

Market Study for Evans & Rosedale Redevelopment Area

FINAL REPORT

Prepared by:
ConsultEcon, Inc.

Prepared for:
**Stanley, Love-Stanley, Ltd. And
The City of Ft. Worth**

October 2004

TABLE OF CONTENTS

Section		Page
	EXECUTIVE SUMMARY	1
I	INTRODUCTION AND ASSUMPTIONS	I- 1
II	REDEVELOPMENT CONTEXT	II- 1
III	COMPARABLE DISTRICTS/REDEVELOPMENT CONTEXT....	III- 1
IV	RETAIL MARKET SUPPORT	IV- 1
V	RESIDENTIAL MARKET SUPPORT	V- 1
VI	OTHER LAND USES	VI- 1
VII	TOURISM AND MINORITY MARKETS.....	VII- 1
VIII	AFRICAN AMERICAN HERITAGE MUSEUM EXPERIENCE...	VIII- 1
IX	MARKET SUPPORT FRAMEWORK	IX- 1

EXECUTIVE SUMMARY

Introduction and Assumptions

The purpose of this report is to evaluate the market support and economic potential of the Evans & Rosedale Redevelopment Area. This report uses as a baseline the past, current and anticipated socioeconomic conditions of Fort Worth and the Metro Area as a whole.

In preparing this report, the following assumptions were made. This study is qualified in its entirety by these assumptions.

- ◆ The scale and design of the Evans & Rosedale Redevelopment Plan will be appropriate to its market potential, and will serve to create a high-quality development. Access points to the area will be highly visible and well signed.
- ◆ The project real estate will be competently and effectively managed, maintained and promoted.
- ◆ Changes in economic conditions such as a major recession or major environmental problems that would negatively affect operations and use are not factored into the assessment of stable operating and development potential.
- ◆ Every reasonable effort has been made in order that the data contained in this study reflect the most accurate and timely information possible, and it is believed to be reliable. This study is based on estimates, assumptions and other information developed by ConsultEcon, Inc. from its independent research efforts, general knowledge of the industry, and consultations with the client and information sources in the community. No responsibility is assumed for inaccuracies in reporting by the client, its agents and representatives, or any other data source used in the preparation of this study. No warranty or representation is made that any of the projected values or results contained in this study will actually be achieved. There will usually be differences between forecasted or projected results and actual results because events and circumstances usually do not occur as expected. Other factors not considered in the study may influence actual results.

This report was prepared during July through September 2004. It represents data available at that time.

Redevelopment Context

The Evans & Rosedale Redevelopment Area is located a 5-10 minute drive south of the Ft. Worth Central Business District and due east of the Ft. Worth Medical Center area. This area was the historic business district for the Ft. Worth African American community, and has excellent access to the larger Ft. Worth Area. It is a designated Urban Village and the City has invested substantial resources into the area, including assembly of land for redevelopment.

Comparable Districts/Redevelopment Context

Many neighborhood redevelopment projects are being implemented successfully. Some of the lessons learned from comparable neighborhood redevelopments are as follows.

- ◆ Neighborhood revitalization and redevelopment is an on-going process.
- ◆ Strong grassroots/community advocacy is important to project success.
- ◆ The naming or branding of the neighborhood/area is important for the community's identity and for marketing purposes.
- ◆ Successful projects work with local and citywide tourism and heritage agencies to develop strategies to bring tourists to the area.
- ◆ Many of the comparable areas have a heritage or museum component.
- ◆ Neighborhood crime prevention and safety organizations have been extremely effective in their work. In some cases, housing design is specified to be a specific way so as to support neighborhood watches and policing (e.g. enough lit space between each house so that someone will notice easily from the road if a perpetrator is lurking about).
- ◆ Municipal/city involvement and support is critical to the planning process for many reasons, including zoning changes and infrastructure support, and for such incentives as Tax Increment Financing (TIF) districts.
- ◆ Investments in public buildings are often used to leverage private investment.
- ◆ Local Community Development Corporations often play a key role as neighborhood developers.
- ◆ In some cases, zoning changes for reduced parking requirements have been key to development success of mixed commercial and residential developments (e.g. commercial on the 1st floor and housing on the 2nd.)
- ◆ Successful projects work to develop excellent accessibility to the neighborhood area by public transportation and roadways (including parking).
- ◆ National Register of Historic Places, "landmark status," can sometimes limit development and growth, such as in the 18th and Vine Jazz District in Kansas City, as anything they take down has to go up as a replica of what existed before. Therefore, most of the Jazz District

Redevelopment Corporation's (JDRC) work is focused on entertainment and commercial uses as these requirements are too restrictive for housing. In addition, this also means that the JDRC cannot replace any historic sites/buildings with parking lots/decks, which they need.

- ◆ Retail development follows residential development, except in the case of Deep Ellum where residential development followed entertainment and retail development.
- ◆ Retail tenants in comparable projects include both local retailers and national franchise operations such as Starbucks, Wendy's, McDonald's and Subway. National retailers in comparable neighborhoods include Payless Shoes, and Footlocker, among others.
- ◆ Ethnic retail and restaurants, when done right, are successful projects in redeveloped neighborhoods and can be a draw to bringing in visitors and tourists to a neighborhood.
- ◆ Challenges for entertainment-driven districts include potential for increased crime, costs of additional security, and not enough parking close by.
- ◆ Creating a synergy with the historic / cultural heritage relevance of a neighborhood is important to project success.
- ◆ Some redevelopment projects are driven by the desire of developers to increase their own property value. This can be leveraged to help increase the pace of the redevelopment of a neighborhood – ensure that a long-term strategy is in place and is revisited, rather than a short-term solution.
- ◆ Cultural institutions such as museums and theaters have served as successful anchors for neighborhood redevelopments.
- ◆ Make home ownership more affordable to lower income families.
- ◆ Provide basic amenities to working families and to community (e.g., grocery stores, drug stores, healthy take-out).
- ◆ Create jobs that connect neighborhood to economic development strategies/engines in the broader community.
- ◆ Make sure to provide enough parking for residents and visitors to the neighborhood alike.

Retail Market Support

The retail potential of the Evans & Rosedale area was evaluated based on interviews of area planning officials and community leadership, in-person observation of area conditions, analysis of secondary source data, and review of past planning studies. Each of these inputs to the evaluation was mutually supportive and confirmed the recommendations for retail development.

This evaluation has shown that there is a substantial development opportunity for food & beverage (restaurants), food and grocery retailing, convenience goods, general merchandise, drug and

proprietary stores. Several categories of retailing hold particular promise. Apparel and accessory stores have a trade deficit east of I-35. Local merchants have an opportunity to serve this market. The sales leakage analysis indicates up to \$35 million in annual sales potential in a number of retail categories is “leaking” from the local market area, and that this represents up to 200,000 square feet in supportable retail development. A reasonable scenario is 25 percent as capturable locally. This would represent on the order of 50,000 square feet of retail and restaurants.

As more residential and job development occurs in Evans & Rosedale and Ft. Worth South, there will be even greater opportunities for retailers. The development of the City Health Department building will bring new workers into the neighborhood, which will be supportive of retail growth. The development of heritage and entertainment venues, likewise, will bring additional market opportunities for retailers.

A drug or proprietary store would serve an unmet need east of I-35. There is a substantial deficit in eating and drinking places where a number of well-targeted and operated restaurants could meet demand and build a “critical mass” of restaurant offerings. Food stores are substantially under-represented. This is a retail type for which consumers desire a local retailer. General merchandise represents the largest sales deficit in this area. While consumers generally shop for such merchandise within a broader geographic area, retailing patterns indicate that a portion of such demand can be satisfied locally – on a convenience basis. Thus, specialty and general retailers have an opportunity in this location as well. A retail program is suggested by these data and the market investigations with 10,000 to 12,000 square feet or more of food & beverage, and two or more “anchor” stores, totaling 12,000 to 15,000 square feet. Target stores would include a pharmacy, food market and/or small discount store. A variety of specialty shops would make up the remainder of retail outlets of 15,000 to 25,000 square feet.

Housing Demand at Evans & Rosedale

Overall, the Fort Worth Metro area is experiencing steady population growth and housing development. Housing permits for single family units have increased since 1998, though multi-family development has been more erratic. The local market area centered on the Evans & Rosedale Redevelopment area is characterized by mixed-use, multi-family and townhouse development to the west and north in the Medical District and the Ft. Worth Central Business District. The areas to the east and south are dominated by single family homes.

The area within a 1-mile radius of Evans & Rosedale has a housing stock that is much older than other parts of the city. Approximately, 52 percent of the area's housing stock is owner occupied. The occupancy rate of all units in this area is 82 percent. This area not only has a stock of housing for rehabilitation, but there are vacant parcels for infill housing.

Several large apartment complexes have been developed in the area in recent years which have occupancy rates in the 85 to 95 percent range, indicating a healthy market. New developments have varied, with some on the high end and some including affordably priced units. The local real estate community is upbeat about a growing rental market in the area, and is supportive of new growth which will help bring even more prospective renters to the area, as well as the businesses that follow population growth.

Housing Development Potential

Despite the downward trend in population and households in the immediate area, there has been continued housing development and absorption of new housing units. Over the next five years, the number of households – which is the primary driver of housing absorption – is projected to increase by more than 42,000 households within 15 miles of the Evans & Rosedale area.

The Evans & Rosedale Redevelopment project offers the opportunity to reverse the loss of households and population if a basis of public infrastructure and investment is accompanied by private sector investments in commercial uses. Residential housing could be developed within such a mixed-use environment. As this revitalized “core” is developed and accepted in the market place, larger residential developments competing more directly in the general market place will become more feasible.

Data in the table below provide a housing development scenario based on the redevelopment plan for Evans & Rosedale. This analysis of the local and regional (15-mile) area provides a reasonable scale for housing development at Evans & Rosedale. The analysis indicates a range of 94 to 121 units over five years, with an average of 19 to 24 units annually. This would tend to be relatively affordable housing geared to existing residents and to attract new residents to this location. Low land values will help in achieving this goal.

**Housing Development Scenario
Evans & Rosedale Redevelopment Area**

				<u>Low Range Scenario</u>		<u>High Range Scenario</u>	
	2003 Households	2008 Households	Change in Number of Households	Percent Share Scenario ^{1/}	Net Housing Potential ^{1/}	Percent Share Scenario ^{1/}	Net Housing Potential ^{1/}
0 to 2 miles	12,406	12,508	102	10%	10	15%	15
2 to 15 miles	482,972	525,198	42,226	0.20%	84	0.25%	106
Total	495,378	537,706	42,328		94		121
Average Annual Demand for five years			8,466		19		24
Percentage Of Total Demand					0.22%		0.29%

^{1/} Percentage Share and Net New Housing Potential assume that the Evans & Rosedale Redevelopment project moves forward, and creates a public and commercial infrastructure attractive to new housing; and that new housing developers are attracted to the Evans & Rosedale area

Source: Claritas, Inc. and ConsultEcon, Inc.

Some of the housing identified in this analysis could be supplied through rehabilitation of existing units, but much of it would be through new construction. The nature of the market in this area and the need for affordable housing indicates that rental housing should be produced as well as ownership housing. The proper mix will depend on future conditions and early projects will help to determine the best mix of housing types and rental / ownership mix.

Other Land Uses

Other uses that are appropriate for the Evans & Rosedale Redevelopment Area, including the office, entertainment and destination restaurant. The office market in Ft. Worth South is dominated by the medical services industry. The area is the location of Ft. Worth's major medical centers. In addition to the medical centers, there are many doctors' offices, labs, and related services. A major development for Evans & Rosedale is the development of the City Health Department building, which will bring 80 jobs into the neighborhood.

Tourism and Minority Markets

As the Evans & Rosedale cultural and heritage area develops, it will be supported not only by local metroplex residents, but also by visitors to the Ft. Worth area.

In 2001, the most recent year for which visitation data is available, there were approximately 4.65 million leisure person-trips and 2.85 million business person-trips spent in Fort Worth, the 5th most visited destination in Texas. Visitors from within the State comprised 65 percent of all person-days in Fort Worth. In-state visitors were most commonly from the Dallas-Fort Worth Area (50 miles outside the region), including Houston, Austin, San Antonio, and other major cities in Texas. Out-of-state travelers come from a number of regions, though visitors from Oklahoma City represented the highest originating Designated Market Area (DMA).

Leisure travel accounted for 62 percent of all person-days in Fort Worth in 2001. Of these leisure visitors, more than half were visiting friends and/or relatives (VFRs). Attractions, culture activities, and touring (sightseeing) were the top three general leisure traveler activities. The average length of stay for all travelers to Fort Worth was 2.0 days; and 47 percent of all visitors stayed overnight, at an average of 3.4 days. In addition to leisure travelers, business travelers and pass-through visitors are also potential markets for the proposed Evans and Rosedale Heritage Area.

The Evans and Rosedale Heritage Area will be able to draw visitors from a strong tourist market that is benefiting from the revitalization of a number of districts in Fort Worth. Marketing and promotional strategies to maximize attendance from tourist markets will be important to project success.

African American Heritage Museum Industry Experience

African American Heritage museums are at a growth period in the museum industry. There are a number of museums currently in the planning stages including the International Civil Rights Museum in Greensboro, NC and the National Museum of African American History and Culture in Washington DC.

African American Heritage museums in general are moderately priced and have moderate attendance levels. Resident and tourists markets are important to visitation, but a strong tourist market helps sustain and increase attendance levels over time. Educational groups and tour groups are also a very important regular source of visitors, and school programs are often tied to public funding. The operating profiles of such museums are also moderate, as low earned revenue among

such museums can be a limiting factor. Marketing is also usually limited but participation in visitor's bureaus can help to share advertising costs. Gift shop revenue is rather low at the profiled museums reflecting a possible area of improvement. Rental income can be a strong source of revenue for African American Heritage museums as these facilities are often considered an integral community asset and a place to hold functions. Overall, the experience of these museums is that while not typically large revenue generators or operations, they are supported by the community at large and local governments, and their educational programs and community building missions are proven to be excellent contributions to their region.

Market Support Framework

The review of market potential, along with the physical development opportunities in Evans & Rosedale, suggests a mixed-use development program in which each use provides cross support for other uses. Office, institutional and commercial uses create demand for nearby housing. Commercial uses make housing more appealing. Housing provides a base of market support for the commercial uses and creates a neighborhood setting desirable for commercial and employment based land uses.

Data in the following table provide a summary of market potential based on the findings of this report and a mixed-use redevelopment approach. This is the five-year market potential and represents a mid-point of a range of market opportunity of approximately fifteen percent higher or lower in either direction. This is used for guiding the planning process, and for informing participants in the process of the scale of demand possible for these development and redevelopment types. The redevelopment plan should anticipate development beyond the five-year horizon that this estimate of demand represents. The Master Plan should reflect full build-out of the project area based on best planning and design principals.

Market Potential
Evans and Rosedale Redevelopment Area

	Units	Typical SF Range	Net to Gross factor	Total SF
Residential				
Townhouse	40	1,600	1.1	70,400
Multi-family	60	900	1.2	64,800
Total Residential	100			135,200
Office				
Institutional	4	3,000	1.2	14,400 ^{1/}
Professional	8	500	1.2	4,800
Social Services				
Legal, accounting services				
Insurance				
Real Estate				
Employment				
Medical services				
Personal services				
Total Office	12			19,200
Commercial				
Food & Beverage	5	1,800	1.2	10,800
Breakfast & lunch shop				
Bakery				
Coffee shop				
Ice Cream Shop				
Ethnic Restaurants				
Retail				
Anchor Stores	2	6,000	1.2	14,400
Pharmacy				
Food Market				
General Merchandise				
Specialty Shops	10	1,800	1.2	21,600
Specialty food				
Shoe store and shoe repair				
Clothing stores				
Sporting goods				
Jewelry				
Telephone / Electronics				
Card & gift shop				
Optical store				
Books				
Hobby				
Convenience store				
Florists				
Other specialty				
Services				
Bank & automated teller	1	1,000	1.2	1,200
Services	5	800	1.2	4,800
Hair cutters / salon / Nails				
Dry cleaner				
Laundromat				
Video rentals				
Mailing / Packaging / Copy				
Dance or Karate studios				
Other Services				
Public Services				
Day Care	1	3,200	1.2	3,840
Total Commercial	24			56,640
Entertainment				
Theater (Building reuse potential)	1	12,000	1.2	14,400
Destination Restaurants	2	4,000	1.2	9,600
Nightclub	1	3,000	1.2	3,600
Total Entertainment	4			27,600
TOTAL NON-INSTITUTIONAL	156			252,400
Institutional Development				
Shamblee Library				-
Heritage Center Museum				-
City Health Department	1			48,000
TOTAL INSTITUTIONAL	1			48,000
TOTAL DEVELOPMENT	157			300,400

^{1/} Potential tenants might include the Near Southeast Community Development Corporation, Southeast Ft. Worth Inc., the Ft. Worth Federation of Colored Women and the Metropolitan Black Chamber of Commerce.

Section I

INTRODUCTION AND ASSUMPTIONS

The purpose of this report is to evaluate the market support and economic potential of the Evans & Rosedale Redevelopment Area. This report uses as a baseline the past, current and anticipated socioeconomic conditions of Fort Worth and the Metro Area as a whole. This analysis focuses on the following scope items:

- ◆ Redevelopment Context
- ◆ Comparable Districts/Redevelopment Context
- ◆ Retail Market Support
- ◆ Residential Market Support
- ◆ Other Land Uses
- ◆ Tourism and Heritage Markets
- ◆ African American Heritage Museum Experience
- ◆ Market Support Framework

In preparing this report, the following assumptions were made. This study is qualified in its entirety by these assumptions.

- ◆ The scale and design of the Evans & Rosedale Redevelopment Plan will be appropriate to its market potential, and will serve to create a high-quality development. Access points to the area will be highly visible and well signed.
- ◆ The project real estate will be competently and effectively managed, maintained and promoted.
- ◆ Changes in economic conditions such as a major recession or major environmental problems that would negatively affect operations and use are not factored into the assessment of stable operating and development potential.
- ◆ Every reasonable effort has been made in order that the data contained in this study reflect the most accurate and timely information possible, and it is believed to be reliable. This study is based on estimates, assumptions and other information developed by ConsultEcon, Inc. from its independent research efforts, general knowledge of the industry, and consultations with the client and information sources in the community. No

responsibility is assumed for inaccuracies in reporting by the client, its agents and representatives, or any other data source used in the preparation of this study. No warranty or representation is made that any of the projected values or results contained in this study will actually be achieved. There will usually be differences between forecasted or projected results and actual results because events and circumstances usually do not occur as expected. Other factors not considered in the study may influence actual results.

This report was prepared during July through September 2004. It represents data available at that time.

Section II

REDEVELOPMENT CONTEXT

This section of the report outlines the redevelopment context, site and situation of the proposed project. The Evans & Rosedale Redevelopment Area is located within a 5 to 10-minute drive south from the Ft. Worth Central Business District, and due east from the Ft. Worth South Medical area. This area was historically the center of the Ft. Worth African American community. The area is part of a National Register Historic District. The project area is bounded by and has access to I-35 W on the west, by single-family residential development to the east and south, and by a mixed-use industrial/institutional area to the north.

The district lies less than a five-minute drive from the Downtown Central Business District to the northwest and the Medical District to the west. The new Business Assistance Center, transformed from the old James E. Guinn School, is just west of Evans & Rosedale.

Urban Village Concept

The Evans & Rosedale Redevelopment Area is designated by the City of Ft. Worth as an Urban Village. After extensive study and public input(?), the City designated a number of historic centers in the City as Urban Villages. Urban Villages have been defined as “urbanized places that have a concentration of jobs, housing, commercial uses, public space, public transportation and pedestrian activity... Urban Villages serve as catalysts for public and private investment and support renewed economic activity in the central city.” The principal incentive for the program is the Neighborhood Empowerment Zone (NEZ) program.

History and Heritage

“Evans & Rosedale was an economic and social center for the African American community in the 1930s and 40s. It was a quiet, upscale neighborhood filled with professionals and thriving businesses like Joe Terrell’s Hotel. Crowds flocked to the area to see big-band greats like Lionel Hampton play the Zanzibar nightclub, or to eat at the Red and White Café. The neighborhood is one of the few original African-American communities remaining in Fort Worth. Historians interested in the accomplishments of Fort Worth’s African-American residents have studied Evans Avenue and the adjacent Near

Southeast neighborhoods. This area has supported many of Fort Worth's African-American entrepreneurs, social activities, and artists. Local architectural landmarks are symbolic reminders of the prosperous period before disinvestment transformed the Near Southeast and other central city neighborhoods. The revitalization of this area is important to Near Southeast residents and the City of Fort Worth.

Although the area fell victim to significant deterioration and abandonment, Evans Avenue still retained the "heart" of this historical, religious, and cultural center. The area is home to two of the community's prominent churches, the NAACP headquarter, the Federated Women's Club and several established businesses."¹

Key Market Factors

Transportation Access

There is excellent access by roads to area employment centers and the rest of the metroplex. In the near future, East Rosedale will be widened to a six-lane divided, tree-lined boulevard between I-35W and US 287. These improvements will carry over 35,000 cars and the local bus line to major commercial and residential centers throughout the region. In addition, two major U.S. interstates link Evans & Rosedale to national markets. I-30 to north aligns the district with the east and west coasts and I-35W, the NAFTA Highway, joins the district with Canada and Mexico. Over 140,000 cars pass the East Rosedale exit along I-35W each day.

Barriers

I-35 W and railroads may present some barriers to the Evans & Rosedale area.

Area Employment Base

Data in **Table II-1** show the employment located in proximity to the Evans & Rosedale Redevelopment Area.

¹ City of Ft. Worth, Evans & Rosedale: The Rebirth of a Neighborhood," Feb. 4, 2004.

Table II-1
Evans & Rosedale Market Study
Market Support/Market Area Employment

Employment by Type	0-1.0 miles	1.0-2.0 miles	Total (0- 2.0 miles)
Retail Trade	903	9,341	10,244
Finance/Insurance	182	9,716	9,898
Services	10,705	32,827	43,532
Agriculture/Construction/Mining	394	3,472	3,866
Manufacturing	2,007	5,726	7,733
Transportation/Communications/Utilities	77	2,569	2,646
Wholesale	281	1,563	1,844
Government	98	6,323	6,421
Total Daytime Employment Population	14,647	71,537	86,184

Source: Claritas, Inc. and ConsultEcon, Inc.

This very large employment base should provide market support for residential development, services, retail and restaurant uses in the Evans & Rosedale Urban Village.

Available Assembled Land

The City has assembled land in the Evans & Rosedale area to expedite assembly of development parcels.

“The City’s Department of Engineering, Real Property Services Division, served as the liaison between an independent broker and the City to acquire privately owned properties – comprising over 70 separate parcels of land – located within the Evans and Rosedale Business and Cultural District’s perimeter. Challenges encountered in assembling these older inner-city lots included determining ownership and locating property owners. Title was murky in some instances, and the City then had to resort to acquiring properties through

the process of eminent domain. The land assemblage required negotiating with over sixty property owners and addressing concerns of many citizens residing near the Project Area.”²

TIF District

The Evans & Rosedale area is part of the Tax Increment Financing District of Ft. Worth South.

Active CDC in Area

There is a very active Community Development Corporation in the area. The Near Southeast Community Development Corporation (NSCDC) has been active in the community in housing redevelopment and land banking, among other programs, and represents a strong community development resource.

Evans Avenue Reconstruction

A major improvement to Evans Avenue has recently been completed.

“The City’s Transportation and Public Works Department has overseen the reconstruction of Evans Avenue. The project will reconstruct Evans Avenue as a two-lane concrete street from East Rosedale Street to Terrell Avenue. Included in this project are water and sewer replacements, head-in and parallel parking space, a public plaza with fountain, landscaped parkways, brick sidewalks and crosswalks, pedestrian and street lighting, benches, trash receptacles, monuments and signs. Funding for this phase of the project has been provided by a \$1.2 million grant from the Economic Development Administration and a \$443,000 CDBG match. The City held several public meetings to gain design input from the community.

The firm hired to design this phase of the redevelopment, Huitt-Zollars, Inc., worked with the Evans & Rosedale Historical Committee and the City’s Planning Department to develop the historical elements for the limestone, granite, and bronze plaques to be located on the sidewalks and in the plaza. The Planning Department facilitated the gathering of historical

² City of Ft. Worth, Evans & Rosedale: The Rebirth of a Neighborhood,” Feb. 4, 2004.

information, photographs, and oral histories. Thirty-five profiles were compiled of individuals and families representing a range of fields including medical religion, education, business communication, civic, military, sports and music. These individuals and families contributed greatly to the development of the Southside neighborhood and city of Fort Worth as a whole. The historical element also includes a timeline of significant events relevant to the African-American community and quotes from local and national African-Americans.

SRO General Contracting, Inc. began construction in June 2002. Construction is now scheduled for completion in early 2004.”³

³ City of Ft. Worth, Evans & Rosedale: The Rebirth of a Neighborhood,” Feb. 4, 2004.

Section III

COMPARABLE DISTRICTS/REDEVELOPMENT CONTEXT

This section of the report reviews neighborhoods that have some comparability to the Evans-Rosedale redevelopment area. The findings of this review will provide insights into ways in which the experience of other neighborhoods informs the market and development potential for the Evans-Rosedale redevelopment.

Neighborhood Redevelopment

Over the past two decades, there have been many redevelopment efforts of historic/ethnic neighborhoods nationally. Some examples of cities and respective neighborhood redevelopment projects that were reviewed for the Evans-Rosedale project are as follows:

- ◆ Kansas City – 18th and Vine
- ◆ St. Louis – Ville
- ◆ Washington, D.C. – Greater “U” Street Historic District
- ◆ Savannah – Cuyler-Brownsville Historic District
- ◆ Chicago – Bronzeville (Black Metropolis, South Side, Douglas/Grand Blvd.)
- ◆ Dallas – Deep Ellum
- ◆ Atlanta – Sweet Auburn Historic District
- ◆ Houston – Independence Heights and Fifth Ward
- ◆ Milwaukee – African-American Cultural and Entertainment District
- ◆ Pittsburgh – East Liberty
- ◆ Oklahoma City – Eastside
- ◆ Boston – Roxbury (Dudley)
- ◆ San Francisco – Fillmore

Most of the projects listed above are comparable in that they:

- ◆ are organized under a municipal agency or related community redevelopment corporation (CDC),
- ◆ have a predominantly high percentage of African-American residents,

- ◆ have active neighborhood communities and organizations whose grassroots efforts have been a force in their efforts for revitalization,
- ◆ include historical sites and/or districts,
- ◆ include a cultural heritage component,
- ◆ began as, or are still, lower to moderate income communities, and
- ◆ are neighborhoods located within major U.S. cities.

Data in **Table III-1** illustrate comparative data on some of the comparable neighborhoods.

Profiled Projects

The following projects were profiled in greater detail for the Evans-Rosedale redevelopment project.

- ◆ Kansas City – 18th and Vine
- ◆ Dallas – Deep Ellum
- ◆ Houston – Fifth Ward
- ◆ Milwaukee – African-American Cultural and Entertainment District
- ◆ Chicago – Bronzeville (Black Metropolis, South Side, Douglas/Grand Blvd.)
- ◆ Boston – Roxbury (Dudley)

Data in **Table III-1** include estimated 2003 demographic data of each of the profiled projects within a zero to one mile radius from each site compared to Evans & Rosedale.

Table III-1
Evans-Rosedale Comparable Projects Demographic Estimates for 2003 within 0.0-1.0 Mile Radius from Site
(Ranked by Population, After Evans-Rosedale)

Neighborhood, Location	Estimated Population within 0.0-1.0 Miles	Ethnicity			Number of Households	Average Household Size	% of Owner Occupied Housing Units	% of Renter Occupied Housing Units	Median Household Income
		% White Alone	% Black or African-American Alone	% Hispanic or Latino 1/					
Evans-Rosedale, Ft. Worth	8,874	25.1%	53.0%	32.5%	2,870	2.82	52.4%	47.6%	\$19,324
Deep Ellum, Dallas	8,873	52.4%	23.8%	30.5%	3,670	1.98	16.5%	83.5%	\$35,396
18th and Vine, Kansas City	9,223	15.6%	77.0%	5.5%	3,232	2.36	25.1%	74.9%	\$23,846
Fifth Ward, Houston	15,350	28.0%	52.8%	45.2%	5,106	2.98	30.6%	69.4%	\$18,019
Bronzeville, Chicago	17,035	12.8%	76.9%	3.0%	17,035	2.32	15.4%	84.6%	\$24,722
African-American Cultural and Entertainment District, Milwaukee	25,767	27.7%	64.3%	8.7%	10,300	2.42	25.1%	74.9%	\$23,743
Roxbury, Boston	51,116	10.9%	61.6%	25.3%	18,804	2.66	21.0%	79.0%	\$28,184

1/ Hispanic or Latino can be also included as either White Alone or Black Alone. Therefore, in some cases, the total of all races shown is more than 100%.

Source: Claritas and ConsultEcon, Inc.

The following **Tables III-2 to III-7** and **Figures III-1 to III-39** include data about the profiled projects. Following the Tables and Figures is a summary of lessons learned.

18TH AND VINE DISTRICT, KANSAS CITY, MISSOURI

Table III-2
18th and Vine Jazz District

Neighborhood/District	18 th and Vine Jazz District
City	Kansas City, Missouri
Locational Context	<p>The 18th and Vine Jazz District is located less than five minutes south from downtown Kansas City. As Kansas City is landlocked by the Missouri River to the north, most of the City's development is occurring south and east of downtown.</p> <p>The Jazz District is a six-block radius bounded by Paseo Blvd. on the west, Woodland Ave. on the east, John "Buck" O'Neil Way (17th terrace) on the north and East 19th St. on the south.</p>
2003 Estimated Economic Information:	<i>See Table III-1.</i>
Metro Area Population	1,821,200
Metro Area Median Household EBI⁴	\$42,308
Population within 0.0-1.0 Miles from the Site	9,223
Ethnicity of Population within 0.0-1.0 Miles from the Site	77% Black or African-American, 15.6% White, and 5.5% Hispanic or Latino ⁵ .
Number of Households and Average Size within 0.0-1.0 Miles from the Site	Number of Households: 3,232 Average Household Size: 2.36
Median Household Income within 0.0-1.0 Miles from the Site	\$23,846

⁴ Sales and Marketing Management, *2003 Survey of Buying Power*. EBI is defined as net income less personal tax and non-tax payments. This measure developed by Sales and Marketing Management is a more sensitive indicator of household income than is the US Census Bureau's, median household income figure.

⁵ Hispanic or Latino can also be included under as either White, or Black or African-American. Therefore, in some cases, the total of all races shown is more than 100%.

**Table III-2 (Cont.)
18th and Vine Jazz District**

<i>Project Development:</i>	
Developer/Authority	<p>The Jazz District Redevelopment Corporation (JDRC) was created to begin the Kansas City's \$26 million 18th and Vine redevelopment project.</p> <p>The JDRC owns 80% of the property that is part of the 18th and Vine Jazz District.</p>
Year Project Began	The JDRC began in 1997. The redevelopment is planned to be completed in 2007.
Area and Development History	<p>The 18th and Vine area is home to some of the nation's greatest jazz and baseball legends such as Charlie Parker, Count Basie, Lester Young, George and Julia Lee, Satchel Paige, James "Cool Papa" Bell, and Josh Gibson.</p> <p>In the 1920's and 1930's, 18th Street was an imaginary line for which African-Americans could not move past, bordered by 27th Street to the south. During this time, Kansas City prospered in many ways, and its reputation as being a "wide open" city attracted musicians who honed their craft in the dozens of clubs in the area. Many of the musicians later moved on to New York and other cities where their fame grew. In 1963-64, a public accommodations bill allowed black people to move farther south and things began to change in the area.</p> <p>The revitalization process for the 18th & Vine Jazz District began in the 1980's by Peterson and others and the organized redevelopment began in 1997.</p> <p>Creating synergy with the history of music in the area was key.</p> <p>Right now, the JDRC says that the district is "right in the middle" of its revitalization. (Phase I was completed in 2001. Phase II of the plan is currently under development, with Phase III to follow. <i>See below for more information</i>)</p>
Change Agents	Famed local historian and preservationist, Horrace Peterson, initiated beginnings of changes in the 18th & Vine Jazz District in the 1980's. He encouraged/"pushed" people to "take a look at what the place could be". The key to this was the history of the place, which was the basis for the branding of the district.
<i>Project Description:</i>	
Map of Project Area	<i>See below.</i>

**Table III-2 (Cont.)
18th and Vine Jazz District**

<p>Project Uses</p>	<p><i>From Kansas City Economic Development Corporation (EDC):</i> “The 18th and Vine Jazz District is a “mixed-use” redevelopment project designed to recreate, preserve and enhance the historical value and heritage the 18th & Vine area had as the “heart” of the African-American community and the birthplace of Kansas City-style jazz and Negro League’s Baseball.</p> <p>When completed, the project will consist of 203 residential units and 50,000 square feet of commercial/retail space. The Jazz District Redevelopment Corporation (JDRC) is seeking entrepreneurs and business owners who are interested in locating restaurants, jazz clubs and neighborhood serving-retail shops, such as a coffee house, ice cream parlor, grocery store, pharmacy, beauty/barber salon, dry cleaners, etc. in the Jazz District. Located on the corner of 18th Street and The Paseo, The Peachtree Restaurant of Kansas City, the JDRC’s first retail tenant, is the first full-service restaurant open in the Jazz District in more than 40 years.”</p> <p>Aside from the 79 housing units that the JDRC developed within the district, the JDRC is primarily focused on the entertainment and commercial side of development for the district.</p> <p>The JDRC’s “job” is to create “new entrepreneurship” in the area. The JDRC wants the district to be a place where people come to eat during the day and come back at night for entertainment, etc.</p> <p>The 18th and Vine Jazz District Redevelopment will take place over three phases as follows.</p> <p><u>PHASE I (completed in February 2002):</u> The Jazz District Apartments, which house 73 new residential units, and 30,000 square feet of commercial/retail space have been constructed on the north side of the 18th Street Corridor from the Paseo to Woodland Avenue. The retail/commercial space is completed. Retail will be located on the ground floor and beautifully decorated residential units are on the upper levels. The Jazz District Apartments are a welcomed addition to the Jazz District. Fully occupied since the spring of 2002, these apartments have attracted singles and families to the area.</p>
----------------------------	--

Table III-2 (Cont.)
18th and Vine Jazz District

Project Uses (Cont.)	<p><u>PHASE II:</u> The new residential construction and rehabilitation/renovation of existing buildings will occur (i.e. the south side of the 18th Street Corridor, Vine Street, 19th & The Paseo, Woodland Avenue between 18th & 19th and Highland Avenue) with 103 new residential units and 15,070 square feet of commercial/retail space. Timetable – 2002 to 2005.</p> <p><u>PHASE III:</u> Rehabilitation is the focus of this phase. The existing single family structures on the west side of Highland between 18th and 19th streets will be restored. In addition, three structures on the north side of 19th Street between Vine Street and Highland Avenue will be reconstructed. Eighteen units will be created. Timetable – 2005 to 2007.</p>
Anchor Facilities	<p>The Museums at 18th and Vine museum complex, which houses the American Jazz Museum, represent the first and only new development in this district since the 1920's and 1930's. These museums were the anchor projects for the district.</p> <p>The American Jazz Museum (AJM) opened in September 1997, after eight years of planning. The museum was part of a \$26 million restoration project that also included the Negro League Baseball Museum, a visitor center, and the restoration of the historic 500-seat Gem Theater. The project was built as the centerpiece of a revitalization plan for the City's former jazz district, 18th and Vine, by the JDRC. The buildings are owned by the city and the museums are operated by the not-for-profit 18th and Vine Authority. The JDRC's goals include recreating the area as it existed in the 1920s and 1930s, when it was a vibrant mixed-use area with jazz clubs, restaurants, retail services and housing. As the centerpiece of a revitalization plan, the American Jazz Museum is an example of museums as economic generators and tools for cultural and community preservation.</p>

**Table III-2 (Cont.)
18th and Vine Jazz District**

Organizations/Businesses Located within the Redevelopment District	<p>The district houses the following organizations/business (<i>also see list in the Jazz District map key in Figure III-3 below</i>):</p> <ul style="list-style-type: none"> ◆ Museums at 18th and Vine is a 50,000 square foot, Smithsonian-affiliated museum complex that consists of the following facilities. Located behind the complex is an outdoor performance theater. <ul style="list-style-type: none"> ○ American Jazz Museum ○ Blue Room (museum & jazz club) - replica of original where the Bird (Charlie Parker) played his sax – located within the American Jazz Museum. The Blue Room is a museum by day and then jazz club at night (four nights per week). Includes pictures of jazz greats and relics of Kansas City’s jazz era. ○ Horace M. Peterson III Visitor's Center ○ Renovated Gem Theater ○ Negro Leagues Baseball Museum ◆ The oldest Black American newspaper, The Call Paper, has been in the district for about 85 years, since 1919. ◆ Black Chamber of Commerce ◆ African-American Motorcycle Club ◆ Lincoln Building houses a small incubator business on the 2nd floor. The other two floors provide commercial office space. ◆ Mutual Musicians Foundation ◆ Black Archives of Mid-America ◆ Four active churches. (In the heyday of the district, there were upwards of twenty churches.) ◆ Red Vine Cajun Restaurant and Jazz House – moderately priced - 5,700-square-foot space seats 268 persons. The entertainment lineup is just as assorted, featuring comedy, jazz, swing, blues and funk. Jam sessions every Wednesday. Entrees cost \$12.95 to \$20.95. ◆ Peach Tree Restaurant (southern cuisine, soul food) – a la carte and more upscale. The Peach Tree Restaurant is the “little sister” to the Peach Tree Buffet which is located in downtown and has had a successful track record (opened in 1996). ◆ The JDRC mentioned that a new diner has opened. ◆ Urban League of Kansas City
---	--

**Table III-2 (Cont.)
18th and Vine Jazz District**

Organizations/Businesses Located within the Redevelopment District (Cont.)	<ul style="list-style-type: none"> ◆ Successful Community Center and Park just north of district (bordering on northern side). ◆ Full employment center that serves from 2,000 to 4,000 people per week. <p>Under Development and/or Hoping to Add to the District Soon:</p> <ul style="list-style-type: none"> ◆ Mini-market/convenience store – the JDRC is considering an ethnic store. ◆ <u>Opening soon:</u> a 6,800 square foot beauty parlor and day spa. ◆ More live music venues ◆ 1 more restaurant ◆ 6 or more bars ◆ Cleaners ◆ Office building ◆ UPS (UPS has already approved the district for a franchise UPS operation) ◆ Starbucks/coffee house ◆ Radio Station – hoping the local station that plays a lot of jazz and blues will relocate to 18th and Vine. ◆ The JDRC has pursued Blockbuster for a video store but Blockbuster has not called them back. ◆ The JDRC would like to pursue a new “needs assessment” market study (last one completed in 1998 by Development Strategies Inc. in St. Louis) to help the JDRC assess how much more and what type of commercial development should they pursue.
Adjacent Districts	<p>Cordish Co., out of Baltimore, is the designated developer of Kansas City’s downtown entertainment complex (appr. \$2 billion), Kansas City Live (located in the old Power & Light District). Construction of the district will not begin until after the State approves financing through the Missouri Downtown and Rural Economic Stimulus Act (which redirects new state sales and income taxes generated by a development to offset public infrastructure construction costs).</p>

Table III-2 (Cont.)
18th and Vine Jazz District

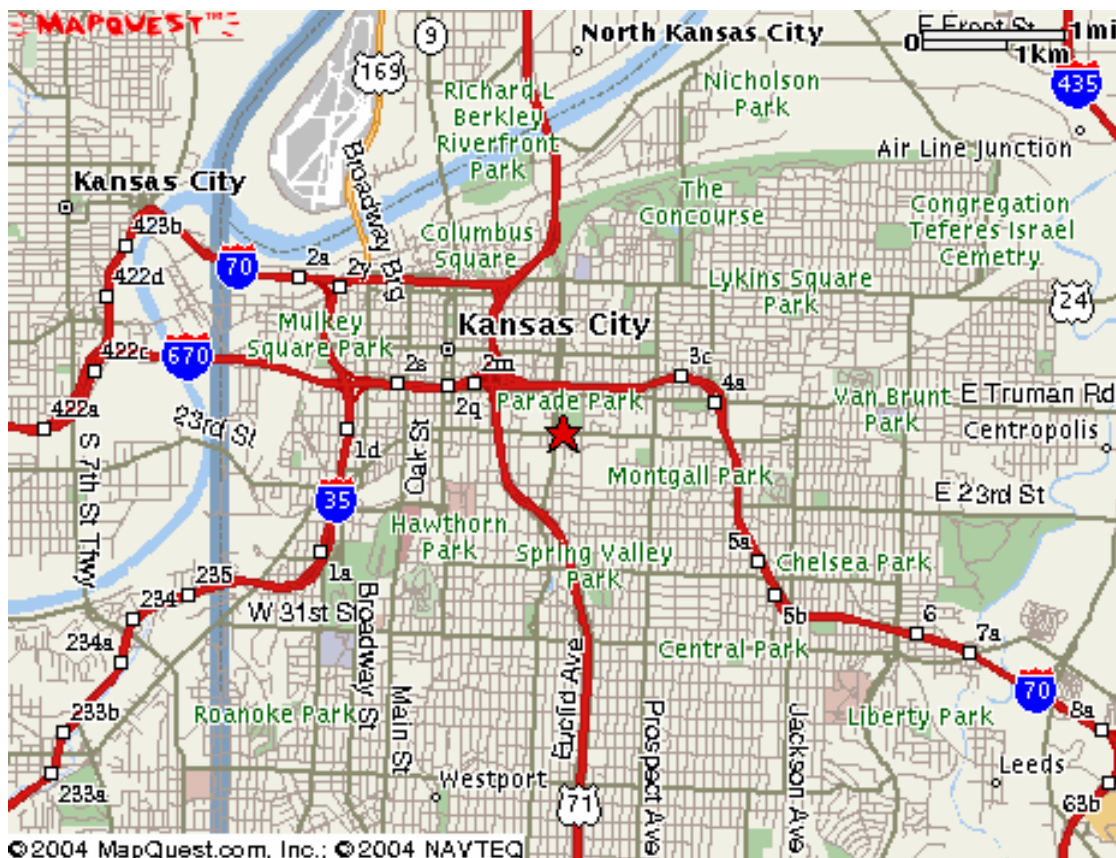
Adjacent Districts (Cont.)	<p><u>Just Outside the Jazz District:</u></p> <ul style="list-style-type: none"> ◆ To the east, a 536-units of cooperative housing. “One of HUD’s most successful projects”. ◆ To the southeast, the Centennial United Methodist Church’s (church around for about 120 years) 47-unit senior housing, called Centennial Villas. The JDRC worked with the Church on this project. ◆ Located close to 18th & Vine but in downtown (.39 miles from 18th & Vine) is the famous Arthur Bryant’s Barbecue Restaurant, open since 1930s. (“Small building is nothing fancy and resides in a sketchy part of town, but diners do not come for the ambience”). ◆ To the north, the 12th Street Heritage Commission Redevelopment Corporation is adding housing. ◆ To the south, the Black Economic Union (BEU) has partnered with the Bank of America and MOVEUP to develop a 67-unit loft-style housing development called The Vine Street Lofts. ◆ From 19th Street to 27th Street, 47 houses are being built at the old municipal, baseball stadium that will be sold for about \$150,000 to \$250,000. ◆ The Beacon Hills development will include homes to be sold for \$150,000 to \$300,000.
<i>Other:</i>	
Other Information	<p>The 18th and Vine Jazz District includes a Tax Increment Financing (TIF) district as an incentive for development.</p> <p>Public Safety</p> <ul style="list-style-type: none"> ◆ The JDRC is partnering with the Local Initiative Support Cooperative (LISC), which supports CDCs, regarding public safety. The LISC initiated a seminar called “How safe are we?” with district stakeholders (including police). There have been no violent crimes against people. There have been some car break-ins. The JDRC hires off-duty police officers for security during special events. ◆ The JDRC is looking at adding “roving” security to the district now that the district has and expects to expand its nighttime crowd.

Table III-2 (Cont.)
18th and Vine Jazz District

Other Information (Cont.)	Recent Community Events
	<p>♦ The JDRC is conducting workshop-type seminars for local business entrepreneurs.</p> <p>The JDRC, the Peach Tree Restaurant, the Red Vine Restaurant, the American Jazz Museum, the Negro League Baseball Museum and the Convention Visitor Bureau sponsored a community event to include a live jazz concert and refreshments just to say thank you to Kansas City area cab drivers and other transportation services.</p>

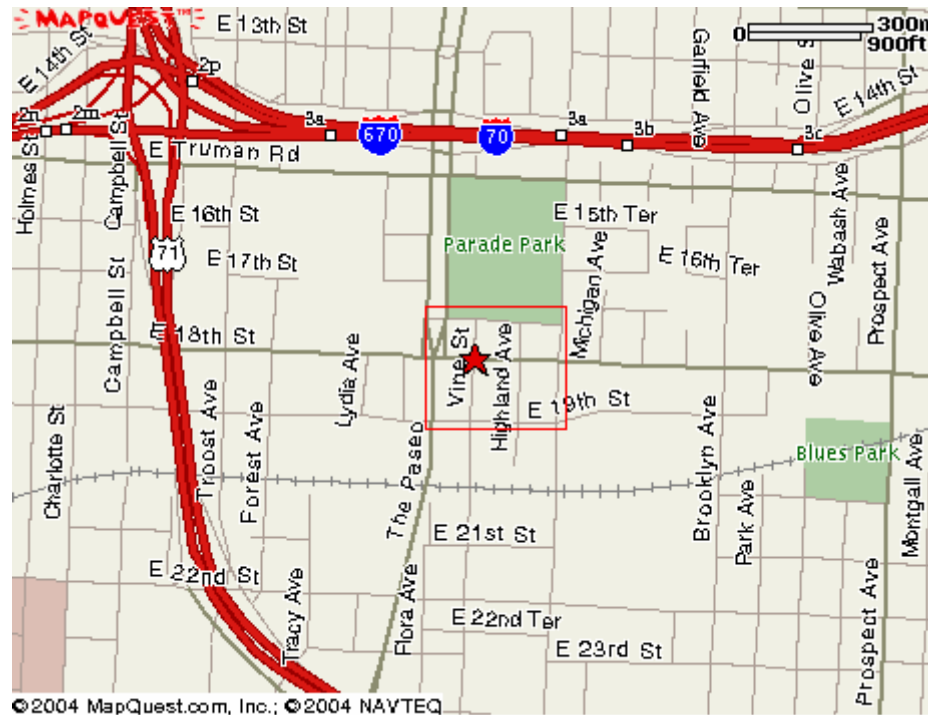
Sources: Jazz District Redevelopment Corporation, Claritas, Sales and Marketing Management 2003, Kansas City Economic Development Corporation, LISC Greater Kansas City, Prudential Lofts and Condo Realty, The Call newspaper, Soul of America.com, Horace M. Peterson III Visitor Center web site, American Jazz Museum, and ConsultEcon, Inc.

Figure III-1
18th and Vine Jazz District Location within Greater Kansas City, Missouri



Source: MapQuest.com

Figure III-2
18th and Vine Jazz District Location in Kansas City, MO



NOTE: Area outlined in red represents the 6-block area that makes up the 18th and Vine District.

Source: MapQuest.com and ConsultEcon, Inc.

Figure III-3
18th and Vine Jazz District Map and Key



Map Key:	
A. Community Center	K. Armory
B. Future Black Archives	L. Hampton
C. Charlie Parker Memorial	M. The Call
D. Billiards Bldg.	N. Grace Temple
E. The Museums at 18th and Vine	O. Zodiac
F. Barker Temple	P. Rochester
G. Holy Ghost Church	Q. Mutual Musicians
H. Lincoln Bldg.	R. Centennial Church
I. Gem Theatre	S. Attucks School
J. Jackson Bldg.	

Source: www.kcjazzdistrict.org.

Figure III-4
American Jazz Museum Entrance



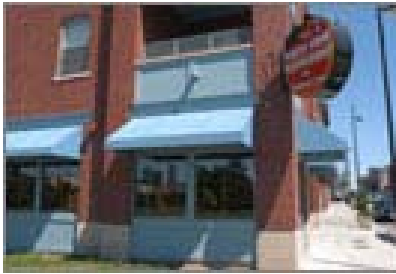
Source: American Jazz Museum web site
(www.americanjazzmuseum.com).

Figure III-5
American Jazz Museum



Source: Smithsonian Affiliations web site
(<http://affiliations.si.edu/html/affiliates.asp?ID=1&bhcp=1>).

Figure III-6
Photo of Peach Tree Restaurant Exterior



Source: AOL Kansas City Guide
(www.digitalcity.com/kansascity).

Figure III-7
JDRC's Completed Apartment Complex at 18th and Woodland
Part of the JDRC's Phase I

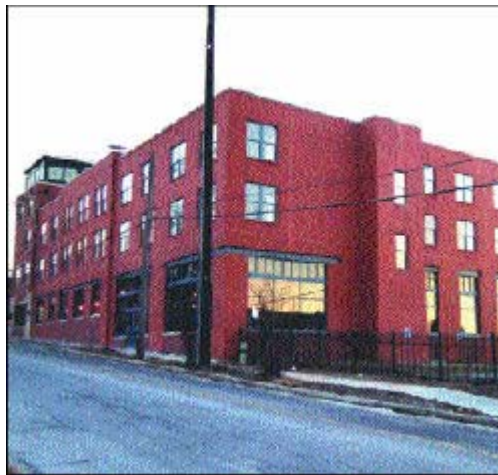


Image Source: On-line news article from The Call dated July 19, 2002, entitled "Redevelopment Efforts Strive to Bring Residential and Commercial Success Back to the 'Vine'" by Dominic Hadley.

Figure III-8
BEU, Bank of America and MOVEUP
The Vine Street Lofts, at 22nd and Vine



Source: Local Initiatives Support Corporation's (LISC) web site
(www.lisc.org/kansascity/cdcs/beu.htm).

Lessons Learned / Challenges of Development and Access

- ◆ Parking – everyone drives in Kansas City. The JDRC is planning on making 18th Street and Highland one-way to create additional parking spaces on the other side of the streets. There is a 297-space parking lot at the Attucks School (currently vacant and originally purchased by a benefactor for the JDRC) that the JDRC owns. However, this parking lot is not visible from the main part of 18th and Vine and is seemingly “too far to walk”. The original intent with acquiring the Attucks School was for the parking spaces available. The JDRC estimates that it will cost \$10 million to redo the 65,000 square foot Attucks School.
- ◆ Creating synergy with the history of music in the area was key.
- ◆ As the district is part of the National Register Historic District, the JDRC limited as to what they can build, as anything they take down has to go up as a replica of what existed before. Therefore, most of the JDRC's work is focused on entertainment and commercial uses as these requirements are too restrictive for housing. In addition, this also means that the JDRC cannot replace any historic sites/buildings with parking lots/decks.
- ◆ Public buses do run through 18th and Vine but no new public transportation systems were added as part of the district's redevelopment.

DEEP ELLUM, DALLAS

**Table III-3
Deep Ellum, Dallas**

Neighborhood/District	Deep Ellum , Plan Development District 269
City	Dallas
Locational Context	Deep Ellum is a 170 acre development district anchored by a 6-block long area along 3 to 4 parallel east-west streets. Downtown Dallas is 3 blocks to the west, separated by the Central Expressway and US Highway 75. To the east, Fair Park is a major cultural amenity for the City. Interstate 30 serves as the southern boundary. A medical district, anchored by Baylor Hospital, is to the north of Deep Ellum.
<i>Economic Information:</i>	<i>See Table III-1</i>
<i>Project Development:</i>	
Developer/Authority	Individual investors and developers are supported by the City of Dallas in terms of zoning and incentives. Multiple Goals Expressed: Investors, Developers = “make money” City of Dallas = “promote a vibrant mixed used district to support an entertainment core”
Year Project Began and Year Completed	“Slow and Steady Process,” 20-25 years 1980-1986: Informal plan development 1986: Plan Development District (PDD) #269 1999: Public Improvement District (PID) designation for a period of 5 to 7 years. 2004: On-going, each year as a PID a 5 year plan must be submitted to the City.

Table III-3 (Cont.)
Deep Ellum, Dallas

Area and Development History	<p>In the beginning of the 20th century the Deep Ellum neighborhood was the location for the train depot that transported African American laborers to the cotton fields in North Dallas. Early residents of the neighborhood at the “deep end of Elm Street” pronounced the area “Deep Ellum.” Pawn shops and jazz clubs grew up around this transportation hub. In 1913 Henry Ford opened a Model T manufacturing plant in Deep Ellum, which attracted complementary automotive service businesses including parts, upholstery, and other “oily” businesses that remained until the decline. By the 1920’s the Deep Ellum area had become a retail and entertainment center for African American residents of Dallas, and by 1950 there were as many as 50 entertainment venues in the area that served as a mecca for jazz and blues artists. The neighborhood began its decline in the 1940s and 1950s when the depot was removed and the street-line car was abandoned. By the 1970s and 1980s few businesses remained. The area, consisting primarily of old warehouses and a few machine shops, became attractive for its low rents to artist and urban fringe communities.</p> <p>In the early 1980s several individuals identified Deep Ellum as a potential real estate investment opportunity. These entrepreneurs and investors conducted informal meetings to define their vision and plan for the Deep Ellum area. In 1983 the Deep Ellum Plan was unveiled to “downzone” the area to keep the neighborhood atmosphere close and “artsy” feeling – limitations on building height, street width, and population were outlined. In 1986 investors and developers brought their ideas to the City of Dallas and Plan Development District #269 was created. This Plan called for reduced parking requirements as well as other rules and incentives that would allow Deep Ellum to be developed for entertainment and mixed-use purposes based on existing building structures. By 1991, Deep Ellum had become an eclectic and trendy entertainment destination for Dallas urbanites to gather. In 1999 Deep Ellum became a Public Improvement District that utilizes tax monies and incentives to improve the area and attract businesses and residents.</p>
-------------------------------------	--

Table III-3 (Cont.)
Deep Ellum, Dallas

Area and Development History (Cont.)	<p>The Deep Ellum Association has been in existence since the early 1990s and its mission is to promote the area and to serve its business, resident, and property owner community. Key objectives are to draw additional foot-traffic into the neighborhood and to keep the area safe. A Deep Ellum Foundation also exists to administer funds from tax collections.</p> <p>The Deep Ellum revitalization process is ongoing and appears to have been successful thus far. Deep Ellum continues to be characterized as a popular and “alternative” entertainment area in Dallas and mixed-uses have grown in the district, including retail, commercial, and residential. The district has maintained its urban eclectic flavor, although its artist community has been priced out of the residential market. In 1986 Deep Ellum had 200 residents, 3 or 4 automotive shops, and 5 restaurants. In 2004 residents number over 2,000 and there are 36 small retail shops and 39 restaurants in the area. In 1991 buildings sold for approximately \$10 per square foot that today sell for \$50 per square foot. A challenge from recent years is an increase of crime in the area, as well as a slight observed decline in businesses, resident demographics, and higher-end restaurants.</p>
Change Agents (e.g. church, high school, library, health facility/clinic, attraction)	<p>The Deep Ellum revitalization process has been primarily developer, investor, and landowner driven. An estimated 5 individuals owned one-half of the Deep Ellum area in the early 1980s. The impetus for this project was to make money for property investors. In the early 1980s buildings sold for \$7.00 per square foot and investors saw an opportunity to realize a return. By improving the Deep Ellum area, investors stood to gain from rising property values.</p> <p>Market factors have also influenced the changing face of Deep Ellum. For example, early residential demand was created by artists seeking low rents and open space in urban areas. Also, Dallas residents have driven entertainment market demand by seeking out more eclectic nightclub and restaurant venues since the early 1990s.</p>

Table III-3 (Cont.)
Deep Ellum, Dallas

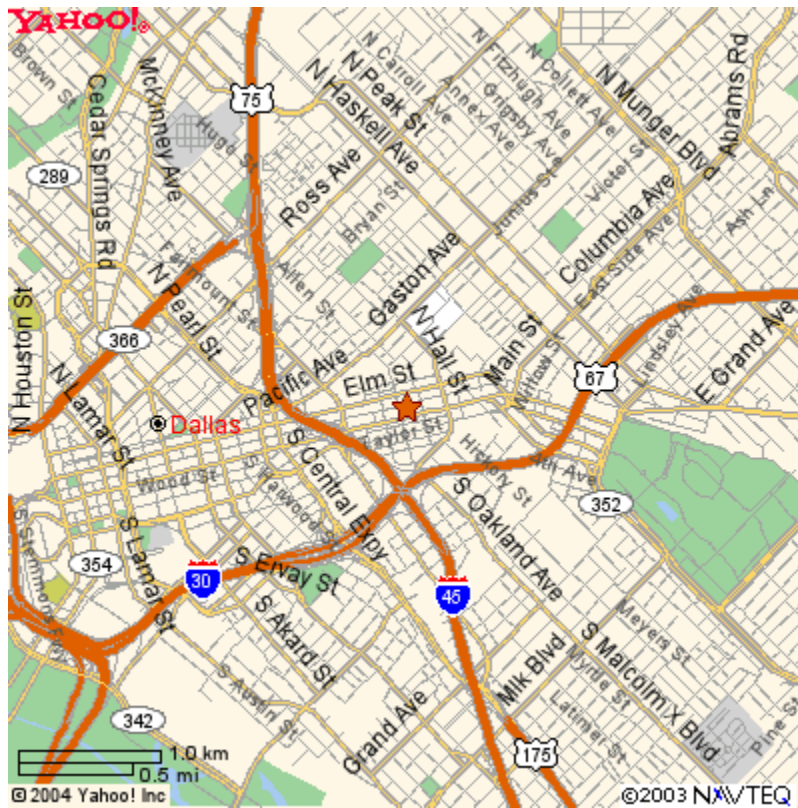
Change Agents (e.g. church, high school, library, health facility/clinic, attraction) (Cont.)	<p>The City of Dallas responded to change agents and market forces to facilitate special zoning and public improvement district changes.</p> <p>Barry Annino emerged as a community leader from early 1980s investor discussions. He became aware of and interested in the area as an investor. Barry drove Plan Development #269 through the City of Dallas in 1986, served as President of the Deep Ellum Association between 1994 and 1999, founded the Deep Ellum Public Improvement District in 1999 and serves as a member on the Deep Ellum District Board.</p>
Project Description:	
Map of Project Area (Geography)	<i>(See Map below)</i>
Project Uses	<p>Entertainment: music, bars, clubs, restaurants</p> <p>Retail: boutique shopping experience, art galleries</p> <p>Residential: loft living (majority of residential is in eastern half of district)</p> <p>Commercial: minimal, a little high-tech</p>
Anchor Facilities	<p>Anchor facilities for Deep Ellum may be characterized as a set of popular restaurants and entertainment venues. Sambuca, a particularly trendy Dallas restaurant and jazz club in the area, has recently decided to move out of the neighborhood. Other anchor facilities are considered to be generally weak, but this is mitigated somewhat since the area is easily accessible to downtown. There is a police station that has always been located in Deep Ellum, and Baylor Hospital is nearby.</p> <p>A Deep Ellum Arts Festival attracts artists and visitors to the area. The Deep Ellum Film Festival also attracts visitors, though the films are shown in downtown Dallas. In 2004, the Deep Ellum Association is implementing 20 historical markers. There are also plans for better linkages with a Farmers Market nearby.</p>
Names of Retailers	One 7-11, all others independently owned and operated.

**Table III-3 (Cont.)
Deep Ellum, Dallas**

Other:	
Other Information	<p>Infrastructure Changes have been minimal. Primarily improvement and conversion of existing building for mixed-use purposes; some new building also. In the 1980s a 6-block streetscape project was completed (sidewalks, tree plantings, and pedestrian lighting). The inside of buildings have been remodeled to accommodate loft-space.</p> <p>Transportation. Minimal transportation improvements have been made. In the 1990s 2 of the primary streets were made 1-way, and 1 primary street was made 2-way. Plans for a Dallas Area Rapid Transit (DART) station are in place for 2010 to serve as a portal to the community.</p> <p>Parking. This has been a major component of the revitalization process in terms of permitting mixed-use space to exist without normal City parking requirements. Due to densely packed existing buildings and no parking lot space, parking provisions have been key to the revitalization process and the ability to attract people to the area. The City is considering adding more parking meters.</p> <p>Key Development Moment. In 1996 “big investors” got into the Deep Ellum market by creating 700 apartment units.</p> <p>Ethnic Heritage. The area has lost much of its historical identity as an African American entertainment hub. 3 venues still exist – reggae, jazz, and a blues club – that reflect entertainment characteristics from the first half of the 20th century. Preserving this heritage does not seem to have been a goal of the Deep Ellum revitalization process.</p>

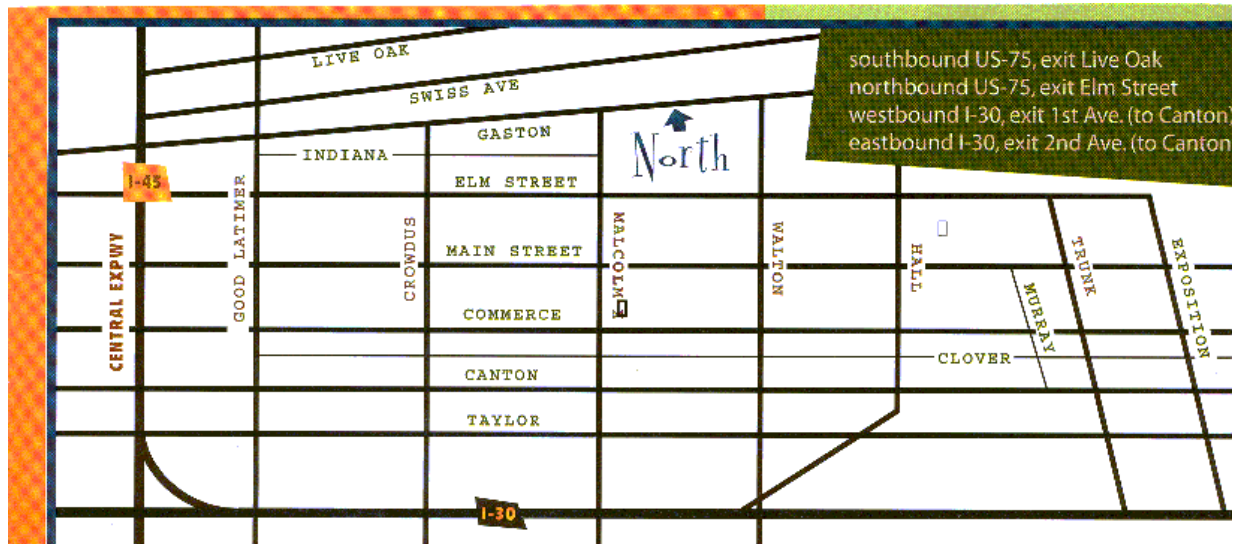
Sources: *Sales and Marketing Management 2003*; Interviews with City of Dallas managers in Long Range Planning, Area Redevelopment, and Public Improvement Districts departments; interview with the Founder and Board Member for the Deep Ellum Public Improvement District, also former President of the Deep Ellum Association (1994-1999); The Handbook of Texas, Lisa C. Maxwell; www.ondaweb.com/deep_ellum for listings of shopping and dining venues;

Figure III-9
Deep Ellum Project Site Map



Source: <http://maps.yahoo.com>

Figure III-10
Deep Ellum District Detail



Source: Deep Ellum Association at <http://www.deepellumtx.com/>

Figure III-11
Street View, Deep Ellum



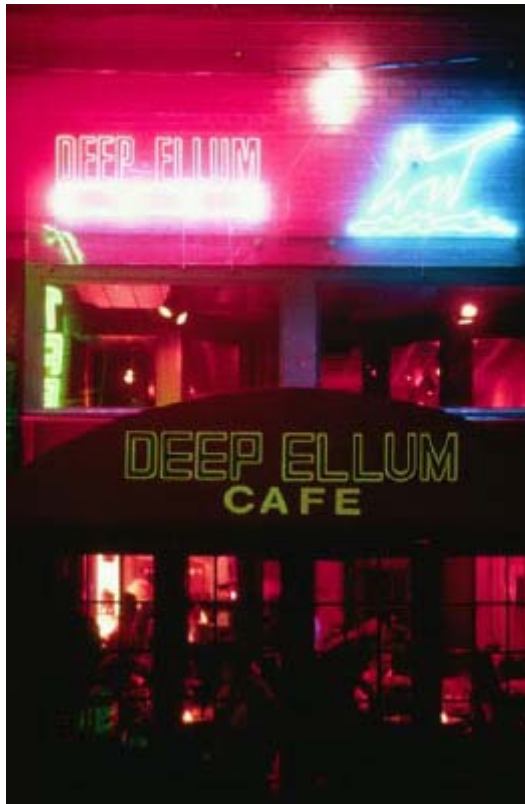
Source: Deep Ellum Images Portfolio at
<http://images.search.yahoo.com/search/images?p=Deep+Ellum+Dallas&b=1>

Figure III-12
Loft View, Deep Ellum



Source: Deep Ellum Images Portfolio at
<http://images.search.yahoo.com/search/images?p=Deep+Ellum+Dallas&b=1>

Figure III-13
Deep Ellum Entertainment



Source: Deep Ellum Images Portfolio at
<http://images.search.yahoo.com/search/images?p=Deep+Ellum+Dallas&b=1>

Figure III-14
Deep Ellum



Source: Deep Ellum Images Portfolio at
<http://images.search.yahoo.com/search/images?p=Deep+Ellum+Dallas&b=1>

Figure III-15
Deep Ellum Arts Festival



Source: Deep Ellum Images Portfolio at
<http://images.search.yahoo.com/search/images?p=Deep+Ellum+Dallas&b=1>

Lessons Learned, Deep Ellum District, Dallas, TX

- ◆ Deep Ellum success has not happened overnight, occurring from the 1980s through today. This has been a steady and gradual revitalization process and not attributable to any one event.
- ◆ Market demand and overall success may be influenced by Deep Ellum's convenient location between two desirable areas: downtown Dallas and Fair Park.
- ◆ Public Improvement District status is viewed as necessary for Deep Ellum to succeed as a viable entertainment and mixed-use development district.
- ◆ Deep Ellum improvements have been driven by investors with the goal of increasing property values and realizing a profit.
- ◆ Strong initial advocacy and continued leadership by the investor group and Deep Ellum Association have been important to improvement process success.
- ◆ In order to attract private investors, significant incentives were put in place by the City. The designation of Deep Ellum as a Tax Increment Financing District has been very important.
- ◆ Zoning changes for reduced parking requirements have been a critical element to initial and continued success. This has enabled development of 1-2 story buildings for downstairs entertainment or restaurant use and for upstairs residential use.
- ◆ In addition to parking, other special provisions of the Deep Ellum public improvement process include: garbage pick-ups, design/improvement for sidewalks and tree plantings, and transfer of development rights for historical structures.
- ◆ The City of Dallas has responded to market needs and facilitated improvements through zoning and regulation, but has not initiated these without strong private-interest Deep Ellum drivers. The City's incentive programs and regulatory environment changes have been in response to a strong market demand.
- ◆ No single anchor facility has been critical to Deep Ellum's success. The anchor of the district is considered to be the entertainment facilities in total, and includes bars, nightclubs, and restaurants. Specialty retail shops are complementary.
- ◆ Residential use has followed entertainment and retail use.
- ◆ Transportation improvements have not been undertaken by the City for those traveling to or through Deep Ellum. There is a potential plan in place for a lighttrail station stop in Deep Ellum for 2010.
- ◆ The Deep Ellum Association has been the neighborhood watchdog, safeguard, planner, improver, and promoter since the 1990s. The Deep Ellum Foundation collects monies and improves targeted areas of Deep Ellum annually.
- ◆ Community growth in the last 20 years has not displaced a strong existing community. Resident population was approximately 200 low-rent seeking artists in the early 1980s.

- ◆ There has been no active effort on the City's behalf to define the area of Deep Ellum as ethnic. This has not been a market-driven attribute. In 2004 the Deep Ellum Association is implementing 20 historical signs for placement throughout the area.
- ◆ A major challenge of the Deep Ellum improvement process was that the district started from "scratch" – run-down conditions – and there was a need to work with existing building structures based on zoning and ordinances. Obtaining changes for parking requirements from the City was another major challenge.
- ◆ Challenges for this entertainment-driven district include crime, paying for additional security, and other parking issues. With an increase in crime recently, some popular restaurant venues are relocating to different areas.
- ◆ A major infrastructure challenges today is that wastewater and water lines are failing. These were built over 100 years ago, many under buildings, and there is now a major coast for repair and upgrade.

5TH WARD REDEVELOPMENT – HOUSTON

Table III-4
5th Ward Redevelopment – Houston, TX

Neighborhood/District	5 th Ward
City	Houston, TX
Locational Context	5 th Ward is located close to downtown Houston but is cutoff from downtown by Interstate 10 and Interstate 59, an area that has typically not experienced much investment.
<i>Economic Information:</i>	<i>See Table III-1.</i>
Metro Area Population	2003 Houston MSA population: 4,440,200. Within a 1 mile radius of the center of 5 th Ward, there are approximately 15,350 residents.
Population by Race	Within a 1 mile radius of the center of 5 th Ward, the population is 53% African-American and 28% white; 45% are Hispanic (can be either white or African-American).
Median Household Income	Within a 1 mile radius of the center of 5 th Ward, the median income is \$18,000.
Average Household Size	Within a 1 mile radius of the center of 5 th Ward, the average household size is 2.98.
<i>Project Development:</i>	
Developer/Authority	Fifth Ward Community Redevelopment Corporation (CRC)
Year Project Began and Year Completed	The CRC began in 1989.
Area and Development History	The neighborhood is home to 18,000 people together with historic churches, the city's first settlement house and first black arts center, 5th Ward has a rich history and is the birthplace of many notable persons. With 62% of the residents below poverty, 5th Ward is the lowest-income neighborhood in the South's largest city, and has long been neglected by private developers. The neighborhood is in desperate need of larger rental housing as the current housing stock consists of substandard 1 and 2 bedroom units.

Table III-4 (Cont.)
5th Ward Redevelopment – Houston, TX

Area and Development History (Cont.)	Fifth Ward CRC has a long history of providing quality development projects and services, which include counseling, technical assistance, capital and financing alternatives and development. Today, Fifth Ward CRC is broadly recognized as a national leader and is frequently cited as a model for community redevelopment. The focus of the organization has been on developing affordable housing, providing spaces for social services, and incubating small business growth.
Change Agents	Fifth Ward Community Redevelopment Corporation was organized in 1989 by Fifth Ward residents, civic leaders, business owners, ministers and educators. A diverse and broadly representative community-based board meets monthly to evaluate progress towards goals, with implementation through a small staff and volunteers.
Project Description:	
Map of Project Area	<i>(See Map below)</i>
Project Uses	<p>Creation of new affordable housing has been a focus of the 5th Ward CRC. The CRC also helped to develop the 5th Ward financial center, as well as a new technology center. Accomplishments since 1989 of the CRC include:</p> <p>Since 1989:</p> <ul style="list-style-type: none"> ◆ Built 250 new homes ◆ Built two multi-family complexes (336 units) ◆ Built two and rehabbed two commercial developments with 40,000 sq. ft. of space ◆ Installed four public art installations ◆ Installed two community gateway monuments
Anchor Facilities	5 th Ward Financial Center (1998) – Anchor tenant is State Farm Insurance. Also includes Houston Police Department community storefront, a University of Houston Small Business Councilor, the CRC's new home center, ATM machines, conference room, and computer workstations for 5 th Ward entrepreneurs.

Table III-4 (Cont.)
5th Ward Redevelopment – Houston, TX

Other:	
Other Information	<p>Examples of specific developments facilitated by the 5th Ward CRC include:</p> <p>Park Village Apartments This Limited Partnership in partnership with Park Village Joint Venture and Pleasant Hill CDC provides affordable rental housing that will provide a transition to ownership. Adjacent to schools, public transportation and shopping, Park Village Apartments - 312 rental homes bring a new approach to family housing with 2, 3, 4, and 5 bedroom units in a low density configuration with on-site daycare and youth activities. The Homeward Bound® pre-ownership program will prepare participating families for homeownership in 5th Ward over a 3-5 year period.</p> <p>Lyon's Village Lyons Village is a 24 unit, multi-family tax-credit development that includes 10,000 square feet of retail space on Lyons Avenue, 5th Ward's "Main Street". All 24 units have four bedrooms, eight of which are above the social services space facing Lyons Avenue featuring an "old time" main street look. The amenities include a full appliance package (range, refrigerator, washer, dryer, garbage disposal, individual water heaters and dishwashers), laminate counter tops with full backsplash, ceiling fans, security system, steel tubs with tile enclosures and mini-blinds. Residential units are 100% occupied.</p> <p>Lyons Village is mixed use and includes spaces for social services providers. The social services space includes a Teen Enterprise Center and Young Fathers in Families program operated by Fifth Ward Enrichment. Other tenants include Career and Recovery Resources, Disaster Recovery Interfaith, McAuley Institute, Houston Works, and Intercoastal Driving School. Within a block of the project are a career center, a teen clinic, a grocery store and east/west and north/south public transit lines.</p>

Table III-4 (Cont.)
5th Ward Redevelopment – Houston, TX

Other Information (Cont.)	<p>Technology Center</p> <p>5th Ward will soon be home to a Community Technology Center. A \$50,000 grant from the Department of Housing and Urban Development's Economic Development Initiative will help to fund the Center. It is part of a public-private partnership to create new jobs and close the "technology" gap among the community. The Center will be a hub for the Fifths Ward / Hewlett Packard I-Community – which currently has several satellite centers.</p> <p>The 32,000 square-foot facility will also be home to minority-owned, technology-based businesses, a cyber café and a food service distributor. Groundbreaking is planned for Fall 2004. The facility will include 18,000 square feet for Houston Community College, and include a "virtual library", classrooms, and offices. Hewlett-Packard assisted the 5th Ward Community Redevelopment- Corporation with \$3 million in multi-year funds, equipment, and services.</p>
--------------------------------------	--

Sources: 5th Ward Community Redevelopment Corporation and ConsultEcon, Inc.

Figure III-16
Lyons Avenue Before Redevelopment



Source: 5th Ward Redevelopment.

Figure III-17
Lyons Avenue After Redevelopment



Source: 5th Ward Redevelopment.

Lessons Learned from 5th Ward

- ◆ An organization such as a CDC can serve as a catalyst for new development by making initial public investment into neighborhood housing, commercial spaces, and small businesses.
- ◆ Accomplishments in the 5th Ward demonstrate that it is possible to make significant physical changes in a community which has not typically experienced new development.
- ◆ Pairing new housing with mixed use area such as office space, technology center, and community services, a critical mass of economic activity can form, upon which new development will grow.

MILWAUKEE AFRICAN AMERICAN CULTURE AND ENTERTAINMENT DISTRICT

Table III-5
Milwaukee African American Culture and Entertainment District, Wisconsin

Neighborhood/District	Milwaukee African American Culture and Entertainment District /
City	Milwaukee, Wisconsin
Locational Context	A proposed <i>African-American Cultural and Entertainment District</i> is planned to be designated along North Avenue between 7 th street and 2 nd street – encompassing parts of Kind Drive (3 rd St.). The district is located 1 mile from downtown Milwaukee and has access to the interstate. It is served by three bus lines. There are a number of important employers in the nearby area; the Schlitz Office Complex has 4,000 employees, the Wisconsin Department of Natural Resources employs 193. The King Commerce Center has several small businesses and a bank. The population of the district (within a ½ mile radius) is approximately 6,000; there are an estimated 26,000 within 1 mile and 116,000 within a two mile radius. In 1993, the <i>Historic King Drive Business Improvement District</i> was formed along a two-mile area adjacent to the north side of Downtown Milwaukee. The District encompasses – but is not the same area – as the proposed <i>African-American Cultural and Entertainment District</i> . The District has seen nearly \$200 million worth of new development, and has become an urban development model for the rest of the country.
Economic Information:	See Table III-1.
Metro Area Population	Milwaukee MSA population: 1,512,400. Within 1 mile of the center of North Avenue and MLK, there are approximately 25,800 residents.
Population by Race	Within 1 mile of the center of North Avenue and MLK, 64% of the population is African-American, 28% is white, and 9% is Hispanic (can be either white or African-American).
Median Household Income	Within 1 mile of the center of North Avenue and MLK, the median household income is \$23,700.
Average Household Size	Within 1 mile of the center of North Avenue and MLK, the average household size is 2.42.

Table III-5 (Cont.)
Milwaukee African American Culture and Entertainment District, Wisconsin

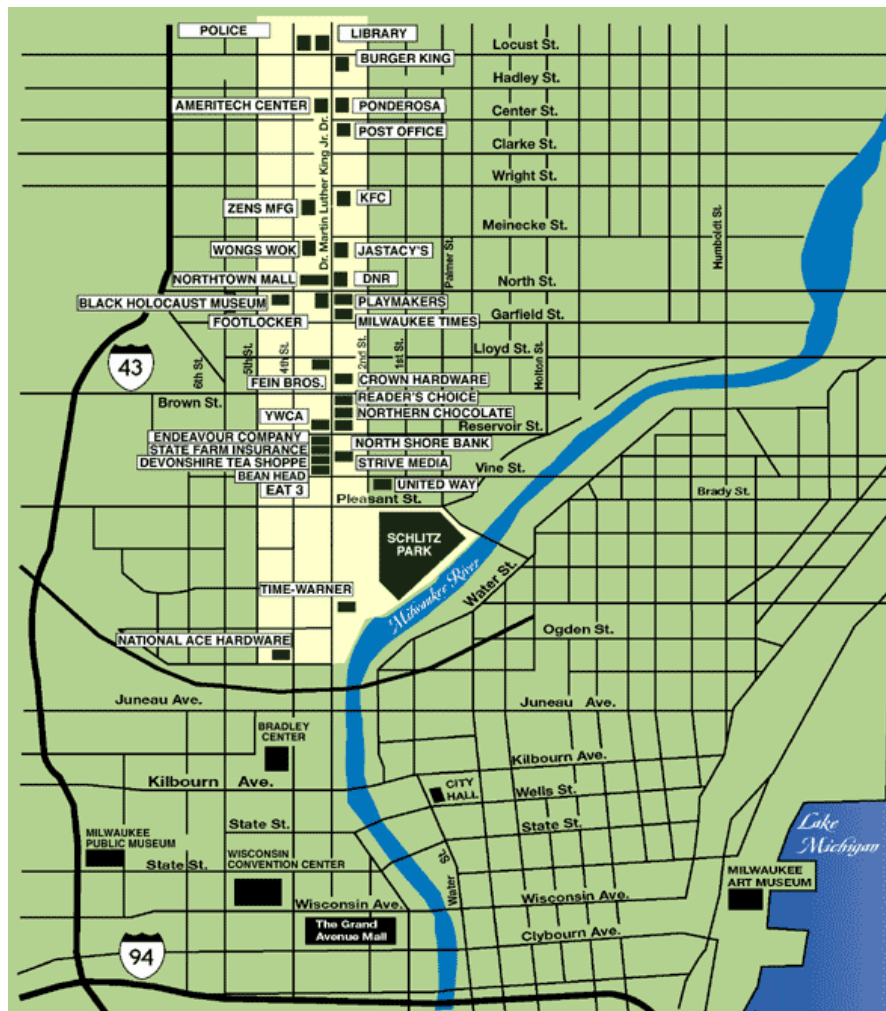
<i>Project Development:</i>	
Developer/Authority	Milwaukee African American Culture and Entertainment District is a project of the City of Milwaukee Planning Department. The Historic King Drive Business Improvement District is a coalition of business owners.
Year Project Began and Year Completed	In 1993, the <i>Historic King Drive Business Improvement District</i> was formed. The <i>Culture and Entertainment District</i> is still in planning stages.
Area and Development History	<p>This area for many years has experienced low rents, vacant buildings, high crime rates, and loss of employment following riots in the 60's and the exodus of many local employers, and their workers. It was once a commercial hub for the African-American community in Milwaukee – known as Bronzeville, where jazz clubs were once frequented by Duke Ellington and other legends. It is on this rich heritage that the District will be developed. A central goal will be to attract new clubs, restaurants, and culture/entertainment options to the neighborhood, thus making it a destination for local residents as well as tourists from all over. It is hoped that the new branding and reputation established will result in an influx of new money and investment into the community.</p> <p>Revitalization strategies in the surround neighborhood have gone beyond the proposed entertainment district. The revitalization effort has encompassed commercial revitalization, housing improvement, and business assistance.</p>
Change Agents	City of Milwaukee and private businesses that make up the Historic King Drive Business Improvement District.

Table III-5 (Cont.)
Milwaukee African American Culture and Entertainment District, Wisconsin

<i>Project Description:</i>	
Project Uses	The area encompassing the proposed African-American Cultural and Entertainment District already has the Black Holocaust Museum, an educational facility drawing 30,000 visitors annually. Currently a consultant is studying feasibility of adding another significant African American cultural attraction and considering options for what might be a good fit. The Cultural and Entertainment District will have a focus on increasing the number of restaurants and clubs in the area. Restaurants with an African-American flavor would be encouraged such as soul food, Jamaican food, and others which are unique and attract visitors from beyond the neighborhood.
Anchor Facilities	King Commerce Center – bank branch office, several small businesses. Schlitz Park Office Complex WI Dept. of Natural Resources Regional Office Black Holocaust Museum
Names of Retailers	Foot Locker, Payless Shoes, Ponderosa Steakhouse Rainbow Fashions, Subway, Value Village, Wendy's Wong's Wok, Bean Head Café, Crown Hardware, E3 Restaurant, Ja Stacy's, Playmakers, Readers Choice, Voluptuous Secrets.
Adjacent Districts	The African-American Cultural and Entertainment District is located within the Historic King Drive Business Improvement District was formed along a two-mile area adjacent to the north side of Downtown Milwaukee.
<i>Other:</i>	
Other Information	Streetscape improvements such as lighting, sidewalk paving, and façade improvements have also made the area more attractive. A grant was recently awarded to improve parking in the district. A commercial building assessment was recently completed which will help the community identify potential spaces for new businesses. The removal of the elevated freeway continues. A total of 26 acres are being redeveloped, which is expected to yield more than \$250 million in new investment. The underutilized and vacant parcels will bring new life to the area with a mix of new housing, offices, shops and entertainment venues

Sources: City of Milwaukee, Historic King Drive Business Improvement District and ConsultEcon, Inc.

Figure III-23
Historic King Drive Business Improvement District



Source: Historic King Drive Business Improvement District.

Figure III-18
Proposed African American Culture and Entertainment District



Source: City of Milwaukee.

Figure III-19
America's Black Holocaust Museum



Source: City of Milwaukee.

Lessons Learned from Milwaukee African American Culture and Entertainment District

- ◆ By defining an area as a “place” within a larger city, it becomes more of a destination for patrons to visit restaurants and entertainment venues. An arts/entertainment district can be a part of a larger neighborhood revitalization district.
- ◆ A signature cultural attraction can add to the viability of a district in that it can potentially draw visitors from well outside the local area, thus attracting new potential customers for area businesses.
- ◆ New business growth and other success can be brought about through business Improvement Districts and other cooperative efforts at commercial growth through re-investment in the local neighborhood.
- ◆ Improvements in streetscape, facades, parking, and transportation collectively help the quality of life for area residents, the viability of businesses, and improve the attractiveness of an area for visitation by tourists and commercial investment.
- ◆ Very strong leadership, cooperation among businesses, and effective public outreach and buy-in from the community is necessary to implement revitalization projects.
- ◆ Recruitment of businesses (both local and regional/national) is often necessary to attract new commercial development. As a critical mass builds, it will become easier to create developments benefiting both business and consumers.
- ◆ The relationship to outlying communities and business districts is very important in that often there is a mutually beneficially relationship between downtown areas and surrounding neighborhoods. Revitalization of an area can potentially spread to adjacent areas.

BRONZEVILLE – CHICAGO

Table III-6
Bronzeville, Chicago

Neighborhood/District	Chicago's Black Metropolis, also known as South Side, Douglas and Bronzeville. 47 th Street Blues District is located within Bronzeville.
City	Chicago, Illinois
Locational Context	Bronzeville is located south of Chicago's The Loop. Bronzeville's boundaries are amorphous. However, some refer to its boundaries as between 26th Street and 51st Street, Wentworth Avenue and Cottage Grove Avenue.
<i>Economic Information:</i>	<i>See Table III-1</i>
<i>Project Development:</i>	
Developer/Authority	Bronzeville includes areas that are under different municipal jurisdictions. Therefore, overall the authority was the City of Chicago and the "local" organization was the South Side Partnership.
Year Project Began and Year Completed	The Southside Partnership came together in 1989. The Bronzeville redevelopment is ongoing.

**Table III-6 (Cont.)
Bronzeville, Chicago**

<p>Area and Development History</p>	<p>“Developed during the first decades of the 20th century, this "city-within-a-city" (Black Metropolis-Bronzeville) was home to numerous nationally prominent, African-American-owned and -operated businesses and cultural institutions. This district offered a commercial alternative to the race restrictions and indifference that characterized much of the city during the early part of the 20th century. Between 1910 and 1920, during the peak of the "Great Migration," the population of the area increased dramatically when thousands of African-Americans emigrated to Chicago in search of industrial jobs. Further development of the area was halted by the onset of the Great Depression. Many famous people were associated with the development of the area including: Jesse Biga, banker ; Anthony Overton, entrepreneur; Joseph Jordan, musician; Andrew "Rube" Foster, founder of the Negro National Baseball League; Ida B. Wells, a civil rights activist, journalist and organizer of the NAACP; Bessie Coleman, the first African-American woman pilot; and Louis Armstrong, the legendary trumpet player and bandleader who performed at many of the area's night clubs. The name, "Black Metropolis," became firmly established with the publication of a 1945 sociological study of the same title. In later years the area was referred to as "Bronzeville,"⁶ a term attributed to Dave Kellum who was the editor of the Black newspaper, the Chicago Bee.</p> <p>The Regal Theatre, the Savoy Ballroom, and the Metropolitan Theatre ranked with the City's premier entertainment venues. In the postwar years, the country blues of the Mississippi delta gained a hard, electrified edge in clubs along 43rd and 47th Streets.</p> <p>Over the years, some of the biggest names in show business came in-Duke Ellington, Count Basie, Cab Calloway, Louis Armstrong, Lena Horne, Bill "Bojangles" Robinson, Billie Holiday, Dinah Washington, Quincy Jones, Miles Davis, James Brown, Muddy Waters, Willie Dixon, Redd Foxx, and Nipsey Russell. There were groups like the Temptations, literary lights like Richard Wright, Langston Hughes, and Lerone Bennett Jr. Ebony publisher John Johnson patronized Gerri's Palm Tavern. The list goes on and on, across the "wall of fame" that dominates the back of the club, next to its small stage.</p>
--	--

⁶ From the City of Chicago's Landmark District's web site (www.cityofchicago.org/Landmarks/B/BlackMet.html).

**Table III-6 (Cont.)
Bronzeville, Chicago**

<p>Area and Development History (Cont.)</p>	<p>“The Black Metropolis was the cultural center of African – American life. Much like Hart in New York or Beale Street in Memphis, every body went to Black Metropolis. The roles of the great Chicago’s blues tradition are to be found buried deep in Black Metropolis. Following World War II, some of the housing restrictions placed on African – American in Chicago was lifted, and many households left Bronzeville and moved further south. Concurrently, the Federal Urban Renewal Program funded massive land clearance projects that spawned a series of large high-rise public housing developments across thousands of private apartment units. Single family homes began to disappear from the area. The result of this redevelopment activity was a substantial decline in the Mid-South population. For example, from 1950 to 1990, the combined populations of the Douglas and Grand Boulevard neighborhoods (two of the neighborhoods included in the study area) declined from 193,000 to just 66,000. As the population declined, the economic base of the area disintegrated. Shopping alternatives for the residents were severely reduced, and most social outlets shuttered their windows.”⁷</p> <p>The Mid-South Development Plan was “developed from 1990 to 1993 by the Mid-South Planning Group under a McCormick Tribune Foundation grant to the City of Chicago, Department of Planning and Development. Aspects of the Plan are being implemented, although the Plan was never officially accepted by the City. The Mid-South Planning Group became the Mid-South Planning & Development Commission.”⁸</p> <p>“The mission of the Mid-South Planning Process is to formulate an improvement plan to enhance the quality of life and maintain the cultural heritage of the indigenous people who live and work in Mid-South Planning area. The mission of the Plan was to be accomplished through the integration and coordination of residents, churches, community based organizations, institutions and government working in a holistic manner towards the positive achievement of redeveloping and revitalizing the Mid-South community. The primary study area is approximately three and one half-square miles large.</p>
--	--

⁷ From Illinois Institute of Technology (www.iit.edu/~iitcomdev/south_partners/mid-south.html).

⁸ From Illinois Institute of Technology (www.iit.edu/~iitcomdev/south_partners/mid-south.html).

**Table III-6 (Cont.)
Bronzeville, Chicago**

Area and Development History (Cont.)	<p>The boundaries are as follows:</p> <ul style="list-style-type: none"> ◆ Northern Boundary - Cermak / 22nd Street ◆ Southern Boundary - 51st Street ◆ Eastern Boundary - Lake Michigan / Cottage Grove ◆ Western Boundary - Dan Ryan Expressway <p>In addition to the primary study area, two secondary areas were used in planning process. These areas extend north and south from the primary area to Roosevelt road and Marquette road / 67th street respectively.</p>
Change Agents (e.g. church, high school, library, health facility/clinic, attraction)	<p>Southside Partnership, which included the following organizations:</p> <ul style="list-style-type: none"> ◆ Bank One/First Chicago, Centers For New Horizons, Chicago Urban League, Elliott Donnelley Center, Gap Community organization, Grand Boulevard Federation, Illinois Institute of Technology, Lugenia Burns Hope Center, John D. and Catherine T. MacArthur Foundation, Mercy Hospital, Mid-South Planning and Development Commission, Partners In Community Development, Michael Reese Hospital, and STRIVE/Chicago Employment Services.
<i>Project Description:</i>	
Map of Project Area	<i>(See Map below)</i>
Project Uses	Housing, schools, retail, entertainment (theaters, bars, museums), historic rehabilitation, restaurants, and commercial.

**Table III-6 (Cont.)
Bronzeville, Chicago**

<p>Anchor Facilities (e.g. medical institutions/facility, historical site, school, church, offices, library, attraction)</p>	<ul style="list-style-type: none"> ◆ Centers for New Horizons ◆ 47th Street Blues District ◆ Police Headquarters ◆ Multiple Historic Sites ◆ Hospital ◆ Schools ◆ Children's Museum (The Bronzeville Children's Museum was founded on August 20, 1993 by Peggy A. Montes and a group of dedicated business, civic, cultural and educational leaders who saw the need for a "children friendly" museum to help increase literacy and open the doors to knowledge, hope and self-esteem for children, especially underserved African-American children, ages three to eleven years old. It is the first and only African-American children's museum in the country.)⁹ <u>Admission:</u> \$2.00 (child) \$3.00 (adult). Each classroom teacher with a class is Free.
<p>Other:</p>	
<p>Other Information</p>	<p>Accomplishments to date of the South Side Partnership¹⁰:</p> <ul style="list-style-type: none"> ◆ Conceived the idea of involving residents and local businesses and institutions in creating their own plan for their community's development, and brought planning professionals and local people together to create and produce Restoring Bronzeville. ◆ Created an organization, the Mid-South Planning and Development Commission, to become an institutionalized force in implementing and renewing the Mid-South Plan, Restoring Bronzeville.

⁹ Bronzeville Children's Museum web site (www.bronzevillechildrensmuseum.com/infopage.html).

¹⁰ From Illinois Institute of Technology (www.iit.edu/~iitcomdev/south_partners/bronzeville1.html).

Table III-6 (Cont.)
Bronzeville, Chicago

Other Information	<ul style="list-style-type: none">• Through the collective "relational power" of the Partners, brought local organizations and the Metropolitan Pier & Exposition Authority together to negotiate a local hiring agreement for jobs created through the McCormick Place Expansion.• Won the Authority's MPEA \$10M investment in the renovation of King Drive.• Sponsored programs and initiatives to improve academic achievement, job opportunities for youth, and school performance in the community, including:<ul style="list-style-type: none">○ the CHESS tutoring and scholarship program,○ a teller training program within Wendell Phillips High School Academy,○ Hire the Future, and○ "Introduction to Business" course• Came up with the campaign theme, "Parent Power," which generated tremendous parent participation citywide in the first LSC elections.• Created and continues to lead the "charrette", a school-community collaboration to improve Wendell Phillips High School Academy and its feeder schools.• Was instrumental in renaming the community "Bronzeville".• Supported IT and MDPDC in so naming the 35th Street Green Line Station.
--------------------------	---

**Table III-6 (Cont.)
Bronzeville, Chicago**

Other Information (Cont.)	<ul style="list-style-type: none">• Initiated an annual awards dinner, hosted by [IT], to celebrate community leadership and community improvements.• Guided strategic investments by First National/First Chicago in the community; among them, the Homes for Bronzeville development that will transform the South Gap.• Catalyzed and supported the work of individual partners in leveraging several major public works and historical preservation projects in the community, including:<ul style="list-style-type: none">○ the siting of the police headquarters here,○ restoring the Armory,○ preserving the Overton Building and Unity Hall, and○ securing capital improvements at Wendell Phillips High School Academy, including a campus connecting Phillips and Mayo School.
--------------------------------------	---

Sources: City of Chicago's Landmark District's web site (www.cityofchicago.org/Landmarks/B/BlackMet.html); Centers for New Horizons; Sales and Marketing Management 2003; Illinois Institute of Technology; and ConsultEcon, Inc.

The nine structures identified in **Figure III-20** are what remain of the "Metropolis," one of the nation's most significant landmarks of African-American urban history.

Figure III-20
Black Metropolis-Bronzeville Landmark Structures



Map Key:

1. Overton Hygienic Building
2. Chicago Bee Building
3. Wabash Avenue YMCA
4. Chicago Defender Building
5. Unity Hall
6. Eighth Regiment Armory
7. Sunset Cafe
8. Victory Monument
9. Supreme Life Building

Source: City of Chicago's Landmark District's web site
(www.cityofchicago.org/Landmarks/B/BlackMet.html).

The Ain't That Sweet Café in Bronzeville is a "next generation urban entrepreneurial business enterprise" was supported by City of Chicago EZ Funds. All of the staff are under 30. The Café features an outdoor "Garden Suite" that has built up a significant carry-out lunch clientele, based on careful preparation of healthy sandwiches and fruit smoothies.

Figure III-21
Ain't That Sweet Café at 4315 South State Street



Left to right in photo: "Catrice Hardeman and Camille Edwards serve a neighborhood customer a freshly prepared ice cream Sunday at the new Ain't That Sweet Cafe located at 4315 South State Street."

Source: Bronzeville On-Line (www.bronzevilleonline.com).

Figure III-22
The Negro League Café



“Unique signage on the storefront features The Negro League Café spelled out with miniature baseball bats.”

Source: Bronzeville On-Line (www.bronzevilleonline.com).

Figure III-23
Exterior of the Palm Tavern



Source: Palm Tavern landmark submission
(http://palmtavern.bizland.com/palmtavern/Palm_Tavern_2000_Landmark.htm).

Figure III-24
Historical Photo of Palm Tavern's Interior



Source: Palm Tavern web site
(<http://palmtavern.bizland.com/palmtavern/>).

The “Gateway to Bronzeville” is considered the 15 foot tall statue named the Monument to the Great Northern Migration, by statue designer Alison Saar as shown in **Figure III-25**.

Figure III-25
Monument to the Great Northern Migration



Source: Tour Black Chicago Inc. (www.tourblackchicago.com/bronzeville.htm).

The Tour Black Chicago web site describes a 1.5 mile walk through Bronzeville. The walk reveals 91 bronze plaques identifying significant characters who once lived here. There are also a variety of sculptural benches along the streetscape. Thirteen artists were selected to create the 24 bench sculptures.

Table III-26
An Example of a Sculptural Bench in Bronzeville



Source: Tour Black Chicago Inc. (www.tourblackchicago.com/bronzeville.htm).

ROXBURY, MASSACHUSETTS

Table III-7
Roxbury, Massachusetts

Neighborhood/District	Roxbury
City	Roxbury (Boston), Massachusetts
Locational Context	Roxbury is a neighborhood that is the geographical center of the City of Boston. Roxbury encompasses 3.5 square miles and 2,200 acres of land. Over 60% of the area is residential. Roxbury's boundaries fall primarily on the following main streets: Massachusetts Avenue, Seaver Street and Columbus Avenue.
Economic Information:	<i>See Table III-1.</i>
2003 Estimated Metro Area Population	Boston-Lawrence-Lowell-Brockton: 4,059,600
Roxbury Population	Total Roxbury population in 2000 was 47,517. In 2000, Boston's total population was 589,141.
Population by Race	In 2000, approximately 65% of Roxbury's population was African-American; 24% was Latino; 10% was white; and small proportions of population were composed of Asian, American Indian and other ethnic categories.
2003 Estimated Metro Area Median Household EBI	\$46,350
Total Number of Households	In 2000 in Roxbury, the total number of households were 17,114, including 10,848 family households.
Average Household Size	The average household size in 2000 in Roxbury was 2.7 persons, compared to 2.3 for Boston.
Employed Population	<p>For 2000, the total employed population over 16 years of age in Roxbury was 17,323 workers.</p> <ul style="list-style-type: none"> ◆ Construction (4% or 615 workers) ◆ Manufacturing (6% or 971 workers) ◆ Wholesale trade (2% or 308 workers) ◆ Retail trade (10% or 1,590 workers) ◆ Transportation and warehousing (5% or 821 workers) ◆ Finance, insurance, real estate, rental/leasing (10% or 1,644 workers) ◆ Professional and related services (11% or 1,733 workers) ◆ Professional, scientific and tech services (4% or 660 workers)

Table III-7 (Cont.)
Roxbury, Massachusetts

Employed Population (Cont.)	<ul style="list-style-type: none"> ◆ Administrative, support and waste management services (7% or 1,073 workers) ◆ Educational services (8% or 1,328 workers) ◆ Health care and social assistance (22% or 3,608 workers) ◆ Accommodation, food services, and other services (12% or 1,848 workers) <p>Public administration (7% or 1,124 workers)</p>
<i>Project Development:</i>	
Developer/Authority	City of Boston and Boston Redevelopment Authority
Year Project Began and Year Completed	Ongoing
Area and Development History	<p>“Founded by English colonists in 1630, Roxbury began as an independent community, connected to Boston only by a narrow neck of land along Washington Street. Today, after massive landfill and annexation to Boston, Roxbury is at the city's geographical center. It contains buildings and landmarks that tell the story of three centuries. Even with dense urban development, Roxbury has much open, green space, a legacy of its days as a farming town and as an early suburb.</p> <p>Until about 1900, Roxbury was a community of English, Irish, and German immigrants and their descendants. In the early 20th century, Roxbury became more diverse with the establishment of a Jewish community in the Grove Hall area along Blue Hill Avenue. Following a massive migration from the South to northern cities in the 1940s and 1950s, Roxbury became the center of the African-American community in Boston.</p>

Table III-7 (Cont.)
Roxbury, Massachusetts

<p>Area and Development History (Cont.)</p>	<p>Social issues and the resulting urban renewal activities of the 1960s and 1970s contributed to a decline in the neighborhood. More recently, grassroots efforts by residents have been the force behind revitalizing historic areas and creating Roxbury Heritage State Park. The relocation of the Orange Line and development of the Southwest Corridor Park spurred major investment, including Roxbury Community College at Roxbury Crossing and Ruggles Center at Columbus Avenue and Ruggles Street. Commercial development now promises reinvestment in the form of shopping and related consumer services.”¹¹</p> <p>“Seventy-two Dale Street is the Boston home of Malcolm X (1925-1965) recognized as one of the most powerful voices for social justice, both nationally and internationally. He resided at this address at various periods from 1941 to 1944, at the invitation of his aunt, Ella Little Collins, a matriarch, advisor, and motivational force for Malcolm X and his seven siblings.”¹²</p> <p><u>Overall Goals and Objective of the Roxbury Strategic Master Plan:</u></p> <ul style="list-style-type: none"> ◆ Enhance civic life and the cultural environment in which residents participate (Arts & Cultural Heritage) ◆ Actively promote a sustainable and diverse economy focused on job opportunities and the creation of wealth (Economic Development & Job Creation) ◆ Provide a safe and convenient pedestrian, public transit and automobile transportation network (Transportation)
--	---

¹¹ From Roxbury Crossing Historic Trust (www.rcht.org).

¹² From The Roxbury Strategic Master Plan.

Table III-7 (Cont.)
Roxbury, Massachusetts

Area and Development History (Cont.)	<ul style="list-style-type: none"> ◆ Provide a wider range of housing options for residents of diverse socioeconomic and age groups (Housing) ◆ Create a public realm that is comfortable, lively and safe that reflects the unique physical and social character of the neighborhood (Community-Wide Urban Design Recommendations) ◆ Enhance community participation and empowerment and increase the accountability of various groups and entities to the Roxbury community; including institutions, government agencies and businesses (Implementation)
Change Agents)	Roxbury Community (see under <i>Other Information</i> below “Jobs and Community Services Programs”), Dudley Neighborhood Initiative and the City of Boston Redevelopment Authority, in response to the need for more housing
<i>Project Description:</i>	
Map of Project Area (Geography)	(See Map below)
Anchor Facilities	<ul style="list-style-type: none"> ◆ Boston Police Headquarters ◆ Roxbury Community College ◆ Dudley Square commercial/entertainment area ◆ Historic Districts that include multiple landmark sites: <ul style="list-style-type: none"> ○ Dudley Station Historic District ○ Eustis Street Architectural Conservation District ○ John Elliot Square Historic District ○ Roxbury Highlands District ○ Museum of the National Center for Afro-American Artists at 300 Walnut Ave. (built in 1872) ◆ 2 Hotels ◆ Grove Hall “Mecca” Shopping Center ◆ Churches

**Table III-7 (Cont.)
Roxbury, Massachusetts**

Anchor Facilities (Cont.)	<ul style="list-style-type: none"> ◆ Schools, such as the Orchard Gardens School ◆ Restaurants, like Bob the Chef's ◆ Roxbury is adjacent to Boston City Hospital and Boston Medical Center ◆ Potential Jazz Museum
Names of Retailers	<ul style="list-style-type: none"> ◆ 2 McDonald's ◆ Grove Hall Mecca Shopping Center (\$13 million mall) includes a Stop & Shop, a Fleet Bank branch, Best Price Fashions, CVS Pharmacy, Dunkin Donuts, and Hollywood Video.¹³ ◆ Alpha Omega (fine watches and jewelers) ◆ Lil' Peach ◆ Save' A Lot ◆ Store 24 ◆ Ethnic Supermarkets ◆ Ethnic Restaurants
Adjacent Districts	Boston Medical District, the South End, Northeastern University Campus, Olmsted Park System
Other:	
Other Information	<p><u>Housing Trends:</u></p> <p>"A lack of necessary housing in the region has resulted in tremendous demand for housing throughout the City of Boston. Roxbury in particular has experienced one of the sharpest increases in housing prices. Driven by its close proximity to downtown, its stunning residential housing stock and its adjacency to other high-priced neighborhoods such as Jamaica Plain and the South End, the price of a three-family home rose 117% between 1997 and 2001. Roxbury's advertised asking rents for a two-bedroom unit increased by 89% between 1995 and 2001.</p>

Sources: The Roxbury Strategic Master Plan, released in January 2004; Sales and Marketing Management 2003; Roxbury Crossing Historic Trust; and ConsultEcon, Inc.

¹³ The Grove Hall Mecca Shopping Center is located in "ambiguous territory" between Roxbury and Dorchester. The grocery store is the only major grocer in the area.

Figure III-27
Roxbury Neighborhoods Map



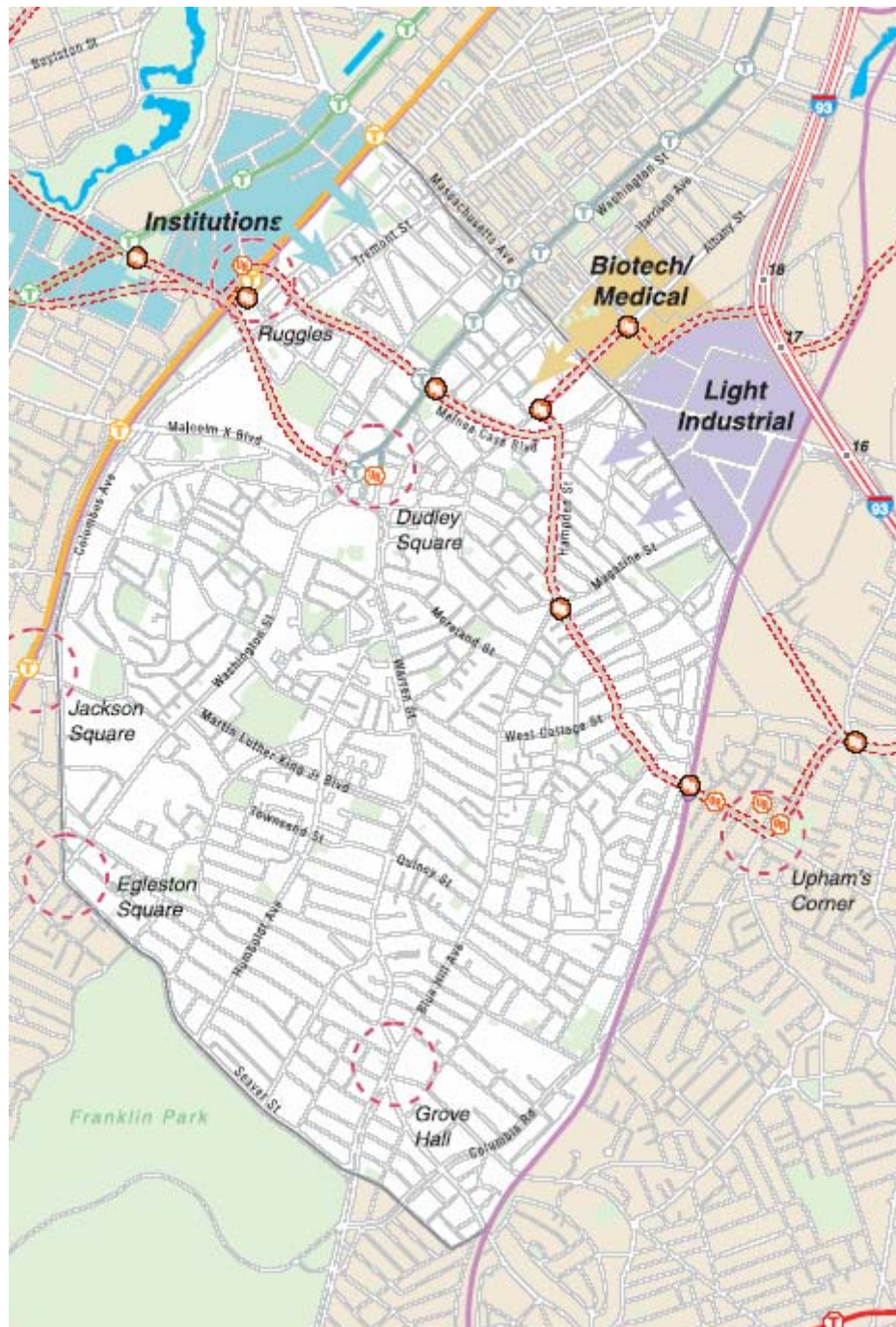
Source: The Roxbury Strategic Master Plan, released in January 2004.

Figure III-28
Roxbury in the Context of the City of Boston



Source: The Roxbury Strategic Master Plan, released in January 2004.

Figure III-29
Locational Assets of Roxbury



Source: The Roxbury Strategic Master Plan, released in January 2004.

Figure III-30
Carlyle Grand Café



Source: The Roxbury Strategic Master Plan, released in January 2004.

Figure III-31
Roxbury Community College



Source: The Roxbury Strategic Master Plan, released in January 2004.

Figure III-32
Proposal for Dudley Square



Source: The Roxbury Strategic Master Plan, released in January 2004.

Figure III-33
Bob the Chef's Restaurant



Source: The Roxbury Strategic Master Plan, released in January 2004.

Figure III-34
Ferdinand's Blue Store Building



Source: The Roxbury Strategic Master Plan, released in January 2004.

Figure III-35
Rendering of a proposed development option for Ferdinand's building



Source: The Roxbury Strategic Master Plan, released in January 2004.

Figure III-36
Roxbury Historic Districts



Source: The Roxbury Strategic Master Plan, released in January 2004.

Figure III-37
Boston Water and Sewer Commission's New Headquarters



Source: The Roxbury Strategic Master Plan, released in January 2004.

**Figure III-38
Before View of Business**



Source: The Roxbury Strategic Master Plan, released in January 2004.

**Figure III-39
After View of Business Improvements Funded by the "Main Streets" Program**



Source: The Roxbury Strategic Master Plan, released in January 2004.

Overall Summary / Lessons Learned

Many neighborhood redevelopment projects are being implemented successfully. Some of the lessons learned from comparable neighborhood redevelopments are as follows.

- ◆ Neighborhood revitalization and redevelopment is an on-going process.
- ◆ Strong grassroots/community advocacy is important to project success.
- ◆ The naming or branding of the neighborhood/area is important for the community's identity and for marketing purposes.
- ◆ Successful projects work with local and citywide tourism and heritage agencies to develop strategies to bring tourists to the area.
- ◆ Many of the comparable areas have a heritage or museum component.
- ◆ Neighborhood crime prevention and safety organizations have been extremely effective in their work. In some cases, housing design is specified to be a specific way so as to support neighborhood watches and policing (e.g. enough lit space between each house so that someone will notice easily from the road if a perpetrator is lurking about).
- ◆ Municipal/city involvement and support is critical to the planning process for many reasons, including zoning changes and infrastructure support, and for such incentives as Tax Increment Financing (TIF) districts.
- ◆ Investments in public buildings are often used to leverage private investment.
- ◆ Local Community Development Corporations often play a key role as neighborhood developers.
- ◆ In some cases, zoning changes for reduced parking requirements have been key to development success of mixed commercial and residential developments (e.g. commercial on the 1st floor and housing on the 2nd).
- ◆ Successful projects work to develop excellent accessibility to the neighborhood area by public transportation and roadways (including parking).
- ◆ National Register of Historic Places, "landmark status," can sometimes limit development and growth, such as in the 18th and Vine Jazz District in Kansas City, as anything they take down has to go up as a replica of what existed before. Therefore, most of the Jazz District Redevelopment Corporation's (JDRC) work is focused on entertainment and commercial uses as these requirements are too restrictive for housing. In addition, this also means that the JDRC cannot replace any historic sites/buildings with parking lots/decks, which they need.
- ◆ Retail development follows residential development, except in the case of Deep Ellum where residential development followed entertainment and retail development.
- ◆ Retail tenants in comparable projects include both local retailers and national franchise operations such as Starbucks, Wendy's, McDonald's and Subway. National retailers in comparable neighborhoods include Payless Shoes, and Footlocker, among others.

- ◆ Ethnic retail and restaurants, when done right, are successful projects in redeveloped neighborhoods and can be a draw to bringing in visitors and tourists to a neighborhood.
- ◆ Challenges for entertainment-driven districts include potential for increased crime, costs of additional security, and not enough parking close by.
- ◆ Creating a synergy with the historic / cultural heritage relevance of a neighborhood is important to project success.
- ◆ Some redevelopment projects are driven by the desire of developers to increase their own property value. This can be leveraged to help increase the pace of the redevelopment of a neighborhood – ensure that a long-term strategy is in place and is revisited, rather than a short-term solution.
- ◆ Cultural institutions such as museums and theaters have served as successful anchors for neighborhood redevelopments.
- ◆ Make home ownership more affordable to lower income families.
- ◆ Provide basic amenities to working families and to community (e.g., grocery stores, drug stores, healthy take-out).
- ◆ Create jobs that connect neighborhood to economic development strategies/engines in the broader community.
- ◆ Make sure to provide enough parking for residents and visitors to the neighborhood alike.

Section IV

RETAIL MARKET SUPPORT

The retail potential of the Evans & Rosedale area was evaluated based on interviews of area planning officials and community leadership, in-person observation of area conditions, analysis of secondary source data, and review of past planning studies. Each of these inputs to the evaluation was mutually supportive and confirmed the recommendations for retail development.

Well focused retail development is highly supportive of land uses and community development. It improves the quality of life of area residents and provides employment opportunities. Business retention and attracting new businesses benefits from a good quality and supportive retail sector. Retail development focuses on retail stores and restaurants, but also can include service businesses as part of the retail mix to support new development and renovation, to contribute to the economic health of the community.

Retail and related businesses serve varying geographic areas depending on their retail type and scale. A bakery, barber shop or convenience store will typically gain the majority of its sales from a close-in area. A major electronics store or furniture store will likely draw from a wide area. The draw of a mall is from a wide area; whereas a neighborhood center may draw from only a mile or less. The retail context of Evans & Rosedale therefore focuses on the local area in terms of the physical area available for development, the Evans & Rosedale urban context, and community needs.

Current Situation

The Evans & Rosedale Redevelopment Area is located within the larger Fort Worth market. This trade area is roughly three miles north to south and five miles east to west. Many retail types, including retail developments of larger scale, will have this entire district and beyond as their trade area. Other retail and service types will be much more locally oriented. The local market is bisected by I-35, with a substantially different character on either side. To the west of I-35 is a higher density, highly developed mixed-use area that includes office, medical, institutional, retail, service and residential uses. To the east is mostly a single family residential area, with local retail and service businesses scattered throughout. There is no centralized

commercial area to the east of I-35, and the Evans & Rosedale redevelopment area will create an opportunity to develop a commercial center for this area.

Evans & Rosedale's character, available space and redevelopment goals indicate community-serving retail is appropriate. Such retail would largely serve the area east of I-35, which is bounded by Route 303, I-180 and Route 287. Because of the Rosedale Street I-35 underpass, as well as the Hattie Street overpass, Evans & Rosedale can also provide community oriented retail to areas to the west of I-35, as well.

Currently, Evans & Rosedale and the east of I-35 area have an under-developed retail sector. Interviews with community leadership and a windshield-survey of the situation support this understanding of the need for additional community oriented retail and services, and the business opportunities this shortfall represents.

Trade Area

Industry experience and the market conditions in Evans & Rosedale indicate that a trade area of about one mile will best represent the primary trade area of Evans & Rosedale for most retail and other service categories. This area will comprise the majority of customers. To the extent that "destination" restaurants, entertainment or specific specialty retailing is developed, the trade area for these uses may well be greater than one mile. For most uses, however, and for market analysis purposes, a one mile trade area is appropriate.

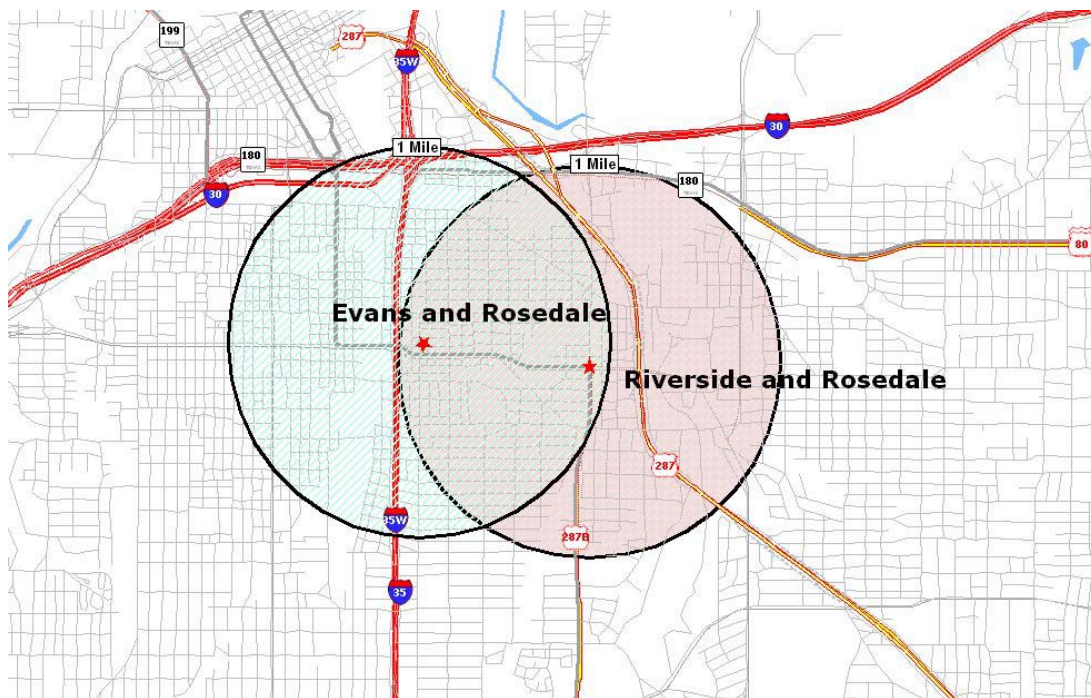
Because Evans & Rosedale is located on the edge of the "east of I-35" portion of the market, and because I-35 divides this market area, Evans & Rosedale has an opportunity to serve areas to its east for one mile or more, with perhaps less daily trade from areas to the west. This situation is amplified by the retail and service offerings to the west of I-35, and the dearth of retail and service businesses east of I-35. Therefore an analysis of a trade area one mile from the Evans & Rosedale site accompanied with an analysis of the one mile market to the east of the site provides an appropriate analysis of the retail market.

Figure IV-1 shows a one-mile ring around the intersection of Evans & Rosedale Streets. This trade area is affected by the commercial environment beyond one mile, as there is overlap in that geographic area with the trade areas of other commercial development. A second one-mile ring

centered at Rosedale Street and Riverside Drive provides a profile of the area east of I-35. Each area provides insights to the market opportunity at Evans & Rosedale.

The one-mile trade area from the intersection of Evans & Rosedale Streets has a population estimated at 8,874, and the one-mile trade area from the intersection of Rosedale and Riverside. has a population estimated at 8,130. It is important to note that there is overlap between these two market areas. Population has declined in these areas, despite the revitalization efforts being undertaken. The Evans & Rosedale redevelopment plan has the possibility of reversing this decline. These are both moderate income areas, but the aggregate household income is in excess of \$80 million for each of these market definitions. Data in **Table IV-1** provide a summary of demographic characteristics of these areas.

Figure IV-1
Evans & Rosedale
Primary Retail Service Area Analysis



Source: © 2004 CLARITAS INC. and ConsultEcon, Inc.

Table IV-1
Evans & Rosedale
Primary Retail Service Area Analysis

EVANS & ROSEDALE, 0.00-1.00 Miles						
	Population	Households	Average Household Size	2003 Est. Average Household Income	2003 Est. Median Household Income	2003 Est. Per Capita Income
2008 Projection	8,764	2,791	3.14			
2003 Estimate	8,874	2,870	3.09	\$29,830	\$19,324	\$10,511
2000 Census	8,978	2,932	3.06			
1990 Census	10,402	3,542	2.94			
Change 2003-2008	-1.24%	-2.75%				
Change 2000-2003	-1.16%	-2.11%				
Change 1990-2000	-13.69%	-17.22%				

S. RIVERSIDE DRIVE AT E. ROSEDALE STREET, 0.00-1.00 Miles						
	Population	Households	Average Household Size	2003 Est. Average Household Income	2003 Est. Median Household Income	2003 Est. Per Capita Income
2008 Projection	8,130	2,576	3.16			
2003 Estimate	8,293	2,679	3.10	\$30,667	\$22,252	\$10,329
2000 Census	8,420	2,756	3.06			
1990 Census	9,310	3,333	2.79			
Change 2003-2008	-1.97%	-3.84%				
Change 2000-2003	-1.51%	-2.79%				
Change 1990-2000	-9.56%	-17.31%				

Source: © 2004 CLARITAS INC. and ConsultEcon, Inc.

Consumer Spending

Data in **Table IV-2** shows the current retail sales potential for the residents of the Evans & Rosedale trade areas. Again, there is overlap between these two market area definitions, but they both show substantial spending power within these areas. Depending on the market definition, there is upwards of \$67 million of retail spending power by the residents of each of these market areas.

Table IV-2
Evans & Rosedale
Resident Retail Expenditures Estimates

	<u>Sales Potential</u>	
	E&R 1.0 Mile Ring	R&R 1.0 Mile Ring
Apparel and Accessory Stores	\$3,273,406	\$3,048,753
Drug and Proprietary Stores	3,145,415	2,946,238
Eating and Drinking Places	10,461,278	9,778,422
Food Stores	13,043,609	12,170,861
Furniture and Home Furnishings Stores	2,059,201	1,926,162
Home Appliance, Radio, and T.V. Stores	2,775,802	2,586,791
General Merchandise / Other	26,038,521	24,278,174
Hardware, Lumber and Garden Stores	4,656,268	4,349,931
Automotive and Home Supply Stores	1,793,579	1,669,711
Total	\$67,247,079	\$62,755,043

Note: E&R is the area within one mile of the intersection of Evans & Rosedale Streets; R&R is the area within one mile of the intersection of Rosedale Street & Riverside Drive (west of the target area, this is about one mile from the site).

Source: ConsultEcon, Inc. and Claritas, Inc.

Employee Market

A second potential source of retail spending at Evans & Rosedale is from persons employed in and near the redevelopment area. It should be noted that some of these employees live in the local area and are included in the resident market profile. Data in **Table IV-3** summarize the number of employees in the area within zero to one miles, one to two miles, and two to fifteen miles of Evans & Rosedale, to provide an understanding of the larger employment context within fifteen miles of Evans & Rosedale. It is important to note that within one mile of the site, there are over 14,000 employed persons, and within two miles of the site there are over 86,000 employed persons. This is especially important in identifying the opportunity for restaurant and related services development in Evans & Rosedale.

Table IV-3

**Evans & Rosedale
Daytime Employment 2003**

Business Employment By Type	Number of	
	Businesses	# Employees
Primary Employment Market		
EVANS & ROSEDALE, 0.00-1.00 Miles		
Retail Trade	125	903
Finance-Insurance-Real Estate	29	182
Services	375	10,705
Agriculture	6	43
Mining	3	70
Construction	26	281
Manufacturing	58	2,007
Transportation, Communication/Public Utilities	10	77
Wholesale Trade	27	281
Government	9	98
Total Businesses	668	14,647
Secondary & Tertiary Employment Markets		
EVANS & ROSEDALE, 1.00-2.00 Miles	3,643	71,537
EVANS & ROSEDALE, 2.00-15.00 Miles	46,488	563,386

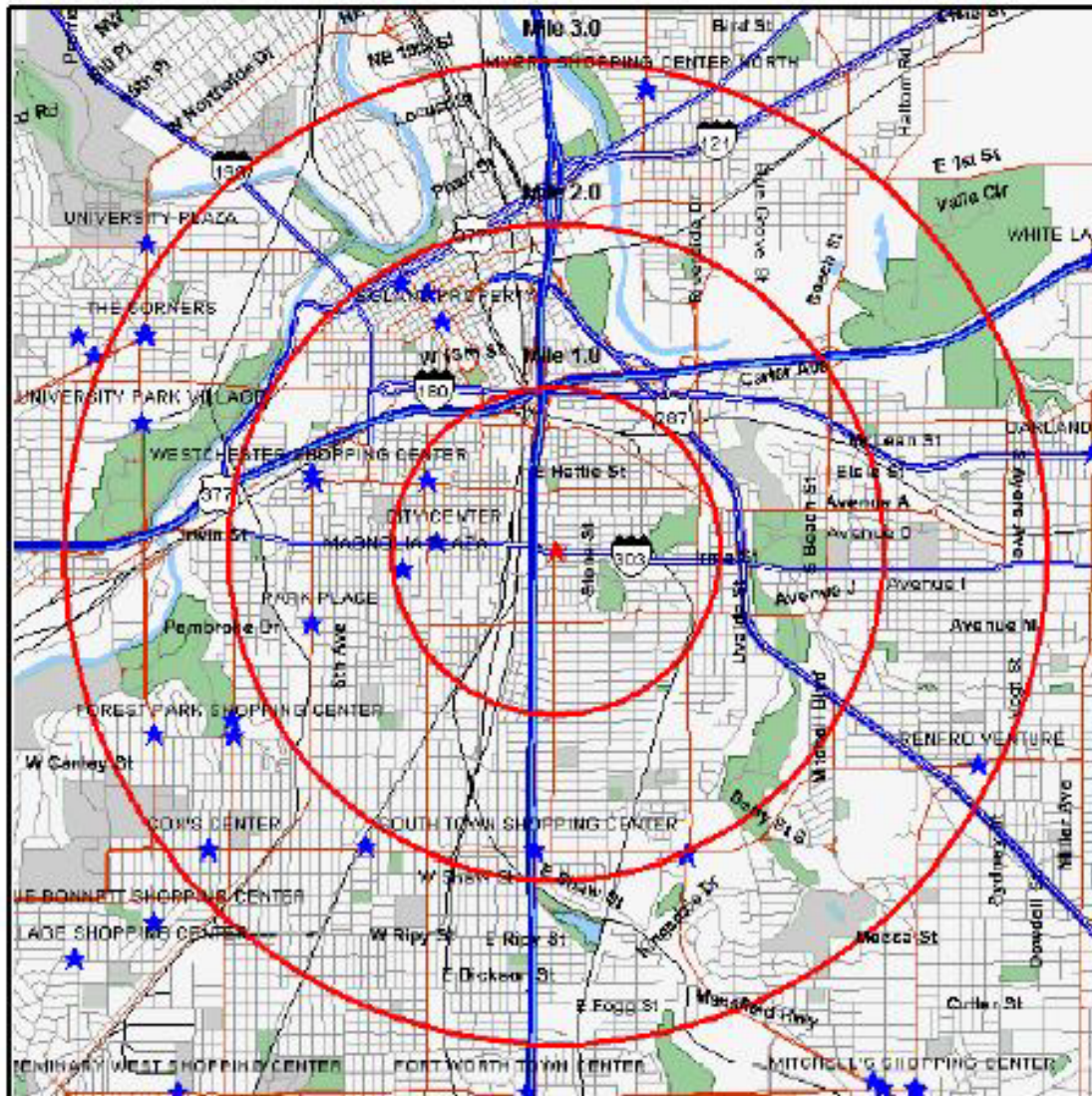
Source: © 2004 CLARITAS INC. and ConsultEcon, Inc.

Current Retail Supply

Interviews of community leadership and a windshield inspection of the Southeast Fort Worth area indicate that the area east of I-35 is generally lacking in retail and service offerings.

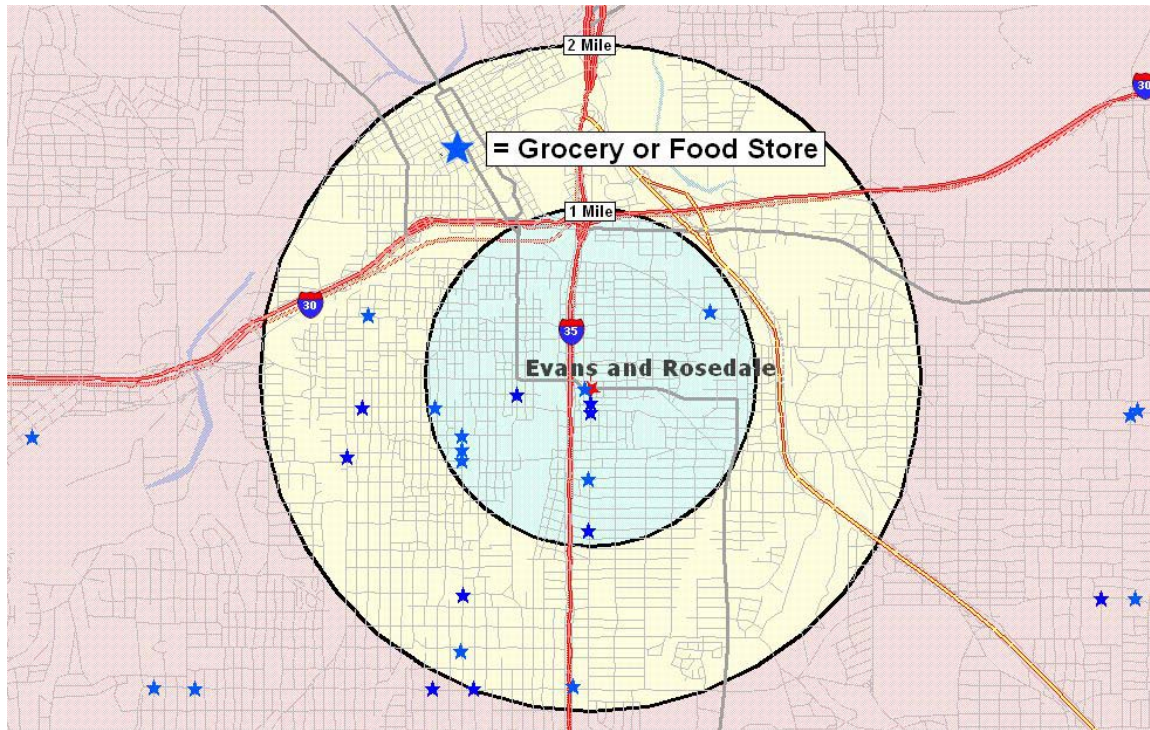
Data in **Figure IV-2** shows the locations of shopping centers in the area. The preponderance of shopping centers are located west of I-35 and Evans & Rosedale. Data in **Figure IV-3** and **Figure IV-4** show the location of selected grocery and food stores, and restaurants in the area. Again the preponderance are located west of I-35. While there are a few food-related stores east of I-35, those that do exist are generally specialty food stores, rather than grocery stores. This location analysis confirms other indicators of retail and service distribution focusing on the west side of I-35, creating a retail and service void east of I-35.

Figure IV-2
Evans & Rosedale
Location of Shopping Centers



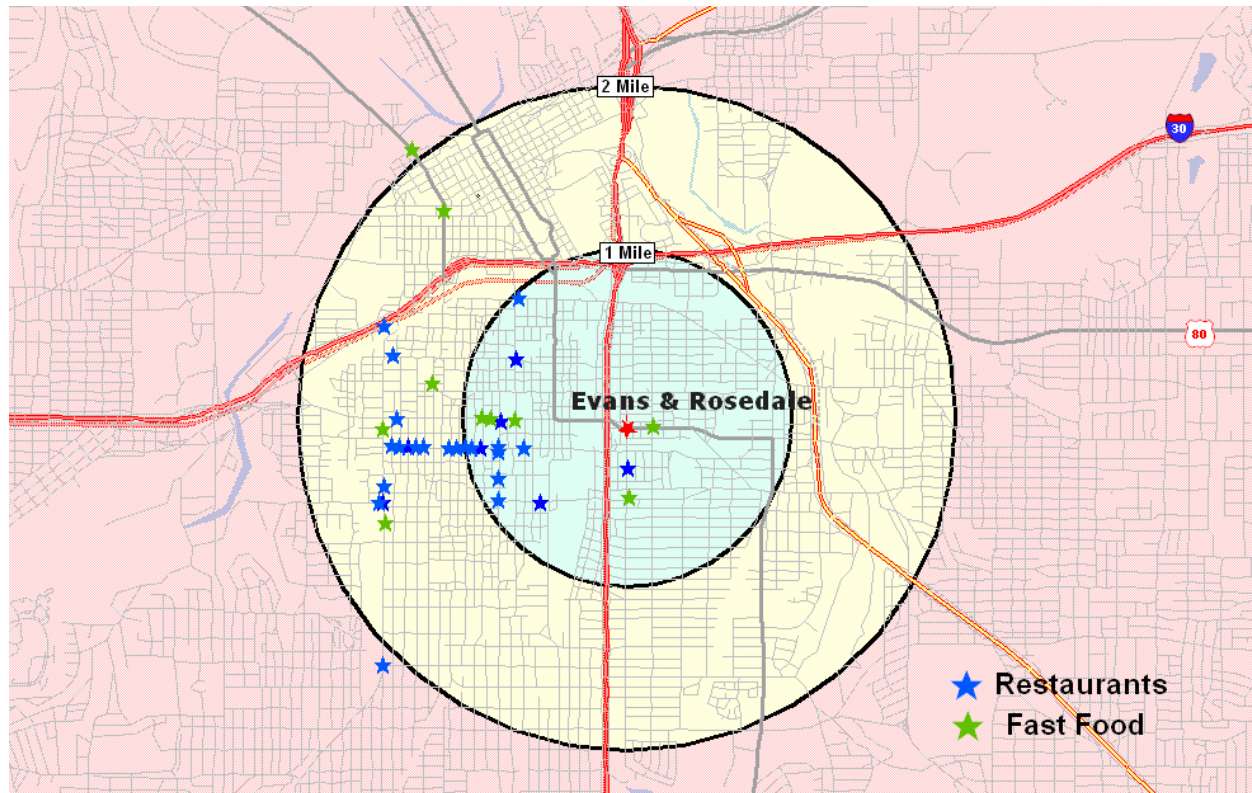
Source: © 2004 CLARITAS INC.

Figure IV-3
Evans & Rosedale
Location of Grocery or Food Stores



Source: ConsultEcon, Inc. and Maptitude.

**Figure IV-4
Evans & Rosedale
Location of Restaurants**



Source: ConsultEcon, Inc. and Maptitude.

Retail Sales Volume

A review of actual sales volume in the trade area of Evans & Rosedale provides insights to the retail development opportunity by further detailing the level of retailing that is occurring the trade area. Data in **Table IV-4** provides a summary of retail sales that occur in businesses located in the one-mile area from the intersection of Evans and Rosedale Streets as well as for the alternate market definition, a one-mile ring from the Rosedale Street and Riverside Drive intersection. The striking difference between these alternative and overlapping market areas is that actual sales are \$77.4 million within one mile, but only \$25.2 million in the alternative market area on the east side of I-35. Notably, there are no Drug and Proprietary Store sales in the area east of I-35.

**Table IV-4
Evans & Rosedale
Retail Sales Estimates**

	<u>Actual Sales</u>	
	E&R 1.0 Mile Ring	R&R 1.0 Mile Ring
Apparel and Accessory Stores	\$14,500,000	\$400,000
Drug and Proprietary Stores	8,000,000	-
Eating and Drinking Places	9,900,000	2,000,000
Food Stores	8,300,000	3,700,000
Furniture and Home Furnishings Stores	1,200,000	1,200,000
Home Appliance, Radio, and T.V. Stores	8,600,000	4,300,000
General Merchandise / Other	20,800,000	9,700,000
Hardware, Lumber and Garden Stores	2,800,000	2,200,000
Automotive and Home Supply Stores	3,300,000	1,700,000
Total	\$77,400,000	\$25,200,000

Note: E&R is the area within one mile of the intersection of Evans and Rosedale Streets; R&R is the area within one mile of the intersection of Rosedale Street and Riverside Drive (west of the target area, this is about one mile from the site).

Source: ConsultEcon, Inc. and Claritas, Inc.

Sales Potential from Resident Market

An important indicator of retail development potential is the difference between the sales potential of a given area, and the actual sales that occur in the area. For Evans & Rosedale, the balance between “imported sales” and “sales leakage” is an important indicator for planning of the scale of retailing to be developed in the redevelopment zone. “Imported sales” are when actual sales are higher than the sales potential of residents of the area indicating a net inflow of retail dollars. “Sales leakage” is when actual sales are lower than the sales potential of residents of the area indicating a net outflow of retail dollars from a given area. Data in **Table IV-5** provide the Sales Leakage analysis for both market areas. For the area east of I-35, because there are no major retail shopping centers, a very high sales leakage pattern is expected and these data verify this pattern. For the area within one mile of Evans & Rosedale, many retail categories have a better balance between the residents’ sales potential and actual sales.

Table IV-5
Retail Sales Potential Analysis
Evans & Rosedale Area

Evans & Rosebud Area															
	Sales Potential			Actual Sales			Net Balance			Typical Sales per sq. Ft. ^{1/}			Net Sq. Ft. of Space ^{2/}		
	E&R 1.0 Mile Ring	R&R 1.0 Mile Ring	E&R 1.0 Mile Ring	E&R 1.0 Mile Ring	R&R 1.0 Mile Ring	E&R 1.0 Mile Ring	E&R 1.0 Mile Ring	R&R 1.0 Mile Ring	E&R 1.0 Mile Ring	R&R 1.0 Mile Ring	E&R 1.0 Mile Ring	R&R 1.0 Mile Ring	E&R 1.0 Mile Ring	R&R 1.0 Mile Ring	
Apparel and Accessory Stores	\$3,273,406	\$3,048,753	\$14,500,000	\$400,000	\$400,000	\$11,226,594		(\$2,648,753)	\$180		(62,370)	14,715			
Drug and Proprietary Stores	3,145,415	2,946,238	8,000,000	-	4,854,585	(2,946,238)		400		(12,136)	7,366				
Eating and Drinking Places	10,461,278	9,778,422	9,900,000	2,000,000	(561,278)	(7,778,422)		200		2,806	38,892				
Food Stores	13,043,609	12,170,861	8,300,000	3,700,000	(847,609)	(8,470,861)		350		13,553	24,202				
Furniture and Home Furnishings Stores	2,059,201	1,926,162	1,200,000	1,200,000	(859,201)	(726,162)		160		5,370	4,539				
Home Appliance, Radio, and T.V. Stores	2,775,802	2,586,791	8,600,000	4,300,000	5,824,198	1,713,209		300		(19,414)	(5,711)				
General Merchandise / Other	26,038,521	24,278,174	20,800,000	9,700,000	(5,238,521)	(14,578,174)		150		34,923	97,188				
Hardware, Lumber and Garden Stores	4,656,268	4,349,931	2,800,000	2,200,000	(1,856,268)	(2,149,931)		140		13,259	15,357				
Automotive and Home Supply Stores	1,793,579	1,669,711	3,300,000	1,700,000	1,506,421	30,289		140		(10,760)	(216)				
Total	\$67,247,079	\$62,755,043	\$77,400,000	\$25,200,000	\$10,152,921	(\$37,555,043)					(34,768)	196,331			
Total of Potential New Demand SF											69,912	202,258			

1/ Based on "Dollars & Cents of Shopping Centers 2004".

2/ Based on "Net Balance" of retail spending divided by typical required sales per SF to warrant development.

E&R is the area within one mile of the intersection of Evans & Rosedale.

R&R is the area within one mile of the intersection of Rosedale & Riverside (west of the target area, this is about one mile from the site).

Source: ConsultEcon, Inc., Claritas, Inc., and Urban Land Institute's "Dollars & Cents of Shopping Centers, 2004"

Many retail categories are overshadowed by large malls, discount department stores, and power centers which have service areas of ten to twenty miles or more. However, everyday retailing focused on fresh and convenient food, personal services, health and beauty needs, convenience goods, restaurants, and some clothing and other goods are purchased close to home. Thus, community shopping centers, strip malls, local downtowns and freestanding stores continue to be important retail outlets despite the consolidation of retailing to giant chains and large malls. Such retailing is essential to quality of life for local residents and to the competitiveness of the area in attracting and retaining its resident base.

As shown by the analysis in Table IV-5, there is a substantial current development opportunity for food & beverage (restaurants), food and grocery retailing, convenience goods, general merchandise, drug and proprietary stores. Several categories of retailing hold particular promise. Apparel and accessory stores have a trade deficit east of I-35. Local merchants have an opportunity to serve this market. The sales leakage analysis indicates up to \$35 million in annual sales potential in a number of retail categories is “leaking” from the local market area, and that this represents up to 200,000 square feet in supportable retail development. A reasonable scenario is 25 percent as capturable locally. This would represent on the order of 50,000 square feet of retail and restaurants.

As more residential and job development occurs in Evans & Rosedale and Ft. Worth South, there will be even greater opportunities for retailers. The development of the City Health Department building will bring new workers into the neighborhood, which will be supportive of retail growth. The development of heritage and entertainment venues, likewise, will bring additional market opportunities for retailers.

A drug or proprietary store would serve an unmet need east of I-35. There is a substantial deficit in eating and drinking places where a number of well-targeted and operated restaurants could meet demand and build a “critical mass” of restaurant offerings. Food stores are substantially under-represented, as demonstrated by the data in Table IV-5. This is a retail type for which consumers desire a local retailer. General merchandise represents the largest sales deficit in this area. While consumers generally shop for such merchandise within a broader geographic area, retailing patterns indicate that a portion of such demand can be satisfied locally – on a convenience basis. Thus, specialty and general retailers have an opportunity in this location as well. As shown by the review

of comparable neighborhoods, there are opportunities for local merchants as well as national retailers within this market.

Program Recommendations

A retail program is suggested by these data and the market investigations with 10,000 to 12,000 square feet or more of food & beverage, and two or more “anchor” stores, totaling 12,000 to 15,000 square feet. Target stores would include a pharmacy, food market and/or small discount store. A variety of specialty shops would make up the remainder of retail outlets of 15,000 to 25,000 square feet. Interviews with community leadership, the tours of the area (windshield survey), and the experience of comparable urban areas indicates that the following are retail, service and food & beverage types that offer good opportunities for development in Evans & Rosedale.

- ◆ Grocery store
- ◆ Delicatessen
- ◆ Breakfast & lunch shop
- ◆ Ethnic restaurants
- ◆ Bakery
- ◆ Coffee shop
- ◆ Pharmacy
- ◆ Food stores
- ◆ General merchandise store
- ◆ Shoe store and shoe repair
- ◆ Clothing stores
- ◆ Sporting goods
- ◆ Jewelry
- ◆ Card & gift shop
- ◆ Bookstore
- ◆ Optical store
- ◆ Convenience store
- ◆ Hair cutters / salon
- ◆ Dry cleaner and Laundromat
- ◆ Video rentals
- ◆ Medical & personal services
- ◆ Bank & automated teller
- ◆ Legal, accounting services
- ◆ Telephone/electronics store

The initial program for retail uses in the Evans & Rosedale Redevelopment Area should be as follows, in **Table IV-6**.

Table IV-6
Retail Market Potential
Evans & Rosedale Redevelopment Area

	Units	Typical Sq. Ft. Range	Net to Gross Factor	Total Sq.Ft.
Commercial				
Food & Beverage	5	1,800	1.2	10,800
Breakfast & lunch shop				
Bakery				
Coffee shop				
Ice Cream Shop				
Ethnic Restaurants				
Retail				
Anchor Stores	2	6,000	1.2	14,400
Pharmacy				
Food Market				
General Merchandise				
Specialty Shops	10	1,800	1.2	21,600
Specialty food				
Shoe store and shoe repair				
Clothing stores				
Sporting goods				
Jewelry				
Telephone / Electronics				
Card & gift shop				
Optical store				
Books				
Hobby				
Convenience store				
Florists				
Other specialty				
Services				
Bank & automated teller	1	1,000	1.2	1,200
Services	5	800	1.2	4,800
Hair cutters / salon / Nails				
Dry cleaner				
Laundromat				
Video rentals				
Mailing / Packaging / Copy				
Dance or Karate studios				
Other Services				
Public Services				
Day Care	1	3,200	1.2	3,840
Total Commercial	24			56,640

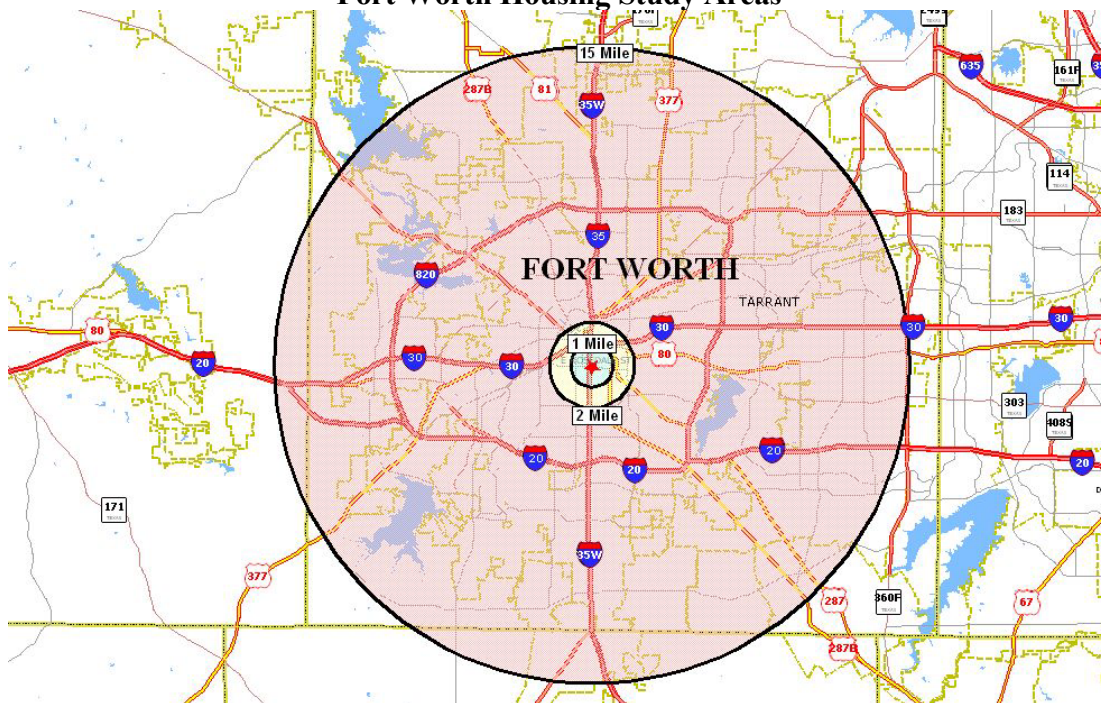
Source: ConsultEcon, Inc.

Section V

ANALYSIS OF HOUSING DEMAND AT EVANS & ROSEDALE

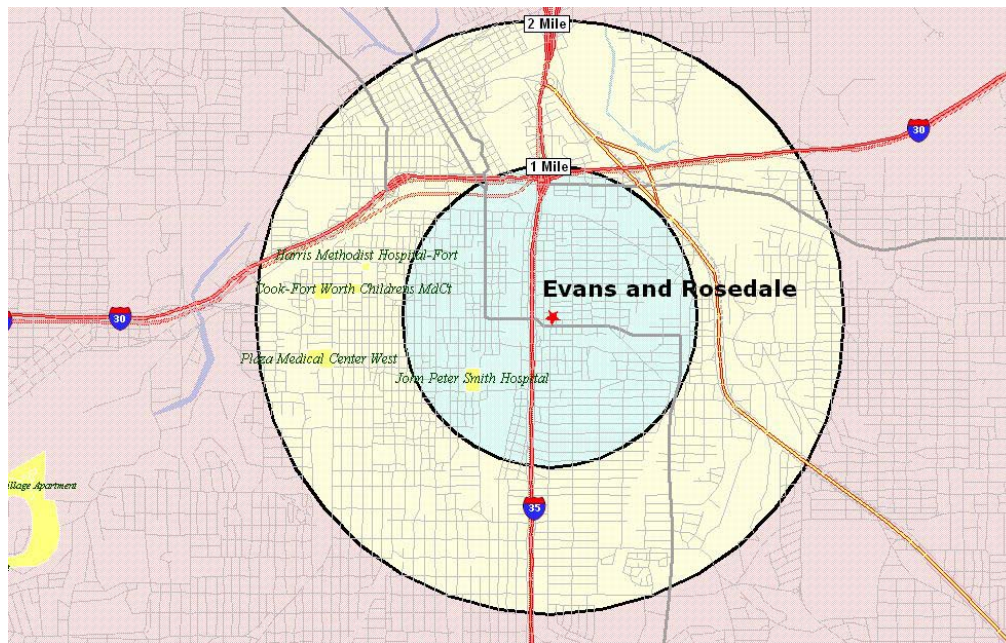
This section describes the market potential for housing development at Evans & Rosedale. The assessment of housing demand at Evans & Rosedale is informed by analysis of the current housing stock, planned and proposed new developments, housing permit trends, housing affordability, and the apartment rental market. In this section, to analyze housing trends in Evans & Rosedale and the larger metro area, three distinct geographies were compared. The first area is a one-mile radius around the intersection of Evans & Rosedale; this is the area most likely to be influenced by the Evans & Rosedale planning process and new investment. The second area is a band within a one to two mile radius of Evans & Rosedale; this area is outside the immediate scope of the Evans & Rosedale Redevelopment Plan, but is representative of the surrounding community which will affect, and be affected by, plans at Evans & Rosedale. The third area is a 0 to 15 mile radius from Evans & Rosedale which covers most of the City of Fort Worth as well as parts of several other communities. These study areas are depicted in **Figure V-1** and **Figure V-2**.

Figure V-1
Fort Worth Housing Study Areas



Source: Maptitude.

Figure V-2
Fort Worth Housing Study Areas: Close Up



Source: Mapitude.

Analysis of Current Housing Stock

Data in **Table V-1** shows the share of housing stock built by decade in selected areas in Fort Worth. Within the 1 mile radius of Evans & Rosedale, 55.5 percent of housing units were built before 1950; 12.9 percent of the housing stock in this area was built after 1980. The area within a 1-2 mile band of Evans & Rosedale also has an older housing stock, but not as old as within 1 mile. Both the 0-1 mile area and the 1-2 mile area have experienced some housing growth in recent years, as housing stock built since 1995 represent 10 percent of the total homes in both areas. The area within 15 miles of Evans & Rosedale is more indicative of the larger metro area. The larger area as a whole has a much newer housing stock, as more than 90 percent was built after 1950; approximately 15 percent was built since 1995.

Table V-1
Housing Units by Year Structure Built

	0 to 1 Mile	1 to 2 Mile	0 to 15 Mile
Housing Unit Built 1999 to present	3.6%	7.3%	8.4%
Housing Unit Built 1995 to 1998	6.7%	2.3%	6.9%
Housing Unit Built 1990 to 1994	0.9%	1.3%	6.6%
Housing Unit Built 1980 to 1989	1.7%	4.6%	24.2%
Housing Unit Built 1970 to 1979	4.9%	5.5%	18.7%
Housing Unit Built 1960 to 1969	9.4%	12.3%	13.4%
Housing Unit Built 1950 to 1959	18.3%	19.4%	12.4%
Housing Unit Built 1940 to 1949	20.2%	15.3%	5.5%
Housing Unit Built 1939 or Earlier	34.3%	32.1%	4.1%

Source: Claritas, Inc.

Data in **Table V-2** shows the composition of housing stock by number of units in the Evans & Rosedale area and the greater Fort Worth area. In the area within one mile of Evans & Rosedale, 71.5 percent of homes are 1 unit detached (single family). Approximately 8 percent are 2 units, and nearly 17 percent have more than three units. In the 1-2 mile band from Evans & Rosedale, there are fewer 1 unit detached homes (53.6%), a similar share of duplexes (9.0%) and quite a bit more apartments (34.4%) with at least 3 units. The area within 15 miles of Evans & Rosedale, which is more representative of the larger metro area, has a housing profile which is more similar to the 1 mile radius; 65.1 percent of homes are 1 unit detached, 2.3 percent are 2 units, and 26.8 percent are 3 or more units.

Table V-2
Housing Stock by Type

	0 to 1 Mile	1 to 2 Mile	0 to 15 Mile
1 Unit Attached	3.6%	2.9%	3.2%
1 Unit Detached	71.5%	53.6%	65.1%
2 Units	8.2%	9.0%	2.3%
3 to 19 Units	11.9%	16.6%	16.8%
20 to 49 Units	2.3%	3.7%	3.0%
50 or More Units	2.6%	14.1%	7.0%
Mobile Home or Trailer	0.0%	0.1%	2.5%
Boat, RV, Van, etc.	0.0%	0.2%	0.1%

Source: Claritas, Inc.

Data in **Table V-3** shows the housing stock in the Evans & Rosedale area and the greater Fort Worth area. Within the one mile radius of Evans & Rosedale, 85.5 percent of homes are valued at less than \$60,000. This compares to 62.5 percent in the 1 to 2 mile band, and only 23.3 percent within the 15 mile radius. In the larger area (0-15 mile), 67.0 percent of homes are valued between \$60,000 and \$200,000. This table shows that homes near Evans & Rosedale are generally valued below the overall regional market. This reflects the older building stock and the income profile of the area. At the same time, the low land value provides better home ownership opportunities than in many other areas of the City for many consumers.

Table V-3
Housing Stock by Home Value

	0 to 1 Mile	1 to 2 Mile	0 to 15 Mile
Value Less than \$20,000	28.1%	13.6%	2.7%
Value \$20,000 - \$39,999	34.3%	29.0%	7.9%
Value \$40,000 - \$59,999	23.2%	19.8%	12.7%
Value \$60,000 - \$79,999	8.1%	9.9%	16.3%
Value \$80,000 - \$99,999	3.5%	7.2%	18.0%
Value \$100,000 - \$149,999	1.4%	8.0%	22.2%
Value \$150,000 - \$199,999	0.5%	5.3%	10.5%
Value \$200,000 - \$299,999	0.0%	3.6%	6.2%
Value \$300,000 - \$399,999	0.2%	2.3%	1.8%
Value \$400,000 - \$499,999	0.1%	0.7%	0.8%
Value \$500,000 - \$749,999	0.5%	0.1%	0.6%
Value \$750,000 - \$999,999	0.2%	0.0%	0.2%
Value \$1,000,000 or more	0.0%	0.5%	0.3%

Source: Claritas, Inc.

Household Growth Trends in Fort Worth

Demand for housing is largely related to the number of households in the region. Data in **Table V-4** shows households and household supply in the study areas. Within a one mile radius of Evans & Rosedale there were an estimated 2,870 households in 2003, down 2.1 percent from the 2000 census. Between 2003 and 2008, the number of households is projected to decrease 2.7 percent to 2,791. Between 1990 and 2000 the number of households in this area decreased 17.2 percent, from 3,542. With an estimated 3,486 housing units in this area, the estimated occupancy rate is 82.3 percent. Approximately 52 percent of households in this area own their homes.

Within a 1-2 mile band from Evans & Rosedale, there has been a slight household growth trend, with an increase of 1.0 percent between 2000 and 2003, and projected household growth of 1.91 percent projected between 2003 and 2008. There was 1.5 percent household growth between 1990 and 2000. With an estimated 10,882 housing units in this area, the occupancy rate is approximately 87.6 percent. An estimated 43 percent of households in this area rent their homes.

Table V-4
Households and Housing Supply

	0 to 1 Mile	1 to 2 Mile	0 to 15 Mile
Home Ownership Rate	52.4%	42.8%	61.0%
Households (2003)	2,870	9,536	495,378
Housing Units (2003)	3,486	10,882	525,104
Occupancy Rate	82.3%	87.6%	94.3%
Projected Growth in Housing Units by 2008	-2.75%	1.90%	8.50%

Source: Claritas.

The population and household decline in the 0-1 mile radius, and the slow growth in the 1-2 mile band, stand in contrast to the population 0-15 miles from Evans & Rosedale which is representative of most of Fort Worth, and several of the surrounding communities. This area experienced household growth of 18.5 percent between 1990 and 2000. Between 2000 and 2003, there was 5.5 percent growth, and another increase of 8.5 percent is projected between 2003 and 2008. Currently the occupancy rate of housing in this larger area is 94 percent, significantly stronger than the 0-1 mile radius and the 1-2 mile band. An estimated 61 percent of households in this area own their homes. This record of household growth in the Fort Worth area indicates that there is demand for new housing but that housing is not being produced to meet overall market demand.

Statistical data showing household projections for 2008 only factor the current situation and are benchmarked on the 2000 census. These small-area trends for an area such as Evans & Rosedale can change if new housing supply is added.

Housing Permit Trends in Fort Worth-Arlington MSA

Data in **Table V-5**, **Table V-6**, and **Table V-7** show the number of building permits for housing units issued in the Fort Worth-Arlington MSA for years 1993 through 2003. Data in Table V-5 shows single-family home permits, data in Table V-6 shows 2-4 unit permits, and data in Table V-7 shows 5+ unit permits. It is evident that the number of single family units is well outpacing 2-4 unit structures and 5+ unit structures. This is indicative of the suburban style growth typical of many Texas cities. Growth in single family building permits appears to be increasing on an annual basis (since 1997) and relatively steady compared to multi-family building permits, which have had an erratic development pattern.

Table V-5
Fort Worth-Arlington MSA Single-Family Building Permits

Number of Dwelling Units			Average Value per Dwelling Unit (\$)	
Year	Units	Percent Change	Value	Percent Change
1993	6,051	13	118,200	0
1994	6,526	8	117,600	-1
1995	6,492	-1	118,100	0
1996	7,460	15	115,500	-2
1997	7,127	-4	122,200	6
1998	9,374	32	124,200	2
1999	9,605	2	124,200	0
2000	10,455	9	125,600	1
2001	12,169	16	123,400	-2
2002	13,391	10	136,300	10
2003	13,814	3	133,300	-2

Note: MSA data is based on 1999 MSA definition.

Source: U.S. Bureau of Census and Real Estate Center at Texas A&M University.

Table V-6
Fort Worth-Arlington MSA 2-4 Family Building Permits

Number of Dwelling Units			Average Value per Dwelling Unit (\$)	
Year	Units	Percent Change	Value	Percent Change
1993	36	50	51,400	57
1994	101	181	30,400	-41
1995	82	-19	51,400	69
1996	112	37	35,400	-31
1997	62	-45	47,800	35
1998	414	568	47,800	0
1999	246	-41	52,300	9
2000	140	-43	46,100	-12
2001	172	23	50,000	8
2002	400	133	55,300	11
2003	181	-55	50,400	-9

Note: MSA data is based on 1999 MSA definitions.

Source: U.S. Bureau of Census and Real Estate Center at Texas A&M University.

Table V-7
Fort Worth-Arlington MSA 5+ Family Building Permits

Number of Dwelling Units			Average Value per Dwelling Unit (\$)	
Year	Units	Percent Change	Value	Percent Change
1993	365	-	35,900	-
1994	1,360	273	37,300	4
1995	2,960	118	43,000	15
1996	2,563	-13	51,900	21
1997	3,621	41	52,100	0
1998	4,971	37	48,500	-7
1999	2,147	-57	45,900	-5
2000	2,070	-4	48,400	5
2001	2,029	-2	50,100	4
2002	3,365	66	57,300	14
2003	3,135	-7	47,700	-17

Note: MSA data is based on 1999 MSA definitions.

Source: U.S. Bureau of Census and Real Estate Center at Texas A&M University.

New Housing Development in the Local Market

The housing market in Fort Worth and the Metroplex in general has been relatively strong in recent years due to low interest rates, job growth, population growth, and a renewed interest in urban living. The Evans & Rosedale Redevelopment Area is on the edge of (and is part of) the Ft. Worth South Tax Increment Financing District. The local market area is characterized by the mixed-use Medical District to the west, the Ft. Worth Central Business District to the North and predominantly single family neighborhoods to the east and south. Residential development in the Medical District and Ft. Worth Central Business District has been characterized by multi-family mixed-use developments and townhouse development, while development to the east and south is characterized by single-family developments.

There are a number of multi-family and single family housing developments in the planning stages in the Medical District area. These are primarily town-homes or loft units for sale. The market for such units is primarily urban professionals without children, empty nesters, or other more affluent buyers who are typically associated with upscale urban dwellings. Relatively few of the projects have yet to be completed and sold indicating that the market is relatively untested. The Medical District is considered an area with excellent development potential, but it is not yet strong enough that large scale speculative development has occurred.

Data in **Table V-8** shows proposed or planned residential units in the Medical District area. This indicates 235 units in various stages of planning and implementation. This list is representative of the new development but may not be comprehensive.

Table V-8
Proposed or Planned Residential Units in the Medical District Area ^{1/}

	Number of Units	Year Completed	Size Range (SF)	Approximate Price Range	Comments
1320 College Street	1 Single Family		Bungalow	\$194,000	Craftsman
Adams Street	14 Town Homes	2005	NA	\$135,000 to \$250,000	
Paris at the Southside	4 Town Homes	2005	NA	NA	
Paris Village	100 Town Homes	2005	NA	\$190,000 to \$265,000	Mixed Use with Live/Work Space
Fairmount Lofts	10 Town Homes	2005	Approx, 2000 SF	\$260,000	Fairmont Neighborhood
Giverny Townhomes	5 Town Homes	2005	NA	NA	Upscale. Location not annuounced
Southside Lofts	9 Town Homes	NA	NA	From \$275,000	
Oleander Plaza	4 Condos	Summer 2004	900 SF	NA	Adjacent to Mixed Use
Midtown	40 Town Homes	NA	NA	NA	Mixed-Use
Magnolia Green	36 Town Homes	NA	NA	NA	Mixed Use
In-Town Living	10 Units	Spring 2005	Approx, 2000 SF	\$175K to \$180K	
Reatta Homes	2 Single Family Houses		1,600 SF	\$200,000	Custom built

1/ This table is not a comprehensive list of all new residential projects in the area.

Source: Fort Worth South, Inc., profiled projects, and ConsultEcon, Inc.

Affordable Housing in Fort Worth

Data in **Table V-9** shows the percent of Fort Worth households that can afford a median priced home. Among Fort Worth households, 58 percent could afford a median priced home. This is slightly higher than the total Texas average, and the total U.S. average. Despite relatively affordable housing costs in Fort Worth, and a relatively soft demand for rental housing, there is still significant portion of the population for whom housing is not affordable. An estimated 11,000 families in Tarrant County live in public housing or receive federal rent subsidies. Tarrant County has 3,000 people on the waiting list for Section 8 federally subsidized housing, according to the Tarrant County Housing Assistance Department. On average, the wait is three to five years.¹⁴ There is continued strong demand for “affordable” housing.

¹⁴ Source: Josh Shaffer and Ellena F. Morrison. “Growth puts stress on the social divide.” Fort Worth Star Telegram. May 18, 2003

Table V-9
Percent of Households that Can Afford Median-Priced Home, 2004

	Percent of Households
Arlington	61
Fort Worth	58
<i>Texas MLS</i>	
<i>Total</i>	54
<i>U.S. Total</i>	55

Source: Real Estate Center at Texas A&M University.

Fort Worth Apartment Rental Market

Data in **Table V-10** shows apartment rental market data for the Fort Worth Metro Area. Average rents in Fort Worth are just slightly lower than the average of total Texas metro areas. Apartment occupancy rates, at 91.6 percent, are slightly lower than the State average.

Table V-10
Fort Worth Apartment Market Data

	Fort Worth	Texas Metro Average
Average rent per square foot	\$0.77	\$0.79
Average rent for units built since 2000	\$0.87	\$0.91
Average occupancy (percent)	91.6	92.1
Average occupancy for units built since 2000 (percent)	90.4	90.8

Source: Apartment MarketData Research

The Dallas-Fort Worth area has been in a slight apartment development slump in recent years, according to real estate analysts *ALN Systems*. However, apartment developers who anticipate an economic recovery have plans to build more than 11,200 apartment units in the Dallas-Fort Worth area - the most in three years.¹⁵ This is in spite of an overbuilt apartment rental market which might not fully recover until 2007. It would take an estimated 41,000 new jobs in the Fort Worth area to fill all the vacant apartment units to 95 percent occupancy - a point where the market will sustain strong rent increases. Occupancy in the Dallas-Fort Worth market is at its lowest since ALN Systems began tracking it in 1991.

Local Apartment Rental Market

Table V-11 shows recently developed apartment rental units of note in the local market. Most are within a short distance of Evans & Rosedale. During the period from 1998 to 2004, approximately 400 units, or 65 units a year, have been developed. The rental market in the local area is unique in comparison to the entire Fort Worth metro area. Several apartment developments have been developed in recent years that have capitalized on adaptive re-use or preservation of historic structures such as the Homes at Parker Commons. The rental market primarily serves a younger demographic, many of whom are employed downtown or the medical district, and have easy access from this close-in neighborhood. There are a broad range of incomes renting in the area, and a variety of rental options for these differing markets. Some apartments, such as the Homes of Parker Commons rent market rate units as well as rent controlled / Section 8 units.

¹⁵ "Apartments show signs of recovery." Fort Worth Star-Telegram 7/9/2004.

Table V-11
Newly Developed Rental Properties

Rental Property	Opening Year	Units	Monthly Rent
The Leuda May Apartments 805 & 807 May Street and 301, 309 & 311 Leuda Street	2003	22	\$500 - \$900
College Avenue Apartments 1416 College Avenue	2003	16	NA
Homes of Parker Commons 905 S. Jennings St. 1, 2, & 3 Bedroom	2001	192	\$429 - \$1295 Market & Section 8
Markeen Apartments 410 Daggett St. 1 Bedroom	2001	14	\$850
Modern Drug Village 709 W. Magnolia St. Loft Apartments	2000	5	\$700 - \$1700
Pennsylvania Place Apts 250 Pennsylvania	1998	152	\$430 - \$710 (section 8)

Source: Fort Worth South, Inc.

The absorption of apartment units in the area has been relatively strong among new developments within a short distance of Evans & Rosedale. The 192-unit *Homes of Parker Common* has an occupancy rate of 88 percent, while the 152-unit *Pennsylvania Place* (all affordable units) has a 93 percent occupancy rate. Other recently developed apartments such as *Markeen* and *Leuda May* have slightly lower occupancy rates but are still doing reasonably well. Among the owners and developers of several of the profiled apartment buildings, there is a sentiment that the development of more housing units in the area would be a positive trend, as the area would become more established within Fort Worth as a desirable place to live. As the critical mass of population increases, there would be a greater influx of much needed restaurants and services to the overall neighborhood.

The stock of apartment units in the Medical District area is regarded by many for its uniqueness, especially with the numerous historic rehab projects and adaptive re-use. This has enabled the area to retain higher occupancy rates, compared to the more suburban areas in which there has been a severe apartment glut, resulting in very low rents and cutthroat competition among apartment complexes. Several projects have been considered ‘ahead of their time’ in terms of the level of (design) sophistication in the market, but there is a very positive outlook about growth in the market in following years.

Data in **Table V-12** show characteristics of an additional 248 apartment rental units in the local market. Most of the properties listed in Table V-12 are not the high end units that are being proposed and developed more recently. Most are 1 or 2 bedroom units in smaller complexes. Rents are generally \$350 to \$600 for 1 and 2 bedroom units. This indicates, that while more high-end residential units are being developed, a large share of the housing stock accommodates the middle and lower income market segments.

Table V-12
Characteristics of Selected Fort Worth South Rental Properties

Name	Address	Units	Types	Rent
Harris Gardens	540 & 550 Eighth Ave	114	8 efficiency, 1-bd 74, 2-bd 32	\$390 - \$590 Electricity and gas not included
Stardust	1103-115 Seventh, 1110-1112 Fairmount	31	Efficiency 1, 1-bd 24, 2-bd 6	\$300 - \$595 Water & Gas paid
Wayside Plaza	700 Ninth Ave	23	1-bd 23	\$365 - \$450 Electricity not included
The Austin Complex	805 & 807 May, 301, 311, 309 W. Leuda St	22	efficiency 1, 1-bd 16, 1+-bd 4, 3-bd 1	\$500 - \$900 Plus utilities
Fifth Ave Place	1605 Fifth Ave Place	16	1-bd 2, 2-bd 14	\$300 - \$625 Plus utilities
Name Unknown	1001-1027 S. Adams	16	2-bd duplex apartments	\$300 - \$400 Plus Utilities
Name Unknown	1420 College	16	1-bd 16	\$450 Electricity not included
Broadview	212 W. Broadway Ave	16	1-bd 3, 2-bd 13 furnished	\$130/wk all bills paid
Fairlawn	1109 - 1114 S. Jennings	12	efficiency 8, 1-bd 4	\$400 plus utilities
Name Unknown	1431 Lipscomb	12	1-bd 12	\$450 plus electricity
Max Mehl Bldg	1200 W. Magnolia	10	1bd lofts	\$840 - \$1600
Economy	1208-1212 Morphy, 1329-1333 Fifth, 1328 S. Henderson	10	1-bd 6, 2-bd 4	\$80 - \$110 plus electricity
Name Unknown	1601 Hemphill St	9	efficiency 2, 1-bd 7	\$250 - \$375 All bills paid
Name Unknown	1317 Alston Pl	8	1-bd 8	\$85 plus electricity
South Chase	1501-1503 W. Myrtle St	8	1-bd 8	\$550 plus utilities Furnished
Name Unknown	906 W. Cannon St	7	efficiency 2, 1-bd 5	\$375 - \$400 plus utilities
Name Unknown	709 W. Cannon St	6	2-bd 6	\$190 - \$210 plus utilities
Name Unknown	1228 S. Adams	6	1-bd 4 1+-bd 2	\$550 plus utilities
Name Unknown	1500 Lipscomb	4	2-bd 4	\$350 plus utilities
Name Unknown	1501 W. Morphy Street	4	3-bd 3 (common kitchen and bath) 4-bd 1 (common kitchen and bath)	\$300 - \$375 all bills paid
Name Unknown	1012 Lipscomb	4		
Name Unknown	1050 -1056 W. Allen Ave	4	1 -bd 1, 2-bd 2, 3-bd 1	\$350 - \$450

Source: Fort Worth South, Inc.

New Single Family Housing Development in the Local Area

The single family housing market has been undergoing change in the past decade. Most of this has been infill developments on vacant lots, or rehabilitation of homes. This change has included the construction of affordable housing by the Ft. Worth Habitat for Humanity (FWHFH) as well as the work of the Near Southeast Community Development Corporation (NSCDC), which revitalizes affordable housing through acquisition and rehabilitation of existing housing, and some private infill development. To date, FWHFH has built single-family homes in the local (Near Southeast) neighborhood. While FWHFH is no longer active in the neighborhood, when the FWHFH was in the neighborhood they built approximately 20 houses per year. In the Hillside neighborhood just to the south of Evans & Rosedale, FWHFH plans to complete about 5-10 houses per year.

Near Southeast Community Development Corporation (NSCDC)

The NSCDC is a neighborhood based, non-profit community development corporation (CDC) created by an Evans & Rosedale neighborhood association's desire to create change, and to "institutionalize" their efforts and to respond to the City of Fort Worth's "Model Block Program." NSCDC applied for the Model Block Program eight years ago and was awarded \$1.2 million (of federal, HUD funds) for redevelopment. Half of that money (\$600,000) was retained by the City to rehabilitate and rebuild existing housing for elderly people in the Evans & Rosedale neighborhood.

NSCDC attempts to revitalize affordable housing through acquisition and rehabilitation of existing housing. In addition, NSCDC acts as a "land bank" and they currently own fifty vacant lots within a ½ mile square area. NSCDC revitalization area boundaries are Vickery to the north, Interstate 35 (I-35) to the west, Rosedale Street to the south, and Riverside Drive to the east.

NSCDC mission statement is as follows:

"Our mission is the comprehensive revitalization of the Near Southeast community. We do so by providing affordable housing, stimulating the development of small business, working for safe conditions and by providing enrichment opportunities for neighborhood families."

NSCDC currently has 3 full-time employees and 1 part-time employee, and its offices are located within a private house on Leuda Avenue. Looking to the future, NSCDC would like to be located on Evans Avenue in the heart of the Evans & Rosedale redevelopment district.

To date, NSCDC has completed and sold five homes in the Evans & Rosedale neighborhood. One of these homes was a new construction home completed in collaboration with the Bank of America. It was a 3-bedroom, 2-bathroom, 1,500 square foot house that sold for \$79,500. The other homes that NSCDC completed are as follows:

- ◆ A 1,200 SF, 2-bedroom house that sold for \$45,000.
- ◆ A 4-bedroom, 2.5 bathroom house that sold for \$80,000.
- ◆ A 1,950 SF 4-bedroom, 2.5 bathroom house with car port that sold for \$104,000.
- ◆ NSCDC is having difficulty selling a 2-bedroom right now, for \$70,000, as the demand is currently for 3-bedroom homes
- ◆ For sale now: 3-bedroom \$85,000

Figures V-3 and V-4 show examples of NSCDC historic home rehabilitation in the Evans & Rosedale neighborhood.

Figure V-3
Historic Home After Rehabilitation, Starting in the Low \$70,000s



Source: NSCDC web site (www.nearsoutheast.org).

Figure V-4
NSCDC's 6th Home Currently for Sale – 1100 Humbolt



Source: NSCDC web site (www.nearsoutheast.org).

The advertisement/description for the 1100 Humbolt home shown in Figure V-4 above is as follows from the NSDCD web site:

“Gorgeous 1476 Sq Ft. Home in Historic District! Near Downtown, Medical District, and the New Evans/Rosedale Cultural District.

Bedrooms: 3

Bathrooms: 2

Square Footage: 1476

Features:

Ceramic Tile Floors

Spacious Ceiling to Floor Pantry

Golden Oak Hardwood Floors

French Double Doors

Utility Room w/Washer/Dryer

Detached Garage w/Garage door opener

Cozy Gas/Wood Fireplace

10-ft Ceilings

Roomy Walk-in Closets

Vintage Wood-divided Window Panes

All New Appliances”

As noted, the demand in the area is for a minimum of 3-bedrooms in a single-family home. According to NSCDC, a “suburban” housing product does not do well in this neighborhood (e.g. 1,500 SF home, of which 400 SF is for the garage, for \$100,000). The design and configuration of these single-family homes is critical.

For August 2004, NSCDC has completed homes at 1231 E. Terrell, 1233 E. Terrell and 1235 E. Terrell. 1059 Humbolt will be completed in the fall. “Each will offer historic design, hardwood floors, 3 bedrooms/2 bathrooms, and an array of features making them each distinctive.”

For their homes, NSCDC is targeting professionals that make under \$100,000 a year that work in the Medical District (a short walk away), such as nurses, teachers, police officers, etc. According to the NSCDC, these professionals currently will buy a home in the surrounding Ft. Worth suburbs, such as Arlington, and get a 1,500 SF home for about \$130,000 to \$150,000 with a 20-30 minute commute to the Medical District. Whereas in the Evans & Rosedale neighborhood, a 1,500 to 2,000 SF home with a garage in the rear is about \$100,000 to \$110,000, and is a short walk from the Medical District.

NSCDC has also been working with the Evans & Rosedale community to develop a 5-year strategy that addresses key crime prevention components as part of a project called Project Safe Neighborhood (PSN). PSN’s boundaries extend past the current NSCDC boundaries. PSN’s boundaries are Vickery to the north, Barry Street to the south, I-35 to the west and Riverside Drive to the east.

To help bring security to the neighborhood, NSCDC offers special discounts to police officers that are interested in buying a home in the Evans & Rosedale (Near Southeast) area. NSCDC also offers specials for first-time homebuyers who earn less than 80 percent of the City’s median income. Together with the City of Fort Worth, NSCDC has developed a worker-assisted housing plan. These plans are for City employees who wish to buy homes in the Near Southeast area.

Summary of Housing Demand at Evans & Rosedale

Overall, the Fort Worth Metro area is experiencing steady population growth and housing development. Housing permits for single family units have increased since 1998, though multi-family development has been more erratic. The local market area centered on the Evans & Rosedale Redevelopment area is characterized by mixed-use, multi-family and townhouse development to the west and north in the Medical District and the Ft. Worth Central Business District. The areas to the east and south are dominated by single family homes.

The area within a 1-mile radius of Evans & Rosedale has a housing stock that is much older than other parts of the city. Approximately, 52 percent of the area's housing stock is owner occupied. The occupancy rate of all units in this area is 82 percent. This area not only has a stock of housing for rehabilitation, but there are vacant parcels for infill housing.

Several large apartment complexes have been developed in the area in recent years which have occupancy rates in the 85 to 95 percent range, indicating a healthy market. New developments have varied, with some on the high end and some including affordably priced units. The local real estate community is upbeat about a growing rental market in the area, and is supportive of new growth which will help bring even more prospective renters to the area, as well as the businesses that follow population growth.

Housing Development Potential

Despite the downward trend in population and households in the immediate area, there has been continued housing development and absorption of new housing units. Over the next five years, the number of households – which is the primary driver of housing absorption – is projected to increase by more than 42,000 households within 15 miles of the Evans & Rosedale area.

The Evans & Rosedale Redevelopment project offers the opportunity to reverse the loss of households and population if a basis of public infrastructure and investment is accompanied by private sector investments in commercial uses. Residential housing could be developed within such a mixed-use environment. As this revitalized “core” is developed and accepted in the market place, larger residential developments competing more directly in the general market place will become more feasible.

Data in **Table V-13** provide a housing development scenario based on the redevelopment plan for Evans & Rosedale. This analysis of the local and regional (15-mile) area provides a reasonable scale for housing development at Evans & Rosedale. The analysis indicates a range of 94 to 121 units over five years, with an average of 19 to 24 units annually. This would tend to be relatively affordable housing geared to existing residents and to attract new residents to this location. Low land values will help in achieving this goal.

Table V-13
Housing Development Scenario
Evans & Rosedale Redevelopment Area

				<u>Low Range Scenario</u>		<u>High Range Scenario</u>	
	2003 Households	2008 Households	Change in Number of Households	Percent Share Scenario ^{1/}	Net Housing Potential ^{1/}	Percent Share Scenario ^{1/}	Net Housing Potential ^{1/}
0 to 2 miles	12,406	12,508	102	10%	10	15%	15
2 to 15 miles	482,972	525,198	42,226	0.20%	84	0.25%	106
Total	495,378	537,706	42,328		94		121
Average Annual Demand for five years			8,466		19		24
Percentage Of Total Demand					0.22%		0.29%

^{1/} Percentage Share and Net New Housing Potential assume that the Evans & Rosedale Redevelopment project moves forward, and creates a public and commercial infrastructure attractive to new housing; and that new housing developers are attracted to the Evans & Rosedale area

Source: Claritas, Inc. and ConsultEcon, Inc.

Some of the housing identified in this analysis could be supplied through rehabilitation of existing units, but much of it would be through new construction. The nature of the market in this area and the need for affordable housing indicates that rental housing should be produced as well as ownership housing. The proper mix will depend on future conditions and early projects will help to determine the best mix of housing types and rental / ownership mix.

Section VI

OTHER POTENTIAL LAND USES

This section provides an overview of the other potential land uses that may be developed as a result of the Evans and Rosedale redevelopment project. These land uses include office space, restaurants, and entertainment venues. In addition to these, this section includes the summary from a hotel feasibility analysis which was conducted for the Evans and Rosedale Heritage Area.

Office Market

The local office market is dominated by the medical services industry. Approximately 30,000 people work in the nearby Medical District area. About 10,000 are employed at the five large medical centers. Another 8,000 work in medically related businesses such as doctor's offices, imaging centers, outpatient surgery centers, treatment facilities, and support services. The remaining 12,000 employees work in an array of non-medical businesses.¹⁶ Many of these workers are located in small scale offices such as converted homes or warehouses. The development of the City Health Department Building near Evans and Rosedale, as well as the County Health Department Building on the west side of I-35, will help to push some of the economic impact of the medical office towards areas east of I-35. The new City Health Department Building will employ an estimated 80 persons. This facility will result in new demand for additional medical office space in adjacent or nearby properties, thus adding to the critical mass of jobs in the area and the recognition of the area as a suitable location for office development. Professional organizations, social service personnel, small institutions, or small businesses may also find the area a suitable place to locate, if there is a large enough supply of quality, affordable spaces and the nearby amenities (restaurants, shops, services, etc.) that tenants demand. Rents in the Medical District area typically range from \$9-\$10 for class C office/medical space, \$12 to \$15 per square foot for class B office/medical space, and \$15-\$19 for Class A office/medical space. If the Evans and Rosedale area can provide quality spaces in small office buildings -- or preferably, office space above retail space -

¹⁶ Source: Fort Worth South, Inc.

- there is potential for growth in this market, as there has been a moderate growth trend over the last decade.

Destination Restaurant Market

The Evans and Rosedale redevelopment area is a potential location for new restaurants, preferably 'destination' restaurants which draw patrons from beyond the local neighborhood. The Medical District has 36 restaurants, only 5 of which are chains. Most of the restaurants are affordably priced, and quite a few are very small scale operations. A list of major restaurants in a Fort Worth Official Visitors Guide indicates that most of the City's restaurants are located in the western parts of Fort Worth, in the stockyards to the north, or in downtown. For the current resident and day-time population of the Medical District, the area is underserved by restaurants and food service, as noted in Section IV of this report. There may be opportunities for new restaurant development at Evans and Rosedale. The increased number of persons working within a short distance of the area, following the construction of the new City Health Department Building, paired with increased commercial opportunities, will provide greater visibility to new restaurants in the area. An increased critical mass of businesses, residential units, and leisure activities in the area would be a very positive factor for the development of new restaurants. Owner/chef operated restaurants which reflect the African-American influence in the neighborhood would be particularly appropriate in Evans and Rosedale. This has been the pattern in other comparable neighborhoods.

Hotel Development

Based on previous research and analysis by the Binford Hospitality Group, the development of a hotel in the proposed "Heritage Park Center" would be a "marginal investment, using traditional investment criteria. The site is inferior to many of the well-established lodging markets in Fort Worth, lacking proximity to major demand generators." Since this study was published in 1999, the overall hotel market has weakened, indicating that the Evans and Rosedale area would still not be an advantageous location for a new hotel. It is a use that should be considered in the future, should market conditions improve and when the heritage component of the project is developed.

Entertainment Venues

The redevelopment of the Evans and Rosedale area will provide opportunities for the development of new entertainment venues such as a performing arts hall, a movie theater, or a nightclub.

The historic Pinkston Building at the end of Evans Street may offer a potential opportunity for rehabilitation into an arts or entertainment venue that would be an asset for the community. The Rose Marine Theater, north of Downtown Fort Worth, is an example of a historic theater of similar size that has been rehabilitated and now serves the community as a venue for the arts, especially through youth programs and performances. The theater serves the local Hispanic community, as well as the larger community, through programming and performances created by local residents, and for local residents, most of whom are Hispanic. The Rose Marine has become a focal point in the community, and has helped to increase development and economic growth in the neighborhood. This could be a model for the way in which a performance hall at Evans and Rosedale would serve not only the African-American community, but also the larger Ft. Worth community.

The experience of the comparable redevelopment areas provides insight into the opportunity for new entertainment and arts venues. Revitalized neighborhoods (profiled in Section III), such as 18th and Vine in Kansas City, and the historic MLK Drive in Milwaukee, (to become an African-American Cultural and Entertainment District) are adding new restaurants and music venues and other destinations that serve visitors from well beyond the neighborhood, providing new sources of income to the community. Deep Ellum, in Dallas, is another example of a successful transformation of a previously under-developed neighborhood into a lively entertainment district. While it is important to mitigate the potential negative impacts of nightclubs and other entertainment venues, such venues can provide jobs for local residents, improve land values, and serve as amenities for neighborhood residents, often making the neighborhood a more desirable place to live.

SUMMARY OF OTHER POTENTIAL LAND USES

There are opportunities for a number of types of new developments in the Evans and Rosedale Redevelopment Area. The market for medical office space in the Fort Worth South area is strong and has been growing. The addition of the new County and City health facilities within close proximity to Evans and Rosedale may help to create a larger critical mass of activity in the area,

which may lead to further demand for commercial spaces. The demand for a hotel at Evans and Rosedale is not currently sufficient to suggest development. The addition of new day-time workers in the immediate area may increase demand for restaurants that would serve the lunch crowd within a close distance of these buildings. With redevelopment, there are also opportunities for one or more ‘destination’ restaurants which would be able to draw from beyond the neighborhood. Local owner/chef operated restaurants which reflect the African-American influence in the neighborhood would be particularly appropriate in Evans and Rosedale. Entertainment venues at Evans and Rosedale are also potential additions to community. These venues may include nightclubs, a movie theater, or a performing arts hall. The historic Pinkston building may be an attractive structure for rehabilitation. The investment in new businesses in the area will help Evans and Rosedale to become more established as a place to work, live, and spend leisure time.

Section VII

TOURISM AND MINORITY TRAVELER MARKET

This section reviews the Ft. Worth visitor market and the minority traveler market. As the Evans & Rosedale cultural and heritage area develops, it will be supported not only by local metroplex residents, but also by visitors to the Ft. Worth area.

Fort Worth Visitor Market Profile

This section reviews the visitor¹⁷ markets available to the proposed Evans and Rosedale Heritage Area. This includes a review of tourism in Texas as a whole, as well as the more relevant subset of the Texas market in Fort Worth.

For this study, tourist market segments include:

- ◆ Visitors to Fort Worth:
 - Destination leisure visitors;
 - Business travelers, including meetings and convention visitors;
 - Individuals visiting friends and relatives (VFRs) in the area.
- ◆ Pass-through visitors:
 - Travelers on I-35W, I-30, I-20, and Highway 287.

Travel in Texas

It is estimated that there were 190 million person-trips to the State in 2002.¹⁸ The most popular activities of leisure travelers include sightseeing, visiting museums and attending plays, visiting theme parks, and historic sites. Important feeder markets for leisure visitors to Texas include Louisiana, Oklahoma, California, New Mexico and Florida.

¹⁷ The terms “visitor,” “tourist” and “traveler” are used interchangeably.

¹⁸ Texas Department of Economic Development and D.K. Shifflet & Associates, Ltd., *Full Year 2002 Travel Trends*.

Travel to the Metroplex

The Dallas-Fort Worth Metroplex consists of the Dallas, Fort Worth, and Sherman MSA's. The region receives 22.8 percent of the State's travel share of person trips, ranking it second among Texas regions. The Metroplex is well-known and popular visitor destination with a well-developed tourism infrastructure including hotels, visitor attractions, and retail opportunities.

There were an estimated 85 million travel person-days taken to the Metroplex in 2001, the most recent year for which tourism data is available. Leisure visitors represented 61 percent of travel person-days while business travelers made up 39 percent. Forty-nine percent of person-days within the region originated from within Texas. Popular attractions in the region include Six Flags Over Texas, the State Fair of Texas, the Ballpark at Arlington, as well as numerous museums, shopping centers, and cultural attractions.

Visitation to Fort Worth

Fort Worth has emerged in recent years as an important cultural center known for its many museums and cultural institutions. As a result, tourism has been an increasingly important component of Fort Worth's economy and a number of initiatives have been implemented to support the tourism industry. Fort Worth draws well from around the State, competing with Dallas, Houston, San Antonio, and other large cities for regional leisure visitors. Following is a discussion of the characteristics of travel and visitors to Fort Worth which helps to establish the baseline tourism market in Fort Worth from which the Heritage Area can potentially draw. In this section, Fort Worth is defined as the Fort Worth-Arlington Metropolitan Statistical Area (MSA), which consists of Hood, Johnson, Parker and Tarrant Counties.

Travel Impact and Volume

According to Dean Runyan Associates, the Fort Worth-Arlington MSA generated \$8.27 billion in tourism (not including airfare) spending in 2002. This income supported \$2.45 billion in personal earnings and almost 55,500 jobs. Additionally, tourism to the region contributed \$156 million in State taxes and \$41 million in local taxes.

Tourists may be an important market segment for the Evans and Rosedale Heritage Area. Data in **Table VII-1** show the estimate of travel person-days and person-trips to Fort Worth in 2001, the most recent estimate available. A “person-trip” is defined as an overnight stay or a day-trip that is 50 miles or more one-way.

Table VII-1
Estimated Travel Volume to Fort Worth MSA in 2001¹⁹

	Person-days	Person-Trips
Business (38%)	6.08 million	2.85 million
Leisure (62%)	9.92 million	4.65 million
Total	16.0 million	7.5 million

Source: Texas Department of Economic Development, D.K. Shifflet & Associates, Ltd, and ConsultEcon, Inc.

Business related visitation comprised 38 percent, or 2.85 million, of the 7.5 million total person-trips to Fort Worth in 2001. Leisure visitors comprised 4.65 million, or 62 percent, of the total. In terms of overall travel volume in Texas, visitors to Fort Worth accounted for 5 percent of all travel person-days in Texas, ranking it 5th among state MSA’s.

Trip Purpose

Approximately 62 percent of all visits to Fort Worth, in 2001, were for leisure purposes. The City is also a strong business travel destination. **Table VII-2** illustrates the trip purpose for leisure and business visitors to Fort Worth.

¹⁹ The D.K. Shifflet report used in this chapter provides the number of person-trips for a 24-month period (2000-2001), rather than 12 month. However, the number of person-days is provided for a 12-month period and 24 month period (2000-2001). To estimate the number of person trips (i.e. total visitors) to Fort Worth in 2001, the ratio of total person-trips, the number of person-days was factored against the number of person-trips for 2000 and 2001.

Table VII-2
Purpose of Stay, Leisure and Business Person-Trips to Fort Worth, 2001

Trip Purpose	Percent to Total
<i>Leisure</i>	
<u>Vacation</u>	<u>12%</u>
General Vacation	8%
Getaway Weekend	4%
<u>Non-vacation</u>	<u>51%</u>
VFR	32%
Special Event	13%
Other	6%
Total Leisure	62%
<u>Business</u>	
Meetings-Total	14%
Transient - Total	24%
Total Business	38%
Total	100%

NOTE: Specific activities may not add up to the net totals for the categories, due to multiple responses and rounding

Source: Texas Department of Economic Development, D.K. Shifflet & Associates, Ltd.

The most common purpose of stay for leisure visitors is to visit friends and/or relatives (VFRs). These VFRs account for 32 percent of all person-days in Fort Worth. People who are visiting friends and/or relatives in Fort Worth are strong candidates to visit points of interest, such as the proposed Evans and Rosedale Heritage Area.

Business visits comprised 38 percent of all person-days to Fort Worth in 2001. Business visitors are not typically considered to be good candidates to visit local attractions, as leisure time is often scarce. However convention and seminar visitors may have time available to visit attractions or cultural areas given adequate marketing. Furthermore, cultural amenities such as lively neighborhoods with restaurants and entertainment will help Fort Worth become a more popular convention and business destination.

Approximately 14 percent of person-days in Fort Worth were for the purpose of attending conventions, meetings, or seminars. The Fort Worth Convention Center is poised to increase its impact on visitation. A \$75 million expansion upgrade to the interior and exterior of the Convention Center is now complete, resulting in a dramatically improved and enlarged facility. Convention visitors, if marketed to, could become a source of visitors to the Evans and Rosedale Heritage Area.

Origin of Visitors

Residents from outside Texas comprise 35 percent of all visitors to Fort Worth, while intrastate travelers comprise 65 percent. Visitors from Dallas, Houston, Austin, and San Antonio MSAs make up a large segment of Fort Worth visitors. Nearly 22 percent of Fort Worth visitors are from the Metroplex region itself, but from more than 50 miles from the city limits. Oklahoma is the leading (non-Texas) state of origin due to its proximity. Data in **Table VII-3** shows the top origin markets for visitors to Fort Worth for both in-state and out-of-state visitors in 2001. The low percentages from selected cities show that visitor origin markets are spread thinly and broadly among many designated market areas.

Table VII-3
Top Origin Markets of Visitors to Fort Worth, 2001

Total In-State DMA's ^{1/}	65%
Dallas- Fort Worth	22%
Houston	9%
Austin	5%
San Antonio	4%
Total Out of State DMA's	35%
Oklahoma City	4%
Shreveport	2%
Wichita-Hutchinson	2%
Los Angeles	1%

1/ DMA – Designated Market Area.

Source: Texas Department of Economic Development,
D.K. Shifflet & Associates, Ltd.

Primary Trip Activities

Data in **Table VII-4** show primary activities in which travelers to Fort Worth participated in 2001. The most popular general categories were visiting attractions, cultural activities, and touring. As a large city surrounded vast rural areas, Fort Worth (like Dallas) is a popular regional destination for people visiting to see the “big city” sights.

Table VII-4
Primary Activities of Travelers to Fort Worth, 2001

Primary Activity	Percent Participation
<u>Attractions</u>	<u>27%</u>
Theme/Amusement Park	10%
Night Life	3%
<u>Culture</u>	<u>15%</u>
Visit Historic Site	7%
Concert/Play/Dance	2%
Museum, Art Exhibit	2%
Festival/Craft Fair	2%
<u>Touring</u>	<u>13%</u>
Sightsee	9%
Group Tour	5%
<u>Nature</u>	<u>7%</u>
Beach/Waterfront	3%
National/State Park	1%
Hike/Bike	1%
Camp	1%
<u>Outdoor Sports</u>	<u>7%</u>
Golf	3%
Hunt/Fish	4%
Other	1%

NOTE: Specific activities may add up to more than the net totals for the categories, due to multiple responses.

Source: Source: Texas Department of Economic Development, D.K. Shifflet & Associates, Ltd.

Length of Stay

Length of stay can be an indicator of both the number of activities that are available to visitors and the interest level that the destination holds for travelers. Data in **Table VII-5** show the average length of stay of visitors to Fort Worth.

Table VII-5
Length of Stay in Fort Worth, 2001

Length of Stay	Percent to Total	
Day Trip	53%	
1-3 Nights	39%	
4-7 Nights	7%	
8+ Nights	2%	
		Number of Days
Average Length of Stay (Day and Overnight)		2.0
Average Length of Stay (Overnight Only)		3.4

Note: Due to rounding, percentages do not add up to 100.

Source: Texas Department of Economic Development, D.K. Shifflet & Associates, Ltd.

An estimated 53 percent of all person-trips to Fort Worth are day-trips. This is indicative of the regional visitation to Fort Worth. Persons staying between one and three nights represent 39 percent of all person-trips to the City. The remaining 9 percent of person-trips are for longer stays of four nights or more. Overall, the average length of stay in Fort Worth for all person-trips is 2.0 days and the average length of stay for overnight person-trips is 3.4 days.

Visitor Spending

Visitors to Fort Worth spent an average of \$100.50 per person-day in 2001. These expenditures are spread among a number of categories, as shown in **Table VII-6**. Average spending on entertainment is \$11.60, or approximately 12 percent of their daily expenditures.

Table VII-6
Expenditures of Visitors to Fort Worth, 2001 (includes day-trips)

Spending Category	Amount	Percent to Total
Transportation	\$27.20	27%
Food	\$22.3	22%
Room	\$17.1	17%
Shopping	\$16.70	17%
Entertainment	\$11.60	12%
Miscellaneous	\$5.70	5%
Total	\$100.50	100%

Source: Texas Department of Economic Development, D.K. Shifflet & Associates, Ltd.

Pass-Through Visitors

Pass through visitors – persons traveling through Fort Worth that have the potential to make an opportunistic visit to a visitor attraction – comprise a potential market segment for the Evans and Rosedale Heritage Area. This market segment is particularly appropriate to the Heritage Area, which will be located close to Interstate 35 and Interstate 30, two heavily traveled corridors in the City. Several other major highways also transect Fort Worth. Strategically placed signage along 20, 35, and 30 and along other travel routes of pass-through visitors, would help to increase visitation to the area, as well as inform destination visitors and residents about its offerings.

MINORITY TRAVELER MARKET

The minority traveler market is a large and growing market. The minority travelers market includes African-Americans, Hispanic-Americans and Asian-Americans. According to a report²⁰ released by the Travel Industry Association of America (TIA) in January 2004, over the past three years travel by minority travelers has significantly increased. While overall growth in U.S. travel from 2000 to 2002 increased by 2 percent, Hispanic-American travel volume increased by 20

percent from 64.1 million to 77.1 million person-trips, Asian-American travel volume increased by 10 percent from 30 million to 33.1 million person-trips, and African-American travel volume increased by 4 percent from 72.2 million to 75.2 million person-trips. Minority travelers in 2002 generated approximately 18 percent of all person-trips taken in the U.S.

In general, according to TIA, minority travelers are more likely than average to include a rental car as their primary mode of transportation, attend cultural events or festivals, participate in nightlife activities, and gamble as a form of recreation.

African-American Travel

African-American travelers accounted for the second largest group of minority travelers in 2002, after Hispanic-Americans. While there are similarities amongst minority travelers' behavior, there are some key differences such as follows from the TIA's report, *The Minority Traveler*.

- ◆ African-Americans are much more likely to travel to destinations throughout the southern census divisions, specifically to the South Atlantic (37% of person-trips), West South Central (15%), and East South Central (13%) divisions.
- ◆ About one tenth (9%) of all African-Americans travel includes a rental car as a primary mode of transportation. One in seven (14%) African-American person-trips include air transportation.
- ◆ On one in ten trips (10%), African-American households spend \$1,000 or more, excluding transportation to the destination.
- ◆ Half (51%) of African-American trips are made by adults traveling alone or with someone outside their household. About one in four (26%) trips taken by African-American households include children under 18 years old.
- ◆ Aside from shopping (41% of person-trips), other popular activities on African-American trips are nightlife or dancing (13%), visiting historical places or museums (12%), attending cultural events or festivals (12%), visiting theme or amusement parks (12%), and gambling (12%).

The most popular destination for African-American travelers is Atlanta, followed by Orlando; Washington, D.C.; Dallas; and New York City. Group tours are popular among African-American travelers. Compared to travelers overall in the U.S., almost three times as many African-American

²⁰ *The Minority Traveler* is based on a survey of 300,000 American households conducted in 2002 (www.tia.org).

person-trips involve group tours (10% vs. 3%). This is attributed in part to a large proportion of urban residents without cars.

Seventy-four percent of African-American person-trips are for leisure purposes and 22 percent for business, including combined business and pleasure purposes. The primary trip purpose of most of the leisure person-trips is to visit friends and/or relatives (44%). On average, African-American households spend \$428 per trip excluding spending transportation costs to their destination.

OVERALL TRAVEL AND TOURISM MARKET SUMMARY

In 2001, the most recent year for which visitation data is available, there were approximately 4.65 million leisure person-trips and 2.85 million business person-trips spent in Fort Worth, the 5th most visited destination in Texas. Visitors from within the State comprised 65 percent of all person-days in Fort Worth. In-state visitors were most commonly from the Dallas-Fort Worth Area (50 miles outside the region), including Houston, Austin, San Antonio, and other major cities in Texas. Out-of-state travelers come from a number of regions, though visitors from Oklahoma City represented the highest originating Designated Market Area (DMA).

Leisure travel accounted for 62 percent of all person-days in Fort Worth in 2001. Of these leisure visitors, more than half were visiting friends and/or relatives (VFRs). Attractions, culture activities, and touring (sightseeing) were the top three general leisure traveler activities. The average length of stay for all travelers to Fort Worth was 2.0 days; and 47 percent of all visitors stayed overnight, at an average of 3.4 days. In addition to leisure travelers, business travelers and pass-through visitors are also potential markets for the proposed Evans and Rosedale Heritage Area.

The Evans and Rosedale Heritage Area will be able to draw visitors from a strong tourist market that is benefiting from the revitalization of a number of districts in Fort Worth. The development of visitor venues, marketing and promotional strategies to maximize attendance from tourist markets will be important to project success.

Section VIII

AFRICAN AMERICAN HERITAGE MUSEUM INDUSTRY EXPERIENCE

This section reviews the experience of several African American Heritage/Civil Rights museums. The experience is important in determining the market potential and operating model for a heritage attractions.

There are no “perfect” comparables to this potential heritage project. The existing African American Heritage museums are diverse in size, program, location, and market contexts. The museums vary widely in the extent of revenue sources, budgets, marketing, and overall organizational scale. Nonetheless, important insights and lessons can be gained not only in market potential of these museums, but also in reviewing the best practices and success requirements for these types of museums.

This section includes an overview of African American Heritage museums newly constructed or in the planning stages. These descriptions are followed by profiles of several African American Heritage museums selected that most similarly reflect the experience of industry similarities in terms of the physical characteristics of the museum, the overall market, and operations. The profiles include (as data are available) site and facility descriptions, program elements, market characteristics, visitation patterns and budget summaries.

In general, the selected profiled museums reflect many of the current trends in African American museums and provide models that can inform the development profile of a proposed Heritage Center. They also illustrate the challenges that are faced in this class of museums.

New or Planned African American Heritage Museums

African American Heritage museums have been a popular and growing segment of the museum industry. During the 1990’s a number of high profile African American and Civil Rights museums were established. These include the Museum Of African American History in Detroit (1997) and the National Civil Rights Museum (1991) among others. This development trend has continued into the 21st century as there are currently at least six major museums that have opened recently or are in planning stages.

National Underground Railroad Freedom Center – Cincinnati, OH – Opened in August 2004. The focus is slavery and resistance. It is supported by a \$110 million capital campaign; the 158,000-square-foot building was designed by African American architect Walter Blackburn of Indianapolis.

Reginald F. Lewis Museum of Maryland African American History – Baltimore, MD. Opening in late 2004. Focus is on local history. Funded primarily with appropriations by the state of Maryland, the 82,000-square-foot facility is slated to open in Baltimore's Inner Harbor area, attracting an estimated 150,000 visitors annually.

National Museum of African American History and Culture – Washington D.C. - Legislation has been approved for the construction of this preeminent facility on the National Mall. It is estimated to cost between \$200 and \$300 million. Congress will pay for one-half of the costs; the rest will come from private donations.

International Civil Rights Center and Museum – Greensboro, NC – Located at the site of the famous Woolworth sit ins, the museum is currently in funding and design stages. Four major planned exhibits will be included. Organizers have raised about \$6 million of the \$9 million to complete the building

U.S. National Slavery Museum - Fredericksburg, VA – The National Slavery Museum at Fredericksburg is envisioned as the centerpiece of the 2,100-acre *Celebrate Virginia*, a commercial, recreational and tourism-based project in Fredericksburg. It is expected to be completed by 2007. Officials say their project will cost about \$200 million.

African-American History Museum – Charleston, SC - Planners are hoping to raise \$60 million for the museum and related efforts. Planners envision a multistory building with about 65,000 to 70,000 square feet of space and a rooftop garden overlooking the water. It would include three main galleries, divided chronologically. The first would include periods before the early 1700s and focus on the slave trade and life before slavery. The second would run to the end of the Civil War and examine slavery and the anti-slavery efforts. The third would deal with struggles since the war to achieve equal opportunity and civil rights.

Experience of Selected Projects

Following is the presentation of the industry experience of four African American Heritage museums. The four museums are:

Chattanooga African American Museum / Bessie Smith Hall – Located in downtown Chattanooga, the Museum has 25,000 square feet including a performance hall. The Museum draws between 10,000 and 15,000 visitors and holds numerous events. There is an emphasis on music (blues and jazz).

Tubman African American Museum – The Tubman African American Museum in Macon currently has 8,500 square feet of exhibit space. There is a strong emphasis on African American art and culture. The museum currently draws 64,000 visitors. A new 49,000 square foot facility is under construction, which is projected to increase annual attendance to 100,000.

Ralph Mark Gilbert African American Museum – This downtown Savannah museum occupies three floors and presents exhibits on the Civil Rights movement, especially the experience of Savannah. The Museums draws 25,000 to 30,000 visitors.

Museums at 18th & Vine – This collection of museums is located in Kansas City (as noted in Section III, Comparable districts). Museums at 18th and Vine is a 50,000 square foot, Smithsonian-affiliated museum complex that consists of the following facilities. Located behind the complex is an outdoor performance theater.

- American Jazz Museum
- Blue Room (museum & jazz club) - replica of original where the Bird (Charlie Parker) played his sax – located within the American Jazz Museum. The Blue Room is a museum by day and then jazz club at night (four nights per week). Includes pictures of jazz greats and relics of Kansas City's jazz era.
- Horace M. Peterson III Visitor's Center
- Renovated Gem Theater
- Negro Leagues Baseball Museum

The American Jazz Museum is the focus of these museums in the following analysis.

Market Summary

Data in **Table VIII-1** show price, attendance, market population, and the attendance to resident market ratio of the four profiled African American Heritage museums.

Table VIII-1
African American Heritage Museum Market Summary

	Adult Admission Price	Attendance	MSA/County Pop. Size	Ratio of attendance to MSA/county pop.
Chattanooga African American Museum	\$3.00	10,000	473,000 ^{1/}	0.02
Ralph Mark Gilbert Museum	\$4.00	25,000	301,700 ^{2/}	0.08
Tubman African American Museum	\$5.00	64,000	331,200 ^{3/}	0.19
American Jazz Museum	\$6.00	300,000	1,821,200 ^{4/}	0.16

1/ Chattanooga, TN MSA

2/ Savannah, GA MSA

3/ Macon, GA MSA

4/ Kansas City MSA

Source: Facilities profiled, Sales and Marketing Management, *Survey of Buying Power* and ConsultEcon, Inc.

Budget and Employment

Data in **Table VIII-2** show summary characteristics of the three profiled museums budget and operations.

Table VIII-2
African American Related Museum Budget and Employment Summary

	Operating Budget	Budget Per Visitor	Full-Time Equivalent Employees	Visitors per FTEs
Chattanooga African American Museum	\$249,214	\$24.92	6.0	1,667
Ralph Mark Gilbert Museum	\$300,654	\$12.03	5.0	5,000
Tubman African American Museum	\$723,923	\$11.31	17.0	3,765
American Jazz Museum	\$2,100,000	\$7.00	30.0	10,000

Source: Facilities profiled and ConsultEcon, Inc.

Tables VIII-3 through Table VIII-6 provide descriptions of the profiled African American Heritage museums as well as their attendance and operating trends.

Table VIII-3
Chattanooga African American Museum

Facility Name and Location	Chattanooga African American Museum. Chattanooga, TN.
Date Opened to Public	1983. Opened at the current museum facility in 1993.
Description of Facility and Collections	<p>The total size of the Chattanooga African American Museum is 25,000 square feet, spread over two floors of a renovated brick warehouse. The facility features the 300 seat Bessie Smith performance hall, another 150 seat meeting room, and several thousand square feet of exhibit space.</p> <p>The Museum presents the experience of African Americans specifically in Chattanooga, which offered life quite different than other areas of the South, especially rural areas. Visitors learn about “the many African businesses such as a Dairy Farm, Insurance Company and Retail outlets that thrived in the 1800’s. This was a world full of energetic African American doctors, lawyers, and movers and shakers rarely explored in current day history books. Discover towns surrounding Chattanooga that were founded and run by Africans.” There are also exhibits on culture and life in Africa, as well as the civil rights movement and integration in Chattanooga.</p> <p>The Chattanooga African American Museum also houses a Gift Shop featuring a variety of related items, and a research library containing rare collections of resource material revolving around the African experience.</p> <p>A very important part of the Museum operations is special events that take place in the two meeting spaces. These include the Annual African Cultural Ball (first Friday in February), New Year’s Eve Party, Black History Expo (February), Annual Kwanzaa Celebration (December) and the Night To Remember (April). The Museum organizes an event called Bessie Smith Strut that draws close to 100,000 to downtown Chattanooga.</p>
Site	Located in downtown Chattanooga about eight blocks from the waterfront, Tennessee Aquarium, and other tourist attractions.
Admission	\$3.00 for adults, \$2.00 for students (K-12). The Museum practices a very generous policy, often allowing seniors and poor people to visit for free; schools that can’t afford admission are often admitted free.
Hours of Operation	Monday thru Friday 10:00 - 5:00 p.m. Saturday noon - 4:00 p.m. Sunday - Closed
Market Size	Chattanooga MSA population: 473,000
Attendance and Attendance Trends	The museum draws between 10,000 and 15,000 visitors annually. This range has been relatively stable over the years. An estimated 60% of attendance is paid attendance.
Visitor Characteristics	Approximately 40 percent of visitors are children in school groups. An estimated 55% of total visitors are African American, 45% are other races. An estimated 45% of visitors are local residents, the remainder are tourists. Visitors typically stay about 1 hour.

Table VIII-3 (Cont.)
Chattanooga African American Museum

Marketing	The advertising budget is \$10,865. The museum is part of the Chattanooga CVB so much of its advertising occurs through this body. They have a brochure and fliers which are available at kiosks at local and regional visitor centers. There is an occasionally radio ad, and TV spots are sometimes donated for free by local stations. The Museum is a member of Triple A and several other tour groups which provide shared advertising costs. They are tied into several tour itineraries and have several cross promotional activities with other Chattanooga museums.
Membership price/number	Family memberships cost \$35. There are approximately 400 members.
Governance and Operations	The Chattanooga African American Museum is a non-profit organization.
Sources of Funding/Budgets	CAAM has an annual operating budget of \$249,000. The major expenses categories are salaries and wages (60%). In 2002, CAAM had total revenue of \$322,840; 33 percent of revenue was earned; 67% was from public or private support. Total revenue is up from \$166,800 in 1997, and peaked at \$354,000 in 1999.
Number of Employees	There are five full time employees including: director, finance director, marketing, education director, gift shop manager, and receptionist. There are also several part-time employees.
Gift Shop	There is a small gift shop. Total Sales: \$8,678 Cost of Goods Sold: \$9,204 Profit: \$-526 Sales Per Visitor: \$.86 (assuming 10,000 visitors)
Education	Educational groups are an important market. 40% of visitors are children in school groups (4,000).
Rental Space	There are two rental spaces available, one for \$600 and one for \$300. These are among the most affordable rental spaces in the City. They are booked well in advanced, and very often filled.
Keys to Visitation and Operating Strategy	-Strong public/private contributions. -Strong rental revenue. -Special event. -Involved with group tours and CVB marketing.. -Tourism in city.

Source: Guidestar, Chattanooga African American Museum and ConsultEcon, Inc.

Figure VIII-1
Chattanooga African American Museum / Bessie Smith Hall



Source: Chattanooga CVB.

Table VIII-4
Ralph Mark Gilbert Museum

Facility Name and Location	The Ralph Mark Gilbert Civil Rights Museum
Date Opened to Public	1996
Description of Facility and Collections	Savannah's Civil Rights Museum chronicles the struggle of the oldest African American community in Georgia. The museum gives an overall picture of the Civil Rights Movement. The museum was the vision of W.W. Law. It's located in a former bank building, constructed in 1914 -- the Wage Earners Savings and Loan Bank, said to be the largest black bank in the country at the time. The museum offers guided tours through the 3 floors. The museum is interactive and includes photographs, memorabilia and videos. Future plans for the museum include the addition of archives and library room, and a multifunction room. The museum, has many displays that portray what life was like for a black. The museum chronicles the struggle from its roots in the Deep South's slavery through today. The Ralph Mark Gilbert Civil Rights Museum is designated as the official Georgia state civil rights museum.
Site	Located in downtown Savannah, a city with a strong tourism economy.
Admission	\$4.00 adults \$2.00 students \$3.00 seniors \$3.00 adult groups of 10 or more
Hours of Operation	Monday - Saturday: 9:00 a.m. – 5:00 p.m.
Market Size	Savannah MSA population: 301,700
Attendance and Attendance Trends	Annual attendance usually falls between 25,000 and 30,000.
Visitor Characteristics	The museum draws well from tourists markets, but less well from adult resident market.
Marketing	The advertising budget is \$12,181.
Membership price/number	Family memberships are available at \$65 for a family of four. All four family members listed on a family membership are entitled to free admission and the 10% gift shop discount.
Governance and Operations	Non-profit organization.
Sources of Funding/Budgets	Total budget expenses in 2002 equaled \$303,600. Personnel costs comprised 48% of the budget. Utilities comprised 11%. Revenue in 2002 only totaled \$161,000; 58% of revenue was earned. Public and private support for the museum has been highly erratic with contributions of \$320,700, \$596,000, and \$112,000 in 2001, 2000, and 1999 respectively. A severe drop in funding explains the large difference between expenses and revenues in 2002.
Number of Employees	There are 3 full-time and 4 part-time employees; 5 FTEs.
Gift Shop	The museum has a small gift shop: Gross Sales: \$12,560 Cost of Goods Sold: \$9,822 Sale of Goods Profit: \$2,738 Per Capita Sales: \$.50

Table VIII-4 (Cont.)
Ralph Mark Gilbert Museum

Education	Approximately 200 school groups attend the museum annually.
Rental Space	Revenue from gross rent totals \$1,852.
Keys to Visitation and Operating Strategy	-Strong tourist visitation. -Strong school group visitation.

Source: Ralph Mark Gilbert Museum and ConsultEcon, Inc

Figure VIII-2
Ralph Mark Gilbert Museum



Source: Ralph Mark Gilbert Museum.

Table VIII-5
Tubman African-American Museum

Facility Name and Location	Tubman African-American Museum. Macon, GA
Date Opened to Public	1985
Description of Facility and Collections	<p>The mission of the Tubman museum is to educate people about African American art, history, and culture. The Museum now houses fourteen galleries including the world class Noel Collection of African Art. This collection includes 2,000-year-old Nok figures, beaded Yoruba wall panels, and Benin bronzes. Other galleries housed in the Museum are devoted to a range of aspects of African American life. From the cuisine of Africa and America in the Soul on Rice Gallery to the Local History Gallery to the Military Leaders Gallery, the Museum has sought to preserve the turbulent but triumphant experience of blacks in America. The Tubman Museum is now the Southeastern venue for many traveling exhibitions that would usually display in prominent venues in large metropolitan areas. Past exhibits have included <i>Portraits of Black Women Who Have Changed America</i>, and <i>A Century of African American Expression in the Decorative Arts</i> among others.</p> <p>The Museum currently occupies 8,500 square feet. An expansion plan is underway which will relocate the museum several blocks to a larger site closer to other tourist attractions.</p> <p>Expansion plans – The core of the 49,000 square foot building will be two 4,000 square foot galleries devoted to the African American experience from 1619 to the present, with a particular focus on the American South.</p>
Site	The Museum is located in downtown Macon in an area accessible to but not adjacent to attractions and entertainment. Free parking is available adjacent to the Museum. The new facility will be located much closer to downtown attractions and amenities.
Admission	Non-member admission: \$5.00 for adults, Children 12 and under...\$3.00
Hours of Operation	Monday-Saturday 9:00 a.m.-5:00 p.m. Sunday 2:00 p.m.-5:00 p.m.
Market Size	Macon MSA: 331,200
Attendance and Attendance Trends	Current attendance is approximately 64,000. Preliminary projections for the new Museum facility estimate 100,000 visitors.
Visitor Characteristics	Local residents (from an 11 county area) comprise half of all visitors; tourists comprise the second half. The strength of the local market has waned recently. Tourism has strongly increased to Macon in recent years. Approximately half of residents are African American, half are other races. Local visitors tend to be predominantly African Americans while tourists are often Caucasian or other races.
Marketing	Approximately \$45,000 is spent on advertising. The Museum has a full-time marketing staff member.
Membership price/number	Family memberships cost \$50. There are approximately 1,000 members.

Table VIII-5 (Cont.)
Tubman African-American Museum

Governance and Operations	Non-profit organization.
Sources of Funding/Budgets	The 2004 budget is approximately \$1 million. The most recent tax form (2002) indicates an expense budget of \$723,000. Revenues totaled \$2.6 million. Contributions comprise 94% of revenue. Unearned revenue has been rising since 1997 from several hundred thousand to several million annually. This revenue has accrued from a capital campaign for the new facility.
Number of Employees	14 full-time, 7 part-time; 17 FTEs.
Gift Shop	The gift shop is an admitted weak spot by the Museum. Gross Sales: \$14,862 Cost of Goods Sold: \$9,261 Profit: \$5,601 Per Capita Sales: \$.23
Education	From the Tubman Children in the Arts Classes to the Pan African Festival of Georgia, the Tubman partners with the community to fulfill its mission: the education of all people about African American art, history and culture. Approximately 16,000 children visit as part of school groups. School children are admitted free. The number of elementary school visitors has decreased in recent years due to school funding cutbacks and standardized testing issues.
Rental Space	At the current facility, rentals are almost non existent, but they are hoped to be a major part of operations at the future facility.
Keys to Visitation and Operating Strategy	<ul style="list-style-type: none">- Strong public/private contributions-Very good capital campaign- School group visits-Tourism growing stronger

Source: Guidestar, Tubman African American Museum and ConsultEcon, Inc.

Figure VIII-3
Tubman African American Museum: Current Museum Facility



Source: Tubman African American Museum

Figure VIII-4
Tubman African American Museum: Facility Under Construction



Source: Tubman African American Museum

The Museums at 18th & Vine; Kansas City, Missouri

The Museums at 18th & Vine focus on the African American Heritage experience related to sports and music. The American Jazz Museum (AMJ) opened in September 1997, after eight years of planning.²¹ The museum was part of a \$26 million restoration project that also included the Negro League Baseball Museum, a visitor center, and the restoration of the historic 500-seat Gem Theater. The project was built as the centerpiece of a revitalization plan for the City's former jazz district, 18th and Vine, by the Jazz District Redevelopment Corporation (JDRC). The buildings are owned by the city and the museums are operated by the not-for-profit 18th and Vine Authority. The JDRC's goals include recreating the area as it existed in the 1920s and 1930s, when it was a vibrant mixed-use area with jazz clubs, restaurants, retail services and housing.

As the centerpiece of a revitalization plan, the American Jazz Museum is an example of museums as economic generators and tools for cultural and community preservation. In addition to restoring the area to promote tourism, the revitalization plan also includes community development, with housing and retail as major components.

Museum Size and Program

The building that houses the two museums and visitor center is approximately 62,000 square feet. The American Jazz Museum occupies approximately 46,600 square feet of the total area, including close to 19,000 square feet of permanent and changing exhibit space, a 780 square-foot gift shop, and shared atrium space with the American Negro Baseball Museum. Additional space on the lower and second levels includes administrative and storage areas. The archives are currently not accessible to the public. The 500-seat Gem Theater, which is located across from the museum, is approximately 23,000 square feet.

The Jazz Museum includes major exhibits honoring Charlie Parker, Louis Armstrong, Ella Fitzgerald and Duke Ellington; an interactive studio where visitors can experiment with musical concepts in a studio-like atmosphere; a jazz discovery area for younger children that offers creative arts activities, classes, story-telling and jazz dance lessons; an interactive resource library with

²¹ American Jazz Museum was formerly the Kansas City Jazz Museum. The name was changed after a study that suggested the name had a limited scope.

internet access and resource materials; and the Blue Room, modeled after a former hotel jazz club, which serves as an exhibit hall during museum hours and a live jazz club after hours. The Blue Room is operated by the museum and can hold up to 120 people; beverages are outsourced. The museum has dedicated, free parking. Additional parking is planned and part of the revitalization plan.

Additions to the American Jazz Museum include a Charlie Parker Memorial Plaza built behind the museum by the Kansas City Parks and Recreation Department. An outdoor pavilion for live music and events is currently in development.

Mission and Activities

The mission of the American Jazz Museum is to celebrate and exhibit the experience of jazz as an original American art form through research, exhibition, education and performance at one of the country's crossroads of jazz.

Activities at the museum include live jazz, four annual symposiums, an annual concert series, educational programs, school tours, and storytelling. The museum also runs a jazz institute for middle and high school students and holds an annual youth music festival. In addition to programming live jazz in the Blue Room, the museum also operates the Gem Theater as a venue for musical and theatrical performances, multimedia events, workshops, and meetings. In 2001, the museum staged between 100 to 140 concerts and events at the Gem Theater, and approximately 200 performances in the Blue Room. The American Jazz Museum and its atrium are available for private rental.

The American Jazz Museum is also a member of the Smithsonian Affiliations Program, which provides numerous benefits including: access to the Smithsonian's national collections, expertise and assistance in educational and programmatic initiatives, collaborative opportunities in programming and exhibitions, borrowing privileges that can extend to long-term loans, participation in the Smithsonian Intern Partnership Program, use of the Smithsonian developed curriculum, and prominence on the Smithsonian Affiliations web site. In 2000 and 2001, AMJ hosted the photography exhibition, "Reflections in Black" from the Smithsonian's Anacostia Museum and Center for African American History and Culture. AMJ also co-sponsored the

"Quests for Freedom" national conference at the Smithsonian's National Museum of American History in Washington, D.C. For several years, the museum has sponsored the Duke Ellington Youth Project, an interdisciplinary curriculum that is now being used in twelve schools in Kansas City.

Museum Attendance

In fiscal year 2002²², the total attendance for the Jazz Museum, Blue Room and Gem Theater was approximately 300,000. Visitors to the American Jazz Museum have the option of purchasing a combination ticket that also includes the Negro Leagues Baseball Museum. Locating these two museums in the same building has helped boost visitation at each venue.

The American Jazz Museum targets all audiences although the majority of visitors are adults. To reach a younger audience, the museum has exhibit areas for children, and offers school tours and educational programming. About 60 percent of visitors are tourists and 40 percent are residents. Visitation includes tour groups that are comprised of city sightseeing tours as well as motor coach groups.

Museum Operations

In fiscal year 2001, the operating budget for the museum was \$2.1 million. Approximately 45 percent of the budget is earned revenues (admissions is the largest source followed by retail), and 55 percent is unearned, of which approximately 40 percent is funded by the City. The Museum is working to become self-supporting and has identified a number of revenue sources that could help to reach this goal including: 1) install new exhibits; 2) explore commercial uses for archives to create use and excitement; 3) enhance marketing strategies to capitalize on the Gem Theater's capacity and other facility rentals; and 4) aggressively pursue memberships. The Museum has already begun an endowment to move toward this goal.

According to the *2003 Official Museum Directory*, the museum's personnel included 29 full-time paid employees, and 2 part-time paid employees.

²² The museum operates on a May to April fiscal year.

Hours of operation are Tuesday through Saturday from 9:00 a.m. to 6:00 p.m., and on Sunday from 12:00 p.m. to 6:00 p.m. Admission is \$6.00 for adults and \$2.50 for children. The combination ticket for both museums is \$8.00. Summer is the museum's peak season and also baseball season, which brings visitors to the Negro Baseball Leagues Museum. The Museum recommends an hour to visit the museum. Visitors tend to stay from 30 minutes up to five hours, depending on the visitor's level of interest.

The jazz club is open Monday and Thursdays from 5:00 until 11:00 p.m.; Fridays from 5:00 p.m. until 1:00 a.m., and Saturdays from 7:00 p.m. until 1:00 a.m. A general admission of \$5 was introduced in 2001 on Fridays and Saturdays; however, admission is free on Monday and Thursdays and can vary depending upon performance. Admission to the Gem Theater varies by performance.

Findings from the Experience of Profiled Facilities

The following findings, lessons and trends in African American and Civil Rights museum planning and operations are derived from the diverse experiences of the profiled facilities and investigations into African American and Civil Rights museums.

Attendance and Market Characteristics

- ◆ **Attendance Volume** – The three comparable museums profiled had attendance ranging from 10,000 to 300,000. Attendance is dependent on multiple factors including market size, visitor experience offered, and marketing budget, among other factors.
- ◆ **Target Audiences** – Target audiences of African-American and Civil Rights Museums are the general public. There tends to be stronger visitation by African Americans. School groups and tour groups are very important visitor segments.
- ◆ **Resident Market Size** – . The comparable museums are located in communities with between 300,000 and 1,800,000 residents in their metropolitan areas.
- ◆ **Visitor Market Size** – The visitor market size is a very important part of the attendance potential for African American / Civil Rights museums. Generally, museums that have a very strong visitor market tend to have strong attendance levels because tourists are often new to the attraction.
- ◆ **Location** - The location of the Museum can strongly affect the levels of visitation to the museum. The four comparable facilities are located in or near downtown areas, not directly in the tourist zones, but close to these areas.

Admission and Membership

- ◆ **Admission Price** –Overall, admission prices have historically been moderate and this has helped to ensure visitation by a broad range of income segments. The four comparable museums have adult admission prices of between \$3.00 and \$6.00.
- ◆ **Memberships** – Providing the opportunities to purchase memberships is a good strategy among public attractions in general. Memberships are relatively low among the comparable museums which have between 400 and 1,000 members.

Facility, Exhibits, and Programming

- ◆ **Exhibits** – The Chattanooga African American Museum and the Tubman African American Museum both feature historical exhibitry and art exhibits. Civil Rights exhibits are part of both, but not the focus. The Ralf Mark Gilbert Museum focuses on the Civil Rights Movement, especially the experience of Savannah. The American Jazz Museum focuses on music and performing arts.

Governance, Funding, and Operations Issues

- ◆ **Seasonality of operations** – The summer is peak season for attendance by tourists at the comparable museums. All four are located near tourist attractions or destinations and their attendance tends to follow overall visitation trends to the region. The late spring is the peak period for school group visitation
- ◆ **Governance** – All four comparable museums are non-profit organizations.
- ◆ **Sources of Funding** – Factors affecting funding for operations are numerous and include the earned revenue (admissions, memberships, sales etc), as well as unearned revenue (contributions, grants, etc). All four profiled museums have a high degree of unearned revenue. Often contributions and government grant monies are tied to education programs for school children.
- ◆ **Budget** – There is wide variation in the budget of African American related museums. Budgets are very dependent on the earned and unearned revenue sources available. The Tubman African American Museum, the Chattanooga African American Museum, and the Ralph Mark Gilbert Museum had budgets of \$724,00, \$247,000, and \$301,000 respectively in 2002. The American Jazz Museum had a budget of \$2.1 million.
- ◆ **Employment** – The number of employees is reflective of the budgets available and the extent of marketing, programming, education, and other needs. The Tubman African American Museum, the Chattanooga African American Museum, and the Ralph Mark Gilbert Museum had 17, 7, and 5 FTE's, respectively. The American Jazz Museum had a staff of 29 FTE's.

SUMMARY

African American Heritage museums are at a growth period in the museum industry. There are a number of museums currently in the planning stages including the International Civil Rights Museum in Greensboro, NC and the National Museum of African American History and Culture in Washington DC.

African American Heritage museums in general are moderately priced and have moderate attendance levels. Resident and tourists markets are important to visitation, but a strong tourist market helps sustain and increase attendance levels over time. Educational groups and tour groups are also a very important regular source of visitors, and school programs are often tied to public funding. The operating profiles of such museums are also moderate, as low earned revenue among such museums can be a limiting factor. Marketing is also usually limited but participation in visitor's bureaus can help to share advertising costs. Gift shop revenue is rather low at the profiled museums reflecting a possible area of improvement. Rental income can be a strong source of revenue for African American Heritage museums as these facilities are often considered an integral community asset and a place to hold functions. Overall, the experience of these museums is that while not typically large revenue generators or operations, they are supported by the community at large and local governments, and their educational programs and community building missions are proven to be excellent contributions to their region.

Section IX

MARKET SUPPORT FRAMEWORK

The review of market potential, along with the physical development opportunities in Evans & Rosedale, suggests a mixed-use development program in which each use provides cross support for other uses. Office, institutional and commercial uses create demand for nearby housing. Commercial uses make housing more appealing. Housing provides a base of market support for the commercial uses and creates a neighborhood setting desirable for commercial and employment based land uses.

Data in **Table IX-1** provide a summary of market potential based on the findings of this report and a mixed use redevelopment approach. This is the five-year market potential and represents a mid-point of a range of market opportunity of approximately fifteen percent higher or lower in either direction. This is used for guiding the planning process, and for informing participants in the process of the scale of demand possible for these development and redevelopment types. The redevelopment plan should anticipate development beyond the five-year horizon that this estimate of demand represents. The Master Plan should reflect full build-out of the project area based on best planning and design principals.

Table IX-1
Market Potential
Evans and Rosedale Redevelopment Area

	Units	Typical SF Range	Net to Gross factor	Total SF
Residential				
Townhouse	40	1,600	1.1	70,400
Multi-family	60	900	1.2	64,800
Total Residential	100			135,200
Office				
Institutional	4	3,000	1.2	14,400 ^{1/}
Professional	8	500	1.2	4,800
Social Services				
Legal, accounting services				
Insurance				
Real Estate				
Employment				
Medical services				
Personal services				
Total Office	12			19,200
Commercial				
Food & Beverage	5	1,800	1.2	10,800
Breakfast & lunch shop				
Bakery				
Coffee shop				
Ice Cream Shop				
Ethnic Restaurants				
Retail				
Anchor Stores	2	6,000	1.2	14,400
Pharmacy				
Food Market				
General Merchandise				
Specialty Shops	10	1,800	1.2	21,600
Specialty food				
Shoe store and shoe repair				
Clothing stores				
Sporting goods				
Jewelry				
Telephone / Electronics				
Card & gift shop				
Optical store				
Books				
Hobby				
Convenience store				
Florists				
Other specialty				
Services				
Bank & automated teller	1	1,000	1.2	1,200
Services	5	800	1.2	4,800
Hair cutters / salon / Nails				
Dry cleaner				
Laundromat				
Video rentals				
Mailing / Packaging / Copy				
Dance or Karate studios				
Other Services				
Public Services				
Day Care	1	3,200	1.2	3,840
Total Commercial	24			56,640
Entertainment				
Theater (Building reuse potential)	1	12,000	1.2	14,400
Destination Restaurants	2	4,000	1.2	9,600
Nightclub	1	3,000	1.2	3,600
Total Entertainment	4			27,600
TOTAL NON-INSTITUTIONAL	156			252,400
Institutional Development				
Shamblee Library				-
Heritage Center Museum				-
City Health Department	1			48,000
TOTAL INSTITUTIONAL	1			48,000
TOTAL DEVELOPMENT	157			300,400

^{1/} Potential tenants might include the Near Southeast Community Development Corporation, Southeast Ft. Worth Inc., the Ft. Worth Federation of Colored Women and the Metropolitan Black Chamber of Commerce.