

INTRODUCTION

“The suburbs built in the 1940’s, 1950’s, and 1960’s are beginning to show the same signs of decay that central cities have been experiencing over the past generation, yet neighborhoods still are being built on the fringe that probably will be thrown away in 20 years.”

Source: Christopher B. Leinberger, Urban Land, October 1998.

This national trend of stagnating and declining “inner ring” suburbs is evident throughout the U.S. Facing increasing competition from not only development “on the fringe”, but from revitalizing downtowns, these “in between” communities are experiencing rapid declines in commercial property values and market share. Together, the public and private sectors face the challenge of revitalizing the commercial corridors that once represented the lifeblood of their communities. Their competitive position will gradually be eroded unless there is a significant repositioning of their role, recognition of their current target markets, and restructuring of their physical layout, to reflect the more mature nature of the communities that surround them.

The commercial corridors which have undergone revitalization are emerging as regional destinations in cities throughout the nation. In virtually every story of success, redevelopment and new development within these corridors 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 corridors, so too are the required solutions. Just as communities can no longer rely on a single economic engine to propel their future, neither can corridors rely on a single project or initiative. Multiple efforts are required, including projects, programs and policies, all designed to “ready the environment for investment.”

Forming and advancing the development agenda within commercial corridors requires a keen understanding of the goals and aspirations of its stakeholders, the realities of the marketplace, peculiarities of the political landscape and constraints of local public / private resources. With this understanding, project advocates are then positioned to establish priorities for action and investment. Through a process which involved educating stakeholders, soliciting their input, identifying barriers, and designing a program of actions to move the South Grapevine Highway, Rufe Snow Drive and Glenview Drive corridors towards a vision of revitalization, the Cities of

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Richland Hills and North Richland Hills (the Cities) and key stakeholders have sought to achieve this end.

P u r p o s e

Through the revitalization effort described herein, the Cities of Richland Hills and North Richland Hills initiated a process that would ensure future improvements within the South Grapevine Highway, Rufe Snow and Glenview Corridors occur with aesthetic and functional continuity. The *South Grapevine Highway Corridor Strategy* is intended to serve as an approved corridor plan providing recommendations for improvements and policy reform which can be implemented over the near- and long-term. As a strategic document it is designed to promote (re) investment.

Encouraging strategic investment in a compact environment (nodes or villages) which contains an appropriate mix of land uses, gives greater emphasis to multiple forms of access, and creates a unique sense of place, has been identified as the central approach for the revitalization of the corridors. The premise behind the selection of catalyst nodes, or villages, assumes concentrating resources in select areas that will have a positive economic “ripple effect” along the corridors and in surrounding neighborhoods. In this way, the Cities (as public partners) can effectively “leverage” investment efforts to overcome barriers and achieve desired outcomes.

O b j e c t i v e s

The project objectives which guided the work of the Cities, stakeholders and consultant team were:

- Revitalize the corridors
- Redevelop key nodes or villages
- Support multiple modes of access (vehicular, pedestrian, transit)
- Increase retail spending
- Improve opportunities for housing
- Reposition underused properties for redevelopment
- Prepare a long-term investment strategy for the corridors

These project objectives were articulated in the following mission statement for the Corridor revitalization effort:

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“To assist the Cities with preparation of redevelopment strategies for the corridors which produce tangible results and information which will lead to careful investments and a well-served market.”

M e t h o d o l o g y / P r o c e s s

The *South Grapevine Highway Corridor Strategy* has been developed to articulate opportunity, vision, and implementation for the future use and development of the South Grapevine Highway, Rufe Snow Drive and Glenview corridors within the area bounded by Loop 820 on the north and east, Baker Boulevard on the south and Haltom City on the west. It is intended to assist the Cities and property owners in this study area with identification and implementation of policies and funding options for investments necessary to serve future development and redevelopment initiatives.

The opportunity, vision and strategies presented here were developed with input from business and property owners in the corridors and representatives of the Cities, with guidance from the consultant team. The project began during the Fall of 2002 when the Cities retained a team of consultants comprised of Leland Consulting Group, Real Estate Strategists, and HNTB, Inc., Planners and Urban Designers, to provide a technical framework for discussions with the public regarding market opportunities, land use alternatives, and infrastructure impacts from potential development patterns on the affected Corridors.

Their efforts focused on investigating economic, financial, and market conditions in the influence area of the corridors (trade area), as well as physical conditions related to land use and access. This was accomplished through a visual inspection of 100 percent of the corridor properties, and analysis of primary and secondary data sources.

During the process, which lasted approximately 18 months, the consultant team conducted focus group discussions with corridor stakeholders and facilitated sessions with both City Councils and Planning Boards to review assembled data, identify corridor issues and impacts, refine potential catalyst investment projects, and discuss alternative strategies required to move the plan towards adoption and implementation. Invitations to the meetings were mailed to 100 percent of the property and/or business ownership within the corridors. In all, more than 50 business and/or property owners participated. Among these participants, many expressed their commitment to participating in improving the corridors and implementing the recommendations contained herein.

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Concerns regarding existing issues within the corridors, as well as efforts to improve its appearance and viability as a business location were voiced by both business and property owners. A major issue for stakeholders was the question of impacts from future actions including – limitations on access points, improvements to the physical realm, and elimination of non-revenue-generating land uses. An evaluation of the Corridors' strengths, weaknesses, opportunities and threats, or "SWOT" analysis, revealed the following perceptions:

Corridor Strengths/Opportunities

- Centralized Regional Location
- Good Access to Highway System
- Well-Established Activity Centers
- Near Stable "Empty-Nester" Market
- High Disposable Incomes in Area
- Highly Rated School District
- Recent Private Investment (Residential and Commercial)
- Low Crime Rate
- Established Property & Business Owners
- Local Lending Commitment

Corridor Weaknesses/Threats

- Aesthetics of Corridor ("Street Appeal")
- Aging Population in Area – Conservative Spending
- Commercial Vacancies/Space Turnover
- Deferred Maintenance/Code Enforcement
- Concentration of "2nd Tier" Commercial Uses
- Lack of Pedestrian Environment/Green Space
- Inconsistent Signage
- Inconsistent Building Design Standards
- Low Traffic Counts
- Lack of Residential Density
- Current North Hills Mall Situation (Uncertainty of Use)

Universal goals among the stakeholders included a stronger economic business climate, improved physical realm, and protection for property owner investments. Regardless of location within the corridors, all of the stakeholders appeared to understand that diversity among businesses and uses needed to be encouraged and that any future improvements be sensitive to residential areas beyond the corridors.

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R e p o r t F o r m a t

The outcome of the effort described above is the *South Grapevine Highway Corridor Strategy*. It identifies specific objectives and strategies in order to make the affected Corridors a better place to conduct business, shop, visit and live. It is based on a realistic understanding of market and physical conditions, and is intended to be responsive to the communities' needs.

The *Strategy* is organized into three major sections: the *Opportunity* – current and future market conditions as analyzed by the consultant team, niche market opportunities which the corridors could capitalize on and land use types which could be incorporated into catalyst projects; the *Vision* – concepts for new investment/reinvestment, including land uses, urban design elements, and public amenities; and, *Implementation* – strategies and actions for change designed to remove barriers and move investment and reinvestment forward.

OPPORTUNITY

Corridors Context

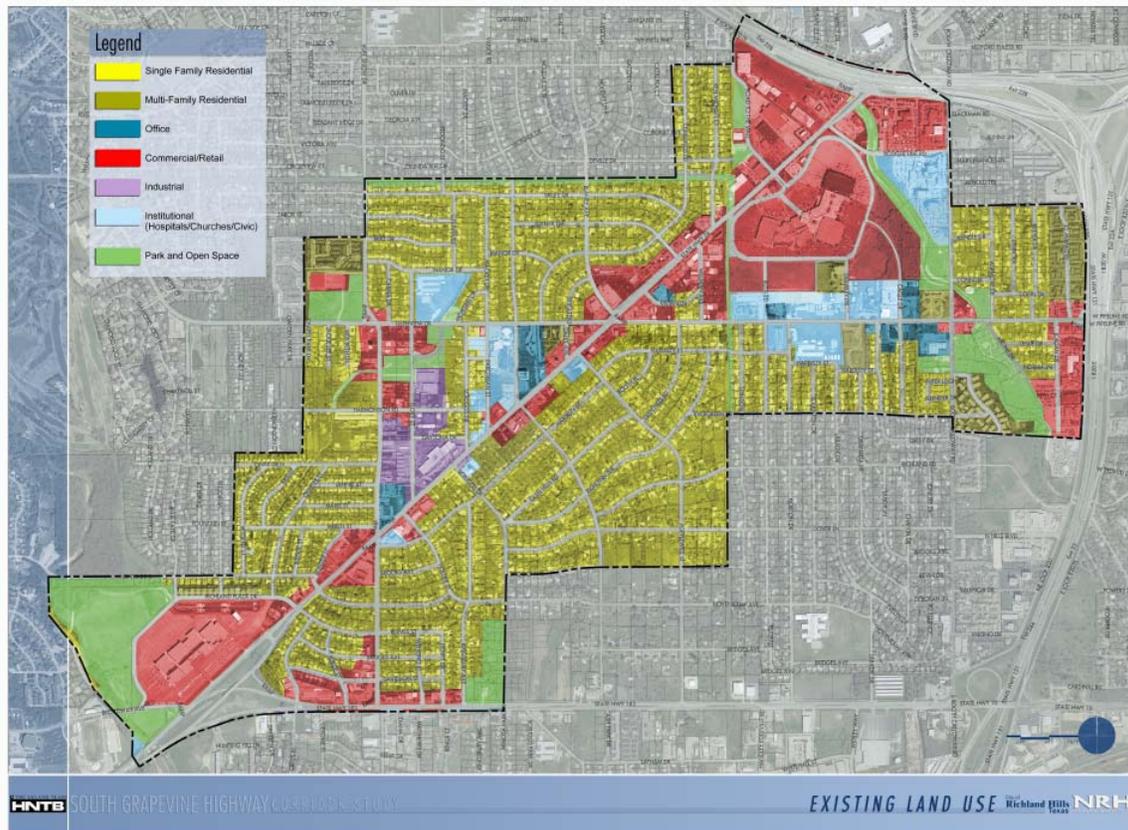
The South Grapevine Highway, Rufe Snow and Glenview Corridors (the Corridors) are located in the central portion of the Dallas-Fort Worth metropolitan area, within the Cities of Richland Hills and North Richland Hills. The South Grapevine Highway corridor extends approximately 2 miles, from Loop 820 south to Baker Boulevard; the Rufe Snow Drive corridor extends approximately 2.5 miles, from Loop 820 south to Baker Boulevard; and the Glenview Drive corridor extends approximately 2.5 miles, from Loop 820 west to the North Richland Hills city limits. There are hundreds of commercial and residential properties either contiguous to, or impacted by access issues or other influences in these three corridors. All were considered part of the study area. These properties represent a combined total area of over 1,800 acres. Figure 1 illustrates the study area and existing land uses in the corridors.

Given their central location within the Dallas-Fort Worth metropolitan area, the Corridors are strategically located to capture a significant share of the region's traffic and business growth. Forecasts indicate that more than 3.9 million square feet of employment and retail space and over 4,000 residential units could be absorbed in the surrounding trade area (summarized later in this section) over the next twenty years, from which the corridors could benefit. The level of investment which actually occurs within the corridors will be directly proportionate to the Cities' and property owners' commitment to stronger physical amenities, supportive infill policies, creative financial solutions and removal of barriers. Barriers to corridor redevelopment fall within four principal categories – physical, market, regulatory and financial. The discussion, which follows generally, describes these barriers in the context of existing conditions within the corridors.

The Corridors can best be described as mature suburban corridors, with limited new investment, fragmented ownership and a fairly consistent base of commercial and service uses. Uses in the corridors fall within the following categories – retail sales, auto sales and service, service commercial/office, and light industrial. The biggest concentrations fall within the retail sales and service commercial/office categories.

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Figure 1: Study Area Map



Analysis of Physical Environment

An analysis was conducted to understand both natural and man-made systems that affect the corridors. This region being highly developed is more impacted by physical man-made systems vs. natural factors. The natural systems have been enclosed and controlled which was the norm of land development between the 1950's and 1980's. Through this analysis the planners and market economists were able to understand the factors that individually impact areas of the corridors.

Existing elements that were analyzed include: land use, urban design, figure ground relationships, transportation networks, and park & trail systems. From an analysis of these elements the team created target areas for new redevelopment. These areas through the planning process became "villages". The villages are the site-specific areas targeting a development concept and plan. Together they establish a vision for revitalization.

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Existing Land Use

This defines the pattern of existing land uses. These patterns establish areas for residential, retail, office, light industrial, and civic land development.

Urban Design

This defines the physical character of an area. The urban design analysis establishes gateways for the corridor, edges to neighborhoods, linkages to be enhanced, focal points, and additional impacts that are understood by users.

Figure Ground Relationship

This defines the building footprints of existing buildings in relationship to surrounding buildings. The pattern of building in a residential single family neighborhood is much different in scale to the Mall. That understanding of scale can assist in establishing new development programs.

Transportation Network

This defines the size and scale of existing roadways. The roadways connect land and development together. Roadways can also create barriers to pedestrian movement.

Parks and Trails

This defines the location of existing parks and trails, and importantly the future network to link the parks together with trails. Trails and linkages to many amenities are important to future development opportunities.

Market Opportunities

Planning for the strategic revitalization of business corridors requires that a community understand its physical limitations and know its market. The purpose of the market analysis, then, was 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
- Provide an accurate and independent “story” to tell potential developer/investor audiences

Primary and Secondary Trade Areas

The market analysis focused on identifying opportunities within representative trade areas for the corridors. These primary and secondary trade areas were determined by the following factors:

- Location of the interstate highway system
- Development growth patterns
- Concentrations of housing and commercial development
- Jurisdictional boundaries

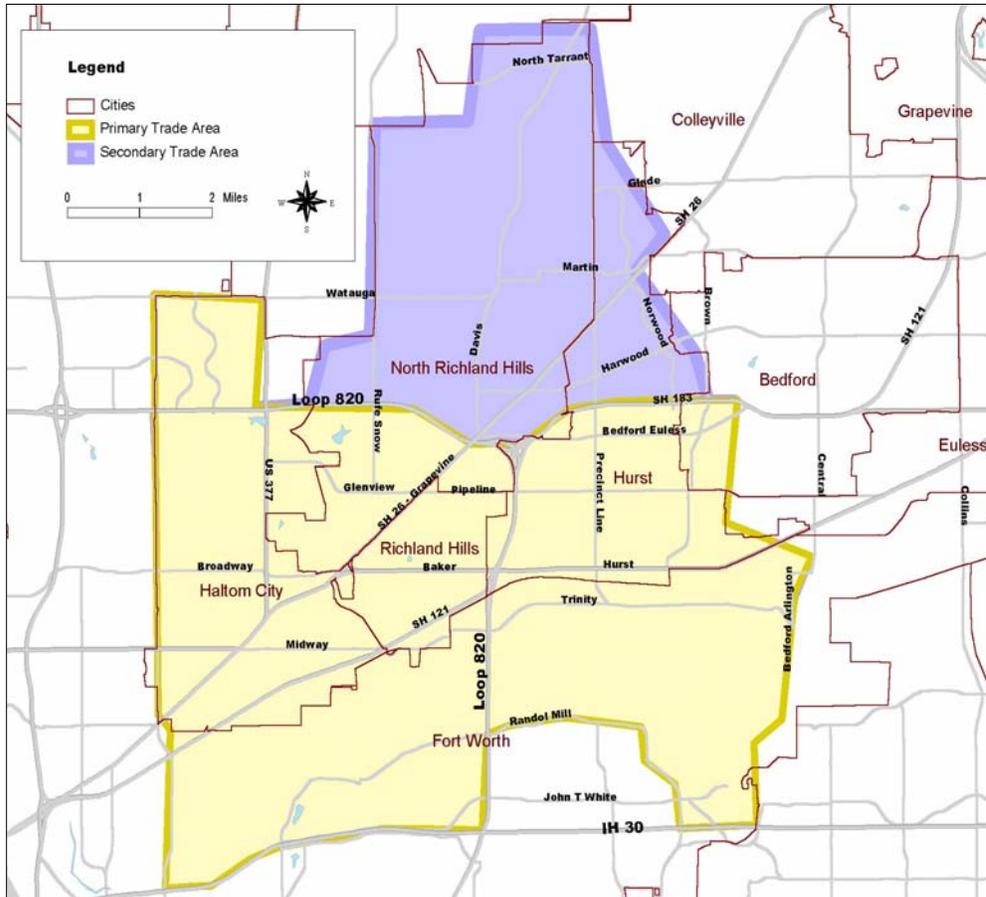
The primary trade area included portions of Richland Hills, North Richland Hills, Hurst, Haltom City and East Fort Worth. An additional secondary trade area added the remaining portion of North Richland Hills and areas of Watauga. Figure 2 illustrates the primary and secondary trade area boundaries.

What the analysis showed was that the region offers unique opportunities for the corridors. There is market demand and the Corridors, with strategic public and private reinvestment and supportive policies, could be positioned to capitalize on select niche and destination opportunities.

The following information presents an overview of current and future conditions within the primary and secondary trade areas for Corridors.

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Figure 2: Trade Area Map



Economic and Demographic Indicators

Economic and demographic characteristics in the market are indicators of overall trends and economic health which may affect private and public sector development. The following summarizes economic and demographic trends which will affect development demand within the Corridors' trade areas over the near- and long-term. Table 1 summarizes key economic and demographic indicators for the Corridors' primary and secondary trade areas.

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TABLE 1: TRADE AREA CHARACTERISTICS

TRADE AREA POPULATION

	<i>Primary Trade Area</i>	<i>Secondary Trade Area</i>
2020 Total (proj.)	101,500	75,200
2010 Total (est.)	96,900	70,400
2000 Total	91,100	61,500
CAAGR* (2001-2020)	0.5%	1.0%

TRADE AREA HOUSEHOLDS

	<i>Primary Trade Area</i>	<i>Secondary Trade Area</i>
2020 Total (proj.)	41,600	26,100
2010 Total (est.)	39,800	24,500
2000 Total	37,350	21,600
CAAGR* (2001-2020)	0.5%	1.0%

TRADE AREA EMPLOYMENT

	<i>Primary Trade Area</i>	<i>Secondary Trade Area</i>
2020 Total (proj.)	88,000	23,200
2010 Total (est.)	79,400	19,400
2000 Total	68,500	14,100
CAAGR* (2001-2020)	1.3%	2.5%

TRADE AREA AGE DISTRIBUTION (2000)

	<i>Primary Trade Area</i>	<i>Secondary Trade Area</i>
Less than 20	29%	32%
20 to 34	22%	25%
35 to 54	30%	30%
55 to 74	14%	10%
75 and over	5%	3%
Median Age	32.5	30.8

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TABLE 1: TRADE AREA CHARACTERISTICS (CONT'D)

TRADE AREA INCOME DISTRIBUTION (2002)

	<i>Primary Trade Area</i>	<i>Secondary Trade Area</i>
Less than \$25,000	23%	18%
\$25,000 to \$50,000	32%	26%
\$50,000 to \$75,000	23%	22%
\$75,000 to \$100,000	12%	14%
\$100,000 to \$150,000	7%	12%
\$150,000 and over	3%	8%
% of Households > \$50,000	45%	56%
Median Household Income	\$45,500	\$56,400

TRADE AREA EDUCATIONAL ATTAINMENT (2000)

	<i>Primary Trade Area</i>	<i>Secondary Trade Area</i>
High School Diploma	79%	86%
Bachelors Degree	17%	28%
Graduate Degree	4%	9%

**Compound Average Annual Growth Rate*

Source: U.S. Census; NCTCOG; Claritas, Inc.; and Leland Consulting Group.

As shown in Table 1, the primary trade area for the Corridors exhibits slower population, household and employment growth than the secondary trade area. In addition, the primary trade area includes smaller household sizes and an older, less educated population. These indicators are typical of a mature, established suburban submarket whose residents have generally lived in the area for several years, if decades. While these areas generally exhibit smaller household incomes, they usually have greater disposable income, because many have paid off mortgages. This typically results in higher home ownership rates and greater neighborhood stability.

The secondary trade area exhibits many of the characteristics of a growing suburban “fringe” subarea: high population and employment growth; younger, highly educated residents; bigger families, etc.

Psychographic Profile

In addition to economic and demographic indicators, retailers and employers are increasingly utilizing lifestyle demographics to target potential market segments. These “psychographic profiles” of a community attempt to predict lifestyle, social and psychological tendencies based on

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demographic characteristics. For the primary trade area, psychographic profiles were analyzed to characterize residents. This profile information is summarized below.

The primary trade area population predominately falls into the *Starter Families*, *Family Scramble*, *Gray Collars* and *Second City Elite* profiles, described as follows:

- *Starter Families*: Unlike most of their contemporaries, Starter Families opted for early marriage and parenthood. This cluster has large families and work in blue-collar jobs. The solo parents in this cluster have young children. They prefer living in the natural beauty of the Pacific Coast areas, the Rockies, and the states bordering northwestern Canada. They are more likely than most to buy Sears tires, use Post Raisin Bran, and own a travel trailer.
- *Family Scramble*: Although this cluster is found in many markets, it is centered across the Southwest and Pacific areas. It ranks third in Hispanic population and has an above-average number of Native American members. Ranked 62nd in higher education, this cluster shows all the scars of poverty, but they are managing by working in transport, labor and service. They are more likely than most to buy a VCR, shop at Montgomery Ward and own baby furniture and equipment.
- *Gray Collars*: The highly skilled blue-collar workers of this cluster weathered the economic downturn of America's industrial areas and now enjoy a resurgence of employment. Their kids grew up and left, but the *Gray Collars* stayed in the Great Lakes "Rust Belt." They are more likely than most to own a convertible bought new, buy indoor light fixtures, use Kellogg's Mueslix and drink Diet 7-Up.
- *Second City Elite*: The movers and shakers of America's smaller cities are the prototypes for Second City Elite. Most are married without children; some have teenagers. They hold professional and white-collar management positions. Most have attended college or are college graduates. They are more likely than most to buy Montblanc/Waterman pens, shop at the Warner Bros. Store, own an Acura/Lexus/Infiniti bought new and own business software.

Market Indicators By Land Use

Critical to interpreting the Corridors' competitive position within the primary and secondary trade areas is an understanding of the supply characteristics of competitive developments within these submarkets. In order to identify potential market opportunities given the area's competitive position and prevailing market conditions, demand estimates were also prepared. The following

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discussion presents an overview of the role each land use plays in the Corridors, existing supply conditions, and estimates of future demand by land use type.

Housing

Historically, the Corridors served as the Cities' centers for commercial retail, service and financial activity. Today, while similar corridors across the country continue to play a role in these arenas, their function and purpose has changed markedly. From Portland, Maine to Portland, Oregon, in communities ranging from 2,500 to 2.5 million, historic commercial corridors are making a comeback, not only as a center for services, products and employment, but as urban neighborhoods with residences, entertainment venues and community gathering places.

Supply characteristics for the Corridors' trade area housing markets are summarized as follows:

- The average single-family home price in Northeast Tarrant County was \$185,000 in 2002, up approximately 3% over the 2001 figure. This compares to the Fort Worth-Arlington Metropolitan Area average price of \$148,000 in 2002, also up 3% over the 2001 figure.
- Approximately 7,125 single-family homes were sold in Northeast Tarrant County in 2002, up approximately 5% over the 2001 figure. This comprised approximately 37% of the Fort Worth-Arlington Metropolitan Area market.
- Apartment rents in the Northeast Tarrant County submarket averaged between \$460 and \$1,050 (depending on unit type), compared to the Fort Worth-Arlington Metropolitan Area average of between \$450 and \$1,020.
- Apartment vacancy rates in the Northeast Tarrant County submarket averaged 7.6% in 2002, up from 7.3% in 2001. This compares to the Fort Worth-Arlington Metropolitan Area average vacancy rate of 8.4% in 2002, up from 7.5% in 2001.

Demand for new residential units is primarily a factor of the growth in income-qualified households within a trade area. Because the Corridors' trade areas are primarily infill development areas, housing redevelopments are likely to be denser product types, such as attached ownership units (townhomes, condominiums, etc.) or rental apartments. Therefore, market demand for each of these product types was estimated. Projected trade area household growth was analyzed along with historical patterns of single- and multi-family development to arrive at an estimated average annual demand for attached ownership housing in the primary trade area of approximately 30 to 40 units per year over the next 20 years. Attached ownership housing demand in the secondary trade area was estimated at approximately 40 to 50 units per

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year over this time period. Demand for rental units in the primary trade area was estimated at approximately 50 to 60 units per year, while demand for rental units in the secondary trade area was estimated at approximately 60 to 70 units per year. Tables 2A and 2B summarize housing demand in the primary and secondary trade areas.

**TABLE 2A: HOUSING DEMAND SUMMARY
 PRIMARY TRADE AREA**

<i>Attached Ownership Housing</i>	
2000 Trade Area Households:	37,350
2020 Trade Area Households:	41,600
Total New Trade Area Households:	4,250
Estimated Percent of New Housing Units:	15%
Total Trade Area Demand for New Attached Ownership Housing Units:	640
Annual Trade Area Demand for New Attached Ownership Housing Units:	30 to 40
<i>Rental Housing</i>	
2000 Trade Area Households:	37,350
2020 Trade Area Households:	41,600
Total New Trade Area Households:	4,250
Estimated Percent of New Housing Units:	25%
Total Trade Area Demand for New Rental Housing Units:	1,060
Annual Trade Area Demand for New Rental Housing Units:	50 to 60
Source: NCTCOG; Claritas, Inc.; and Leland Consulting Group.	

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**TABLE 2B: HOUSING DEMAND SUMMARY
SECONDARY TRADE AREA**

<i>Attached Ownership Housing</i>	
2000 Trade Area Households:	21,600
2020 Trade Area Households:	26,100
Total New Trade Area Households:	4,500
Estimated Percent of New Housing Units:	15%
Total Trade Area Demand for New Attached Ownership Housing Units:	675
Annual Trade Area Demand for New Attached Ownership Housing Units:	40 to 50
<i>Rental Housing</i>	
2000 Trade Area Households:	21,600
2020 Trade Area Households:	26,100
Total New Trade Area Households:	4,500
Estimated Percent of New Housing Units:	25%
Total Trade Area Demand for New Rental Housing Units:	1,125
Annual Trade Area Demand for New Rental Housing Units:	60 to 70
Source: NCTCOG; Claritas, Inc.; and Leland Consulting Group.	

Assuming a 25% to 35% capture rate of primary trade area housing demand, annual demand for new units within the Corridors could be expected to total between 1,000 and 1,400 over the next twenty years. Potential housing opportunity niches include:

- Diversity of housing choices – denser ownership housing (townhomes, condos)
- Greater live/work opportunities
- Limited affordable housing opportunities
- Potential for niche housing, e.g., seniors, empty nesters, etc.

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Retail

The existing retail base in the Corridors is relatively dispersed and does not provide a cohesive mix of shopping and service opportunities. One of the primary goals of the *South Grapevine Highway Corridor Strategy* is to concentrate retail/service activity at key centers, or “nodes”, along the Corridors. By doing so, this activity is not diluted along a lengthy service area, but rather is allowed to build a critical mass at key locations. The resulting activity centers will encourage both an expansion and diversification of the Corridors’ overall retail/service tenant base.

Supply characteristics for the primary and secondary retail trade areas are summarized in Table 3.

TABLE 3: RETAIL SUPPLY SUMMARY

Submarket Area	YE2002	YE2001
Northeast Tarrant County		
Total SF	5,023,800	5,301,400
Vacancy Rate	5.9%	3.1%
Avg. Rental Rate	\$17.80	\$16.05
Absorption	172,500	255,700
North Richland Hills		
Total SF	3,620,600	3,408,900
Vacancy Rate	21.6%	28.5%
Avg. Rental Rate	\$12.00	\$11.50
Absorption	401,500	155,000
Hurst		
Total SF	3,460,600	3,462,000
Vacancy Rate	7.3%	7.0%
Avg. Rental Rate	\$9.55	\$10.50
Absorption	-11,900	30,000
Northeast Fort Worth		
Total SF	2,071,300	1,983,000
Vacancy Rate	10.1%	4.4%
Avg. Rental Rate	\$9.37	\$9.80
Absorption	-120,400	75,000
Source: Weitzman Group; Cencor Realty Services; and Leland Consulting Group.		

Demand for retail space is determined by the potential level of retail expenditures in a given trade area. Existing and projected total household retail expenditures in the primary and secondary

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trade areas were determined by multiplying growth in households with that portion of household income typically spent on general retail purchases. The results of this analysis indicated demand for between 300,000 and 350,000 square feet of additional retail space in the primary trade area and between 400,000 and 450,000 square feet of additional retail space in the secondary trade area over the next twenty years.

The degree to which the Corridor is able to capture new demand within the trade areas (and beyond) is a function of the redevelopment process itself. Given the small overall size of the local market for retail development, successful redevelopment of the Corridors will depend on defining them as a “place” in the minds of area residents. Redeveloping them as retail and community destinations will necessarily increase their ability to capture not only a greater share of their trade area demand, but also to reach beyond those boundaries. Assuming that the Corridors could capture 25% to 35% of primary trade area retail demand over the next twenty years, there would be between 80,000 and 125,000 square feet of new retail space in the Corridors. It should be noted that these demand figures do not address the potential for a region-serving retail concentration that would have a substantially larger trade area draw. These figures primarily address demand for neighborhood-serving retail uses. Potential retail opportunity niches include:

- Build on potential entertainment destination (Mall/Hospital area)
- Convenience/service retail for growing employment base
- Neighborhood-serving retail for existing and future housing

Office

Another foundation of the *South Grapevine Highway Corridor Strategy* is the provision of live/work opportunities within the Corridors. In concert with densifying housing, office development can be introduced to further strengthen the connection between employment uses and residential uses. The Corridors will also work as a business address if there are ample opportunities for business support space, retail services, eating and drinking establishments, and government and other institutional tenants (i.e., North Hills Hospital).

Supply characteristics for the primary and secondary office trade areas are summarized in Table 4.

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TABLE 4: OFFICE SUPPLY SUMMARY

<i>Suburban Fort Worth Market</i>	<i>YE2002</i>	<i>YE2001</i>	<i>YE2000</i>
Class A			
Total SF	2,417,100	2,417,100	2,417,100
Vacancy Rate	20%	15%	10%
Avg. Asking Rate	\$16.67	\$17.41	\$17.41
Class B			
Total SF	3,530,200	3,530,200	3,440,200
Vacancy Rate	28%	29%	27%
Avg. Asking Rate	\$14.02	\$14.47	\$14.82
Class C			
Total SF	522,300	522,300	522,300
Vacancy Rate	32%	28%	24%
Avg. Asking Rate	NA	NA	NA

Source: CoStar Group and Leland Consulting Group.

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 primary and secondary trade areas were used to estimate an average annual demand.

The analysis revealed demand for between 2.3 and 2.4 million square feet of new office space for the primary trade area and approximately 1.1 to 1.3 million square feet for the secondary trade area through 2020. A capture rate of approximately 10% to 20% of primary trade area demand would result in between 230,000 and 460,000 square feet of office space within the Corridors by 2020.

As with demand for retail space, the ability to capture additional demand both within and outside of the trade areas depends on the overall success of the redevelopment process itself. Given the existing physical restraints, office demand will likely be limited to smaller Class B multi-tenant space. As the Corridors redevelop and land prices begin to increase, demand for higher density mixed-use projects (e.g. "office-over-retail") will begin to emerge. The more successful the Cities are in establishing the Corridors as a destination, the greater will be the ability to capture demand from tenants seeking these kinds of spaces. Potential office opportunity niches include:

- Regional access is marketable amenity – opportunity to increase employment base
- Local service office space to support housing/employment base

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- Increased housing density supports live/work opportunities
- Potential for niche office, e.g., medical office, live/work, office condos, etc.

Industrial

As with office development, the *South Grapevine Highway Corridor Strategy* will provide the Cities with greater opportunities to build and enhance job base. Additional industrial development further strengthen the connection between employment uses and residential uses, as well as bolster existing employment concentrations within the Corridors (e.g., Richland Business Center).

Supply characteristics for the primary and secondary industrial trade areas are summarized in Table 5.

TABLE 5: INDUSTRIAL SUPPLY SUMMARY

South Fort Worth Market	YE2002	YE2001	YE2000
Distribution			
Total SF	2,417,100	2,417,100	14,896,400
Vacancy Rate	8.1%	6.6%	3.5%
Absorption	-325,000	-254,000	637,400
Flex/Light Industrial			
Total SF	7,394,900	7,042,800	6,707,400
Vacancy Rate	11.9%	7.4%	5.6%
Absorption	99,000	142,000	186,900
Bulk Warehouse			
Total SF	17,908,900	17,056,100	16,806,100
Vacancy Rate	6.1%	5.8%	4.6%
Absorption	60,000	-54,100	34,600

Source: CoStar Group and Leland Consulting Group.

As with office space, demand for new industrial 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 primary and secondary trade areas were used to estimate an average annual demand.

The analysis revealed demand for between 1.3 and 1.5 million square feet of new industrial space for the primary trade area and approximately 600,000 to 800,000 square feet for the

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secondary trade area through 2020. A capture rate of approximately 10% to 20% of primary trade area demand would result in between 130,000 and 260,000 square feet of office space within the Corridors by 2020. Potential industrial opportunity niches include:

- Regional access is marketable amenity – opportunity to increase employment base
- Service commercial combined with light industry to support housing/employment base
- Build on existing base with ancillary/support industry

Market Opportunity Summary

Taking into consideration these market analysis conclusions, specific development opportunities were identified for the Corridors. These opportunities not only represent market-driven trends supporting development, but projects which have the potential to strengthen and link these opportunities to the Corridors' existing neighborhoods. Table 6 presents a summary of market opportunities and their potential timing.

TABLE 6: MARKET OPPORTUNITY SUMMARY

<i>Land Uses</i>	<i>Potential for Development</i>		
	<i>Short-Term (1 to 5 Years)</i>	<i>Mid-Term (5 to 10 Years)</i>	<i>Long-Term (10+ Years)</i>
<i>Retail</i>			
Specialty Retail (*)		X	
Entertainment Retail (*)		X	
Neighborhood-Serving (*)	X		
Community/Regional (*)	X		
<i>Office/Industrial</i>			
Class A High-Rise			X
Corporate Campus (*)		X	
Class B Mid-Rise (*)		X	
Local Service/Professional (*)	X		
Office/Industrial "Flex" (*)	X		
<i>Housing</i>			
Single Family Detached (*)	X		
Rental Apartments (*)	X		
Rowhouse/Townhouse (*)	X		
Condominiums (*)	X		
Live/Work Lofts (*)		X	
Senior Housing (*)	X		

() Indicates land uses appropriate for Corridor revitalization.*

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The following characterizes some of the land use types described above:

Retail

- **Specialty Retail:** retailers which are a “destination”, or which typically involve a special trip (The Gap, Starbucks)
- **Entertainment Retail:** retailers which emphasize “experience” as much as, or more than, merchandise (Dave & Busters, REI)
- **Neighborhood-Serving Retail:** retailers which are convenience-oriented, usually frequented as part of a “multi-stop” trip (dry cleaners, fast food, hair salon)
- **Community/Regional Retail:** large-scale retailers such as grocery stores, “big box” and department stores (Albertsons, Wal Mart, Foleys)

Office/Industrial

- **Class A Office:** highest quality “corporate” office space in best location; often developed in downtown or suburban office park settings; command highest rents in the market (Downtown Dallas and Fort Worth)
- **Corporate Campus:** high quality “corporate” office space in suburban setting; typically lower density space with multiple buildings in office park setting; near the top of the market in terms of rents (Las Colinas)
- **Class B Mid-Rise:** good quality office space in suburban setting; typically lower density space in either small office park setting or stand-alone configuration; middle of the market in terms of rents (Liberty Bank Building)
- **Local Service Professional:** smaller office buildings in suburban setting; typically cater to local professionals (realtors, insurance agents, accountants, etc.); lower to middle of the market in terms of rents; could be stand-alone or part of a shopping center
- **Office/Industrial Flex:** hybrid between office and industrial space; typically has more office finish than industrial; examples would be office/showroom or office/warehouse space; does not typically house heavy industrial uses

Housing

- **Single Family Detached:** typical residential pattern found in most study area neighborhoods; density of units typically range between 2 and 5 units per acre; could accommodate higher-density units (smaller lots)
- **Rental Apartments:** typical multifamily housing seen in most Texas markets – 3-story, walk-up apartments; can be designed in other configurations (high-rise or lower-density)
- **Rowhouses/Townhouses:** higher density ownership unit without units above or below; typically larger than apartments and condominiums; design emphasis on “street appeal”
- **Condominiums:** higher density ownership unit; similar in design to rental apartments, with higher level of amenities
- **Live/Work Lofts:** typically a combination of residential and commercial/industrial space; accommodates both living and work space; example could be housing unit over a workshop or gallery
- **Senior Housing:** housing products targeted specifically to older residents, from active seniors and retirees (age 55 to 70) to elderly residents needing assistance (80 and older); typically higher density housing, such as apartments, condominiums, patio homes, etc.; emphasis on low maintenance and high degree of amenities and services

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Development Absorption Summary

Based on the level of development demand by land use type summarized in the previous section, the Corridors should be positioned to attract a significant share of Trade Area demand over the next twenty years. Table 7 summarizes projected absorption of land uses in the Corridors over this development period.

TABLE 7: DEVELOPMENT ABSORPTION SUMMARY

<i>Land Use Type</i>	<i>Trade Area Demand (20-Year Period)</i>	<i>South Grapevine Highway Corridors</i>			
		<i>Market Share</i>		<i>20-Year Absorption (Units/SF)</i>	
		<i>Low</i>	<i>High</i>	<i>Low</i>	<i>High</i>
<i>Residential (Units):</i>					
Single Family	2,550	25%	35%	638	893
Multifamily	1,700	25%	35%	425	595
<i>Residential Total</i>	<i>4,250</i>			<i>1,063</i>	<i>1,488</i>
<i>Non-Residential (SF):</i>					
Retail	350,000	25%	35%	87,500	122,500
Office	2,300,000	10%	20%	230,000	460,000
Industrial	1,300,000	10%	20%	130,000	260,000
<i>Non-Residential Total</i>	<i>3,950,000</i>			<i>447,500</i>	<i>842,500</i>

As shown, residential absorption equates to approximately 50 to 75 units per year, while nonresidential absorption equates to between 20,000 and 45,000 square feet per year. The nature of real estate absorption is such that larger projects coming on-line may capture several years' worth of demand at one time. For example, a 100,000-square foot shopping center may accommodate four to five years of retail demand in a single year. Because of these likely "spikes" in development activity, the absorption estimates prepared for the Corridors should be considered for their impact over longer periods of time, rather than on an annual basis.

VISION

The vision for the revitalization of the Corridors embodies the following key elements:

- Corridors vision needs to be holistic – addressing design, market forces and development/redevelopment economics
- Corridors vision will avoid diluting investment by encouraging investment in key activity areas
- Corridors vision will introduce fresh development concepts, such as urban housing, mixed-use development and new public amenities
- Corridors vision will create a sense of place, with unique land uses, public spaces and connections to neighborhoods

Village Areas

As explained early in this report, the strategy for revitalization of the Corridors is based on redevelopment and targeted investment in these “village areas”, which hold investment potential, despite select economic and physical redevelopment challenges. These village areas are defined as: a highly urbanized place that has a concentration of jobs, housing units, commercial use, public spaces, public transportation, pedestrian activity and a sense of place. Village areas are frequently located at significant intersections. Predominant land uses within villages can be residential, commercial and public. Within this relatively compact geographic area, different land uses are found side by side or within the same structures. The mix of uses in the village is located in developments with minimal setbacks, reduced parking requirements, and taller structures, all in an effort to achieve higher densities necessary to support transit, pedestrian activity, private investment and a sense of place. A village area serves as a catalyst for public and private investment and economic activity, effectively building off the strengths of the surrounding area and connecting to adjacent neighborhoods.

Selection Process and Criteria

Village areas were generally identified and evaluated based on screening criteria, with guidance from Corridor stakeholders and staff from both cities. While an expressed interest in an immediate development or redevelopment project influenced the selection of certain areas, most

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were selected because they presented a compelling location or market advantage for future investment. Criteria used to select catalyst areas for detailed analysis included the following:

Village Area Selection Criteria

- Presence of a market opportunity in the near- or long-term
- Opportunities to strengthen and link existing activity centers
- Ability to leverage existing or planned public investment
- Physical environment including parks and open space, public improvements
- Potential for creating key entryways or “gateways” into development areas
- Ownership patterns including public and private and multiple vs. assembled
- Presence of unified, energetic stakeholders
- Upward trend in local investment
- Availability of public programs, incentives and tools for revitalization
- Ability to create activity centers, emphasizing opportunities with multi-modal access
- Presence of support organizations – service groups, churches, schools
- Demonstrated community need, both perceived and quantified
- Consistent in character and building on prevailing strengths

Using the above criteria, the *Strategy* identified eight key mixed-use growth areas, or “villages”, along the three corridors: the Mall/North Hills Hospital area; Grapevine Highway and Parchman Street; Grapevine Highway and Popplewell Street; Walker Commercial Center; Rufe Snow Drive and Grapevine Highway; Glenview and Rufe Snow; Booth Calloway and Glenview; and Grapevine Highway and Glenview. However, experience has proven that implementable plans must maintain a high degree of flexibility. As markets change, the physical realm must change with them. Therefore, while these village areas have been identified today as offering potential for leveraged investment, the criteria will provide the Cities with the tools to evaluate future projects which might occur outside these areas, and which are still consistent with the vision for the corridors. A description of a development concept for each village area is presented in the remainder of this section of the report.

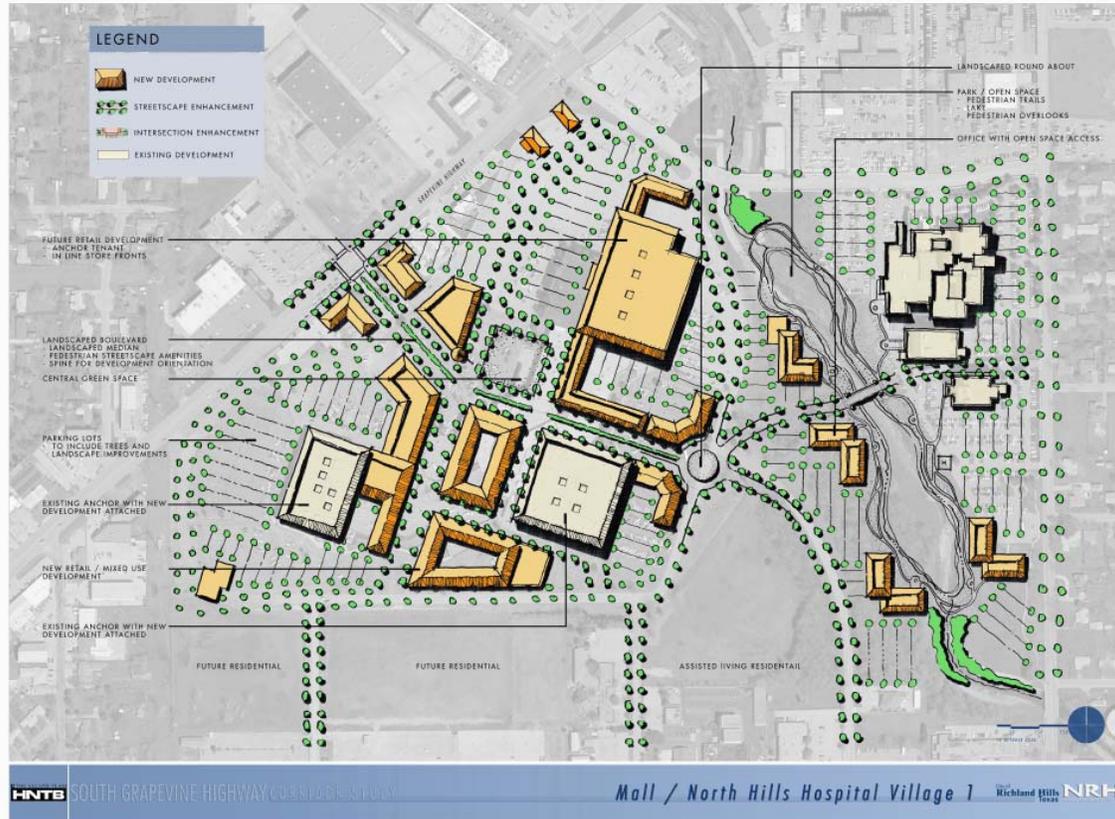
Village Plans

Each village plan includes the following:

- The village location and definition of uses within the village, as well as a limited list of public, private and non-profit stakeholders with a presence in the village who will participate in reinvestment efforts as facilitator, investor, promoter, or other appropriate role.
- Conceptual plan of future improvements in the village at build-out, including anticipated levels and location of streetscape enhancements, location of public spaces and sidewalks, building scale, street/building relationship, and densities.

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Village #1: Mall/North Hills Hospital Village



The Mall/North Hills Hospital Village is located in the southeast quadrant of the interchange of Loop 820 and South Grapevine Highway and provides the best opportunity for a region-drawing development. Two major facilities – North Hills Mall and North Hills Hospital – share this quadrant of the interchange area, one (the Mall) undergoing substantial renovation and the other (the Hospital) looking for opportunities to expand. Anticipated redevelopment of this village would include the following components:

Land Uses

- Regional Retail/Entertainment -- movie theaters, entertainment retail, restaurants, etc.
- Hospital Campus – medical offices, housing
- Urban Mixed-Use – housing, neighborhood retail

Urban Design Elements

- Park/Open Space – trail connections, lake, pedestrian overlooks
- Streetscape – landscaped medians, pedestrian streetscape amenities, central green space
- Parking – trees and landscape improvements

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Development Types

This village has the largest variety of potential new development. That is created with the size of the redevelopment site and the concept to break down the site into smaller areas that correspond to walkable pedestrian streets. These streets with their alignments have opportunities for both large- and small-scaled projects.

Retail development types for this village include: primary large box retail - such as Best Buy, Office Max, Tower Records, Pottery Barn; grocery anchors; smaller support retail,



such as dry cleaners, sandwich shops, coffee houses, restaurants; and other service-related functions.

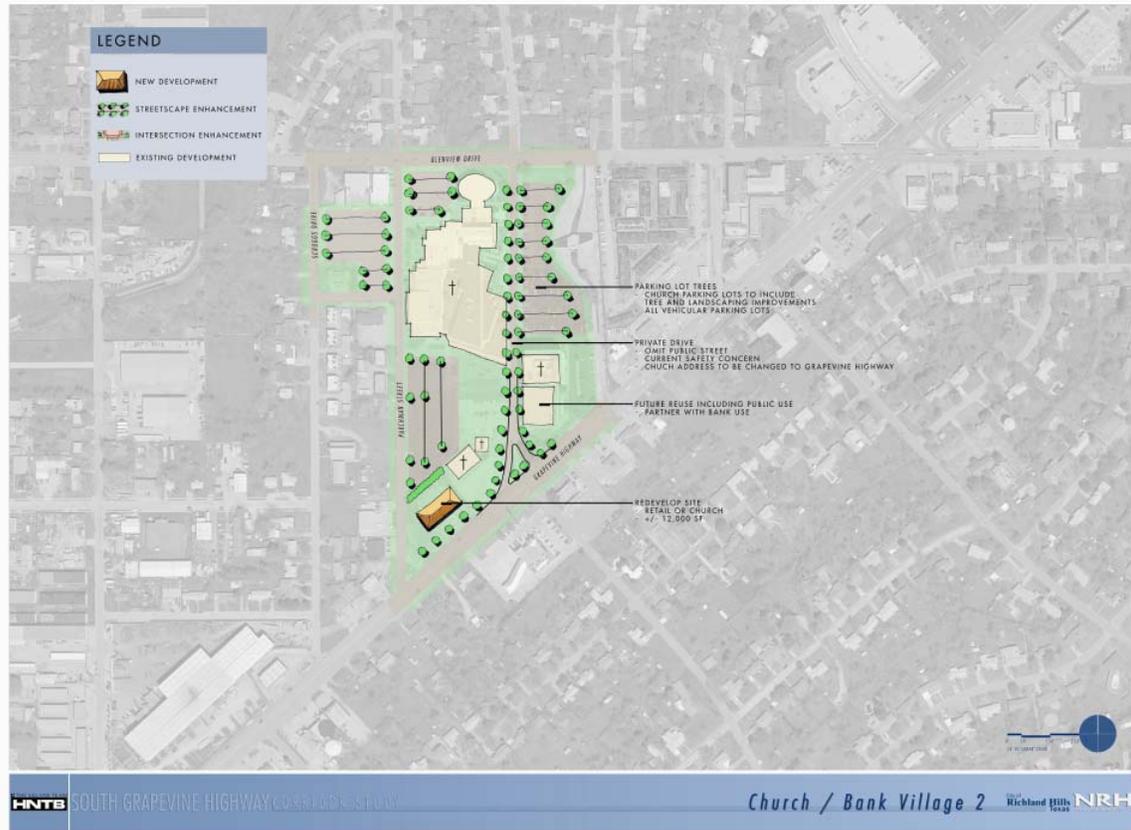
Office types for this village include: general office, professional, and medical office users. Residential development, with street frontage and street access, for the village includes: townhouses; urban lofts;

mid-rise condominiums; and urban apartments. Mixed-use development is highly supported with ground floor, street-accessed commercial and residential units above.



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Village #2: Church/Bank Village



The Church/Bank Village is located on the west side of South Grapevine Highway, between Vance Road and Parchman Street. The project area consists primarily of property owned by the NRH Baptist Church. During the planning process, the Church expressed a desire to re-orient their property to more directly connect to South Grapevine Highway. In addition, they would like to explore possible public uses on the property in partnership with the Cities. Anticipated redevelopment of this village would include the following components:

Land Uses

- Future Public Uses – recreation, community center
- Retail – possible commercial opportunity fronting on South Grapevine Highway

Urban Design Elements

- Private Drive – vacate street to accommodate orientation to South Grapevine Highway
- Streetscape – landscaped enhancements along private drive and South Grapevine Highway
- Parking – trees and landscape improvements

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Development Types

This village offers some new retail development. The village concept establishes some in-line retail for small neighborhood support uses, such as pastry shops, dry cleaners, sandwich shops, coffee houses, etc.



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Village #3: Future Joint Recreation Center Village



The Future Joint Recreation Center Village is located in the southeast quadrant of the South Grapevine Highway/Popplewell Street intersection. The project area consists of a church building, seven residential units, an existing bank building and vacant property. During the planning process, the two Cities expressed a desire to explore the possibility of a joint recreational facility. The intent of such a facility would be to not only address the recreational needs of residents in “South of the Loop” neighborhoods, but do so in a fiscally responsible way. In addition, the activity that a facility like this would generate would create positive economic impact for both Cities. Redevelopment of this village would include the following components:

Land Uses

- Joint Recreation/Community Center
- Bank Redevelopment – new facility with enlarged customer service and drive-through
- Retail – possible convenience/service retail fronting on South Grapevine Highway

Urban Design Elements

- Intersection Enhancements – crosswalks, pedestrian sidewalks, streetscape
- Landscape Buffer and Pedestrian Enhancements – provide connections into neighborhood

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Development Types

This village offers some revitalized retail development along with the joint city recreation facility at the corner. The village concept establishes some retail for small neighborhood support uses, such as pastry shops, dry cleaners, banks, sandwich shops, coffee houses, etc.



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Village #4: Walker Commercial Center Village



The Walker Commercial Center Village is located on the west side of South Grapevine Highway, between Scroggs Drive and Flory Street. The project area consists of the Walker Construction facility and a mix of residential, service commercial and light industrial uses. During the planning process, Walker representatives expressed a desire to explore the possibility of redeveloping/renovating the properties they own in this village area. The intent of such redevelopment would be to not only address the aesthetic improvements needed along the Walker Construction facility frontage, but to provide a “business park” identity for the project area. Anticipated redevelopment of this village would include the following components:

Land Uses

- Walker Construction facility remains – new paint concept
- Residential Redevelopment – change to light industrial/business park uses

Urban Design Elements

- Truck Access Reconfiguration – 90 degree turn on Flory Street with entry signage
- Landscape Buffer – business park entry landscaping along South Grapevine Highway
- Internal Roadway Loop – close Flory Street to through traffic
- Landscape Buffer – dense landscaping and fence between business and neighborhood uses

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Development Types

The Walker village offers a unique focus to revitalization. This village provides new opportunities for light manufacturing, product assembly, distribution, machine repair, landscaping and yard maintenance, and other labor-intensive applications.



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Village #5: Albertson's Retail Village



The Albertson's Retail Village is located at the southeast corner of South Grapevine Highway and Rufe Snow Drive. The project area consists of the proposed Albertson's shopping center and adjacent residential uses. Because the Albertson's redevelopment is currently in process, this village provides a unique opportunity to leverage both public and private investment at or near this intersection. The potential "ripple effect" that this project represents could extend into the neighborhoods to the east and south, providing opportunities for housing rehabilitation and mixed-use development. Anticipated redevelopment of this village would include the following components:

Land Uses

- Albertson's anchor store
- Retail Redevelopment – community center retail/service uses
- Residential Redevelopment – selected future redevelopment of adjacent residential units

Urban Design Elements

- Primary Intersection Treatment – crosswalks (special paving), themed lighting, signage
- Urban Landscape/Site Standards – increased tree and landscape standards
- Streetscape Enhancements – sidewalks, street trees

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Development Types

Retail development types for this village include an Albertson's full-service grocery store for the anchor.

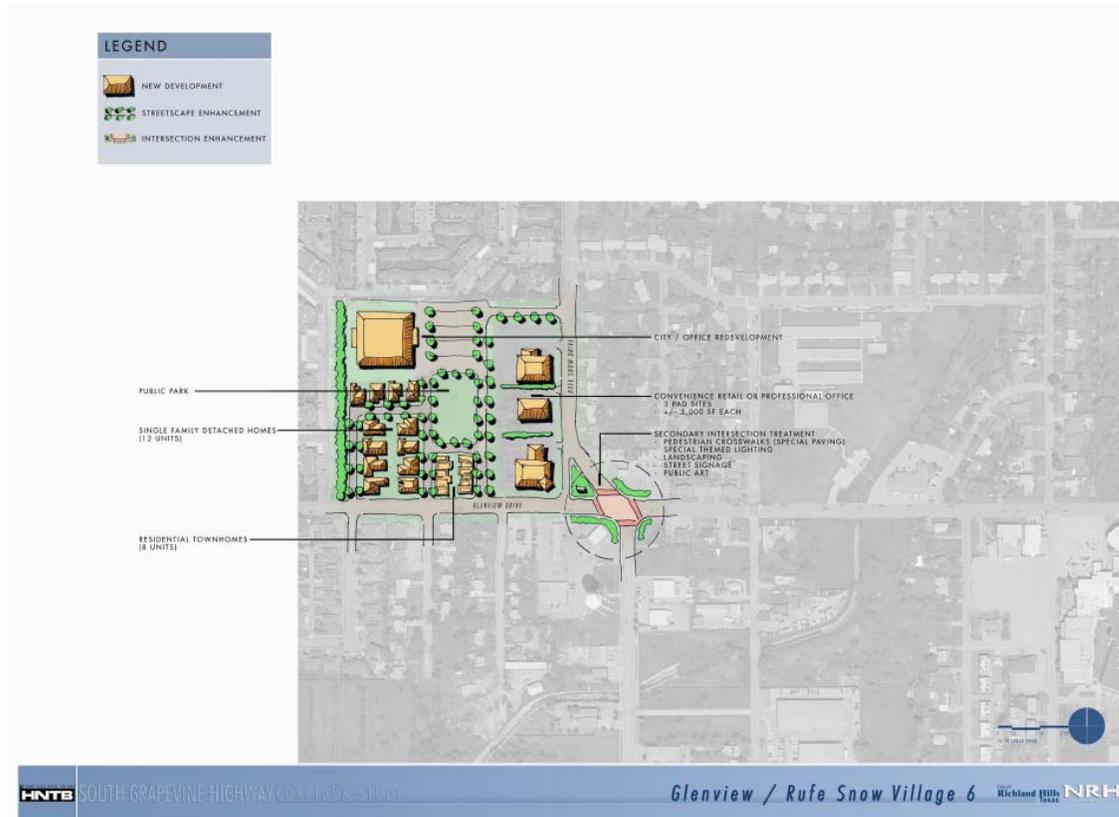
Neighborhood retail which supports adjacent residential can consist of the following development types that will locate in the center: barber / hair

salon; pastry shops; tax preparation services; dry cleaners; banks; sandwich shops; coffee houses; restaurants; etc. This commercial center includes sites for stand-alone pad sites which can include fast-food – McDonald's, Wendy's, Whataburger -- and automobile gas stations.



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Village #6: Glenview/Rufe Snow Village



The Glenview/Rufe Snow Village is located at the northwest corner of Glenview Drive and Rufe Snow Drive. The project area consists of a vacant Food Lion store, a vacant gas station and vacant land. The Food Lion building has been considered for a variety of uses, including space for City of North Richland Hills services. With that kind of activity center established, there would be the potential for additional office and/or retail development along Rufe Snow, as well as selected urban housing products. Anticipated redevelopment of this village would include the following components:

Land Uses

- Redeveloped Food Lion building – public use and/or office space
- Retail Development – convenience retail/service uses along Rufe Snow Drive
- Residential Development – small lot single family and towhomes

Urban Design Elements

- Secondary Intersection Treatment – crosswalks (special paving), themed lighting, signage, public art
- Public Park – serves as a “courtyard” connection between residential and office uses
- Landscaping – buffer between village and adjacent neighborhoods

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Development Types

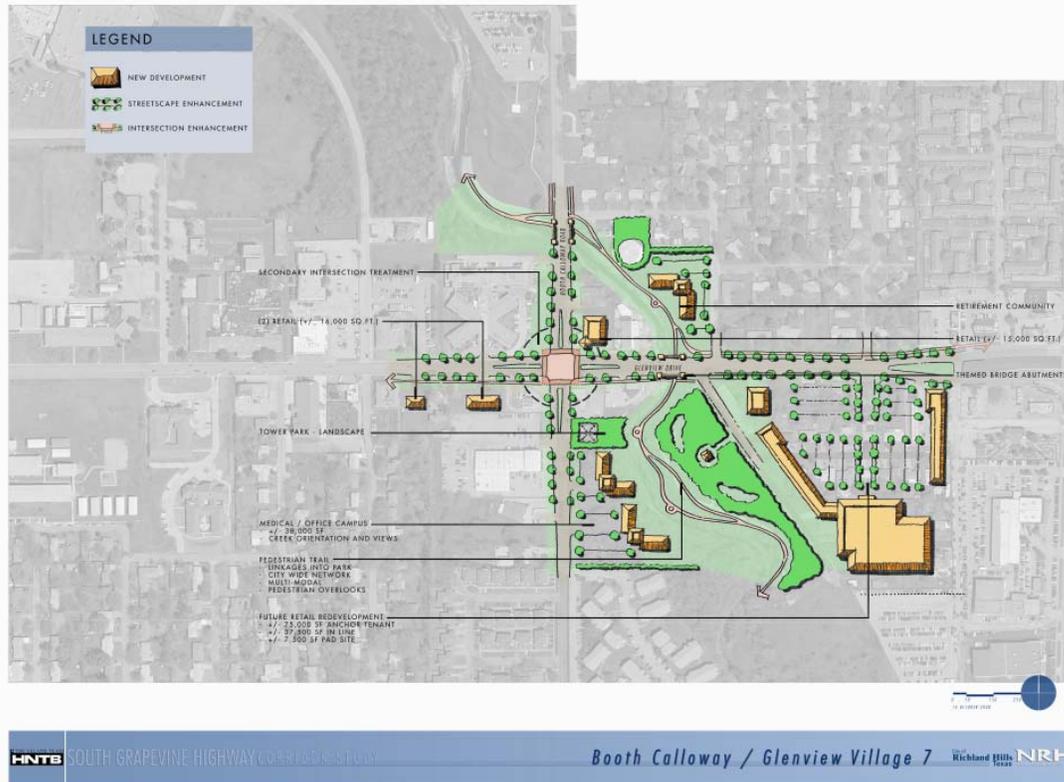
Retail development types for this village include a revitalized grocery store building that can accommodate municipal offices, city services, etc for the anchor. This village includes sites for stand-alone pad sites which can include fast-food, an automobile gas station, or professional office.

The retail in this village supports the larger quantity of residential urban land uses -- townhouses, row houses, patio homes, and urban single family.



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Village #7: Booth Calloway/Glenview Village



The Booth Calloway/Glenview Village is located around the Booth Calloway Road/Glenview Drive intersection. The project area consists of aging residential and commercial uses, vacant property and open space. The redevelopment concept attempts to create a regional retail and medical office center, taking advantage of the site's proximity to both Loop 820 and North Hills Hospital. The concept also includes strong open space connections to the regional trail system. Anticipated redevelopment of this village would include the following components:

Land Uses

- Regional Retail Center – large-scale retailer and in-line convenience/service space
- Medical Office Campus – with waterfront orientation and views
- Retirement Community – active adult housing with frontage on open space

Urban Design Elements

- Secondary Intersection Treatment – crosswalks (special paving), themed lighting, signage
- Public Park – amenity for medical office campus
- Streetscape Enhancements – street trees, sidewalk treatments
- Themed Bridge Abutments – gateway enhancement on Glenview Drive

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Urban Design Elements (Cont'd)

- Pedestrian Trails – connection to regional system

Development Types

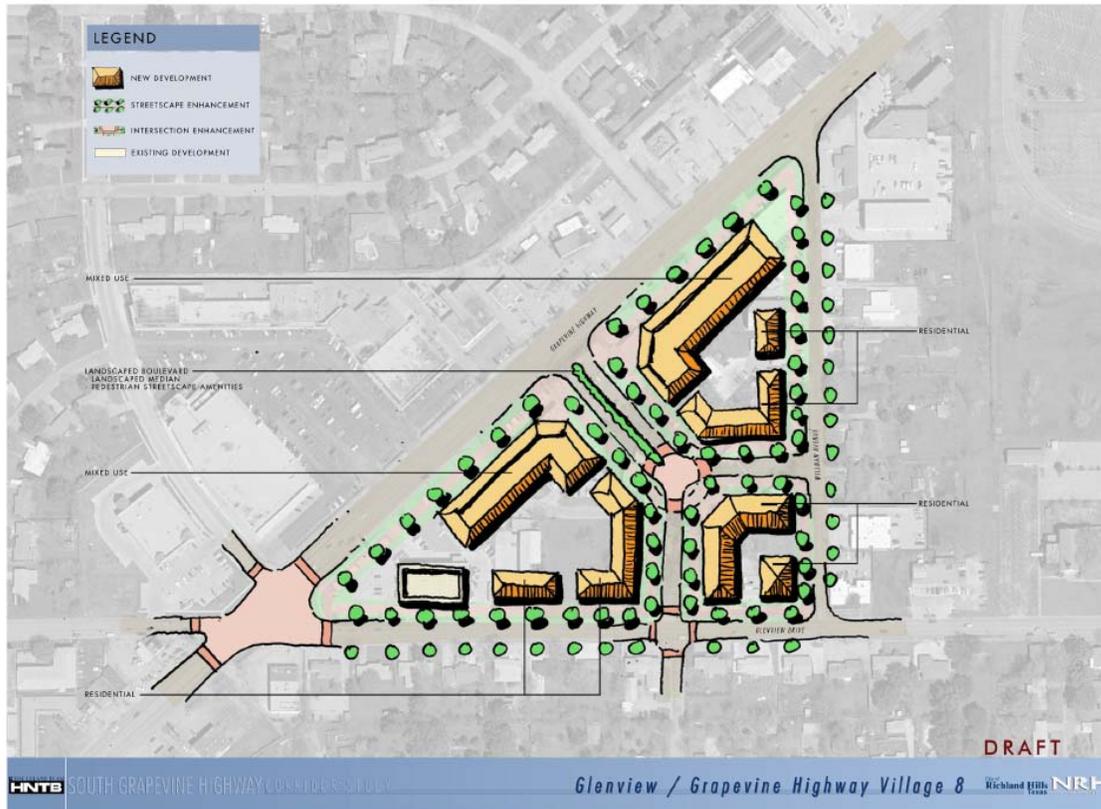
Commercial development types for this village include: primary large-box retail, such as Best Buy, Office Max, Tower Records, Pottery Barn or grocery anchors; smaller support retail, such as dry cleaners, sandwich shops, coffee houses, restaurants; and other service-related functions. Office types for this village supports: general office, professional, and medical office users. Residential



development, with street frontage and street access, for the village includes senior care residential. Mixed-use development is highly supported with ground floor, street-accessed commercial and residential units above.

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Village #8: South Grapevine Highway/Glenview Village



The South Grapevine Highway/Glenview Village is located in the northeast quadrant of the South Grapevine Highway/Glenview Drive intersection. The project area consists of commercial uses, vacant property and aging residential uses. The redevelopment concept envisions an opportunity to introduce urban housing products and mixed-use development in support of commercial uses at the intersection. The concept also includes strong streetscape connections to adjacent neighborhoods and an interior roadway system. Anticipated redevelopment of this village would include the following components:

Land Uses

- Urban Housing – in support of existing commercial uses
- Mixed-Use – housing over retail along the Grapevine and Glenview frontages

Urban Design Elements

- Primary Intersection Treatment – crosswalks (special paving), themed lighting, signage
- Streetscape Enhancements – street trees, sidewalk treatments, landscaped median

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Development Types

Retail development types for this village include smaller shops such as pastry shops, dry cleaners, banks, tax service, sandwich shops, coffee houses, etc. The retail in this village supports the larger quantity of residential urban land uses -- townhouses, row houses, patio homes, and urban single family. Mixed-use development is highly supported with ground floor, street-accessed commercial and residential units above.



Streetscape Elements

A key component affecting the physical environment of the Corridors relates to streetscape improvements. Currently, there is not a lot of consistency in design and level of improvement from Corridor segment to segment. Therefore, as part of the urban design component of the *Strategy*, treatments to various intersections along the project's primary thoroughfare, South Grapevine Highway, were prepared. These streetscape elements are specific to this corridor and should occur only at intersections or village areas. They include the following elements:

- Ornamental street lighting
- Special traffic signals
- Special paving, monumentation and/or landscaping
- Pedestrian linkages into adjacent neighborhoods

Because one of the *Strategy's* key premises is the ability to leverage, and not dilute, investment throughout the Corridors, recommended streetscape elements are delineated into three types of intersections:

- Gateways – these include key entries into the South Grapevine Highway Corridor
- Primary Intersections – these include the largest intersections (in terms of activity) in the Corridor
- Secondary Intersections – these reflect intersections where activity is lighter, but which still provide key neighborhood connections

Figures 3a, 3b and 3c provide graphic illustrations of the different levels of treatment for these intersection types.

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Figure 3a: Gateway Elements

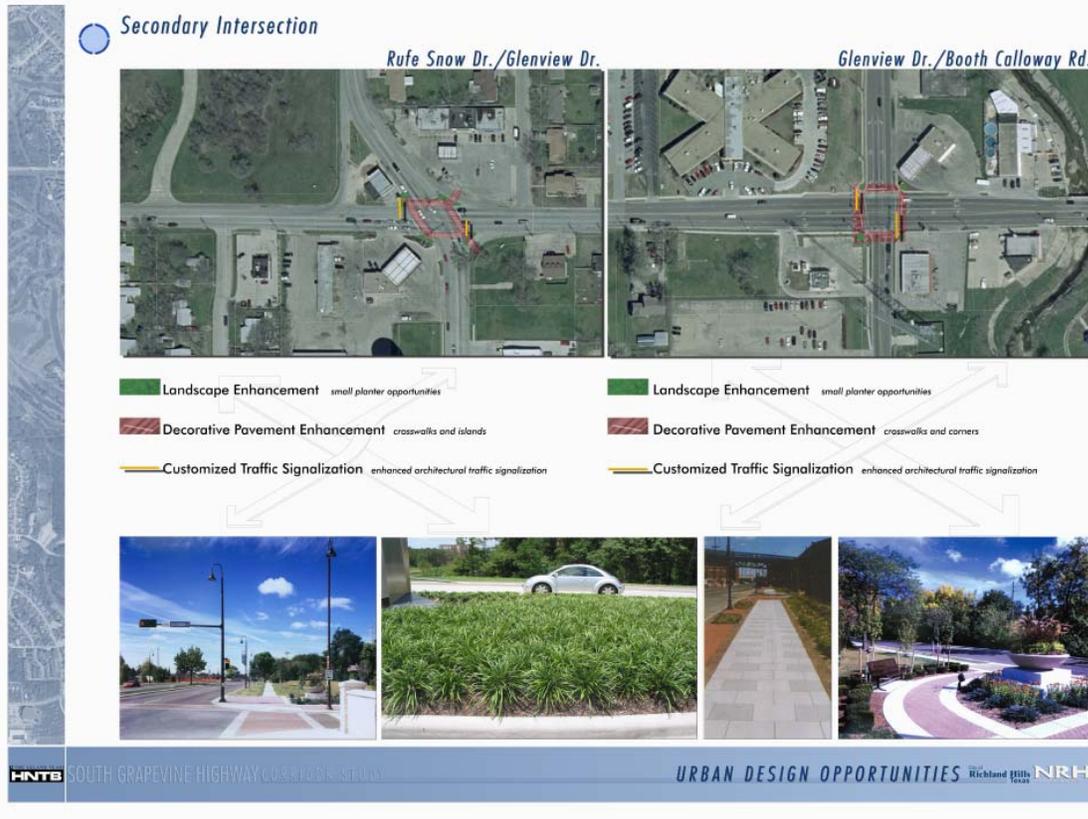


Figure 3b: Primary Intersection Elements



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Figure 3c: Secondary Intersection Elements



IMPLEMENTATION

Following identification of the catalyst investment areas (villages) and analyses came the challenge of outlining an implementable strategy for promoting investment in the target areas, as well as throughout the corridors. Webster's Dictionary defines implementation as "a means for accomplishing an end" or "an action to put into effect."

As explained earlier in the report and during the plan process, no one project will revitalize these Corridors. Rather, revitalization will be dependent on a series of actions designed to capitalize on market opportunities and overcome barriers - effectively readying the environment for investment. Key to the successful implementation of the corridor strategy will be the continued identification and implementation of actions tailored to the unique issues of the corridors and respective districts and villages within the corridors.¹ This strategy builds community goodwill; enhances quality-of-life; provides opportunities for public participation; allows special-interest groups to have a role in the revitalization effort; sends a message that the corridors are successful and making positive strides; and, creates an increasingly attractive environment for investment and development. Investors, developers and lenders seek out environments with market opportunity and prospects for success, devoid of obstacles and sound in sustainability.

G u i d i n g P r i n c i p l e s

The range of actions identified to move the plan forward were selected based on a foundation of select guiding principles. These guiding principles, while general in nature, are responsive to the conditions analyses, market opportunities, catalyst concepts and (re)development programs, and stakeholder input.

Guiding Principles

- The Cities will maintain a pro-business attitude towards redevelopment in the corridors.
- Underdeveloped properties will be put into productive use over a phased period of time.

¹ The definition of "actions" is broad as it applies here – it includes public, private or public-private physical projects, social programs, and educational programs; public relations and goodwill-building programs; and policy reform – identified to promote opportunities and overcome barriers.

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- Advocacy entities will be identified and empowered to implement projects to further the vision.
- Higher density development will be encouraged in key locations.
- Public investment will “leverage” private investment.
- The physical environment will balance the role of vehicles, pedestrians and other modes of transportation.
- Creative reinvestment “tools” and incentives will be diverse and made available.
- Development framework is established with short-term standards and long-term guidelines.
- Awareness of the Corridors’ role in the region will be heightened and stakeholder education will continue.
- Corridor strategies will be enforced and supported by public policy.

A c t i o n s f o r C h a n g e

Just as the challenges or “barriers” to investment are multifaceted, so too must the solutions be. The national trend of stagnating and declining “inner ring” suburbs and the corridors within them is evident not just in Richland Hills and North Richland Hills, but throughout the U.S. Facing increasing competition from development “on the fringe”, as well as revitalizing downtowns, Richland Hills and North Richland Hills as “in between” communities, could experience a heightened decline in commercial property values and market share unless specific actions are taken. Together, the public and private sectors face the challenge of revitalizing the South Grapevine Highway Corridors. Their competitive position will continue to be eroded unless there is a significant repositioning of their role in the market; restructuring of their physical layout; recognition of the economic challenges inherent in infill and corridor redevelopment; and, aggressive recruitment of niche opportunities.

The *South Grapevine Highway Corridor Strategy* is the roadmap to move the Cities’ and stakeholders’ vision towards reality and to ensure that redevelopment of the corridors be accomplished in a way that balances private investment objectives with community sustainability. Presented in the remainder of this section is a discussion of actions / strategies to eliminate barriers and encourage private investment/reinvestment. Ultimately, the Cities of Richland Hills and North Richland Hills, their Councils, Commissions, staff and citizenry will have to select 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.

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General Principles of Corridor Revitalization

“What we do know about suburban commercial corridors is apparent to anyone who visits them: typically, they are one-dimensional forms of development that lack a distinct sense of place or community and that increasingly are plagued by problems to do with fragmentation, congestion, inconvenience, inefficiency, deterioration, and visual blight . . . they are no longer suited to the denser, more complex urban context of metropolitan America.”

Source: Ten Principles for Reinventing America’s Suburban Strips, Urban Land Institute, 2001.

To build a strategy framework for implementing Corridor revitalization, it is useful to study the experiences of similar corridors in other markets. In 2001, the Urban Land Institute commissioned a study of three suburban commercial corridors, chosen as representative of different prototypes of commercial environments. The results of that study were principles of revitalization that apply to most suburban strips. These principles formed the foundation of the actions for change developed for the *South Grapevine Highway Corridor Strategy*.

10 Principles of Corridor Revitalization

1. Ignite Leadership and Nurture Partnerships
2. Anticipate Evolution
3. Know the Market
4. Scale Commercial Land to the Market
5. Establish Pulse Nodes of Development
6. Tame the Traffic
7. Create the Place
8. Diversify the Character
9. Eradicate the Ugliness
10. Put Your Money (and Regulations) Where Your Policy Is

Source: Urban Land Institute

Using the principles of corridor revitalization outlined above as a framework, a set of actions for change were developed. These actions are summarized below.

Principle #1: Ignite Leadership and Nurture Public/Private Partnership

Actions:

- Incorporate an Interlocal Agreement for Joint Planning, Implementation, Marketing, and Funding

Develop a formal agreement between both cities to jointly support and promote the Corridors.

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- Establish a Framework for Advocacy Entities

Initially establish a business association with the intent to eventually create and empower a Public Improvement District that could fund public improvements through property assessments.

Principle #2: Anticipate Evolution

- Monitor Commercial Trends, Concepts and Products

Be innovative and keep up with local, regional and nationwide market trends.

- Encourage New Concepts in the Corridor – Mixed-Use, Public Amenities

Research new and unique land uses and markets for their appropriateness within the Corridors.

Principle #3: Know The Market

- Develop Data Base of Market Information/Trends for Dissemination to Real Estate Professionals

Keep current information and demographics on primary market.

- Build Relationships with Area Brokers through Seminars, Workshops, Monthly Lunches

Keep real estate professionals well informed about the Corridors.

Principle #4: Scale Commercial Land To Market

- Re-Zone Strategic Parcels to Encourage More Mixed-Use Development

Zone parcels to be flexible and responsive to long-term market trends.

- Encourage Infill Development Concepts -- Mixed-Use, Urban Housing, Pedestrian-Oriented Retail

Maximize land use efficiency to enhance marketability and promote investment and revenue potential.

Principle #5: Establish Pulse Nodes of Development

- Develop Joint Public Improvement Plans for Gateway Areas and Activity Centers (“Villages”)

Develop capital improvement plans and strategically invest public dollars at visible intersections and activity centers to maximize impact and stimulate private investment.

- Formulate Public/Private Implementation Strategies for Village Areas

Develop specific plans for each “village area”: define signature projects; accommodate assemblage and acquisition of parcels; and prepare economic incentives to create a catalyst for development.

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Principle #6: Tame The Traffic

- Balance Traffic Design to Accommodate Multimodal Activity

Develop a plan for coordinating all automobile, pedestrian, bikes, mass transit and parking activities.

- Work with TXDOT on Access Management Plan

Eliminate multiple access points, encourage shared drive approaches, improve alignments at major intersections, and coordinate timing of signal systems.

Principle #7: Create the Place

- Develop a “Branding” Program for Marketing the Corridor Area

Create a new street name for Grapevine Highway and a new concept for marketing the area.

- Identify and Encourage “Urban” Housing Opportunities

Identify underutilized properties to potentially develop as smaller lot single family, townhouses and high-quality multifamily housing, to feed and support commercial development in the Corridors.

Principle #8: Diversify the Character

- Plan Activity Centers with Different Uses, Levels of Access and Orientation to Neighborhoods

Ensure that activity centers contain unique land uses that support the local market and tie activity centers to surrounding neighborhoods.

- Initiate Planning for a Joint Public Facility

Sharing a joint public facility such as a Recreation Center serves the area, is a cost savings for each city and stimulates activity and private investment along the Corridors.

Principle #9: Eradicate the Ugliness

- Form an Overlay District to Implement Joint Urban Design, Development and Architectural Standards for Corridors

Create a unique character and image for the Corridors.

- Encourage Consistent Code Enforcement

Both cities should support property and aesthetic improvements and apply equal code enforcement throughout the Corridors.

- Promote Image Enhancement Campaign

Develop policies and regulations that improve Signage, Lighting, Landscaping, Streetscape and promote underground Utilities.

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Principle #10: Put Your Money Where Your Policy Is

- Conduct Regulatory “Audit” to Determine Inconsistencies Between Current Regulations and Proposed Land Uses

Continually seek to update and modernize regulations and land use controls to enhance the Corridors and “level the playing field” for efficient redevelopment.

- Develop a Comprehensive Package of Funding Options for Corridor Improvements – ED Sales Tax, Bond Financing, EDA Grants, Tax Abatements

Consider all available funding options to build strategically-placed public improvements in order to stimulate private investment throughout the Corridors.

- Create a New Tax Increment District for the Corridors to Fund Necessary Public Improvements

Explore the viability of either creating a new TIF district or expanding an existing TIF district to provide a funding mechanism for public improvements.

- Formulate a “Benchmarking” Program for Evaluating Corridor Revitalization Efforts

Present annual report card on new private investments and increased values in relation to public dollars spent.

Priority Implementation Strategies

The set of strategies outlined above was presented to the Richland Hills and North Richland Hills Councils at a work session in October 2003. At that time, the two Councils were asked to assist in prioritizing strategies for implementation. Through a “dot exercise”, Council members were asked to pick their top 10 strategies for priority implementation. The results of that prioritization exercise were encouraging in that the two Councils had 6 common strategies among their top 10s. These 6 strategies were then reflected as **highest** priority items:

Actions for Change: Councils’ Highest Priorities

1. Incorporate an Interlocal Agreement for Joint Planning, Implementation, Marketing, and Funding.
2. Encourage Consistent Code Enforcement.
3. Encourage Infill Development Concepts -- Mixed-Use, Urban Housing, Pedestrian-Oriented Retail.
4. Plan Activity Centers with Different Uses, Levels of Access and Orientation to Neighborhoods.
5. Build Relationships with Area Brokers through Seminars, Workshops, and Monthly Lunches.
6. Develop a Comprehensive Package of Funding Options for Corridor Improvements.

The remaining strategies that were included in each City’s top 10 were then reflected as **high** priority items:

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Actions for Change: Councils' High Priorities

1. Initiate Planning for a Joint Public Facility.
2. Encourage New Concepts in the Corridor – Mixed-Use, Public Amenities.
3. Re-Zone Strategic Parcels to Encourage More Mixed-Use Development.
4. Form an Overlay District to Implement Joint Urban Design, Development and Monitor Architectural Standards for Corridors.
5. Commercial Trends, Concepts and Products.
6. Develop Joint Public Improvement Plans for Gateway Areas and Activity Centers ("Villages").
7. Create a New Tax Increment District for the Corridors to Fund Necessary Public Improvements.
8. Promote Image Enhancement Campaign.

Once the two Councils prioritized strategies, an action plan was developed for implementation of those strategies. The action plan identified the following:

- Specific action items in implementing the strategies
- Cities' role in implementing
- Key partners that may be called upon to help implement
- Timing of efforts (immediate, short-term or long-term)
- Funding and cost factors

Table 8 at the end of this section of the report summarizes the action plan for revitalization of the South Grapevine Highway corridors.

F a c t o r s f o r S u c c e s s

A few key components should be in effect for an implementation program to succeed. These include:

COMMITTED ON-GOING LEADERSHIP

Successful corridor development and redevelopment usually comes down to the leadership of a few individuals or "cheerleaders". Those individuals are focused and committed to seeing the project or the program through to successful completion. It may be an elected public official or public sector staff member, it may be a business or citizen leader or a combination working in committee. Nonetheless, virtually all urban redevelopment programs such as corridor redevelopment, civic center development, community beautification and the like have consistent and determined leaders to see them through.

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MULTIPLE PROJECTS

The need for a variety of on-going simultaneous projects is an important component of any implementation strategy. The actual target number is less important than the fact that there is a range of projects that will always keep moving forward in the Corridors. The number might be 20, 30 or even more. It should represent enough “action” to ensure that there will be continuous success stories to tell even if the funding fails or slows down for any given project.

MANY STAKEHOLDERS

Broadening the number of stakeholders is a key element to a successful implementation program. Stakeholders should include, but not be limited to, public officials, public employees, business leaders, citizen participants, representatives of other nearby local and regional governments, representatives from the state legislature, the governor’s office, congressional delegates, special interest organizations such as non-profits, fraternal organizations, garden clubs, the media, banking, and the like. Any organization or individual that can possibly have an interest in and a desire to play a role in the successful implementation of the projects that contribute to the future of these Corridors should be encouraged.

In some cases individuals or organizations have a very limited and focused interest. Nonetheless, it is important to keep them involved in the process through communications, invitations to meetings and events and other parts of the process that communicate the desire to embrace a wide range of citizens and special interests. Ultimately, these stakeholders will become supporters, workers and financial contributors, and provide access to local state and federal funding programs, as well as help providers.

REMOVAL OF BARRIERS

Corridor revitalization is never easy, but always exciting. It is challenging, and as such requires higher levels of analysis, planning and assistance, in order to attract the right type of investment and developer interest. A commercial corridor, while being most communities’ business core, is but one subset of a larger market, and as such, has strengths which can be capitalized on and limitations which should be overcome. These limitations, or barriers, pose unique obstacles which require unique solutions. Corridors have a tremendous influence on the economic well being of the entire region. Therefore, it is widely accepted that early projects in any revitalization effort be assisted, at least until market conditions reach levels where new construction can more than support itself.

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COMMUNICATION AND REVIEW

The fifth and equally important component of the strategy is an on-going communications and review program that tells how the Corridors are doing and more importantly what they are accomplishing. This is essentially a public relations effort and involves communicating to the media, to the special interest groups that make up the stakeholders, to residents of the two Cities, to the development community, to the lending and building community and to others that may help make the process successful. Part of this “success breeds success” strategy is the communication of success as it happens. This can only happen on a consistent basis if it is part of a planned communications and public relations program.

As important as continually communicating successes is an on-going review process designed to evaluate revitalization efforts, making adjustments and learning from mistakes. This “benchmarking” program can be used to: monitor trends affecting Corridor revitalization; track indicators that reveal success or failure of specific efforts; provide information for Corridor marketing efforts; develop an annual “report card” for Corridor revitalization; guide public investment in infrastructure and public amenities; and inform community leaders. As with communications, this benchmarking program will be successful only if done on a consistent, long-term basis.

TABLE 8: CORRIDOR STRATEGY ACTION PLAN

PRIORITY STRATEGY: JOINT PLANNING, IMPLEMENTATION, MARKETING AND FUNDING FOR CORRIDORS

Council Priority Addressed	Priority Level	Action Items	Cities' Role	Key Partners*	Timing**	Funding/Cost
Incorporate Interlocal Agreement for Joint Planning, Implementation, Marketing and Funding (RH1/NRH1).	Highest	A. Incorporate an <u>Interlocal Agreement</u> between the two cities for joint Corridor efforts	Policy Maker; Facilitator	Cities of RH/NRH	Immediate	Staff Time
Build Relationships with Area Real Estate Brokers (RH4/NRH10).	Highest	B. Initiate a monthly series of jointly-sponsored <u>real estate forums</u> to educate developers, brokers and investors about development/redevelopment opportunities in the Corridors	Promoter; Educator	Cities of RH/NRH; Chamber of Commerce; Area Developers/Brokers	Immediate	Staff Time; Voluntary Time from Stakeholders and Real Estate Reps
Develop Comprehensive Package of Funding Options for Corridor Improvements (RH10/NRH7).	Highest	C. Research <u>creative funding options</u> for urban revitalization – Evaluate applicability for Corridors	Educator	Cities of RH/NRH; Fort Worth Economic Development	Immediate	Staff Time
Incorporate Interlocal Agreement for Joint Planning, Implementation, Marketing and Funding (RH1/NRH1).	High	D. Encourage the formation of advocacy entities (e.g., business association, community development corporation, public improvement district, neighborhood association)	Advocate; Facilitator; Educator	Cities of RH/NRH; Corridor Stakeholders	Immediate	Staff Time; Voluntary Time from Stakeholders
Form an Overlay District for Joint Urban Design, Development and Architectural Standards (RH6).	High	E. Evaluate and Identify a Corridors <u>Overlay District</u> to implement joint urban design, development and architectural standards	Policy Maker; Facilitator	Cities of RH/NRH; Corridor Stakeholders	Immediate/ Short-Term	Staff Time; Voluntary Time from Stakeholders
Initiate Planning for a Joint Public Facility (NRH2).	High	F. Establish a <u>Joint Task Force</u> to initiate planning for a Joint public facility (recreation center, library)	Policy Maker; Facilitator	Cities of RH/NRH; Corridor Stakeholders; South of Loop Neighborhood Reps	Immediate	Staff Time; Voluntary Time from Stakeholders and Neighborhood Reps
Create a New Tax Increment District for Corridors to Fund Necessary Public Improvements (NRH8).	High	G. Examine the feasibility of a <u>Corridors Tax Increment Financing (TIF) district</u> to assist with funding public improvements	Policy Maker; Facilitator	Cities of RH/NRH; Corridor Stakeholders	Immediate/ Short-Term	Staff Time; Voluntary Time from Stakeholders and Neighborhood Reps; Consultant Fees

* First entity listed is lead partner

** Immediate – Next 12 months
Short-Term – 1 to 3 years
Long-Term – 3 to 5 years

Cities' Role:

Advocate – Supports Initiative
Promoter – Markets Program
Facilitator – Engages in Process
Policy Maker – Establishes Regulatory Support

Financier – Assists with Funding
Educator – Disseminates Information

Source: The Leland Team

TABLE 8: CORRIDOR STRATEGY ACTION PLAN (CONT'D)

PRIORITY STRATEGY: CORRIDORS MARKETING AND IMAGE ENHANCEMENT

<i>Council Priority Addressed</i>	<i>Priority Level</i>	<i>Action Items</i>	<i>Cities' Role</i>	<i>Key Partners*</i>	<i>Timing**</i>	<i>Funding/Cost</i>
Incorporate Interlocal Agreement for Joint Planning, Implementation, Marketing and Funding (RH1/NRH1).	Highest	A. Formulate a “branding” campaign for the Corridors, including: name change; design elements; and marketing materials	Policy Maker; Facilitator; Financier	Cities of RH/NRH; Corridor Stakeholders	Immediate	Staff Time; \$\$ for Marketing/Public Relations Consultant
Plan Activity Centers with Different Uses, Levels of Access and Orientation to Neighborhoods (RH2&7/NRH9).	Highest	B. Develop joint public improvement plans for gateway areas and intersections	Policy Maker; Facilitator; Financier	Cities of RH/NRH	Immediate	Staff Time; Capital Improvement \$\$
Encourage Consistent Code Enforcement (RH9/NRH4).	Highest	C. Encourage consistent code enforcement through the Interlocal Agreement	Policy Maker; Advocate; Facilitator;	Cities of RH/NRH; Corridor Stakeholders	Immediate	Staff Time
Plan Activity Centers with Different Uses, Levels of Access and Orientation to Neighborhoods (RH2&7/NRH9).	High	D. Initiate discussions with TXDOT related to right-of-way improvements, maintenance, design issues, access management, etc.	Promoter; Facilitator; Educator	Cities of RH/NRH; Corridor Stakeholders	Immediate/ Short-Term	Staff Time; Voluntary Time from Stakeholders
Promote Image Enhancement Campaign (RH8).	High	E. Research potential for a “wayfaring” program – Evaluate applicability	Educator	Cities of RH/NRH	Immediate	Staff Time
Promote Image Enhancement Campaign (RH8).	High	F. Initiate a “Decorate the Corridor” campaign with assistance from merchants, neighborhoods, schools, etc. – introduce public art concepts	Advocate; Promoter; Facilitator	Cities of RH/NRH; Corridor Stakeholders; South of Loop Neighborhood Reps	Immediate/ Short-Term	Staff Time; Voluntary Time from Stakeholders and Neighborhood Reps
Promote Image Enhancement Campaign (RH8).	High	G. Initiate a Storefront Improvement Program to encourage property owners to upgrade their properties	Facilitator	Cities of RH/NRH; Corridor Stakeholders	Immediate	Staff Time; Voluntary Time from Stakeholders
Develop Comprehensive Package of Funding Options for Corridor Improvements (RH10/NRH7).	High	H. Begin a Corridor “escrow account” to fund future efforts such as: undergrounding utilities; eliminating pole signs; upgrading aging infrastructure; etc.	Policy Maker; Financier	Cities of RH/NRH	Immediate	General Fund \$\$
Monitor Commercial Trends, Concepts, and Products (NRH5).	High	I. Develop a “benchmarking” program for monitoring Corridor revitalization efforts	Policy Maker; Educator	Cities of RH/NRH	Immediate	Staff Time

TABLE 8: CORRIDOR STRATEGY ACTION PLAN (CONT'D)

PRIORITY STRATEGY: ENCOURAGE MIXED-USE DEVELOPMENT

Council Priority Addressed	Priority Level	Action Items	Cities' Role	Key Partners*	Timing**	Funding/Cost
Encourage Infill Development Concepts – Mixed-Use, Urban Housing, Pedestrian-Oriented Retail (RH5/NRH6).	Highest	A. Conduct a joint <u>regulatory “diagnosis”</u> to determine if current codes and standards will accommodate proposed development/redevelopment	Policy Maker; Facilitator; Financier	Cities of RH/NRH; Corridor Stakeholders	Immediate	Staff Time; Consultant Fees
Develop Comprehensive Package of Funding Options for Corridor Improvements (RH10/NRH7).	Highest	B. Review and formulate joint economic development <u>incentives package</u> for target marketing of Corridors	Policy Maker; Facilitator; Promoter	Cities of RH/NRH	Immediate	Staff Time
Plan Activity Centers with Different Uses, Levels of Access and Orientation to Neighborhoods (RH2&7/NRH9).	Highest	C. Develop “pilot” <u>project development implementation plans for key parcels in Corridors</u> (activity centers) – Initiate Developer RFP process for selected projects	Policy Maker; Advocate; Facilitator; Promoter	Cities of RH/NRH; Corridor Stakeholders	Immediate	Staff Time; Consultant Fees
Encourage Infill Development Concepts – Mixed-Use, Urban Housing, Pedestrian-Oriented Retail (RH5/NRH6).	Highest	D. Formulate an <u>Urban Housing Initiative</u> to address housing opportunities in Corridors, including: needs assessment; product concepts; development economics; and public/private strategies	Policy Maker; Advocate; Facilitator; Educator; Promoter	Cities of RH/NRH; Corridor Stakeholders	Immediate/ Short-Term	Staff Time; Consultant Fees; Voluntary Time from Stakeholders
Re-Zone Strategic Parcels to Encourage More Mixed-Use Development (NRH3).	High	E. <u>Re-zone strategic parcels</u> to encourage mixed-use development proposals	Policy Maker; Facilitator	Cities of RH/NRH	Immediate	Staff Time
Promote Image Enhancement Campaign (RH8).	High	F. Develop a <u>secondary redevelopment strategy for the North Hills Mall/Hospital subarea</u> , including: alternative land uses; public/private strategies; and fiscal impact	Policy Maker; Advocate; Facilitator; Educator; Promoter	Cities of RH/NRH; Corridor Stakeholders	Immediate	Staff Time; Consultant Fees; Voluntary Time from Stakeholders
Monitor Commercial Trends, Concepts, and Products (NRH5).	High	G. Develop a <u>database of Corridor properties</u> and evaluate their current utilization and potential for redevelopment	Facilitator; Educator	Cities of RH/NRH	Immediate	Staff Time