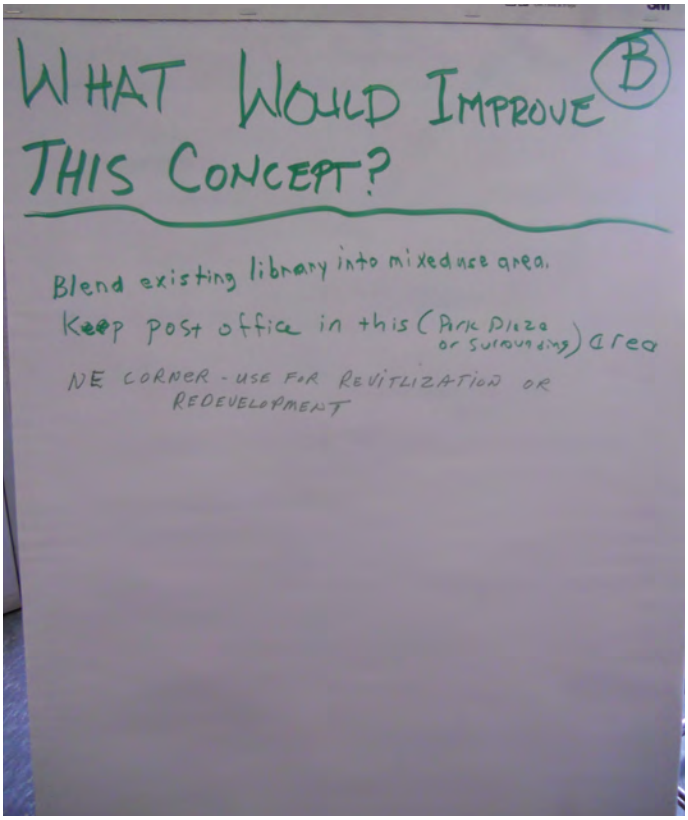


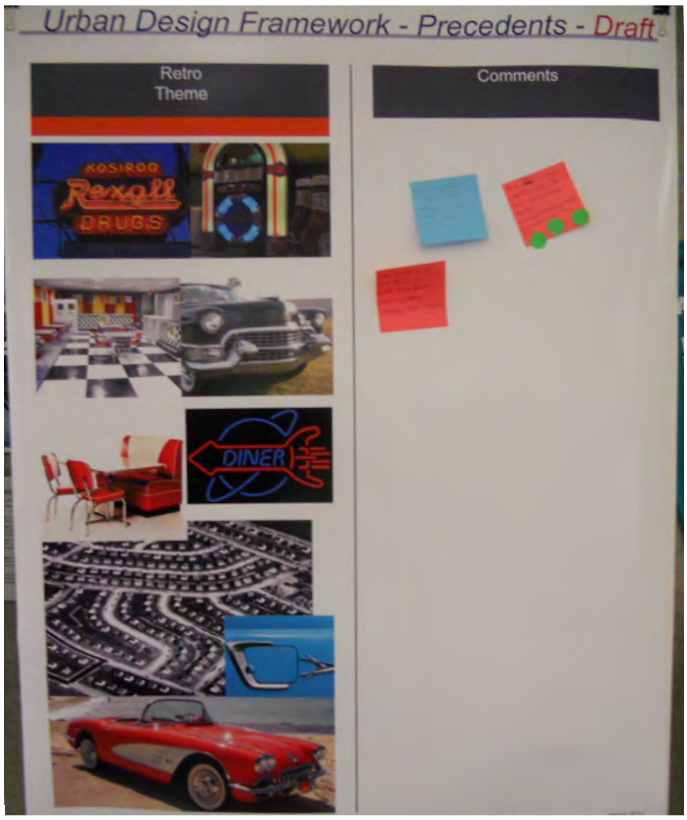



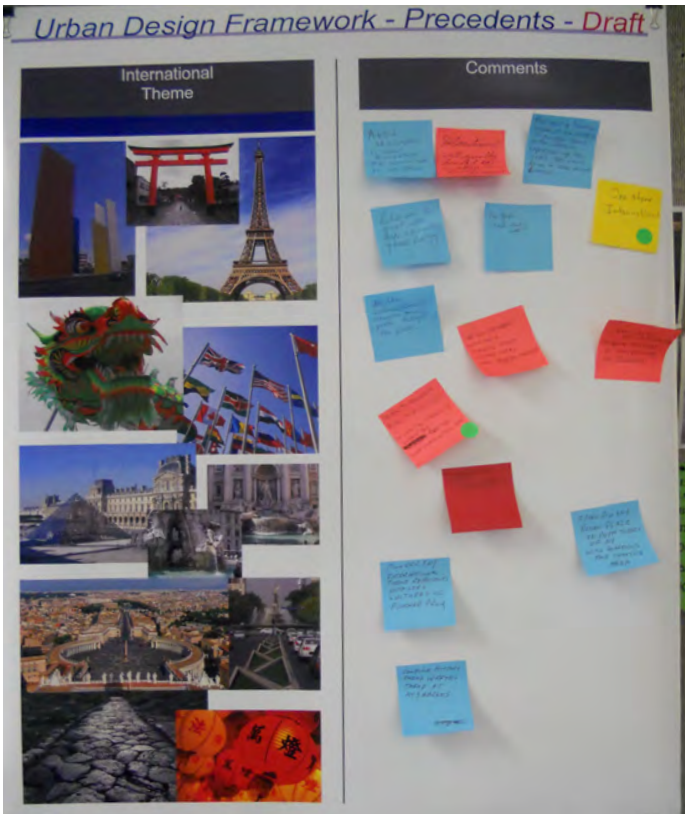



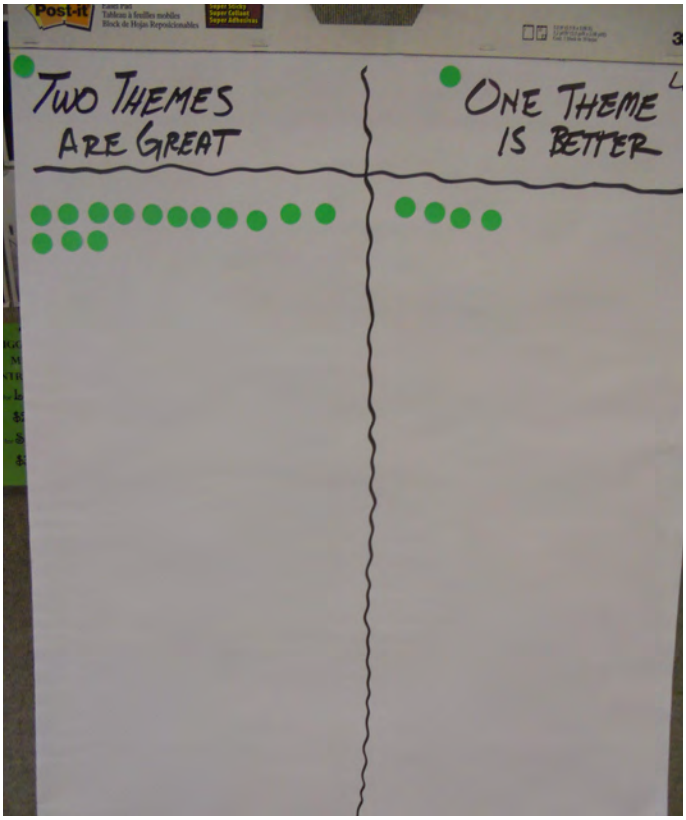


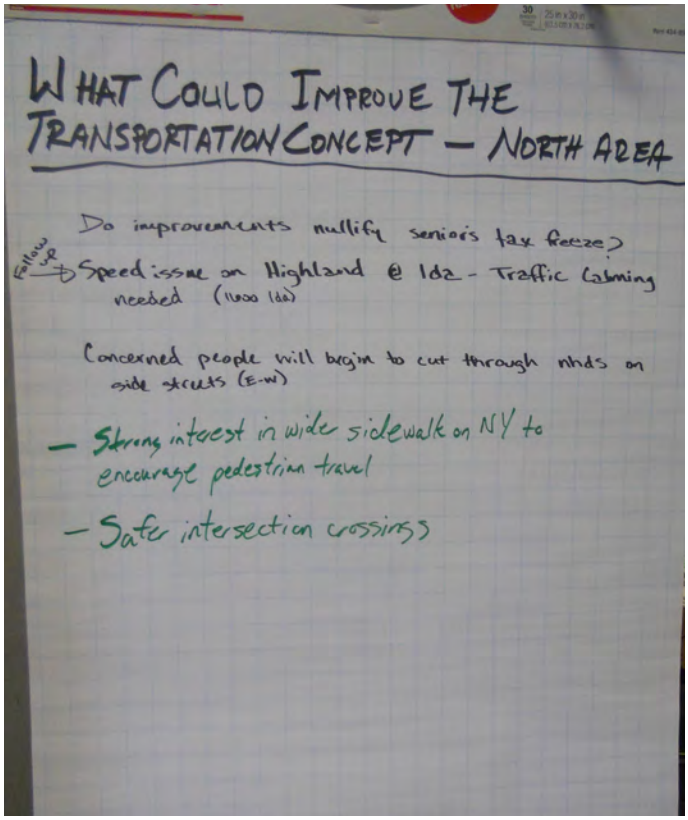

WHAT WOULD IMPROVE THIS CONCEPT?
A
1 More Ped. Access
APRUACH OWERS OF LIKE BUSINESSES TO DISCUSS POSSIBILITY OF JOINT VENTURE- LOCATE TO SINGLE BUILDING ie TIRE STORES

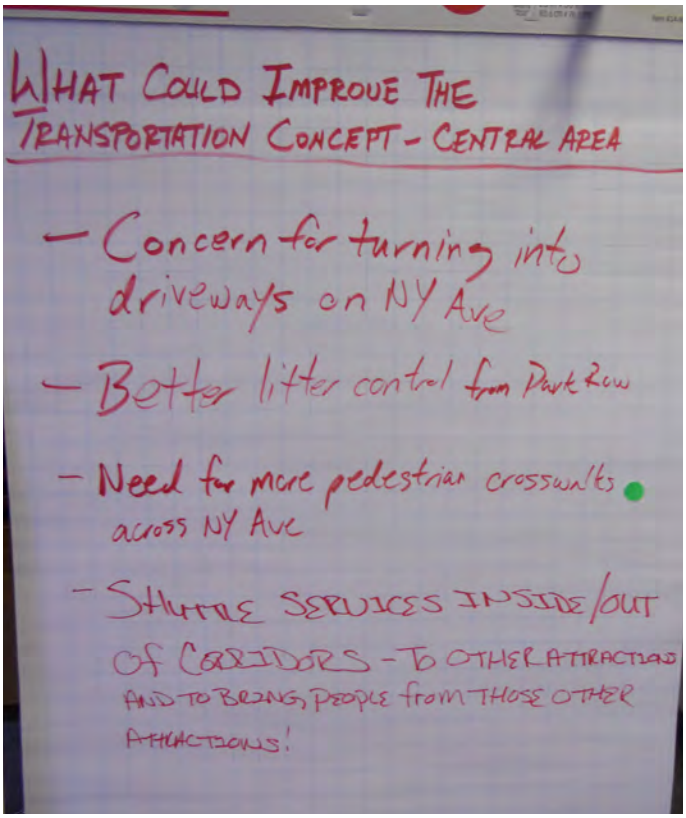

WHAT WOULD IMPROVE THIS CONCEPT?
B
Blend existing library into mixed use area.
Keep post office in this (Park Plaza or surrounding) area
NE CORNER - USE FOR REVITLIZATION OR REDEVELOPMENT

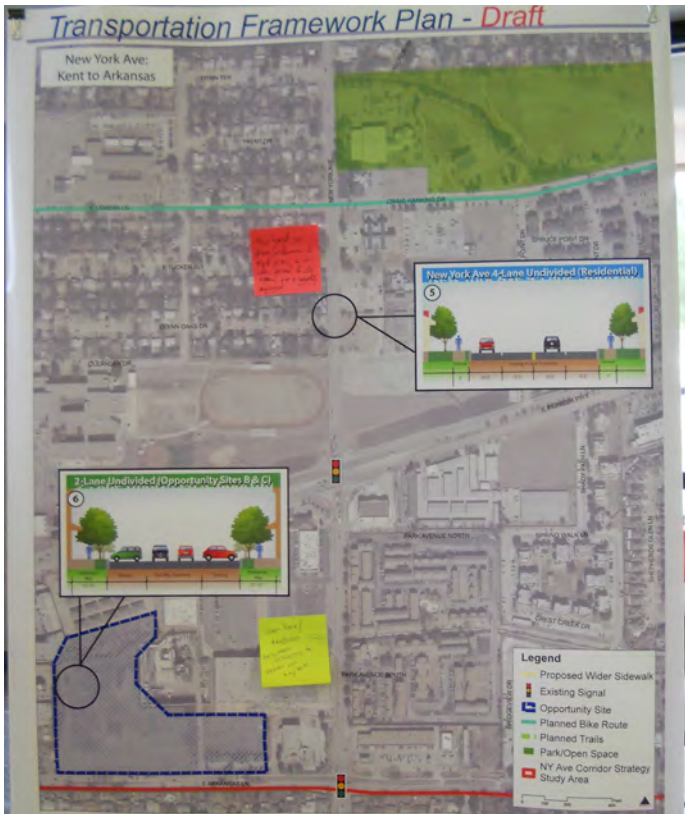

Urban Design Framework - Precedents - Draft
Retro Theme
Comments
KOSIROG
Rexall
DRUGS
DINER

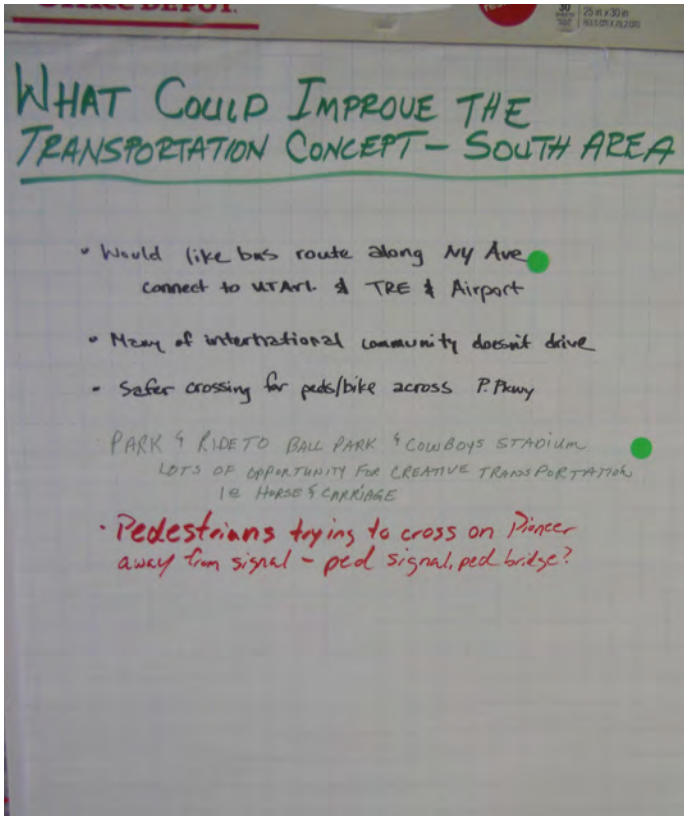

Urban Design Framework - Precedents - Draft
International Theme
Comments


TWO THEMES ARE GREAT
ONE THEME IS BETTER


WHAT COULD IMPROVE THE TRANSPORTATION CONCEPT – NORTH AREA
Do improvements nullify seniors tax freeze?
Follow up
Speed issue on Highland @ Ida - Traffic Calming needed (1000 Ida)
Concerned people will begin to cut through nhds on side streets (E-W)
– Strong interest in wider sidewalk on NY to encourage pedestrian travel
– Safer intersection crossings


WHAT COULD IMPROVE THE TRANSPORTATION CONCEPT - CENTRAL AREA
– Concern for turning into driveways on NY Ave
– Better litter control from Park Row
– Need for more pedestrian crosswalks across NY Ave
– SHUTTLE SERVICES INSIDE/OUT OF CORRIDORS - TO OTHER ATTRACTIONS AND TO BRING PEOPLE FROM THOSE OTHER ATTRACTIONS!


Transportation Framework Plan - Draft
New York Ave: Kent to Arkansas
New York Ave 4-Lane Undivided (Residential)
2-Lane Undivided (Opportunity Sites B & C)
Legend
Proposed Wider Sidewalk
Existing Signal
Opportunity Site
Planned Bike Route
Planned Trails
Park/Open Space
NY Ave Corridor Strategy Study Area


WHAT COULD IMPROVE THE
TRANSPORTATION CONCEPT – SOUTH AREA
• Would like bus route along NY Ave
connect to UTArl. & TRE & Airport
• Many of intertrational community doesn't drive
• Safer crossing for peds/bike across P. Pkwy
PARK & RIDE TO BALL PARK & COWBOYS STADIUM
LOTS OF OPPORTUNITY FOR CREATIVE TRANSPORTATION
ie HORSE & CARRIAGE
• Pedestrians trying to cross on Pioneer
away from signal – ped signal, ped bridge?

## IV. ECONOMIC ANALYSIS

### Analysis Objectives

- Determine financial impact of potential "prototype" projects:
  - East Abram Road and New York Avenue (Retail, Live/Work Units)
  - East Park Row Drive and New York Avenue (Mixed-Use Retail/Residential, Live/Work and Townhome Units, Library/Rec Center)
  - East Pioneer Parkway and New York Avenue (International Marketplace – Infill Retail and Senior Housing)
- Quantify economic "gaps" between prevailing market conditions and desired real estate products
- Educate public and private partners
- Provide "independent" story to tell potential investors/developers/property owners

### Methodology

- Assumed private developer perspective – How much development value can be created from each prototypical product type?
- Prepared build-out economic analysis for each prototype
- Sale prices/commercial rents for each prototype based on current and future market conditions in Arlington and DFW Metroplex
- Estimated project value vs. project cost, resulting in margin or "gap"
- Once "gap" quantified, estimated potential "contributions to gap"
- "Gap filling" measures considered included:
  - Land Acquisition/Writedown
  - Site Improvements Contribution (infrastructure, parking)
  - Property Tax TIF (25 years)
  - Sales Tax Sharing (380 Loan)
  - Public Improvement District (20 Years)
  - Property Tax Abatement (10 Years)
  - Development Fee Waivers (Roadway, Water)
  - Federal/State/Local Grants
  - Streamlined Development Approval Process
  - Tax Credit Equity (LIHTC, Historic, New Market)
- Economic gaps could be filled with a **combination** of measures outlined above
- Several variables affect economic feasibility (both negatively and positively): land cost; building density; rehab vs. new construction costs; parking requirements; premiums on rents and sale prices; "place-making" potential (amenities, connections, public spaces)
- Goal in redevelopment is to balance variables in an aesthetically and economically responsible manner

## Key Assumptions

**Project Revenue**

| | |
|---|---|
| Office Building Efficiency | 90% |
| Retail Building Efficiency | 90% |
| Rental Residential Building Efficiency | 80% |
| Rental Residential Rent | $1.20 to $3.40 Per Square Foot (includes Senior Housing) |
| Ownership Residential Sales Price | $225,000 to $350,000 Per Unit (includes Senior Housing) |
| Retail Rental Rate | $15.00 to $18.00 Per Square Foot (triple net) |
| Stabilized Occupancy Rate | 90% |
| Operating Costs | $.50 Per Square Foot (Retail)<br>$4,500 Per Unit (Residential Rental)<br>$20,000 Per Unit (Senior Housing) |
| Marketing Costs (Ownership Residential) | 7% of Sales |
| Stabilized Capitalization Rate | 8% |

**Project Costs**

| | |
|---|---|
| Property Acquisition/Demolition | TAD Value + 20% Premium |
| On-Site Improvements (Surface Parking) | $2,500 Per Space |
| On-Site Improvements (Structured Parking) | $15,000 Per Space |
| Site Development | $1.50 to $3.40 Per Square Foot |
| Building Construction (Hard Costs Only) | |
| Retail | $80 to $90 Per Square Foot |
| Rental Housing | $80 to $90 Per Square Foot |
| For-Sale Housing | $110 to $120 Per Square Foot |
| Construction Contingency | 5% of Construction Costs |
| "Soft" Costs (% of Hard Costs) | 10% to 15% of Hard Costs |
| Developer Profit | 10% of Total Costs |

**Potential Contributions To Gap**

| | |
|---|---|
| Land Acquisition/Writedown | Up to 50% of Total Cost |
| Site Improvements Contribution | Up to 50% of Total Cost |
| Property Tax TIF (25 Years) | City and County Tax Rates Only (.912) |
| Sales Tax Sharing (380 Loan) | 50% of Sales @ $200 to $300 Per Square Foot |
| Public Improvement District (20 Years) | .20 to .30 Per $100 Valuation |
| Property Tax Abatement (10 Years) | City Tax Rate Only (.648) |
| Development Fee Waivers | City Estimate |
| Federal/State/Local Grants | Project Specific |
| Streamlined Development Processing | Acquisition Cost X Monthly Interest Rate X # of Months Reduced Processing Time |

### Conclusions/Observations

- Economic "gaps" ranged from 18% to 34%; as noted, it is not unusual to have gaps ranging between 25% and 40% for urban infill projects.
- The largest gap was for Opportunity Project B, which includes the library/recreation center. Because these public uses do not typically generate revenue in excess of operating expenses, they only contribute to the cost side of the equation. Without the library/recreation center, the economic "gap" for Opportunity Project B would be reduced to approximately 15%.
- Potential contributions could offset the gaps estimated for Opportunity A and Opportunity B (without the library/recreation center). The gap for Opportunity C would likely require additional contributions, such as a land acquisition or writedown.
- Another measure of an opportunity project's success is the amount of private sector investment that can be "leveraged" from public investment. Table 1 summarizes each Opportunity Project and the ratio of private investment resulting from "filling the gap" with public investment (number of private dollars for every $1 of public investment). Individual economic analyses for each Opportunity Project are presented in Tables 2 through 4.

## Opportunity Project A Pro Forma

| Development Program | Units/Spaces | Square Feet | | Assumption Factors | |
|---|---|---|---|---|---|
| Retail/Restaurant | | 54,000 | | | |
| Office/Employment | | 0 | | | |
| Residential (Rental) | 0 | 0 | | 900 | SF/Unit |
| Live/Work (For-Sale) | 10 | 18,000 | | 1,800 | SF/Unit |
| Gross Floor Area | | 72,000 | | | |
| Project Land Area | | 337,590 | | 7.75 | Acres |
| Floor Area Ratio | | 21% | | | |
| Surface Parking | 290 | 92,800 | | 320 | SF/Space |
| Structured Parking | 0 | 0 | | 320 | SF/Space |
| **Estimated Project Value (Stabilized Yr)** | | | | | |
| Total Retail/Restaurant Rentable SF | | 48,600 | | 90% | Bldg. Efficiency Ratio |
| Rent/SF* | | $15.00 | | | |
| Total Office/Employment Rentable SF | | 0 | | 90% | Bldg. Efficiency Ratio |
| Rent/SF* | | $16.00 | | | |
| Total Residential Rentable SF | | 0 | | 80% | Bldg. Efficiency Ratio |
| Rent/SF | | $14.40 | | $1.20 | Monthly Rent/SF |
| Total Parking Spaces (Structured) | | 0 | | | |
| Rent/Space | | $0 | | $0 | Monthly Rent/Space |
| Gross Income | | $729,000 | | | |
| Occupancy | | 90% | | | |
| Effective Gross Income | | $656,100 | | | |
| Operating Costs | | $27,000 | | $0.50 | $/SF (Wtd. Avg. All Uses) |
| Net Operating Income | | $629,100 | | | |
| Capitalization Rate | | 8.0% | | | |
| **Project Value -- Office/Retail/Rental Hsg** | | **$7,863,750** | | | |
| Total Housing Units | | 10 | | | |
| Sales Price/Unit (Wtd Avg) | | $225,000 | | | |
| Gross Revenue | | $2,250,000 | | | |
| Less Marketing Costs | | ($157,500) | | 7% | % of Sales |
| Net Sale Proceeds | | $2,092,500 | | | |
| **Project Value -- For-Sale Housing** | | **$2,092,500** | | | |
| **Total Project Value** | | | **$9,956,250** | | |
| * Retail based on triple net lease; Office based on gross lease. | | | | | |
| **Development Cost Estimate** | | | | | |
| Property Purchase (Acquisition/Demolition) | | $1,687,950 | | $5.00 | $/SF Land (20% Premium) |
| On-Site Improvements (Surface Parking) | | $725,000 | | $2,500 | $/Space |
| On-Site Improvements (Structured Parking) | | $0 | | $15,000 | $/Space |
| Site Development/Infrastructure | | $1,147,806 | | $3.40 | $/SF |
| Building Construction (Hard Costs) | | $6,237,000 | | $87 | $/SF (Wtd. Avg. All Uses) |
| Construction Contingency | | $405,490 | | 5% | % of Construction Costs |
| Soft Costs (% of Hard Costs) | | $810,981 | | 10% | % of Hard Costs |
| Developer Profit | | $1,101,423 | | 10% | % of Total Costs |
| **Total Project Cost** | | | **$12,115,650** | **$168.27** | **$/SF** |
| **Development Economic Summary** | | | | | |
| **Total Project Cost** | | | **$12,115,650** | | |
| **Total Project Value** | | | **$9,956,250** | | |
| **Project Margin/"Gap"** | | | **($2,159,400)** | | |
| **% Project Margin/"Gap"** | | | **-18%** | | |
| **Potential Contributions to "Gap":** | | | | | |
| Land Acquistion/Writedown | | $0 | | 0% | of Land Cost |
| Site Improvements Contribution | | $936,403 | | 50% | of Total Site Costs |
| Supportable TIF (25 Years) | | $1,700,000 | | 0.912000 | Property Tax Rate (City/County) |
| Sales Tax Sharing (380 Loan -- 10 Yrs) | | $1,200,000 | | 50% | % of Local Sales Tax |
| Public Improvement District (20 Years) | | $0 | | $0.00 | Assessment Per Bldg Sq Ft |
| Property Tax Abatement (10 Years) | | $0 | | 0.000000 | City Property Tax Rate |
| Development Fee Waivers | | $0 | | | |
| Federal/State/Local Grants | | $0 | | | |
| Streamlined Development Approval Process | | $0 | | | |
| Tax Credit Equity (LIHTC, Historic, New Market) | | $0 | | | |
| **Total Contributions to "Gap"** | | | **$3,836,403** | | |

Source: Jacobs Inc. and Ricker | Cunningham.

## Opportunity Project B Pro Forma

| Development Program | | | | Assumption Factors | |
|---|---|---|---|---|---|
| | Units/Spaces | Square Feet | | | |
| Retail/Restaurant | | 113,600 | | | |
| Library/Rec Center | | 71,000 | | | |
| Residential (Rental) | 142 | 127,800 | | 900 | SF/Unit |
| Live/Work (For-Sale) | 68 | 122,400 | | 1,800 | SF/Unit |
| Gross Floor Area | | 434,800 | | | |
| Project Land Area | | 1,960,200 | | 45.0 | Acres |
| Floor Area Ratio | | 22% | | | |
| Surface Parking | 1,065 | 340,800 | | 320 | SF/Space |
| Structured Parking | 0 | 0 | | 320 | SF/Space |
| **Estimated Project Value (Stabilized Yr)** | | | | | |
| Total Retail/Restaurant Rentable SF | | 102,240 | | 90% | Bldg. Efficiency Ratio |
| Rent/SF* | | $17.50 | | | |
| Total Office/Employment Rentable SF | | 63,900 | | 90% | Bldg. Efficiency Ratio |
| Rent/SF* | | $16.00 | | | |
| Total Residential Rentable SF | | 102,240 | | 80% | Bldg. Efficiency Ratio |
| Rent/SF | | $15.00 | | $1.25 | Monthly Rent/SF |
| Total Parking Spaces (Structured) | | 0 | | | |
| Rent/Space | | $0 | | $0 | Monthly Rent/Space |
| Gross Income | | $4,345,200 | | | |
| Occupancy | | 90% | | | |
| Effective Gross Income | | $3,910,680 | | | |
| Operating Costs | | $1,124,640 | | $3.60 | $/SF (Wtd. Avg. All Uses) |
| Net Operating Income | | $2,786,040 | | | |
| Capitalization Rate | | 8.0% | | | |
| **Project Value -- Retail/Public/Rental Hsg** | | **$34,825,500** | | | |
| Total Housing Units | | 68 | | | |
| Sales Price/Unit (Wtd Avg) | | $225,000 | | | |
| Gross Revenue | | $15,300,000 | | | |
| Less Marketing Costs | | ($1,071,000) | | 7% | % of Sales |
| Net Sale Proceeds | | $14,229,000 | | | |
| **Project Value -- For-Sale Housing** | | **$14,229,000** | | | |
| **Total Project Value** | | | **$49,054,500** | | |
| * Retail based on triple net lease; Office based on gross lease. | | | | | |
| **Development Cost Estimate** | | | | | |
| Property Purchase (Acquisition/Demolition) | | $15,681,600 | | $8.00 | $/SF Land (20% Premium) |
| On-Site Improvements (Surface Parking) | | $2,662,500 | | $2,500 | $/Space |
| On-Site Improvements (Structured Parking) | | $0 | | $15,000 | $/Space |
| Site Development/Infrastructure | | $2,940,300 | | $1.50 | $/SF |
| Building Construction (Hard Costs) | | $39,083,302 | | $90 | $/SF (Wtd. Avg. All Uses) |
| Construction Contingency | | $2,234,305 | | 5% | % of Construction Costs |
| Soft Costs (% of Hard Costs) | | $4,468,610 | | 10% | % of Hard Costs |
| Developer Profit | | $6,707,062 | | 10% | % of Total Costs |
| **Total Project Cost** | | | **$73,777,680** | **$169.68** | **$/SF** |
| **Development Economic Summary** | | | | | |
| **Total Project Cost** | | | **$73,777,680** | | |
| **Total Project Value** | | | **$49,054,500** | | |
| **Project Margin/"Gap"** | | | **($24,723,180)** | | |
| **% Project Margin/"Gap"** | | | **-34%** | | |
| **Potential Contributions to "Gap":** | | | | | |
| Land Acquistion/Writedown | | $0 | | 0% | of Land Cost |
| Site Improvements Contribution | | $2,801,400 | | 50% | of Total Site Costs |
| Supportable TIF (25 Years) | | $6,800,000 | | 0.912000 | Property Tax Rate (City/County) |
| Sales Tax Sharing (380 Loan -- 10 Yrs) | | $2,500,000 | | 50% | % of Local Sales Tax |
| Public Improvement District (20 Years) | | $0 | | $0.00 | Assessment Per Bldg Sq Ft |
| Property Tax Abatement (10 Years) | | $0 | | 0.000000 | City Property Tax Rate |
| Development Fee Waivers | | $0 | | | |
| Federal/State/Local Grants | | $0 | | | |
| Streamlined Development Approval Process | | $0 | | | |
| Tax Credit Equity (LIHTC, Historic, New Market) | | $0 | | | |
| **Total Contributions to "Gap"** | | | **$12,101,400** | | |

Source: Jacobs Inc. and Ricker | Cunningham.

## Opportunity Project C Pro Forma

| Development Program | Units/Spaces | Square Feet | | Assumption Factors | |
|---|---|---|---|---|---|
| Retail/Restaurant | | 13,000 | | | |
| Office/Employment | | 0 | | | |
| Senior Independent Living | 123 | 110,700 | | 900 | SF/Unit |
| Senior Cottages (For-Sale) | 12 | 14,400 | | 1,200 | SF/Unit |
| Gross Floor Area | | 138,100 | | | |
| Project Land Area | | 653,400 | | 15.0 | Acres |
| Floor Area Ratio | | 21% | | | |
| Surface Parking | 250 | 79,840 | | 320 | SF/Space |
| Structured Parking | 0 | 0 | | 320 | SF/Space |
| **Estimated Project Value (Stabilized Yr)** | | | | | |
| Total Retail/Restaurant Rentable SF | | 11,700 | | 90% | Bldg. Efficiency Ratio |
| Rent/SF* | | $18.00 | | | |
| Total Office/Employment Rentable SF | | 0 | | 90% | Bldg. Efficiency Ratio |
| Rent/SF* | | $16.00 | | | |
| Total Residential Rentable SF | | 88,560 | | 80% | Bldg. Efficiency Ratio |
| Rent/SF | | $40.80 | | $3.40 | Monthly Rent/SF |
| Total Parking Spaces (Structured) | | 0 | | | |
| Rent/Space | | $0 | | $0 | Monthly Rent/Space |
| Gross Income | | $3,823,848 | | | |
| Occupancy | | 90% | | | |
| Effective Gross Income | | $3,441,463 | | | |
| Operating Costs | | $2,461,630 | | $19.90 | $/SF (Wtd. Avg. All Uses) |
| Net Operating Income | | $979,833 | | | |
| Capitalization Rate | | 8.0% | | | |
| **Project Value -- Retail/Public/Rental Hsg** | | **$12,247,915** | | | |
| Total Housing Units | | 12 | | | |
| Sales Price/Unit (Wtd Avg) | | $300,000 | | | |
| Gross Revenue | | $3,600,000 | | | |
| Less Marketing Costs | | ($252,000) | | 7% | % of Sales |
| Net Sale Proceeds | | $3,348,000 | | | |
| **Project Value -- For-Sale Housing** | | **$3,348,000** | | | |
| **Total Project Value** | | | **$15,595,915** | | |
| * Retail based on triple net lease; Office based on gross lease. | | | | | |
| **Development Cost Estimate** | | | | | |
| Property Purchase (Acquisition/Demolition) | | $4,900,500 | | $7.50 | $/SF Land (20% Premium) |
| On-Site Improvements (Surface Parking) | | $623,750 | | $2,500 | $/Space |
| On-Site Improvements (Structured Parking) | | $0 | | $15,000 | $/Space |
| Site Development/Infrastructure | | $980,100 | | $1.50 | $/SF |
| Building Construction (Hard Costs) | | $10,396,859 | | $75 | $/SF (Wtd. Avg. All Uses) |
| Construction Contingency | | $600,035 | | 5% | % of Construction Costs |
| Soft Costs (% of Hard Costs) | | $1,200,071 | | 10% | % of Hard Costs |
| Developer Profit | | $1,870,131 | | 10% | % of Total Costs |
| **Total Project Cost** | | | **$20,571,446** | **$148.96** | **$/SF** |
| **Development Economic Summary** | | | | | |
| **Total Project Cost** | | | **$20,571,446** | | |
| **Total Project Value** | | | **$15,595,915** | | |
| **Project Margin/"Gap"** | | | **($4,975,531)** | | |
| **% Project Margin/"Gap"** | | | **-24%** | | |
| **Potential Contributions to "Gap":** | | | | | |
| Land Acquistion/Writedown | | $0 | | 0% | of Land Cost |
| Site Improvements Contribution | | $801,925 | | 50% | of Total Site Costs |
| Supportable TIF (25 Years) | | $2,200,000 | | 0.912000 | Property Tax Rate (City/County) |
| Sales Tax Sharing (380 Loan -- 10 Yrs) | | $300,000 | | 50% | % of Local Sales Tax |
| Public Improvement District (20 Years) | | $0 | | $0.00 | Assessment Per Bldg Sq Ft |
| Property Tax Abatement (10 Years) | | $0 | | 0.000000 | City Property Tax Rate |
| Development Fee Waivers | | $0 | | | |
| Federal/State/Local Grants | | $0 | | | |
| Streamlined Development Approval Process | | $0 | | | |
| Tax Credit Equity (LIHTC, Historic, New Market) | | $0 | | | |
| **Total Contributions to "Gap"** | | | **$3,301,925** | | |

Source: Jacobs Inc. and Ricker | Cunningham.

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## V. IMPLEMENTATION MATRIX

### Physical

| Barrier Category* | Strategy | Action | Public Sector Role | Participating Groups | Resources Needed | Near-Term (< 24 Months) | Mid-Term (3 to 5 Years) | Long-Term (5 to 10 Years) |
|---|---|---|---|---|---|---|---|---|
| **Physical** | | | | | | | | |
| Visual appeal and perceptions of value in the area are significantly impacted by the age and condition of fencing adjacent to thoroughfares. | Design a consistent system of fencing along the corridor and construct in public spaces; initiate discussions with affected property owners regarding participation in a corridor-wide improvement program. | Map out property owners and boundary lines to better understand the relationship between public and private spaces - identify where a public easement could be established and a consistent system of fencing installed. | Steward | Community Development & Planning, Real Estate | Staff Time | | X | |
| | | Design an education program (written materials and public meetings) that describes the intent and economic benefits - City constructed and maintained until private sector values are such that a district overlay could be created to fund maintenance. | Steward | Community Development & Planning, Real Estate | Staff Time, Attorney Time, Consultant Time (Optional), Hard Costs | | X | |
| Lack of identity or "address" that could be marketed and promoted in an effort to attract private investment and inform public investment. | Develop streetscape guidelines that begin at the corridor and continues through the neighborhoods and that effectively serves to "brand" the area and streets within it (e.g., flowers, pavement or signage). | Prepare detailed design standards or guidelines for the implementation of the "Retro Theme" hardscape, landscape and public art elements into Opportunity Sites A and B as they redevelop. | Designer | Community Development & Planning | Staff Time, Consultant Time (Optional) | X | | |
| | | Construct the "Retro Theme" hardscape, landscape and public art elements into Opportunity Sites A and B as they redevelop. | Regulator | Private Developers | Staff Time, Developer Resources | On-Going | | |
| | | Prepare detailed design standards or guidelines for the implementation of the "International Theme" hardscape, landscape and public art elements into Opportunity Site C as it redevelops. | Designer | Community Development & Planning, TxDOT | Staff Time, Consultant Time (Optional) | X | | |
| | | Construct the "International Theme" hardscape, landscape and public art elements into Opportunity Site C as it redevelops. | Regulator | Private Developers | Staff Time, Developer Resources | On-Going | | |
| | | Work with neighborhoods to develop guidelines that identify which elements from the "Retro" and "International" themes are appropriate for incorporation onto neighborhood streets. | Promoter | Community Development & Planning, East Arlington Renewal | Staff Time, Volunteer Time, Consultant Time (Optional) | X | | |
| | | Identify a strategy for neighborhood organizations to work with individual property owners to implement the two themes onto neighborhood streets. | Supporter | East Arlington Renewal, Individual Property Owners | Staff Time, Volunteer Time | | X | |

| Barrier Category* | Strategy | Action | Public Sector Role | Participating Groups | Resources Needed | Near-Term (< 24 Months) | Mid-Term (3 to 5 Years) | Long-Term (5 to 10 Years) |
|---|---|---|---|---|---|---|---|---|
| **Physical** | | | | | | | | |
| Sidewalks and trails serving the Study Area vary in size, completeness and connection; lighting serving these pedestrian areas is inconsistent. | Fill in the gaps to complete the sidewalk system and trails within and beyond the Study Area, ensuring consistent standards and design. | Prepare a map illustrating potential public improvements in the Study Area. | Investor | Community Development & Planning, Public Works & Transportation | Staff Time | X | | |
| | | Using the recommendations of the Strategy, prioritize specific locations (intersections) within the Study Area for early investment using an agreed upon set of screening criteria. | Investor | Community Development & Planning, Public Works & Transportation | Staff Time | X | | |
| | | Incorporate the design recommendations from the Strategy and priority location recommendations (From the previous action) and establish a capital improvement phasing plan - using CIP, bond, grant or other dollars. | Investor | Community Development & Planning, Public Works & Transportation, City Management | Staff Time | X | | |
| Portions of the corridor require landscaping, while other areas require improvements to existing landscaping. | Identify where new trees and landscaping can be introduced to improve the area's aesthetic appeal. | Evaluate the condition and location of existing trees along the corridor and develop a strategy for new trees and landscaping. Evaluate existing ROW limitations for new landscaping and identify where a public easement could be established if necessary. | Investor | Community Development & Planning, Parks & Recreation Department, Real Estate | Staff Time | X | | |
| | | Plant new trees and other landscaping within the public ROW to align with the Strategy. | Investor | Parks & Recreation | Hard Costs | | X | |
| Existing conditions which discourage vehicular and non-vehicular movement within the Study Area. | Complete urban design recommendations and roadway improvements as proposed in the Strategy. | Prepare landscape, hardscape and architectural plans for improvements at the intersection of New York Avenue and E. Abram Street and at the intersection of New York Avenue and Pioneer Parkway | Investor | Community Development & Planning, Public Works & Transportation | Staff Time, Consultant Time (Optional) | X | | |
| | | Construct the gateway at New York Avenue and East Abram Street and at New York Avenue and Pioneer Parkway | Investor | City of Arlington, Private Developer | Developer Resources, City Resources (Optional) | | X | |

| Barrier Category* | Strategy | Action | Public Sector Role | Participating Groups | Resources Needed | Near-Term (< 24 Months) | Mid-Term (3 to 5 Years) | Long-Term (5 to 10 Years) |
|---|---|---|---|---|---|---|---|---|
| **Physical** | | | | | | | | |
| Opportunity within the corridor for a public-private partnership with public destination anchors. | Complete a facility study for the existing library / recreation center complexes to inform capital improvements (currently funded through proceeds of the 2008 bond program). | Within the context of the on-going facility study understand the programming needs of both facilities and the ability of the Study Area to accommodate both uses in a single setting (identified in Opportunity Site B). Based on the results of the study, amend the recommendations presented in the New York Avenue Corridor Strategy. | Investor | Library, Parks and Recreation | Staff Time, Consultant Time (Optional) | X | | |
| | | If the findings are favorable for these uses to remain / expand / co-locate, identify public resources to finance this improvement and include the City's intention as part of the investment "story" for the Area included in any developer request. | Investor | Library, Parks and Recreation, Economic Development, City Manager's Office | City Resources, Developer Resources | X | | |
| Elements of past commitments to the public realm, yet too few and aged. | Initiate a public art program that builds on the Area's cultural diversity and leverages past efforts associated with the existing murals. | Work with area advocates to understand past efforts to encourage public art, murals, etc. Work with UT-Arlington and Sam Houston High School to initiate a public art program. | Promoter | East Arlington Renewal, Community Development & Planning | Staff Time, Volunteer Time, Hard Costs | X | | |
| Ample total square footage of park space, but parks are sometimes inappropriately located or inefficient in their ability to leverage private investment. | Identify future neighborhood and pocket parks, open space corridors and other locations for public spaces (hard and soft). | Evaluate the potential for additional neighborhood gathering and recreational spaces to support new residents to and thru the corridor. | Investor | Parks and Recreation Department, Community Development & Planning | Staff Time, Consultant Time (Optional) | X | | |
| | | Evaluate the potential for future recreational spaces, neighborhood and pocket parks, open space corridors and other locations for public spaces (hard and soft). | Investor | Parks and Recreation Department, Community Development & Planning | Staff Time, Consultant Time (Optional) | X | | |
| | | Consider incorporating any potential neighborhood and pocket parks, open space corridors and other locations for public spaces (hard and soft) along with their anticipated programs, and potential funding sources into the City's Parks Master Plan. | Investor | Parks and Recreation Department, Community Development & Planning | Staff Time | X | | |
| | | Construct all spaces identified in the Master Plan. | Investor | Parks and Recreation Department, Community Development & Planning | Hard Costs | On-Going | | |

* Barrier Category is: General categories of barriers to investment either present in the Study Area or impacting it.

Source: Ricker | Cunningham.

*Market*

| Barrier Category* | Strategy | Action | Public Sector Role | Participating Groups | Resources Needed | Near-Term (< 24 Months) | Mid-Term (3 to 5 Years) | Long-Term (5 to 10 Years) |
|---|---|---|---|---|---|---|---|---|
| **Market** | | | | | | | | |
| A retail inventory serving limited market interests; secondary market information that does not adequately explain the market opportunity. | Work with area Chambers and the City's Economic Development Department, along with select other professionals who share the long-term vision for the area and that can assist with recruiting retailers. | Choose an approach to identify potentially interested operators, issue a request for proposals, retain a commercial broker, share market information with existing property owners, create marketing materials for opportunity sites, or other. | Promoter | City Management, Economic Development | Staff Time | X | | |
| | | Meet with City Council members to solicit their interest in establishing an incentive policy specifically for retail owners and operators. | Policy Maker, Financier | City Management | Staff Time | X | | |
| | | Update the market analysis information completed as part of this effort to monitor the effectiveness of select initiatives and any changes in market conditions (i.e., completed leases, property transactions, trends in lease rates, etc.). | Educator | Community Development & Planning, Economic Development, Arlington Chamber | Staff Time, Consultant Time (Optional) | On-Going | | |
| The perception / belief by stakeholders, officials, others that the public sector should allow the market to act on its own without intervention. This results in opportunities going elsewhere or developing in a way that is inconsistent with the vision. | Continue to brief elected and appointed officials about challenges associated with economic feasibility among desired retailers so that negotiations related to potential incentive agreements involve informed participants. | Bring in advisors to explain the various components of economic feasibility and prepare officials for the potential magnitude of economic "gaps", resources that in combination could be used to fill them and the community's return on investment were they to elect to participate. | Financier | Economic Development, Department, City Management | Consultant Time (Fee for Services or Pro Bono) | X | | |
| | Pursue residential developers who are willing to deliver alternative products to the area, and financially able to assemble and entitle properties accordingly. | Either in lieu of or in combination with acquiring and assembling parcels for redevelopment (using partner agents including the Arlington Chamber) - issue a residential developer RFQ which highlights the market opportunity for different residential product types, as well as available incentives the City and its partners could use to address any financial "gap." | Promoter, Financier | Economic Development, Department, City Management | Staff Time, Consultant Time (Optional) | X | | |

| Barrier Category* | Strategy | Action | Public Sector Role | Participating Groups | Resources Needed | Near-Term (< 24 Months) | Mid-Term (3 to 5 Years) | Long-Term (5 to 10 Years) |
|---|---|---|---|---|---|---|---|---|
| **Market** | | | | | | | | |
| Current reporting on criminal trends (up or down) reflects an area inconsistent with the Study Area and therefore, misrepresentative. | Consider the impacts of aligning existing Police service area boundaries with the Study Area to allow for more accurate safety/crime statistics reporting. | Compare Study Area to existing Police service area boundaries - discuss the implications of amending the service area boundaries in an effort to align it with the Study Area to more accurately track the impact of initiatives associated with this effort. | Educator | Police Department, Community Development | Staff Time | X | | |
| | | Engage elected and appointed officials regarding the desire to amend the service area boundaries - address any questions or concerns and implement. | Policy Maker | Police Department, Community Development, City Council | Staff Time | X | | |
| | | Identify baseline statistics for Study Area boundaries as they relate to police service and criminal activity and continue to monitor - share findings City officials on a periodic basis. | Monitor | Police Department, Community Development & Planning | Staff Time | On-Going | | |
| | | Communicate crime statistics to the public through community meetings, flyers, public education at area schools, and other media outlets. | Educator | Police Department, Community Development & Planning | Staff Time | On-Going | | |

* Barrier Category is: General categories of barriers to investment either present in the Study Area or impacting it.

Source: Ricker | Cunningham.

*Financial*

| Barrier Category* | Strategy | Action | Public Sector Role | Participating Groups | Resources Needed | Near-Term (< 24 Months) | Mid-Term (3 to 5 Years) | Long-Term (5 to 10 Years) |
|---|---|---|---|---|---|---|---|---|
| **Financial** | | | | | | | | |
| Based on preliminary analyses of financial feasibility associated with catalyzing developments, there will be an economic "gap" that cannot be filled without some sort of public participation. | Investigate the range of financing mechanisms identified here for application within the Opportunity Sites and Study Area at-large (including capital improvement dollars (CIP), bond revenue, tax increment financing (TIRZ), special districts). | In addition to those identified and tested for their ability to fill potential economic "gaps" associated with opportunity concepts within the Corridor, continue to research the availability of others including regional, state and federal programs and dollars intended for target reinvestment areas (e.g., CRA dollars from participating banks). | Financier | Economic Development | Staff Time, Consultant Time | On-Going | | |
| Although the Study Area includes a significant amount of residentially developed land, there are also sizable concentrations of commercial land and improvements for which tax increment financing could be used in association with redevelopment. | If feasible, establish a TIRZ that encompasses commercial properties within both the Study Area, as well as portions of other revenue-generating areas if possible. | Identify appropriate individuals and organizations to solicit for their participation in defining the boundaries of a potential TIRZ district, and necessary step to advance its creation. | Financier | Economic Development, City Finance Department, City Management | Staff Time, Consultant Time (Optional) | X | | |
| There is limited ownership of public land and buildings, with the exception of those being used for public purposes. Site control can make redevelopment initiatives infinitely easier. | Work to acquire targeted parcels and position them for private investment, making them part of a developer request (if this approach is desired). | Using the New York Avenue Corridor Strategy as the guide, prepare a profile of property ownership, values, and other information for each of the Opportunity Sites in order to understand potential challenges associated with acquisition (public or private). | Financier | Economic Development, Community Development & Planning, Arlington Chamber | Staff Time, Broker Services (Optional) | X | | |
| | | Determine if the structure of existing organizations allows for the acquisition and positioning of private properties (arms length) for redevelopment by a responding development interest. | Financier | Economic Development, Arlington Chamber, City Management | Staff Time, Consultant Time (Optional) | X | | |
| | | Identify resources that allow for the acquisition of property, complete necessary rezoning and other entitlements, package property information in a developer request. | Financier | Economic Development, Community Development & Planning | Staff Time, Consultant Time (Optional) | On-Going | | |

| Barrier Category* | Strategy | Action | Public Sector Role | Participating Groups | Resources Needed | Near-Term (< 24 Months) | Mid-Term (3 to 5 Years) | Long-Term (5 to 10 Years) |
|---|---|---|---|---|---|---|---|---|
| **Financial** | | | | | | | | |
| Based on preliminary analyses of financial feasibility associated with catalyzing developments, no one resource was sufficient to fill the identified economic "gaps." | Establish policies that support co-mingling public resources (i.e., library funds, senior center / recreation center funds, CIP, CDBG). | Meet with City officials to share discussions with private interests related to financial challenges associated with redevelopment in the Study Area in an effort to preemptively prepare them for future discussions regarding public participation in catalyzing initiatives. | Policy Maker, Financier | Economic Development, City Management | Staff Time, Consultant Time (Optional) | X | | |
| Perception / belief by stakeholders, officials, others that the public sector should allow the market to act on its own without intervention -- the fact that it will by going somewhere else or develop in a way inconsistent with the vision. | Share the "gap" analyses prepared as part of this planning process with elected and appointment officials so that they understand contributing factors and the impact of select resources. | Bring in advisors to explain the various components of economic feasibility and prepare officials for the potential magnitude of economic "gaps", resources that in combination could be used to fill them and the community's return on investment were they to elect to participate. | Financier | Economic Development, Department, City Management | Consultant Time (Fee for Services or Pro Bono) | X | | |
| | Establish public commitments to use many of the financial and policy resources identified in the "gap" analysis process. | Meet with City officials to share discussions with private interests related to financial challenges associated with redevelopment in the Study Area in an effort to preemptively prepare them for future discussions regarding public participation in catalyzing initiatives. | Policy Maker, Financier | Economic Development, Department, City Management | Staff Time | X | | |

| Barrier Category* | Strategy | Action | Public Sector Role | Participating Groups | Resources Needed | Near-Term (< 24 Months) | Mid-Term (3 to 5 Years) | Long-Term (5 to 10 Years) |
|---|---|---|---|---|---|---|---|---|
| **Financial** | | | | | | | | |
| Private sector is often unaware of a community's resources that are available to assist with redevelopment and economic "gaps" - opportunities are often lost without early and continuous interaction throughout the revitalization process. | Promote the availability of resources as they become available and continually monitor their effectiveness as they are applied to projects (benchmarking). | Prepare a list of existing resources (e.g., financial incentives, programs, policies and other items of value) and make them available on the City's and their advocacy partner websites, as well as in any developer requests. | Financier | Economic Development | Staff Time | X | | |
| | | Proactively encourage incentive requests for projects in the Study Area that advance the vision (as well as elsewhere in the city). | Policy Maker, Financier | Economic Development, Arlington Chamber, Other Chambers | Staff Time | On-Going | | |
| | | If one does not exist, consider preparing an incentive policy that serves to educate potential investors about the city's vision and available resources - tailor to specific target areas including the Study Area. | Financier | Economic Development | Staff Time, Consultant Time (Optional) | X | | |
| Current housing stock is aging and needs stabilization in the adjacent established residential neighborhoods. | Initiate housing policies to address housing-related concerns and promote the availability of the housing policies to interested property owners. | Consider establishing a Community Development Corporation | Financier | Community Development & Planning/Housing Department | Staff Time | X | | |
| | | Promote existing Housing Rehab and Home Improvement Incentive Program at community meetings and events. | Financier | Community Development & Planning/Housing Department | Staff Time | X | | |

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Source: Ricker | Cunningham.

*Regulatory*

| Barrier Category* | Strategy | Action | Public Sector Role | Participating Groups | Resources Needed | Near-Term (< 24 Months) | Mid-Term (3 to 5 Years) | Long-Term (5 to 10 Years) |
|---|---|---|---|---|---|---|---|---|
| **Regulatory** | | | | | | | | |
| Inconsistent and dilapidated appearance of building facades, signs and landscaping. | Prepare a modified sign standard code for the Study Area, consistent with the vision. | Complete a set of sign standards unique to the Study Area that reflect the recommendations of the Strategy and formally adopt a regulating document to ensure new investment is consistent with the vision. | Regulator | Community Development & Planning | Consultant Time | | X | |
| | | Work with existing property owners to bring signs along the corridor into compliance with the new standards. | Promoter | Community Development & Planning | Staff Time, Consultant Time (Optional) | | X | |
| | Prepare an inventory of buildings within the corridor that have dilapidated building facades, signs, and landscaping. | Identify possible funding sources (matching grant dollars, low interest loans, tax increment financing dollars, bond dollars, etc.) to encourage private sector investment and reinvestment. | Financier | Community Development & Planning, Economic Development, Chamber of Commerce | Staff Time, Consultant Time (Optional) | | X | |
| The New York Avenue Corridor Strategy is not a regulating document and therefore, its vision is unprotected and can't be ensured. | Ensure land uses and densities described in the Strategy are allowed under existing zoning. | Identify specific parcels (those within the identified Opportunity Sites) where existing zoning is inconsistent with the vision established for the New York Avenue Corridor. | Promoter | Community Development & Planning | Staff Time | X | | |
| | | Contact the owners of these parcels and explain the regulatory disconnect and increase in value associated with a re-zoning action. | Promoter | Community Development & Planning | Staff Time | | X | |
| | Require future zoning changes and specific use permits to be evaluated using the Strategy's recommendations to ensure the request is consistent with the vision. | Incorporate the Strategy as a component to the Comprehensive Plan. | Promoter | Community Development & Planning | Staff Time | X | | |
| | Promote land uses that support the Strategy's vision and community desires. | Until regulations and standards are aligned with the vision expressed in the Strategy, work with existing property owners and developers to understand the vision for the Area and desired land uses. Where possible complete due diligence to address any value / market opportunity concerns and offer appropriate assistance (incentives) to overcome perceptions of risk. | Promoter | Community Development & Planning | Staff Time | On-Going | | |

| Barrier Category* | Strategy | Action | Public Sector Role | Participating Groups | Resources Needed | Near-Term (< 24 Months) | Mid-Term (3 to 5 Years) | Long-Term (5 to 10 Years) |
|---|---|---|---|---|---|---|---|---|
| **Regulatory** | | | | | | | | |
| Resources are being spent to monitor property maintenance and in select instances are barely enough to remain compliant, rather than affect a desired change. | Prepare a strategic plan for code enforcement rather than a formulaic one – balancing the desire to improve property conditions and attract new property owners who share the vision for the Area. | Establish a deliberate and balanced policy for code enforcement in the area that includes a combination of delayed action and constant monitoring - dictated by the desired outcome, ownership profile, and other criteria. | Code Enforcer | Code Enforcement, Community Development & Planning, City Management | Staff Time | X | | |
| | | Educate new and existing business owners of the rules and regulations regarding permits, temprary signage, and other common code violations. | Code Enforcer | Code Enforcement, Community Development & Planning, City Management | Staff Time | On-Going | | |
| | | Identify properties where deferred maintenance has been and continues to be a problem and contemplate the outcome of different approaches on a parcel-by-parcel basis. | Code Enforcer | Code Enforcement, Community Development & Planning, City Management | Staff Time | X | | |
| | | Based on the accepted strategy for enforcement, engage residents, business owners, and apartment property managers to address property maintenance concerns. | Code Enforcer | Code Enforcement, Community Development & Planning, City Management | Staff Time | On-Going | | |

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Source: Ricker | Cunningham.

*Organizational*

| Barrier Category* | Strategy | Action | Public Sector Role | Participating Groups | Resources Needed | Near-Term (< 24 Months) | Mid-Term (3 to 5 Years) | Long-Term (5 to 10 Years) |
|---|---|---|---|---|---|---|---|---|
| **Organizational** | | | | | | | | |
| Successful international corridors and districts are as multi-cultural as possible - additional input is needed to ensure the broadest possible representation. | Establish a committee of representatives of different cultures (Chamber reps) to advance the international corridor concept to make sure that it is broadly representative. | Meet with various Chamber representatives and other key stakeholders to discuss interest in participating in an international corridor concept, understanding the presence of potential vendors who might want to locate in a corridor or area. | Promoter | Arlington Chamber, Community Development & Planning, Other Chambers | Staff Time | X | | |
| | | Meet with the owners of properties in the Area identified as being within the international corridor and its influence area. Share recommendations and market opportunities, the purpose of which is to encourage appropriate tenanting. | Promoter | Arlington Chamber, Community Development & Planning, Other Chambers | Staff Time | X | | |
| The international corridor concept involves Grand Prairie as the "other bookend" since it has an existing concentration of international users which could be leveraged. | Meet with representatives of Grand Prairie and Tarrant County to discuss a multi-jurisdictional international corridor. | Share the results of the New York Avenue Corridor Strategy with Grand Prairie, particularly those elements which involve the international corridor concept - discern their interest and discuss potential next steps. | Promoter | Community Development & Planning, City Management, Tarrant County | Staff Time | X | | |
| | | Include the results of this and all future meetings in progress reports to elected and appointed officials. | Monitor | Community Development & Planning, City Management, Tarrant County | Staff Time | On-Going | | |
| School ratings, although high and improving are over-shadowed by negative perceptions of the area around them. | Meet with East Arlington school principals and AISD superintendent to identify and highlight strengths of the East Arlington schools. | Work with the school district and specific schools to prepare promotional materials that explain the area's assets and available programs, including unique offerings within the school system (share information with targeted audiences including developers, brokers, chambers, etc.) that might impact perceptions of quality and standards. | Promoter | Community Development & Planning, AISD | Staff Time | X | | |
| East Arlington has strong community and civic groups, churches, and schools that work independently of one another. Assistance is needed to "dot-connect" to have every organization working together towards a common vision. | Meet with school principals, church representatives, and community and civic organizations to understand how each group contributes the community's vision. | Present Strategy to school principals, church representatives, and community and civic organizations to ensure all groups are aware of the Strategy. | Organizer | Community Development & Planning, AISD, Churches, Community Organizations | Staff Time | X | | |
| | | Establish an email network with community groups (schools, churches, community and civic organizations) to promote events and to assist in organizing the community for special events. | Organizer | Community Development & Planning, AISD, Churches, Community Organizations | Staff Time | X | | |

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Source: Ricker | Cunningham.

*Other*

| Barrier Category* | Strategy | Action | Public Sector Role | Participating Groups | Resources Needed | Near-Term (< 24 Months) | Mid-Term (3 to 5 Years) | Long-Term (5 to 10 Years) |
|---|---|---|---|---|---|---|---|---|
| **Other** | | | | | | | | |
| Threat of this effort being "just another plan" rather than a deliberate strategy. | Prepare a schedule for periodic review and status reporting related to implementation of strategies and actions identified in this section. | Work with departments to incorporate strategies into annual business plans. | Monitor | Community Development & Planning | Policy Decision | X | | |
| | | Schedule and conduct periodic meetings with Advisory Committee and key stakeholders to provide a status report of the implementation strategies. | Policy Maker | Community Development & Planning | Policy Decision | X | | |

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Source: Ricker | Cunningham.