Welcome
MEETING | Agenda

- Welcome / Project Team Introductions
- Project Background and Overview
- Meeting Goals and Objectives
- Project Understanding
- Open House Activities
  - Transportation
  - Development / Market
  - Station Design Elements
- Next Steps
- Adjourn
MEETING | Welcome – Client Team Introductions

- **NCTCOG** – *Project Management / Funding Partner*

- **The City of Burleson** – *Primary Project Stakeholder / Funding Partner*

- **The Fort Worth Transportation Authority** – *Key Stakeholder*
Welcome – Consultant Team Introductions

- HOK – Master Planning, Urban Design, Project Management

- URS Corporation – Transportation Planning

- Ricker - Cunningham – Market / Economic Analysis

- Public Information Associates – Stakeholder Involvement

- Bowman- Melton Associates – Bicyclist and Pedestrian Planning
PROJECT BACKGROUND | What is a TOD?

- TOD (Transit Oriented Development)
- Designed to maximize access to public transportation
-Typically consists of mixed-use development
- Incorporates features to encourage transit ridership
- Encourages higher density development within ¼ mile of the station
PROJECT BACKGROUND | Regional Rail Plan

Proposed Station Locations:
- McKinney Line
- Frisco Line
- Denton Line
- Hulen/DFWIA Line
- TRE Line (West)
- TRE Line (East)
- Cleburne Line
- Union Pacific Mainline
- Midlothian Line
- Waxahachie Line

Based on Mobility 2025-2004 Update and refinements through the Regional Rail Corridor Study.

Source - NCTCOG
PROJECT BACKGROUND | Johnson County Rail Plan

Future Rail Stations at:

- Sycamore School Rd.
- Crowley
- Burleson
- Joshua
- Cleburne (2 Stations)

Source – Johnson County Rail Plan
PROJECT BACKGROUND | Burleson TOD Concept Plan

- Conceptual Plan
- Explored development potential for site surrounding future rail station
- Identified framework for basic infrastructure
- Established TOD District Boundary

Source – Johnson County Rail Plan
PROJECT BACKGROUND | Burleson Comprehensive Plan

Future Land Use Map

Source – The City of Burleson
PROJECT OVERVIEW | Burleson TOD Project Scope

- Transportation
  - Review of Current Transit System and Prior Studies
  - Case Studies – Bus / Rail Station Precedents
  - Bus System Evaluation
  - Station Parking Analysis
  - Bus to Rail Transition Plan

- Development / Market
  - Review / Analysis of Future Market and Development Conditions
  - Real Estate Product / Land Development Market Assessment

- Station Design Elements
  - Alternative Site Concepts
  - Alternative Station Concepts
PROJECT OVERVIEW | Burleson TOD Study Areas

- **Primary Study Area**
- **Secondary Study Area**
PROJECT OVERVIEW | Primary Study Area Scope

- Transportation
  - Station Parking Analysis
  - Bus to Rail Transition Plan

- Development / Market
  - Future Market / Development Conditions
  - Real Estate Product / Land Development Market Assessment

- Station Design Elements
  - Alternative Site Concepts
  - Alternative Station Concepts
PROJECT OVERVIEW | Secondary Study Area Scope

- Development / Market
  - Future Market / Development Conditions
To establish an understanding of the TOD projects scope and deliverables

To examine the consultant team’s findings to date

To gain an understanding of your desires related to:

- Existing and future transportation modes and destinations
- Future development patterns, uses and densities
- Appropriate design elements and prototypes for future station concepts
- **TOD District**
  - approximately 560-acre district straddling BNSF railway
  - site of future bus, and later, passenger rail station
  - identified as potential transit-oriented development opportunity

- **Old Town District**
  - approximately 230-acre district encompassing Burleson historic downtown area
PROJECT UNDERSTANDING | Strategic Market Issues

- Short and long-term market opportunities that exist for new land uses within these districts
- Viability of interim uses in a long-range development program
- Balancing community vision with market reality
- Strategic phasing of construction / infrastructure
- Impact of density on a project’s financial feasibility
- Balancing financial feasibility with study area context
- Nuances of planning for development around transit
Types of TOD’s

- **Employment Centers** –
  - act as trip generators for residential centers
  - include major office and/or industrial developments
  - may include associated commercial uses
  - draws from the entire transit line and from auto commute zone of 20 to 30 minutes

- **Residential Centers** –
  - act less as generators than as originating points of trips
  - include higher and moderate levels of density
  - draw upper income demographic and psychographic (lifestyle profile) mix, 25 to 35 year and 55+
- Mixed-Use Centers –
  - existing neighborhoods (including downtowns) where housing and retail uses have been intensified
  - retail, restaurant and entertainment uses associated with residential units
  - parking ratios reflect shared and dedicated spaces
  - rely on high-amenity attractive environment
  - high land values and scarce land supply is a market pre-requisite

- Parking Centers – municipal and transportation district policies influence the role of parking at different stations, i.e., fewer public spaces close to the hub with more space on the edges; or, balance of public spaces along the line; surface parking frequently the first phase use before structured parking
BUILDINGS ON PLAN

- Business/Commercial
- Residential
- Manufacturing/Industrial
- Government/Institutional
- Agricultural
- Transportation
- Heritage
- Natural
- Historic
- Public Open Space
- Other

A. Project Area and Context

- Location
- Land Use
- Zoning
- Elevation
- Topography
- Climate
- Transportation
- Infrastructure

B. Project Goals

- Access
- Sustainability
- Livability
- Economic

C. Project Opportunities

- Redevelopment
- Revitalization
- Green Infrastructure
- Heritage

D. Project Constraints

- Financial
- Legal
- Social
- Environmental

E. Key Considerations

- Public Participation
- Community Engagement
- Stakeholder Involvement
- Public/Private Partnerships

F. Project Implementation

- Phasing
- Timeline
- Budget
- Funding Sources

G. Project Management

- Leadership
- Team
- Communication
- Coordination

H. Project Evaluation

- Monitoring
- Evaluation
- Feedback
- Continuous Improvement
Light Rail Station –
- relies on proximity to residential neighborhoods
- closely spaced stations attract more riders per station when located in denser residential areas
- feeder bus service helps to boost ridership
- averages about twice as many daily boarders per station as commuter rail
- can function in regions with a wide range of hub sizes and employment densities, but found more often in comparatively smaller metropolitan areas (such as DART Red Line)

Commuter Rail Stop –
- depends more on park-and-ride lots at stations in low-density, high-income suburban areas farther from the CBD,
- hub (CBD) tends to be larger and more dense
- commuter rail attracts the largest number of its riders about 35 miles out from the CBD (such as TRE)
What purpose do market analyses serve in a station area programming effort such as this?

- provides a reality check for the land use planning component
- establishes an order of magnitude for growth and development
- narrows the field of land uses and product types
- ensures that recommendations are grounded in market and economic reality
- informs the community vision in the context of market realities
- sets stage for implementation and policy reform
- provides an accurate and independent story to tell potential developer/investor audiences
Liquidity is now “king” in both residential and commercial markets as lenders move in “slow motion”

- Bad time to sell or build much…
  - but, great time to buy if you have the cash and can be selective about assets
  - demographic trends, combined with economy, point towards strengthening rental portion of residential portfolio
  - expanding population of young 20-something adults (sons / daughters of Baby Boomers) tired of living with parents or bunking with roommates

- Office …
  - tenants have all the power
  - owners / landlords scramble to minimize upkeep costs while hanging on to tenants
Hotels …
- occupancies and room rates dropping below break-even points
- luxury properties struggle to meet guest service demands with dwindling cash for staff and amenities

Industrial …
- not particularly overstocked, but rents and vacancies falling
- must wait for consumer spending for full recovery, but pickup in homebuilding will help

Single Family Housing …
- hardly anyone predicting substantial homebuilding recovery until 2012
- credit difficulties (for individuals) stumbling block to transaction activity to move inventory glut
- any bump to employment picture will slow bleeding in occupancies / rents
- echo-boomer population (born 1977 – 2000) bulge continues to expand
- some Boomers will settle for comfortable rental as empty-nest move-out option
- lack of construction –pipeline fairly dry
- safest bet: invest in proven properties; but , development could be warranted with strong cash position
- condo-conversion glut in many urban markets
- short-term lease structure --let properties compete now; plan for rent increases as employment picture improves
- Retail …

- not pretty right now – survivors retreat to proven centers (including highly-amenitized and well-connected sites, meaning those with public space offerings)

- retail centers on the edge of communities and independent retailers are experiencing the greatest losses during this down economy

- return of healthy retail activity dependent on growth in rooftops which will likely be the result (in part) on job growth
In housing, at least, infill may be best opportunity, compared to other housing types; those supported by transit still good investment.
Methodology

**Top Down**

- what are the existing conditions
- what are prevailing uses
- what is the profile of the area beyond the study area
- what are the psychographic segments
- how much demand will there be near- and long-term for select market segments

**Bottom Up**

Based on market demand and an expressed vision …

- what is the physical capacity of the area
- will the existing building inventory accommodate redevelopment
- could current regulations present barriers to investment and reinvestment
- are there property assemblages
- if not, are property ownership patterns favorable for assemblages
- what are the economic factors that impact feasibility (hard and soft costs)
Trade Area is…

The area from which a project (s) will draw the majority of its patrons (retail), residents (housing) and employees (office) – that area that will likely be a source of competition and demand.

The boundaries are often irregular as they are influenced by the following conditions: physical barriers, location of competition, proximity to population and employment concentrations, zoning, market factors, drive times, spending and commuting patterns, and eventually what happens at other stations along the transit line.

(5-mile rings reflect more locally-oriented opportunities and provide demographic comparisons)
Trade Area Demographics

- Approx 22% of Trade Area residents reside within 5 miles of Old Town (20% for West TOD)
- Trade Area growth (~3.4% annually) should substantially outpace Metro DFW
- The Trade Area picks up significant renter populations along the south IH-820 loop, but still has a smaller share of renters vs. Metro DFW
- The Old Town vicinity has a slightly higher percentage of seniors relative to the Trade Area and overall Metro

<table>
<thead>
<tr>
<th></th>
<th>Old Town 5-mi.</th>
<th>West TOD 5-mi.</th>
<th>Burleson</th>
<th>Regional Trade Area</th>
<th>DFW Metro</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000 Population</td>
<td>44,681</td>
<td>38,463</td>
<td>20,976</td>
<td>237,674</td>
<td>5,030,828</td>
</tr>
<tr>
<td>2010 Population</td>
<td>69,416</td>
<td>62,204</td>
<td>34,350</td>
<td>311,115</td>
<td>6,381,950</td>
</tr>
<tr>
<td>2010 Households</td>
<td>24,799</td>
<td>21,913</td>
<td>12,236</td>
<td>111,729</td>
<td>2,334,568</td>
</tr>
<tr>
<td>Annual Household Growth Rate to 2020 (blended NCTCOG, Claritas projections)</td>
<td>3.3%</td>
<td>3.4%</td>
<td>4.2%</td>
<td>3.4%</td>
<td>2.2%</td>
</tr>
<tr>
<td>Average Household Size (2010)</td>
<td>2.78</td>
<td>2.83</td>
<td>2.81</td>
<td>2.76</td>
<td>2.88</td>
</tr>
<tr>
<td>Pct. Non-family Households (2010)</td>
<td>27%</td>
<td>24%</td>
<td>24%</td>
<td>35%</td>
<td>31%</td>
</tr>
<tr>
<td>Pct. Renters (2010)</td>
<td>21%</td>
<td>22%</td>
<td>21%</td>
<td>29%</td>
<td>38%</td>
</tr>
<tr>
<td>Pct. Age 65+</td>
<td>12%</td>
<td>11%</td>
<td>10%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Pct. Age 0-14</td>
<td>22%</td>
<td>22%</td>
<td>26%</td>
<td>23%</td>
<td>24%</td>
</tr>
</tbody>
</table>
Psychographics describe characteristics of people and neighborhoods beyond pure demographics—speaking more to attitudes, interests, opinions and lifestyles. PRIZM-ne (Claritas, Inc.) is a leading system for such segmentation—classifying all US households into one of 65 distinct segments.

Commercial retail developers use psychographic profiling as an indication of residents’ propensity to spend across select retail categories. Residential developers use the segments to suggest preferences for certain housing product types.

The Trade Area is a blend of suburban, exurban and even some rural/small-town lifestyle segments.

Higher population concentrations along tollway skew Trade Area psychographics toward relatively affluent family-oriented suburban segments.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Segment Name</th>
<th>Households</th>
<th>Pct. of Households</th>
<th>Index to US (100 = avg.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>New Homesteaders</td>
<td>7,108</td>
<td>6.4%</td>
<td>359</td>
</tr>
<tr>
<td>2</td>
<td>White Picket Fences</td>
<td>5,766</td>
<td>5.2%</td>
<td>390</td>
</tr>
<tr>
<td>3</td>
<td>Kid Country, USA</td>
<td>5,407</td>
<td>4.8%</td>
<td>382</td>
</tr>
<tr>
<td>4</td>
<td>Upward Bound</td>
<td>5,299</td>
<td>4.7%</td>
<td>281</td>
</tr>
<tr>
<td>5</td>
<td>Fast-Track Families</td>
<td>4,358</td>
<td>3.9%</td>
<td>244</td>
</tr>
<tr>
<td>6</td>
<td>City Startups</td>
<td>4,314</td>
<td>3.9%</td>
<td>301</td>
</tr>
<tr>
<td>7</td>
<td>Middleburg Managers</td>
<td>4,293</td>
<td>3.8%</td>
<td>197</td>
</tr>
<tr>
<td>8</td>
<td>Sunset City Blues</td>
<td>3,691</td>
<td>3.3%</td>
<td>185</td>
</tr>
<tr>
<td>9</td>
<td>Family Thrifts</td>
<td>3,663</td>
<td>3.3%</td>
<td>180</td>
</tr>
<tr>
<td>10</td>
<td>Boomtown Singles</td>
<td>3,600</td>
<td>3.2%</td>
<td>232</td>
</tr>
<tr>
<td>11</td>
<td>Country Squires</td>
<td>2,970</td>
<td>2.7%</td>
<td>154</td>
</tr>
<tr>
<td>12</td>
<td>Blue-Chip Blues</td>
<td>2,890</td>
<td>2.6%</td>
<td>207</td>
</tr>
<tr>
<td>13</td>
<td>Second City Elite</td>
<td>2,858</td>
<td>2.6%</td>
<td>204</td>
</tr>
<tr>
<td>14</td>
<td>Kids and Cul-de-Sacs</td>
<td>2,799</td>
<td>2.5%</td>
<td>155</td>
</tr>
<tr>
<td>15</td>
<td>Up-and-Comers</td>
<td>2,791</td>
<td>2.5%</td>
<td>193</td>
</tr>
<tr>
<td></td>
<td>All others</td>
<td>49,922</td>
<td>44.5%</td>
<td></td>
</tr>
</tbody>
</table>
Residential Demand

- residential demand is estimated as a function of projected Trade Area household growth
- NCTCOG projects 4.1% annual household growth through 2020, while Claritas (census-based) projects 2.1% annually to 2015
- 3.4%/yr blended growth rate used herein for the moderate growth scenario
- analysis assumes new households will conform to existing income distribution rather than experience significant upward adjustment typical of upward inflation trend
### Residential Demand

<table>
<thead>
<tr>
<th>Year</th>
<th>Households</th>
<th>Annual Growth Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>111,729</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>132,175</td>
<td>3.4% (moderate scenario)</td>
</tr>
<tr>
<td>2020</td>
<td>156,362</td>
<td></td>
</tr>
</tbody>
</table>

**Household Growth (2010-20)**

44,633

**Adjusted New Unit Requirement through 2020**

46,864

**Pct. Renter** 29%

Projected levels of household growth in the Trade Area suggest total unit demand of 46,864 new units through 2020 – although at least 4,000 of those will be for households unable to afford market rents/prices.
### Residential Demand by Growth and Capture Scenarios

<table>
<thead>
<tr>
<th></th>
<th>(Moderate Growth Scenario)</th>
<th>conservative growth</th>
<th>moderate growth</th>
<th>aggressive growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total 10-Year Trade Area Unit Demand</td>
<td>46,864</td>
<td>2.5% CAGR</td>
<td>3.4% CAGR</td>
<td>4.5% CAGR</td>
</tr>
<tr>
<td>Approximate Market-Rate Demand (household incomes &gt;$15K)</td>
<td>42,681</td>
<td>2,267</td>
<td>3,234</td>
<td>4,476</td>
</tr>
<tr>
<td>Rental</td>
<td>10,346</td>
<td>2,721</td>
<td>3,880</td>
<td>5,371</td>
</tr>
<tr>
<td>Attached Ownership</td>
<td>4,850</td>
<td>3,401</td>
<td>4,850</td>
<td>6,714</td>
</tr>
<tr>
<td>Detached Ownership</td>
<td>27,485</td>
<td>42,684</td>
<td>57,806</td>
<td>77,125</td>
</tr>
</tbody>
</table>

10-year residential absorption for both sites combined could range from 3,000 to almost 10,000 units, with majority of likely capture in rental segment.
# PROJECT UNDERSTANDING

## Burleson Market Test

### Residential Demand Inputs

<table>
<thead>
<tr>
<th>Category</th>
<th>2010 Household Retail Spending Potential</th>
<th>2010 Est. Retail Sales</th>
<th>2010 Est. Retail Void (Leakage)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Furniture &amp; Home Furnishings</td>
<td>$94,432,129</td>
<td>$40,583,087</td>
<td>$53,849,042</td>
</tr>
<tr>
<td>Electronics &amp; Appliance</td>
<td>$79,409,458</td>
<td>$30,107,188</td>
<td>$49,302,270</td>
</tr>
<tr>
<td>Bldg Materials, Garden</td>
<td>$114,887,190</td>
<td>$103,111,171</td>
<td>$11,776,019</td>
</tr>
<tr>
<td>Food &amp; Beverage (Grocery)</td>
<td>$489,689,104</td>
<td>$293,461,098</td>
<td>$196,228,006</td>
</tr>
<tr>
<td>Health &amp; Personal Care</td>
<td>$92,551,073</td>
<td>$53,524,033</td>
<td>$39,027,040</td>
</tr>
<tr>
<td>Clothing and Accessories</td>
<td>$111,060,556</td>
<td>$99,689,008</td>
<td>$11,371,548</td>
</tr>
<tr>
<td>Sporting, Hobby, Book, Music</td>
<td>$35,646,111</td>
<td>$30,098,739</td>
<td>$5,547,372</td>
</tr>
<tr>
<td>General Merchandise</td>
<td>$347,657,903</td>
<td>$297,845,074</td>
<td>$49,812,829</td>
</tr>
<tr>
<td>Miscellaneous Stores</td>
<td>$53,030,143</td>
<td>$37,933,268</td>
<td>$15,096,875</td>
</tr>
<tr>
<td>Dining &amp; Drinking Places</td>
<td>$431,452,393</td>
<td>$342,242,005</td>
<td>$89,210,388</td>
</tr>
<tr>
<td>Other retail center space (entertainment, med/storefront office, consumer banking, etc.)</td>
<td>$462,454,015</td>
<td>$332,148,668</td>
<td>$130,305,347</td>
</tr>
<tr>
<td>Total Retail (excl. automotive)</td>
<td><strong>$2,312,270,075</strong></td>
<td><strong>$1,660,743,339</strong></td>
<td><strong>$651,526,736</strong></td>
</tr>
</tbody>
</table>
### Residential Demand – Moderate Growth Scenario

<table>
<thead>
<tr>
<th>Category</th>
<th>New Retail Space Needed by 2020 for All HH Growth</th>
<th>New Retail Space Needed to Recapture All Existing Voids</th>
<th>Total 10-Year New Trade Area Retail Demand (s.f.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Furniture &amp; Home Furnishings</td>
<td>208,290</td>
<td>299,161</td>
<td>202,981</td>
</tr>
<tr>
<td>Electronics &amp; Appliance</td>
<td>143,308</td>
<td>224,101</td>
<td>146,964</td>
</tr>
<tr>
<td>Bldg Materials, Garden</td>
<td>182,454</td>
<td>47,104</td>
<td>137,735</td>
</tr>
<tr>
<td>Food &amp; Beverage (Grocery)</td>
<td>511,633</td>
<td>516,389</td>
<td>719,616</td>
</tr>
<tr>
<td>Health &amp; Personal Care</td>
<td>104,987</td>
<td>111,506</td>
<td>151,545</td>
</tr>
<tr>
<td>Clothing and Accessories</td>
<td>200,428</td>
<td>51,689</td>
<td>100,847</td>
</tr>
<tr>
<td>Sporting, Hobby, Book, Music</td>
<td>65,826</td>
<td>25,802</td>
<td>45,814</td>
</tr>
<tr>
<td>General Merchandise</td>
<td>552,121</td>
<td>199,251</td>
<td>375,686</td>
</tr>
<tr>
<td>Miscellaneous Stores</td>
<td>105,272</td>
<td>75,484</td>
<td>72,303</td>
</tr>
<tr>
<td>Dining &amp; Drinking Places</td>
<td>570,997</td>
<td>297,368</td>
<td>347,346</td>
</tr>
<tr>
<td>Other retail center space (entertainment, med/storefront office, consumer banking, etc.)</td>
<td>816,034</td>
<td>579,135</td>
<td>558,067</td>
</tr>
<tr>
<td>Total Retail (excl. automotive)</td>
<td>3,461,352</td>
<td>2,426,991</td>
<td>2,858,903</td>
</tr>
</tbody>
</table>

As the Trade Area grows and recaptures lost dollars (retail leakages), new retail space demand through 2020 should approach 3 million square feet.
### Subject Retail Capture – By Scenario

#### 10-Year Retail Capture (s.f.)

<table>
<thead>
<tr>
<th>Subject Capture Rate (market share)</th>
<th>Trade Area Household Growth (CAGR)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>conservative (2.5%)</strong></td>
</tr>
<tr>
<td>conservative (8%)</td>
<td>190K</td>
</tr>
<tr>
<td>moderate (10%)</td>
<td>235K</td>
</tr>
<tr>
<td>aggressive (15%)</td>
<td>355K</td>
</tr>
</tbody>
</table>

Combined retail capture across the two study areas through 2020 could range from just under 200,000 square feet to over 500,000 square feet (with additional potential growth over an extended time frame).
PROJECT UNDERSTANDING | Existing Site Conditions

**Floodplain / Tree Stands**

**Planned Bicyclist / Pedestrian Facilities**
PROJECT UNDERSTANDING | Station Design Precedents

Burleson Precedents

Burleson Precedents

BURLESON, TEXAS | BURLESON TO D STUDY
PROJECT UNDERSTANDING

Station Design Precedents

Station Elements
OPEN HOUSE | Overview

- **Focus Area 1 - Transportation**
  - Tell us how you currently use transportation and how you might change your transportation pattern in the future.

- **Focus Area 2 - Development / Market**
  - Offer your thoughts about Burleson’s growth and how it can best serve the community and help make transit more effective.

- **Focus Area 3 - Station Design Elements**
  - Review design elements / prototypes and comment on which design elements you think would best fit the character of Burleson.

- **Questionnaire / Comment Form**
  - Your thoughts and comments are very important to this process. Please return the questionnaire / comment form at your earliest convenience.
Next Steps
NEXT STEPS | Study Timeline

Project Kickoff - October 13, 2010 (Complete)

Public Meeting 1 - January 13, 2011 (Today)

Public Meeting 2 (Concepts Review) - Early April 2011

Public Meeting 3 (Final Review - Adoption) - Mid June 2011

For additional information / updates go to:

www.nctcog.org/SDplanningprojects or www.burlesontx.com