Long Reach Village Center Community Meeting

April 30, 2015

Stonehouse

7PM to 9PM

Agenda

- Welcome-County Executive Allan Kittleman
- Overview-Mark Thompson, Howard County EDA
- Market Insights-Tom Moriarity, Retail & Development Strategies
- Existing Site Conditions-Sean Davis, Morris & Ritchie Associates
- Q & As for Speakers
- Tabletop Exercise
- Wrap-up

Background

- **Retail Center History:** Built in 1974 and expanded in 1997
- **Other Village Center uses/owners:** Stonehouse (LRV Board/CA's Columbia Art Center), Celebration Church, Exxon gas station, Deli Town & Richburn Liquor Store.
- **Multiple Retail Center Owners:** The Rouse Company, Kimco, Cedar Shopping Centers, LR Village Associates.
- **Anchors:** Safeway closed its store in 2011. Family Market, an ethnic grocer, opened briefly, but closed in mid-2013. The anchor space has been vacant since then.

Howard County's Involvement

- Purchase Initiation
- Required Legislation
- Acquisition
- Game Plan going forward

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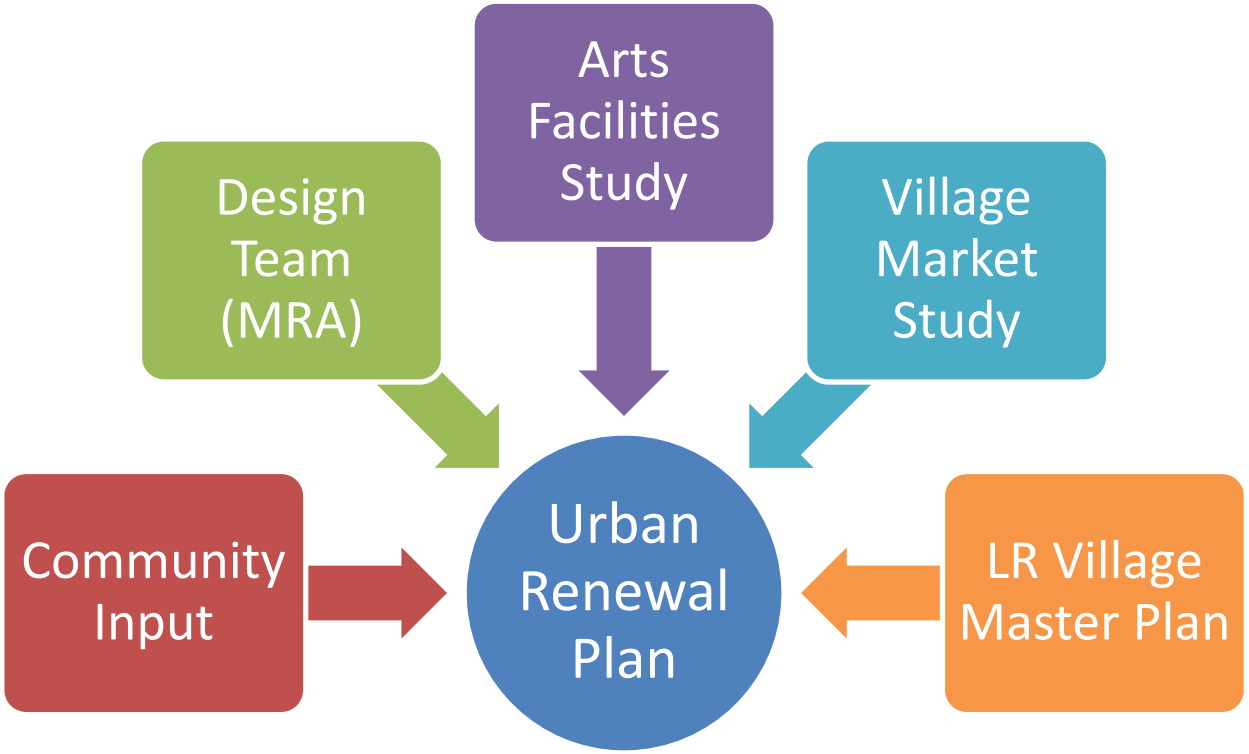
LRVC Urban Renewal Area

Planning Process



Community Engagement

A series of community meetings will be held to solicit input and feedback

#1: Market and Site Analysis
4/30/15

 # 2: Case Studies on redevelopments including Wilde Lake
5/28/15

#3: Preliminary concept plans
6/11/15

#4: Final concept plans
9/17/15

Urban Renewal Plan

DPZ will prepare the URP

→

County Council consider the plan with a normal legislative process

→

County Council will then make any modifications and pass the plan by resolution

County Sale Strategy

- A stabilized asset with an approved URP will represent a much more attractive opportunity for a private developer
- The URP will define the content and structure of a Request for Proposals
- Howard County will seek to provide guidance with flexibility to attract as many proposals as possible

Long Reach Market Insights

Tom Moriarity

Retail Development Strategies LLC

Columbia Village Centers Market Analysis

Village Centers:

- Long Reach
- Oakland Mills
- Owen Brown
- Dorsey's Search
- River Hill
- King's Contrivance
- Harper's Choice
- Hickory Ridge

- GE Site and Dobbin Road/Snowden River Parkway Corridors (GEDS)

- Study did not include Downtown Columbia/Town Center or Wilde Lake

Real Estate Development Context

- Key economic drivers: population/HH growth, mortgage interest rates, job growth
- Success of new residential in Wilde Lake: key market indicator of demand for new MF residential in other Village Centers
- Market opportunities in Village Centers should recognize new housing in Downtown Columbia
- Limited available land in Village Centers may require more ‘vertical’ developments if number of housing units is increased

Retail Context

- Original development model: grocery-anchored neighborhood centers
- Comparative positioning with Howard County:
  - Howard County retail: 11.48 million SF (in total)
  - Columbia retail: 7.76 million SF (68% of County)
  - GEDS Corridor retail 1.56 million SF (13% of County)
  - Village Centers retail: Total: 864,068 SF (7.5% of County)

Columbia Village Centers Market Analysis –

Completed in 2014:

- Long Reach had highest rate of vacancy among all Village Centers due to vacant grocery space, disinvestment
- High level of retail competition due to nearby shopping centers
- Physical condition not an indication of redevelopment potential
- Median Household Income Level (2013 data) was second lowest among Village Centers (@ **$82,417 per year**), second to Oakland Mills (@ $73,246 per year)
- ***By comparison:*** 2013 US Median HHI = ***$51,939***

  Baltimore/Columbia/Towson area 2013 Median HHI = ***$ 67,658***

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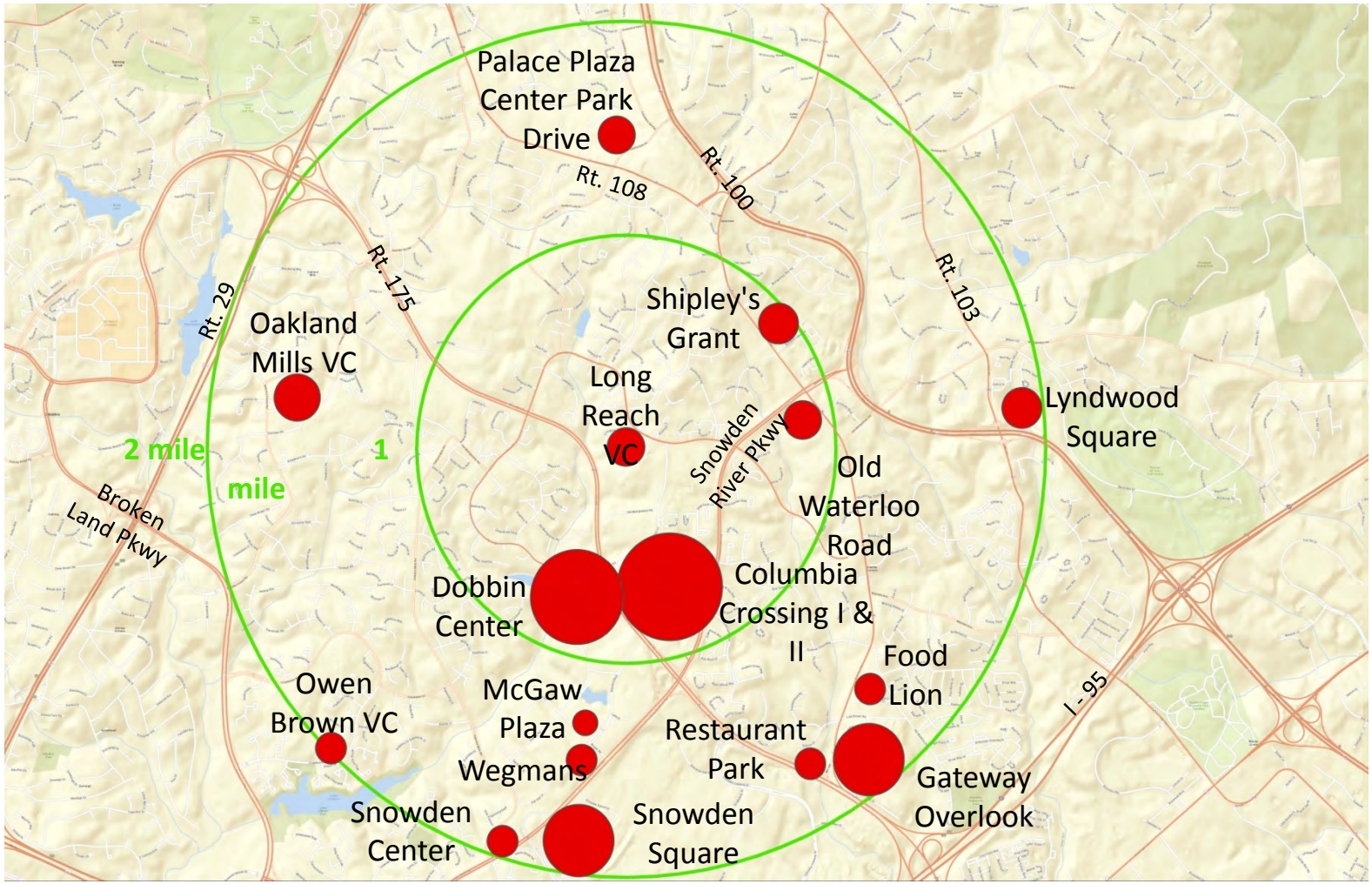

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Competitive Context Within Columbia

Village Center Retail Competition (Grocery)

Village Center	*Supermarkets W/in 5 - 6 min. drive*	*Supermarkets W/in 10 min. drive*	*Other Nearby Retail*	*Competitive Context*
Long Reach	**5**	**14**	Wal*Mart, BJ's, Costco, Target	Highly Competitive
Oakland Mills	**3**	**15**	Wal*Mart	Highly Competitive
Owen Brown	**4**	**12**	BJ's Wholesale Club	Highly Competitive
Hickory Ridge	**4**	**7**		Competitive
Harper's Choice	**3**	**7**		Limited Competition
Dorsey's Search	**2**	**9**		Limited Competition
King's Contrivance	**2**	**6**		Limited Competition
River Hill	**1**	**3**		Limited Competition

Source: Folan Consulting; RDS

Impact of Wegmans on the Columbia Market

Wegmans has captured market share from grocers, F&B

- *Larger stores:* 80,000 to 140,000 SF
- *More products:* +/- 70,000 vs. 40,000 in typical grocery store
- *Prepared foods:* Market cafes, seating for 100-500
  Restaurant-quality carry out foods
- *Larger trade area:* Typical grocery = 1.5 to 3 miles
  Wegmans = 3 to 6 miles
  Costco, BJ's = 5 to 10 miles

ReImagine... LONG REACH VILLAGE CENTER

ReImagine Long Reach Village Center

Village Center Population Density - 2012

Village Center	Density Within a ***Five*** Minute Drive	Density Within a ***Ten*** Minute Drive
River Hill	5,252	66,628
Oakland Mills	6,989	94,925
Dorsey's Search	8,865	124,909
King's Contrivance	15,365	148,272
Long Reach	17,061	107,005
Owen Brown	17,356	138,696
Hickory Ridge	18,993	93,887
Harper's Choice	24,290	82,055

Source: Folan Consulting: RDS

Village Center Household Income Levels

Village Center	*Median HH Income - 5 min drive*
Oakland Mills	$73,246
Long Reach	$82,417
Owen Brown	$88,292
Harper's Choice	$92,533
King's Contrivance	$99,180
Dorsey's Search	$101,059
Hickory Ridge	$102,053
River Hill	$170,708

Source: Folan Consulting; RDS

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Village Center Visibility / Access

Village Center	*Visibility/Access*	*Avg Daily Traffic Counts 2012*
Long Reach	Poor to moderate	Tamar Drive @ 175: 12,081 VPD
Owen Brown	Poor to moderate	n/a
Hickory Ridge	Poor to moderate	Freetown Road: 5,061 VPD
Oakland Mills	Poor to moderate	Stevens Forest Road: 11,821 VPD
Harper's Choice	Poor to moderate	Harper's Farm Road: 11,431 VPD
King's Contrivance	Poor to moderate	Guilford Road: 7,620 VPD
Dorsey's Search	Moderate	Old Annapolis Road: 11,821 VPD
River Hill	Good	Route 108: 19,220 VPD

Source: Howard County; Folan Consulting; RDS

How can retail increase? Add new consumers

- Villages are basically built out
- Stable, viable housing market; add more?
- Future new housing: scattered, in-fill and redevelopment
  - 5,500 units in Downtown Columbia
  - 236 units in Wilde Lake

Village Center Retail vacancies, 2013

Retail Comparison: Village Centers and GEDs			
Village	*Total Retail SF*	Vacant Retail SF	% Vacant
Long Reach	152,150	60,129	39.5%
Owen Brown	112,292	5,855	5.2%
Oakland Mills	76,427	5,218	6.8%
River Hill	191,402	-	0.0%
Hickory Ridge	88,510	832	0.9%
Dorsey's Search	83,352	-	0.0%
King's Contrivance	120,053	2,570	2.1%
Harper's Choice	120,592	8,576	7.1%
Total Village Centers	944,778	83,180	
GEDs	1,535,517	35,344	2.3%

Source: CoStar, Nov 15, 2013; WTL+a

The Office Context

- Village Centers support small, local consumer & professional office services oriented toward residents
- Significant scale differences:
  - Howard County office: 17.7 million SF
  - Columbia office: 14.3 million SF (81% of County)
  - Downtown Columbia office: 1.7 million SF (+ 4.3 million SF approved)
  - Village Centers office: Total: 108,763 SF (> 1% of all office)

Hotel Market

- Currently 15 hotels, almost 1,900 rooms
- 12 of the 15 are older product, only 3 built since 2009
- Only ONE full service hotel in Columbia (Sheraton)
- Sustained average occupancy of 68% = new hotel product, likely Downtown
- Other new hotels require office space growth, location on a visible roadway or arterial
- Village Centers not likely hotel sites

Current Conditions:

- First to evolve from traditional grocery-anchored Village Center model – new direction/new precedent
- Market-based redevelopment opportunities affected by competitive context (especially grocery and non-traditional grocery stores like WalMart, CostCo, BJ's, all nearby)
- Columbia Art Center as an existing 'destination use' not reflected in adjoining retail uses – art supplies, food & beverage
- Long Reach residents want more activation, more reasons to stay, more dining options, more services, upgraded public realm

Market-related Opportunities/Concepts

- Major opportunity for improvement in physical setting
- Consider whether/how infill housing could strengthen the Village Center, add new residents and housing options
- Build on Columbia Art Center to create a cultural/recreational focus, add compatible businesses
- Add more food and beverage uses, art supplies store, consumer services
- Improve walkability, connections to neighborhoods

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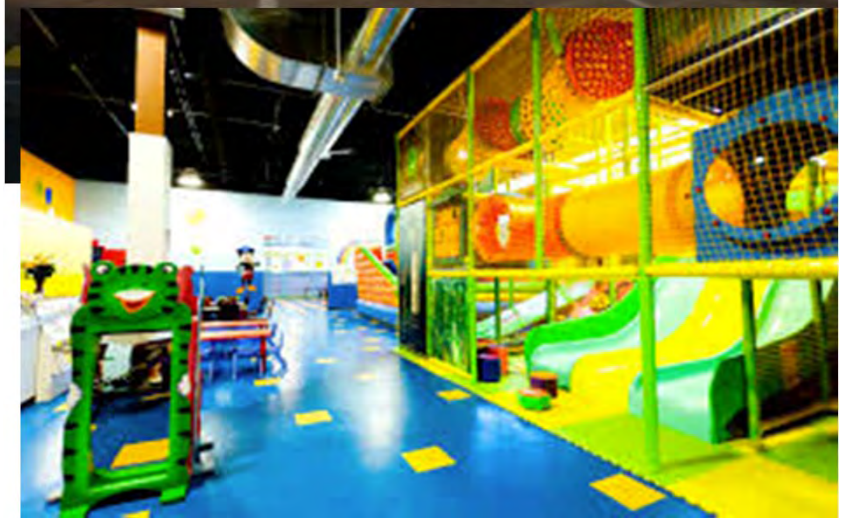
Vacant Grocery Stores have been converted to:

- Medical Offices (Mt. Airy, Overlea and Lutherville MD)
- Libraries and Government Offices
- Pre-Schools & Day Care Centers
- Ethnic Specialty Grocery Markets (Reston VA)
- Specialty Recreation Facilities (trampoline courts, shooting ranges, gyms, indoor golf)
- Explore other site-appropriate options and uses



Key Findings:

- Village Centers are not major office development opportunities; locally serving, small scale offices only
- Village Centers also not competitive as hotel sites
- For retail, unmet market potentials, but need more/better offerings
- Current perceptions can be changed through design improvements, assembled properties redeveloped
- The logical merchandising 'idea' for Long Reach will be shaped by the main "destination use"

Key Findings:

- Long Reach can be a strong opportunity for a Public Private Partnership, structure to be determined
- New models and development patterns are possible, regulations will allow different approaches

Suggested Actions

- Review parking – existing supply and layouts – to explore opportunities for more density, new uses
- Create contiguous activating uses, especially around public spaces and destinations
- Use great design to create a new Long Reach image, identity, opportunities for new uses, better sight lines, visibility, access
- Leverage limited public funding to attract a new owner/developer

Existing Site Conditions

Sean Davis, Gary Getz, and Brittany Sink
Morris & Ritchie Associates

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Context

Thoughts:

- Accessibility,
- Visibility,
- Residential Neighbors,
- Commercial concentration to the south.

Take Home:

- Original Design intent of VC's in today's context.
- Maintain strong relationship with adjacent residences.

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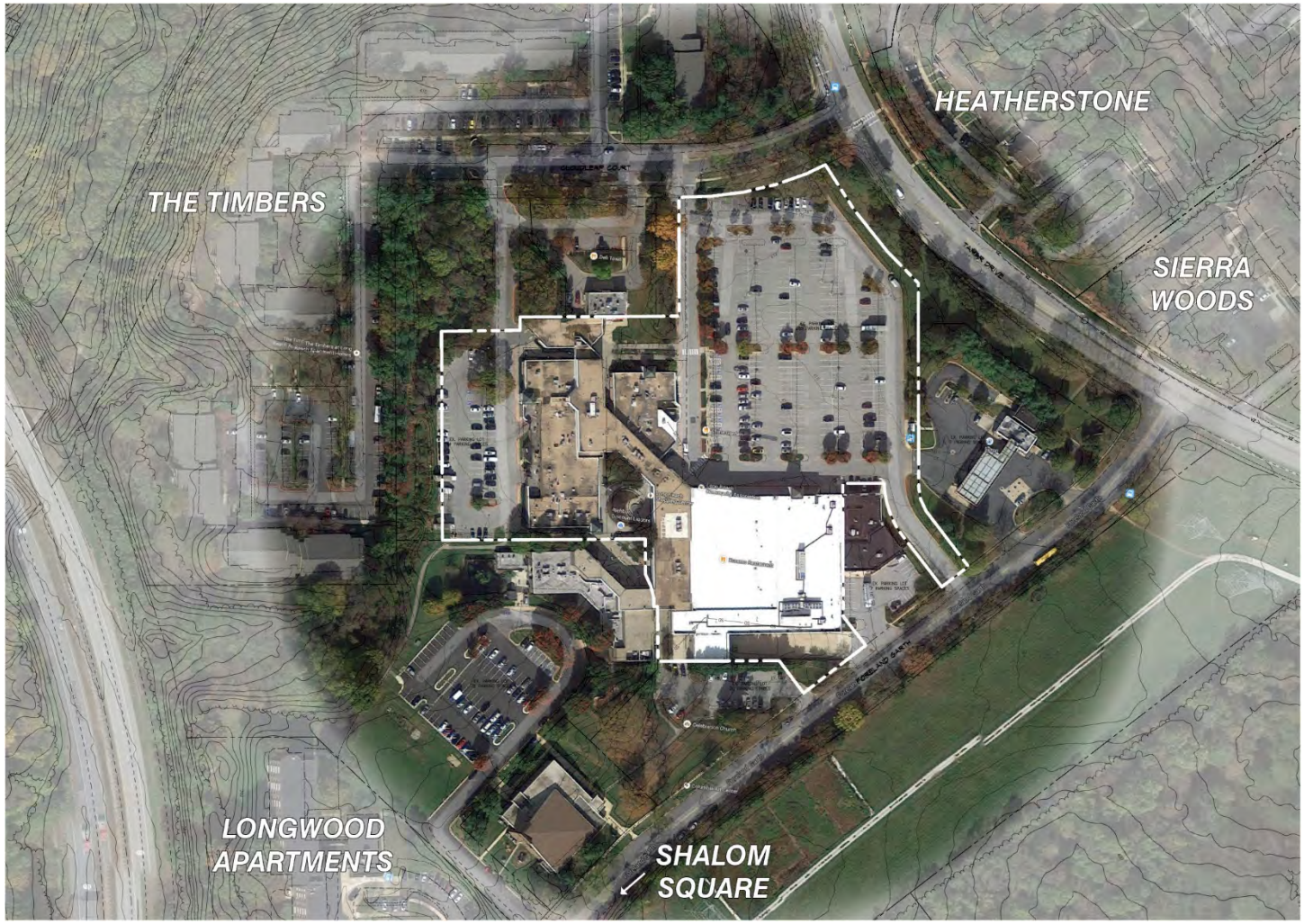
Project Site

Thoughts:

- 7.6 Acres is a good size redevelopment parcel.
- ¼ mile walk from epicenter of subject site.

Take Home:

- Future uses need to respect and serve both neighbors and the entire Village.
- No direct frontage onto Tamar Drive.



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Adjacencies

Thoughts:

- Several adjacent uses will help define the ultimate configuration of this VC.

Take Home:

- Adjacent uses need to be interwoven into ultimate plan for the site.

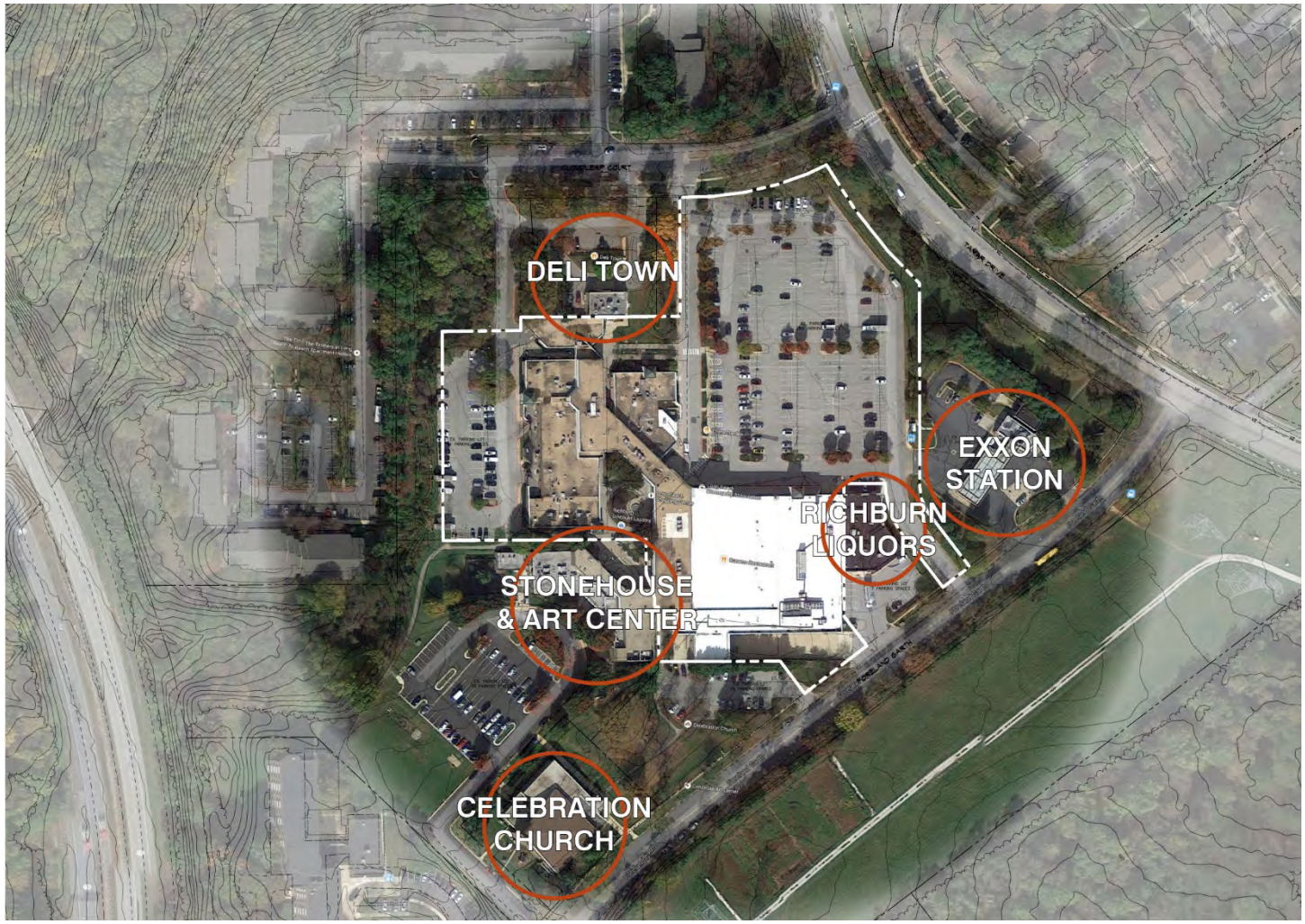

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Photo Inventory

Thoughts:

- Have a complete inventory of existing uses.

Take Home:

- Architecture and landscape architecture of site and surroundings are compatible, but not the same.
- How do future uses relate to surrounding uses?

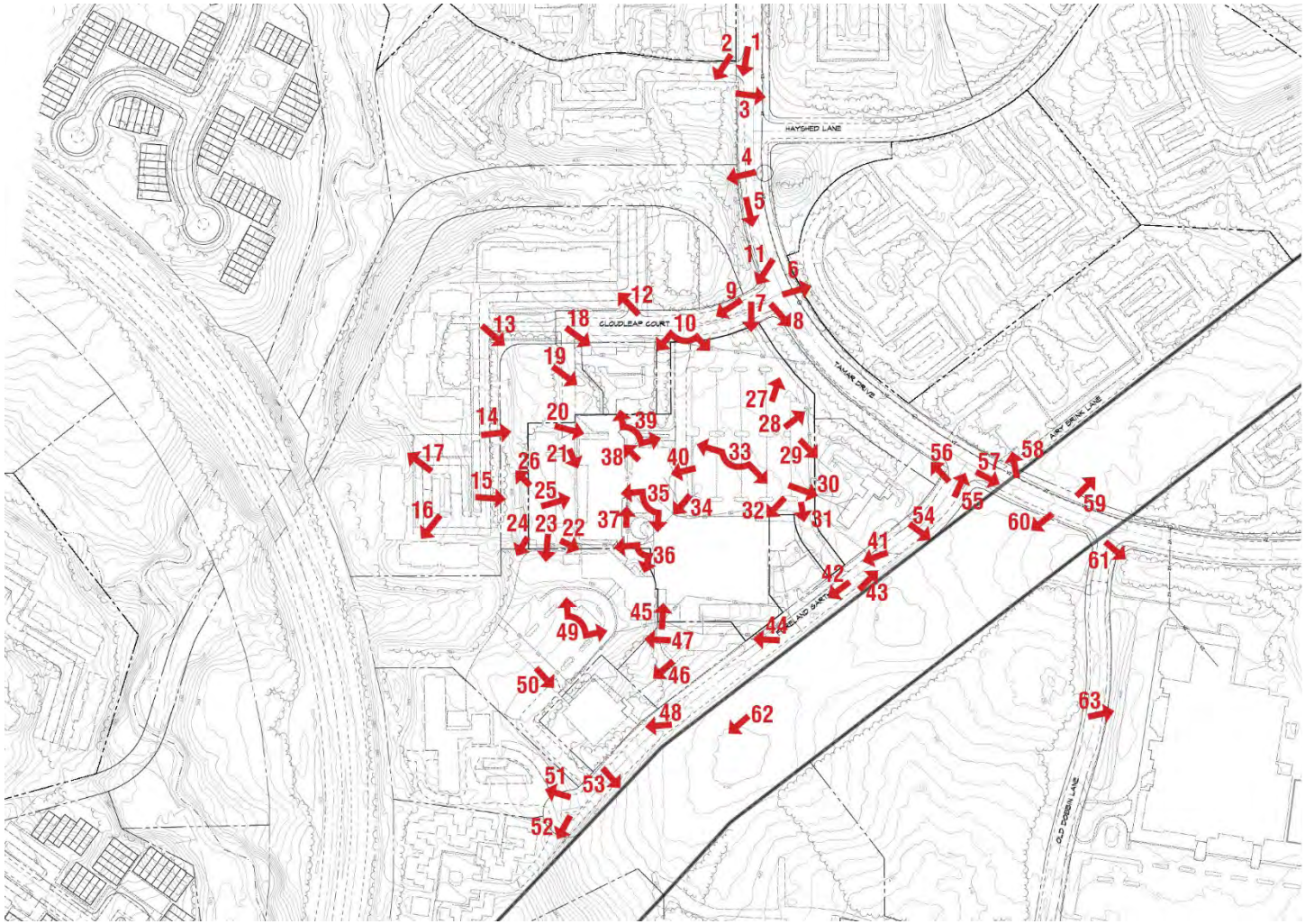

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Image Board 1

ReImagine Long Reach Village Center

Image Board 2

ReImagine Long Reach Village Center

Image Board 3

ReImagine Long Reach Village Center

Image Board 4

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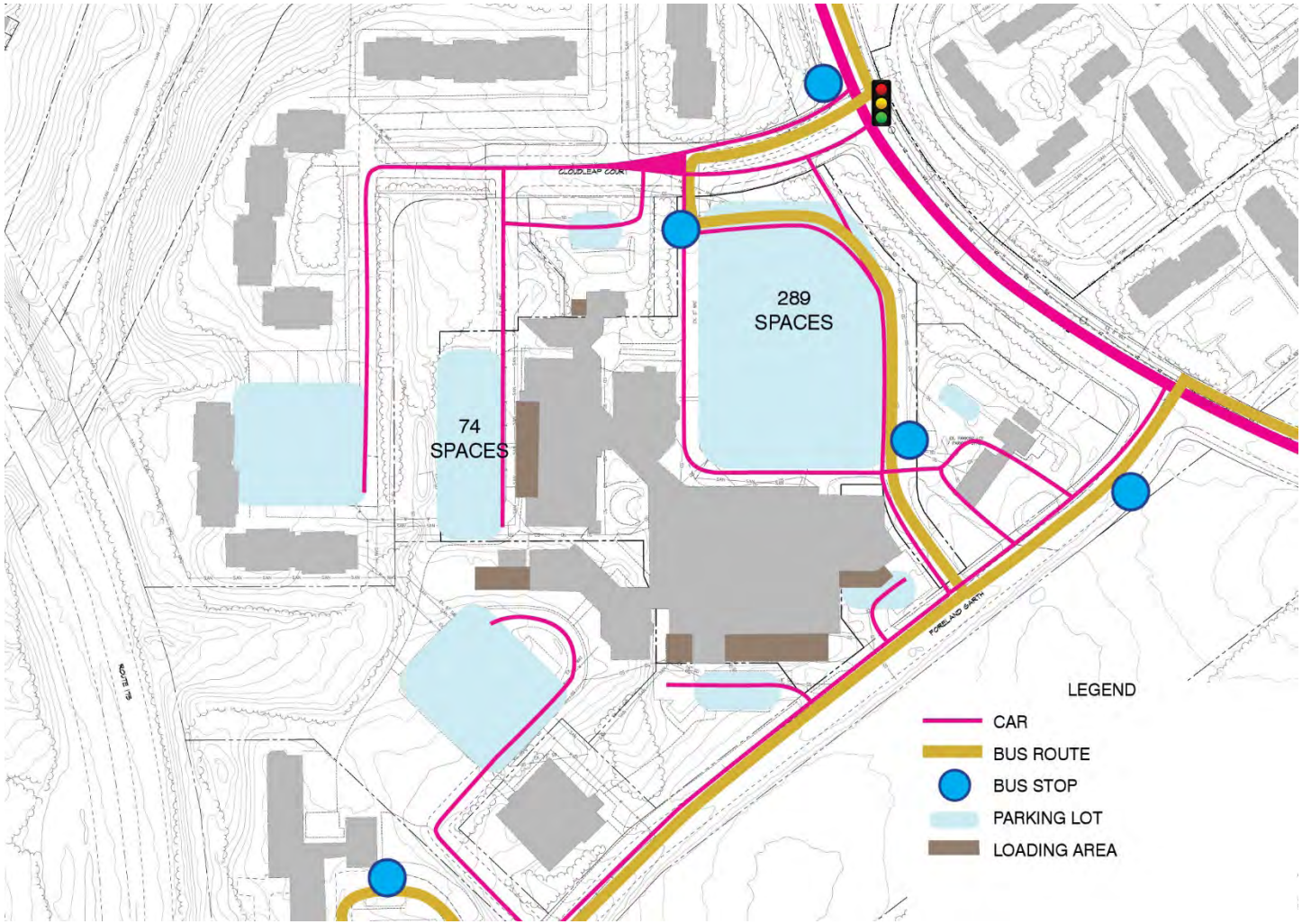
Vehicular Connectivity

Thoughts:

- Access points to the site are from the sides, not the front.
- Circulation is disconnected front to back.
- Loading areas detract from views along edges and impact customer experiences.



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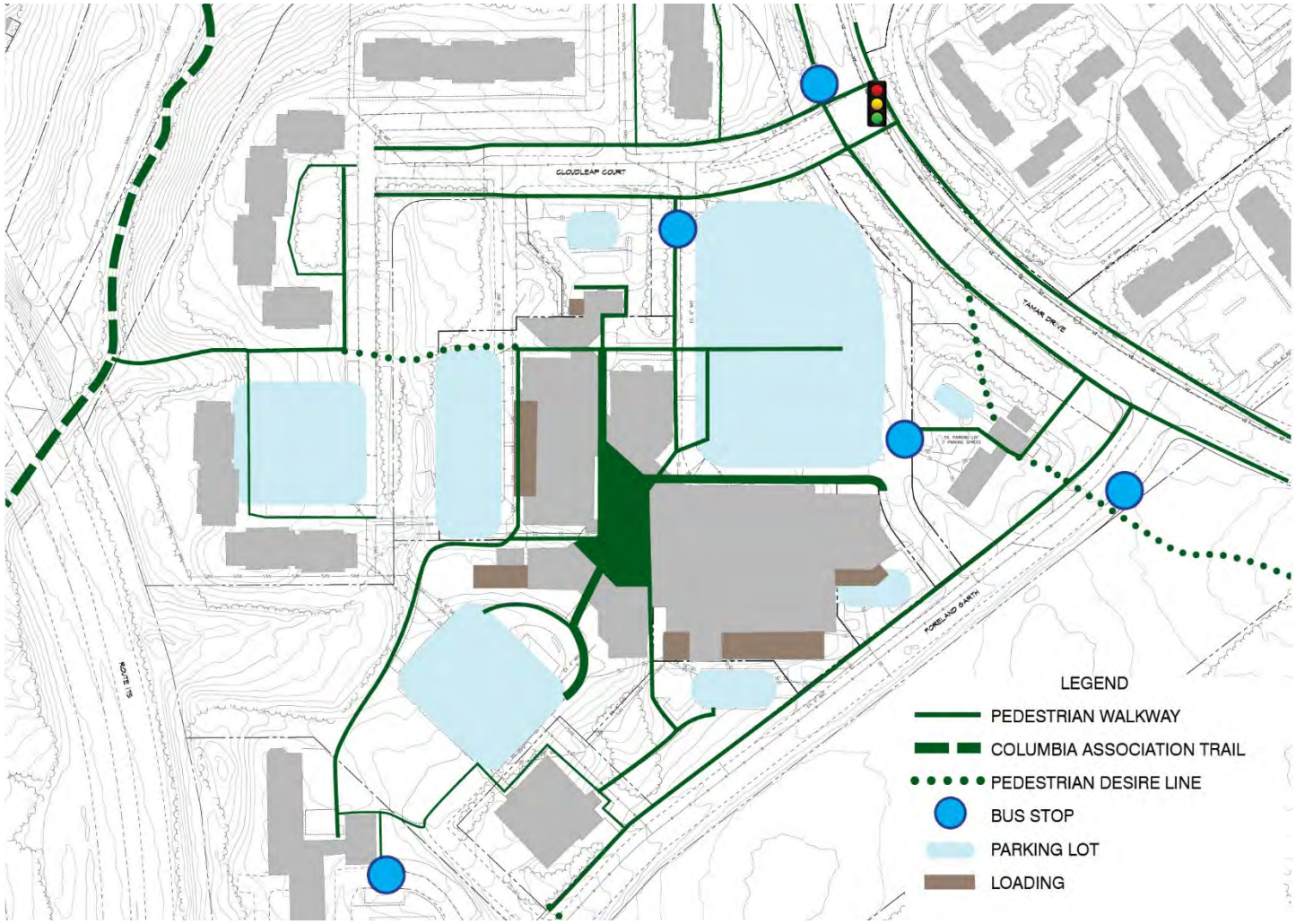
Pedestrian Connectivity

Thoughts:

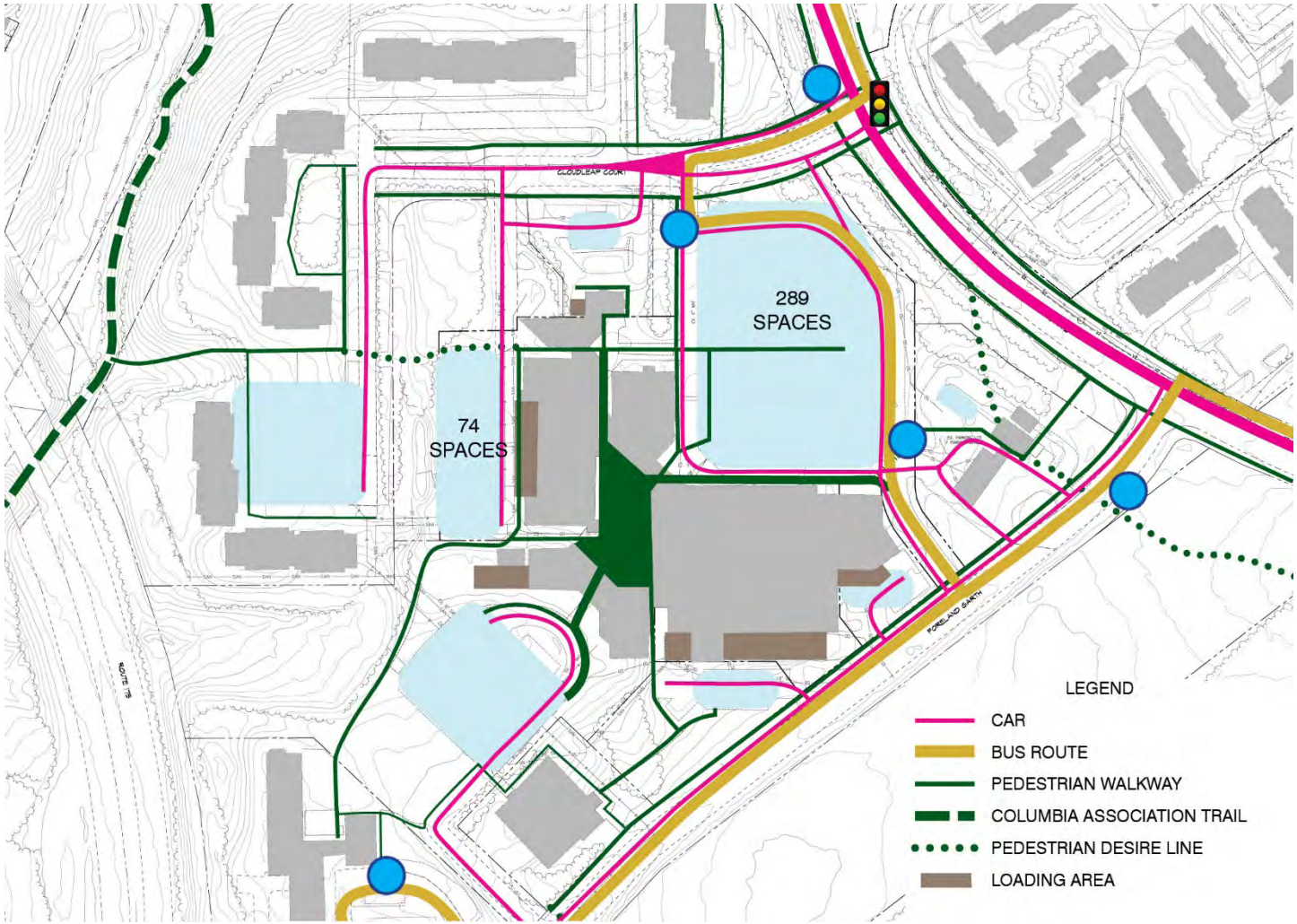
- Pedestrian connections to CA Trail, Tamar Drive, and adjacent uses are critical.
- Grade changes across site and surroundings must be considered.



Combined Connectivity

Take Home:

- Ultimate plan should have a complete and inter-connected circulation system throughout site and to all adjacent uses.
- Pay attention to the Desire Lines in future planning.
- Consider # and location of bus stops.



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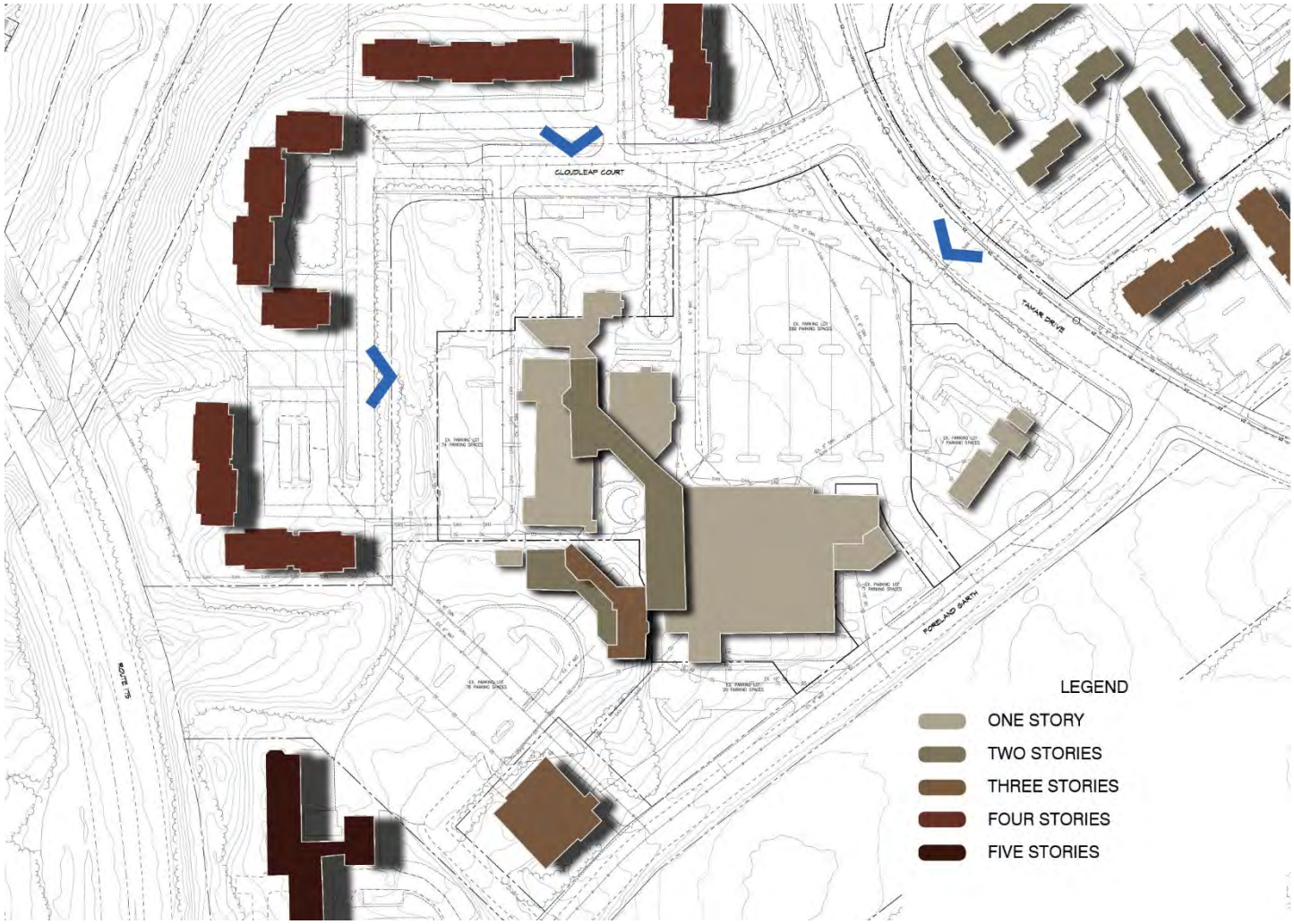
Building Mass

Thoughts:

- Adjacent uses front onto the VC.
- There are 3 front doors to the VC
- Internal pedestrian focus poses use limitations.

Take Home:

- Future plan needs to respect existing building heights and not "tower over" neighbors.



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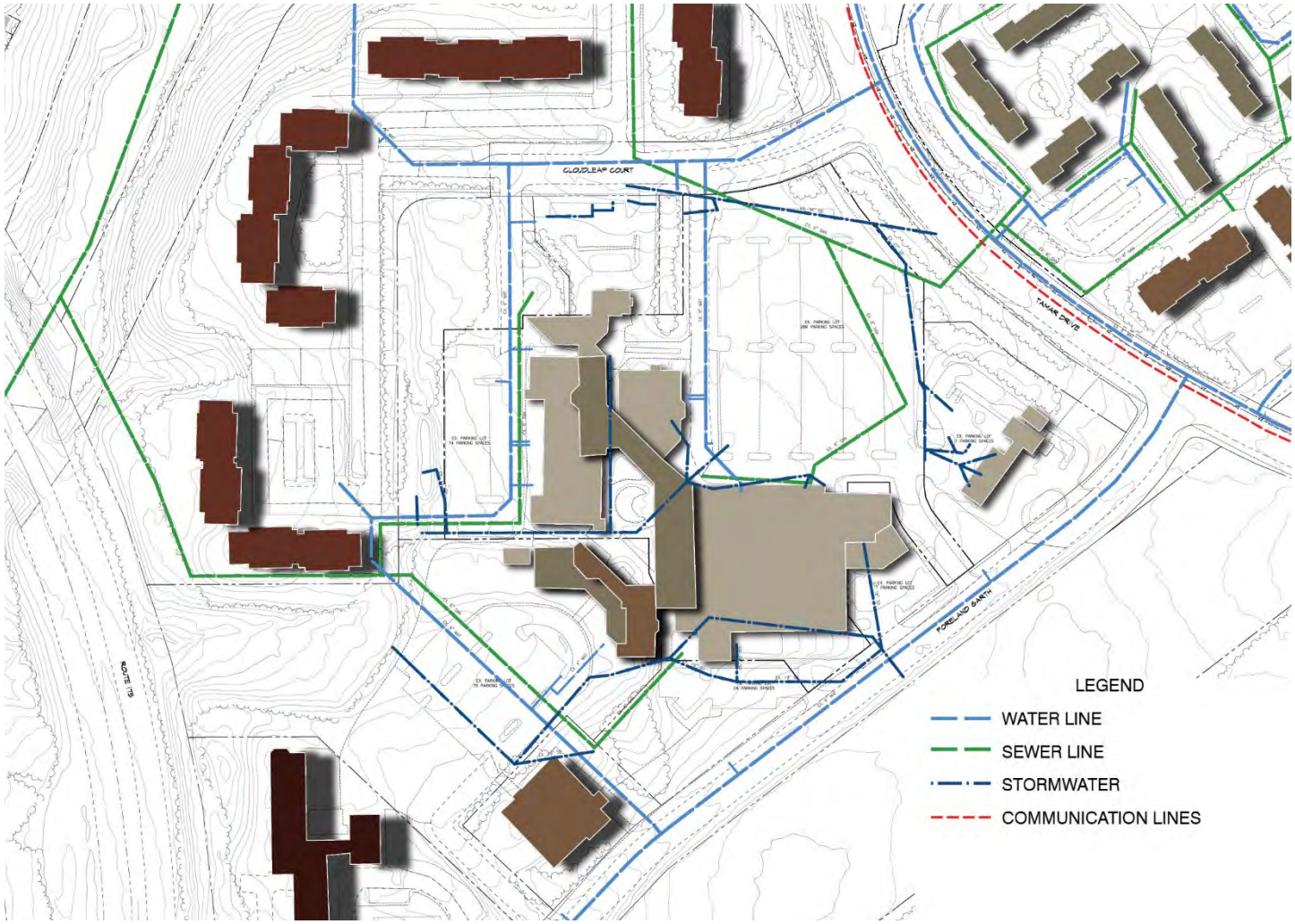
Utility Service

Thoughts:

- The site is fully serviced by sewer, water, and storm drains.
- Site will be considered Redevelopment for future SWM requirements.

Take Home:

- Maximize the use of existing systems to reduce future redevelopment costs.



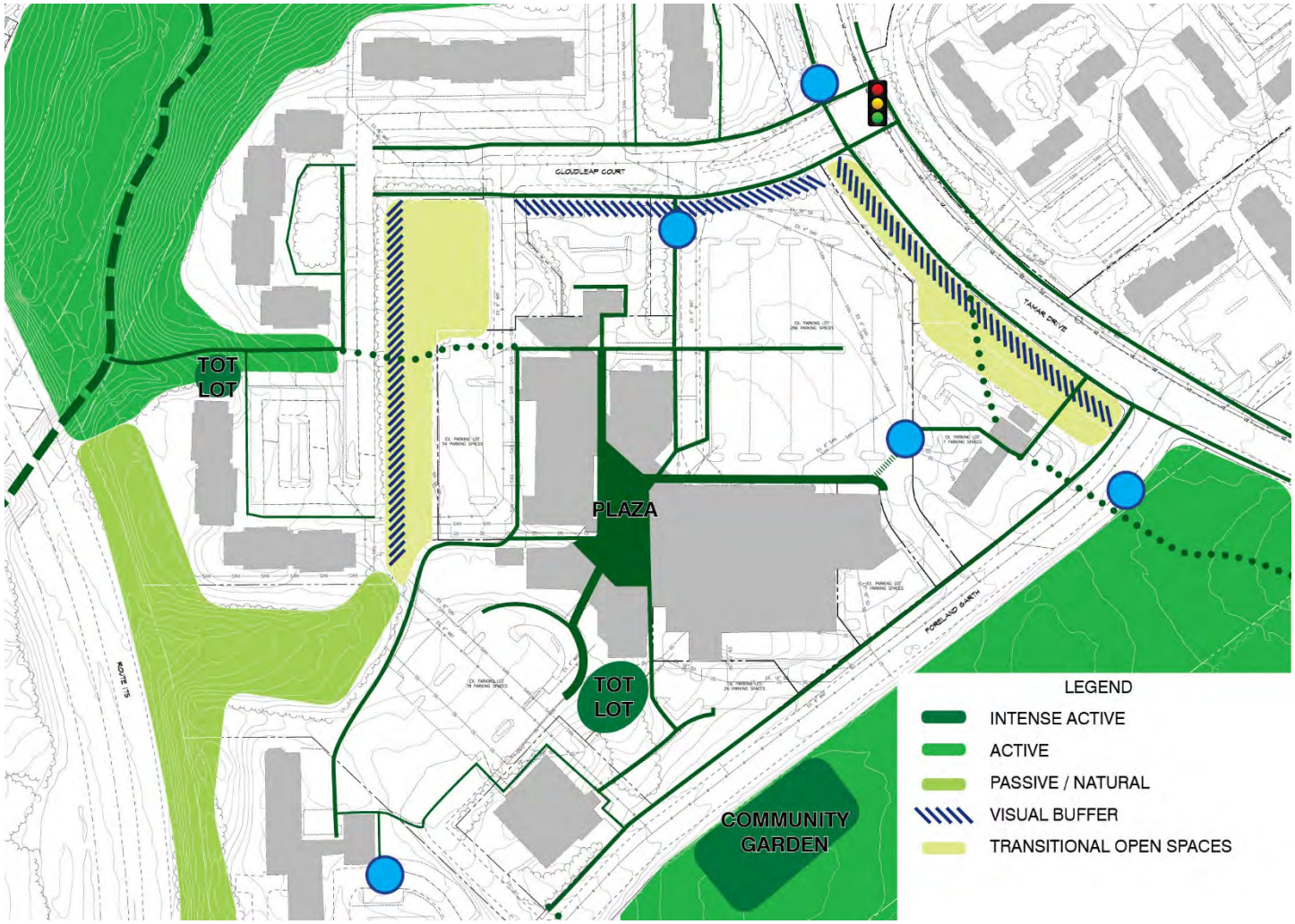
Open Space, Buffers, Amenities

Thoughts:

- Variety of systems work well together.

Take Home:

- Must maintain strong relationship with neighbors.
- Use the open space system to strengthen connections with neighbors.



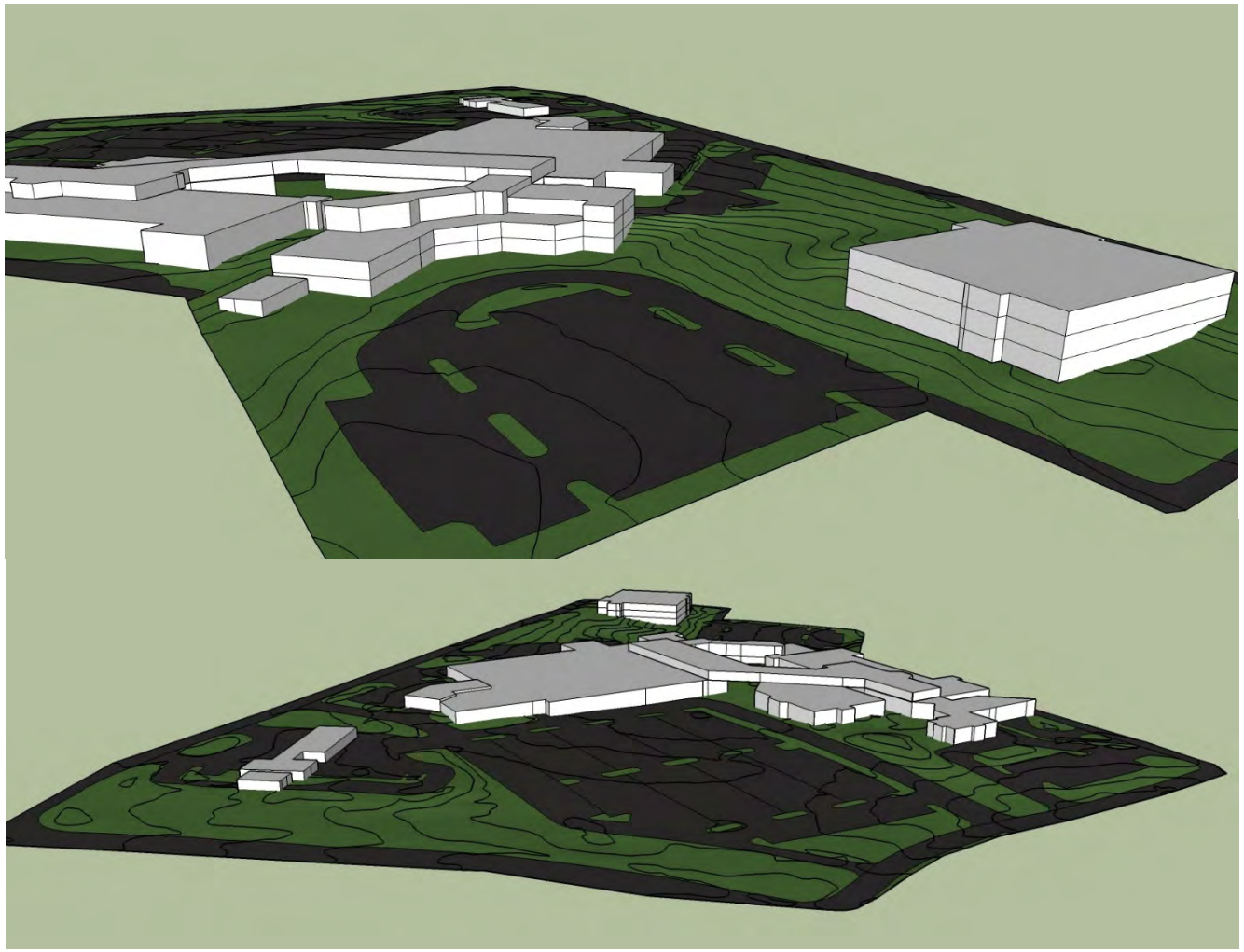
Topographic Challenges

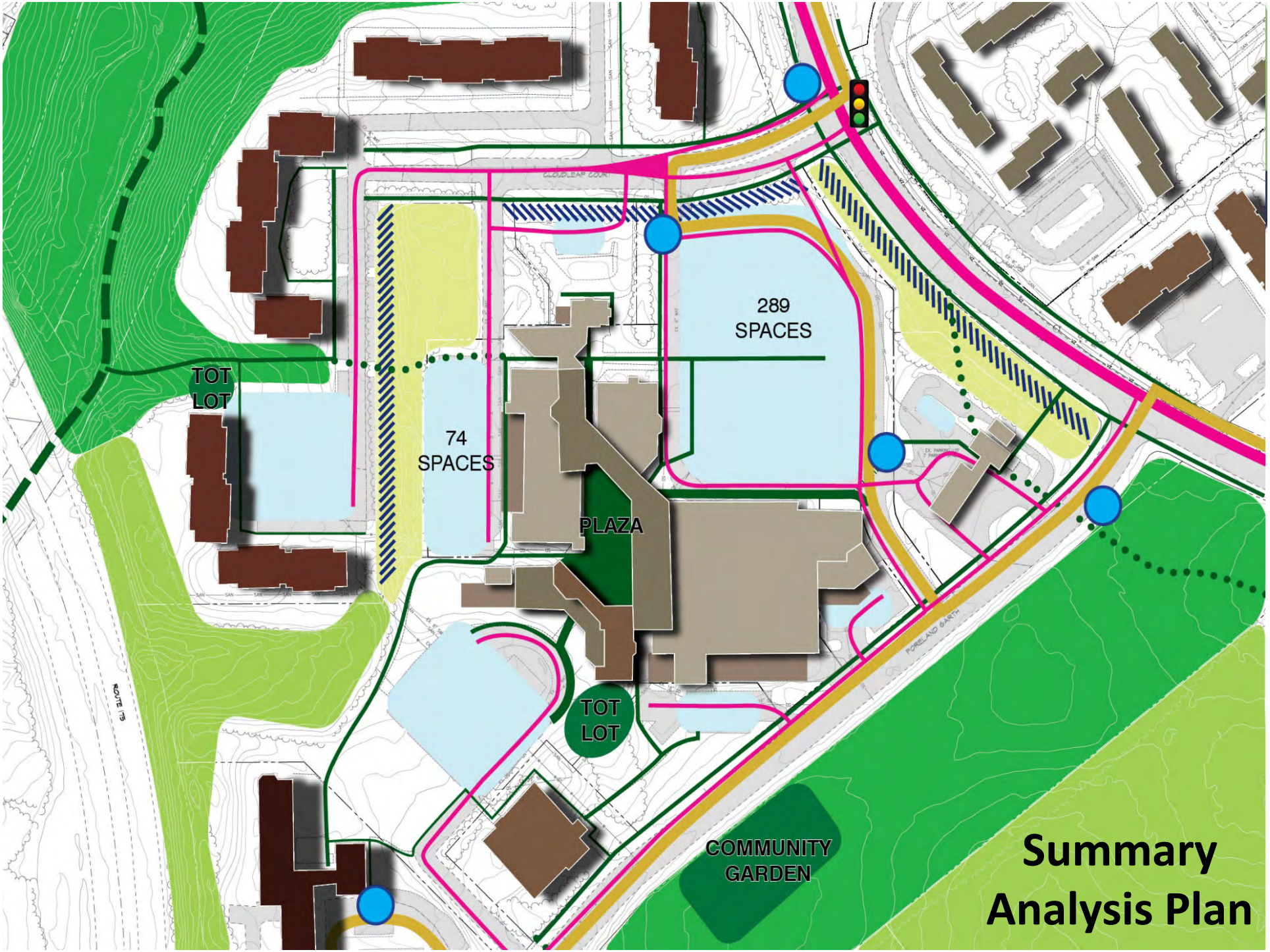
Thoughts:

- Several areas of the site have significant grade changes internally and with neighbors.

Take Home:

- Considering grading of the site will be essential for developing a successful redevelopment plan.

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SPACES
74
SPACES
TOT
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PLAZA
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COMMUNITY
GARDEN
ROUTE 175
FORELAND GARTH
Summary
Analysis Plan

Conclusions:

1. This is a significant redevelopment opportunity within an established community. The parcel size, location, utility service, and market offer great opportunities.
2. Maintaining the principals of the original village center design is important – this is the heart of Long Reach and should contain a mixture of uses that are thoughtfully connected to it's neighbors.
3. The timing and sequence of redevelopment must be carefully thought out to minimize disruption while understanding economic realities.
4. Flexibility in the ultimate approval will help tremendously in creating a "there, there".
5. The site has limitations (accessibility, context, topography, connectivity, building mass and relationship with neighbors, storm water management needs, etc.) that, if considered throughout the design and development process, can be overcome.

Questions & Answers for Speakers