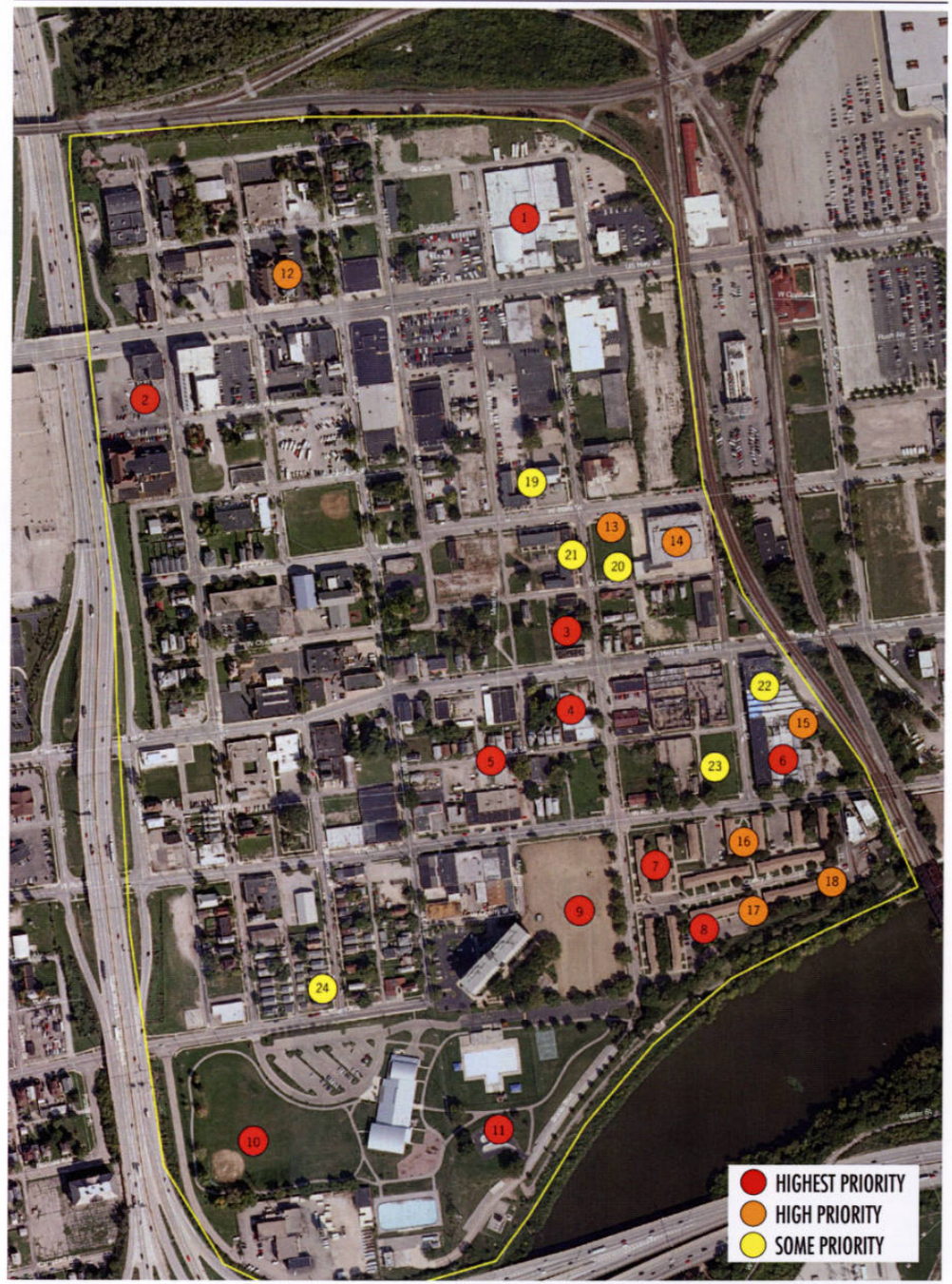
SIGNIFICANT LOCATIONS—HIGH PRIORITY

DOT NUMBER	NAME OF PLACE	REASON
12	Sullivant House	Franklinton is oldest (European) community in Central Ohio; historic preservation
13	Empty Residential Lots	Great opportunity to add more housing density to E. Franklinton
14	Warehouse	Can be developed family
15	400 W. Rich St.	Proximity to Riverside Bradley neighborhood; great concept for the facility; build on with living space concept
16	CMHA Site	New residence w th affordable choices for diverse population
17	Old Riverside Bradley area	Huge potential for housing near downtown, family space, near COSI
18	SE corner of E. Franklinton	New center place for the neighborhood; ripe for development

SIGNIFICANT LOCATIONS—SOME PRIORITY

DOT NUMBER	NAME OF PLACE	REASON
19	May Street Housing Complex	Architectural interest; Core—central area at E. Franklinton; People live there now
20	W. State St. & McDowell St.	Open land, Quick development
21	W. State St. & McDowell St.	Love this!
22	400 W. Rich or Glass Factory	Artistic community center, develop sense of community, first place with new life and energy
23	400 W. Rich St.	Expansion of programs to other lots!
24	Dodge Park	Housing here has appeal because of proximity to rec center and transportation ease

FIGURE B2 **Priority Locations**



APPENDIX C

THE EVOLUTION OF CREATIVE COMMUNITIES

The traditional paradigm for a creative community holds that artists colonize an urban area with plentiful space in buildings for which market demand has vanished. Their arrival triggers a sequence of recognizable stages:

1. They convert underutilized industrial structures into live/work spaces.
2. Galleries and performance spaces follow, raising the profile of the pioneering community through events like art walks, performances, and special events.
3. Other "early adopter" settlers arrive, attracted by a hip, creative image and still- affordable rents.
4. Retail and service establishments begin trickling in to serve the growing population, which in turn draws more residents, who are neither artists nor pioneers.
5. Demand for space increases and rents rise, attracting the attention of developers, who renovate additional structures or build new ones.
6. A thriving neighborhood emerges from seeds sewn by the pioneers—who, ironically, find themselves forced out by rising real estate values.

This plan aims to break the traditional paradigm by assuring that East Franklinton always contains a significant component of housing affordable to artists, entrepreneurs, and the district's current residents.

Creative communities have become increasingly inclusive, diverse and organic. Today they draw people with a broad spectrum of backgrounds, interests, skills, and professions to collide and interact, creating a more robust community. Visual and performing artists are still present, but they live next to chefs, IT entrepreneurs, new and old media specialists, "makers" and small businesses. This diversity fuels production in the creative community and it attracts younger, educated "creative workers" whose presence holds the key to Columbus's success in the new economy.

Several best practice examples from across the country highlight the novel ways that innovative spaces and districts shape creative communities today. Regardless of scale, all share a similar vision: a space or neighborhood where new ideas, concepts and products materialize based on diversity, proximity and collaboration.

The case studies yield four key lessons about the evolution of creative communities:

1. Flexible co-working spaces are essential to attracting a creative workforce.
2. Arts-based anchors and organizations that aim to create community remain an important element in the new paradigm.
3. An amenity-rich, walkable, live/work/play environment remains vital to long-term success.
4. The private sector can orchestrate a creative community on a large scale without losing sight of the creative worker.

1. Creative Spaces Are Key

Informal, collaborative co-working spaces serve as magnets for creative workers and start-ups, drawn by low rents and a highly social environment. Many of them offer basic shared office space and services; some are fully equipped tech shops with expensive, shared mechanical equipment; and others fall on a continuum between the two. All are fueled by the shared belief that creativity and innovation accelerate when people with diverse interests work side-by-side in spaces that facilitate informal interaction.

Such spaces have popped up across the country and include *The Pumping Station* in Chicago; *the Transistor* in Provo, Utah; *Crash Space* in Los Angeles; and *NY Resistor* in Brooklyn. Similar facilities exist in many other cities, including Baltimore, Detroit, Kansas City, Memphis, and Washington, as well as in Asia, Europe and South America. Beyond the benefit these spaces provide the creative workforce, they also generate compelling PR for their host communities. Media coverage of these centers puts the communities themselves on the creative/maker/entrepreneur map, which helps attract additional talent.

ARTISAN'S ASYLUM: NONPROFIT CRAFT STUDIO FOR MAKERS | SOMERVILLE, MASSACHUSETTS

Artisan's Asylum is a co-working, craft workshop with a community-learning component. The brainchild of two twenty-somethings with a mission of "mak[ing] creativity a way of life," the facility opened in 2010 in a 1,000sf space with $40,000 of shared mechanical equipment. The concept enabled artisans to rent out small spaces, share

the space's equipment, and teach classes on their craft to the public. Essentially, the space's shared infrastructure lowers the daunting up-front cost of creating mechanical/craft art and marketable products.

Within a year, AA outgrew its space and moved to a 10,000sf space, followed by a move to an even larger space in 2011. The current 25,000sf facility offers leased space for more than 100 artists, artisans and fabricators. Artisan's Asylum maintains a waiting list for space and has begun planning to add another 5,000sf.

From the start, Artisan's Asylum's founders and tenants emphasized learning, with classes aimed at building a larger community of craft workers within Somerville. Subsequently, it caught the media's attention, and the area around the facility has built a growing reputation as a hub for "makers."

Rental Spaces at Artisan's Asylum

Artisan's Asylum rents spaces ranging from storage only to large workspaces. Members have 24-hour access, and monthly rent includes utilities. Tenants provide only first- and last-month deposit up front.

RENTAL TYPE	COST PER MONTH[1]	NORMAL DIMENSIONS
Storage—shelf space	$5	2×2×2
Storage—palletized	$20	40×48 inches or 13sf
Workspace—50sf	$75	6× 8.5
Workspace—100sf	$125	12× 8.5
Workspace—200sf	$275	12× 16.5

CAMBRIDGE INNOVATION CENTER (CIC)
CAMBRIDGE, MASSACHUSETTS

The hugely successful Cambridge Innovation Center helped pioneer the concept of co-working facilities in the US. Launched in 1999 on one floor of an office building, CIC provides start-ups and small companies, primarily in biotech and IT, a collaborative work environment without the burden of high overhead costs.

Designed to foster collaboration and interaction, the Center offers flex office space to start-ups and small companies for a monthly fee based on head count and type of space leased. Affiliates choose from configurations that range from single seats at tables in open co-working rooms (known as C3 within the facility), to individual cubes, to enclosed offices for companies. Any affiliated employee has access to shared facilities, including numerous conference rooms, community kitchens, and lounge areas. Member companies also have access to the Venture Café, a networking facility that hosts numerous social events each week that are open to entrepreneurs and other interested parties.

The facility has grown to the point that nearly 450 companies—mostly biotech, IT, venture capital and other businesses—call CIC home. Now occupying six floors, the facility continues to expand as space opens up in its building. Other co-working spaces, like WorkBar Boston

and Intrepid Labs, have opened in the area to meet the space demands for startups seeking co-working environments.

CIC owes much of its success to its format, but its location in the Kendall Square education/biotech/IT hub plays a key role in its success. Beyond encouraging networking, the location benefits CIC's affiliated companies in two ways: the start-ups like the proximity to large organizations in the area, and many of those companies contract work out to CIC tenants.

2. Arts-based anchors and nonprofits still matter.

Artists and arts organizations continue to play a vital role in the emergence and long-term success of creative districts. However, many now work on specific projects to help maintain or attract talent by building, adapting, or preserving affordable space in areas where market rents would otherwise push artists out.

THE STEEL YARD | PROVIDENCE, RHODE ISLAND

This award-winning project rehabilitated and transformed an abandoned steel plant into a successful arts-based community center and sought-after space for working artists, students, tradespeople and entrepreneurs.

Located in Providence's Industrial Valley neighborhood, the facility acts as a community builder by providing arts and technical programs designed to increase opportunities in cultural and artistic expression, as well as career-oriented training. The Steel Yard also functions as a business incubator, renting out spaces to numerous programs, businesses and artisans in need of space to create.

After purchasing the abandoned mill in 2002, two young artists/entrepreneurs worked with local artists and community members to create a facility that would act as a catalyst for urban revitalization, arts promotion, workforce development and community growth. Financing proved complex, involving private funding, multiple state and federal grants, a large federal brownfields grant for site clean-up, and additional funding sources. The Steel Yard team hired architects to transform the property in a way that maintained its "grittiness" and carved out large spaces for artistic creation.

The Steel Yard operates as a nonprofit corporation, drawing funds from a combination of program-related income, foundation and government grants, corporate giving, and individual philanthropy. In addition to

the working artists and businesses that call it home, the facility stands as a centerpiece of the surrounding community, providing activities that range from free industrial arts classes for low-income teens and a children's summer camp to courses in metals, jewelry making, ceramics, theater arts, writing, and more. As at the Artisan's Asylum, artists located in the facility teach most of its classes.

THE RAILYARD | SANTA FE, NEW MEXICO

In the 1980s, the City of Santa Fe announced its intention to redevelop a vacant rail yard as a tourist destination. Strong resident and staekholder opposition to the initial plan led to a comprehensive community planning process that produced the Railyard master plan.

The master plan embraced the site's history and "rugged, gritty" appeal. It dedicated key anchor spaces to community arts organizations; encouraged art galleries to set up shop; incorporated a performance center; and focused development marketing on creative industries. These plan elements grew from a belief that concentrated arts activity would attract creative workers and companies, and the retail to support them.

The Railyards' subsequent success demonstrates that the arts can, in fact, attract the right mix of businesses, retailers, and residents of surrounding communities, the development did not incorporate housing into the mix. In retrospect and compared to other successful creative communities, this looks like a missed opportunity.

ARTSPACE

Maintaining affordable space for artists and other innovative workers represents a significant challenge once a creative community becomes successful. Many US cities and nonprofits have worked with with organizations like Artspace to bring in or help retain the "creatives" within creative communities. Artspace is an arts-based non-profit with a mission to create, foster, and preserve affordable space for artists and arts organizations. The organization has developed numerous catalyst projects at all scales.

Artspace operates both as a developer and a property manager to accomplish its goals. The property-development division works on adaptive reuse and new construction, using creative financing to create mixed-use properties with affordable live/work units, retail space, and administrative/performance space for arts organizations. These projects then act as a centers for the arts community, thus helping anchor and protect the creative community's presence.

3. Live/work/play environments are critical to long-range success.

Local and state governments increasingly recognize the importance of the creative community to economic development. According to Carol Coletta of CEOs for Cities, walkability adds value to communities, with more than half of all 25- to 34-year-old "creative workers" more likely to choose vibrant, walkable, urban neighborhoods over suburban ones. Additionally, walkable metro areas had higher levels of highly educated people, higher wages, higher housing values, more high-tech companies and greater levels of innovation, and more artistic creatives.[1] Thus, jurisdictions have put into place the land use, zoning and procedural frameworks that allow and encourage the vibrant, live-work-play environments that innovation workers find attractive.

[1] *Richard Florida, 2011*

COLORADO CREATIVE DISTRICTS

The State of Colorado created its Creative Districts program as a statewide economic development tool. The program encourages municipalities to identify neighborhoods, often disadvantaged, suitable for mixed-use development with artist live/work spaces, restaurants and shopping, entertainment and other living spaces that appeal to "hip, young" professionals. The state believes that clustering creative industries—including design, film/media, literary, heritage, publishing and visual/creative arts—can benefit communities, particularly disadvantaged ones, by cultivating unique, vibrant places and venues that engage younger residents and creative workers.

KENDALL SQUARE | CAMBRIDGE, MASSACHUSETTS

Careful cultivation has helped a former underutilized industrial area adjacent to MIT has evolve into one of the world's most successful biotech and information technology clusters. Redeveloped as part of an urban renewal district over the last 30 years, Kendall Square now serves as a

global model for a mixed-use, academic/office innovation district with offices, labs, hotels, and university facilities. The area's high energy level plummets at 5:00 p.m., however, because it has few amenities and stores, limited residential offerings, and minimal arts and cultural spaces outside of MIT.

Although some new housing and restaurants have popped up in recent years, the City of Cambridge and MIT share the goal of transforming the area into the amenity-rich, walkable, live/work/play environment that the innovative work force and its biotech and IT employers seek out. The municipality and the university have both embarked on planning processes to guide future growth.

Both projects aim to establish a new "sense of place"—to make Kendall Square feel lively, accessible and people-oriented and to encourage the informal social interaction that appeals to creative workers. Strategies include an improved mix of uses, with more housing, a better range of stores and services, and more cultural offerings. Improving the public realm to enliven streets and upgrade the quality of open spaces plays a key role in both planning processes.

4. Creative communities can be orchestrated.

Creative communities generally evolve organically over extended periods—but they don't have to. Private interests like developers can "force" them successfully, as long as both project and process respect the ideals and needs of the innovative workers the project hopes to attract.

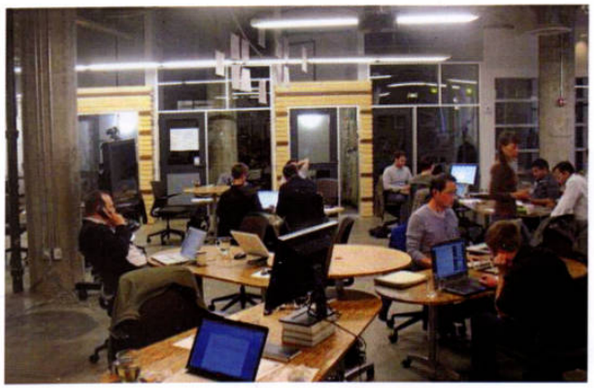
5M | SAN FRANCISCO, CALIFORNIA

Named for the nearby intersection of 5th and Mission streets, 5M stands as the most successful "orchestrated" creative community in the US. In planning a mixed-use development on 4.5 acres, Developer Forest City formulated a vision for an "open place where diversity comes together in the form of artists..., students, changemakers... where we share resources, programs, connections and ideas to create value for our economy and our communities."

To achieve this goal, Forest City built a virtual foundation for a community before construction had begun. First, it recruited three creative entrepreneurial groups to anchor the facility:

- Intersection of the Arts, San Francisco's oldest nonprofit arts group.
- TechShop, a DIY workshop for industrial designers and craftsman.
- Hub SoMa, a co-working incubator particularly attractive to IT start-ups.

At the same time, 5M engaged in a community process that identified the desire and need for a "permeable campus" that would provide education and workforce



5M's co-working space.

training for neighborhood residents and youth. Forest City established a stand-alone nonprofit, 5M.org, to oversee this task.

Second, Forest City built 5M with the kinds of spaces and amenities that appeal to creative community interests and needs, among them:

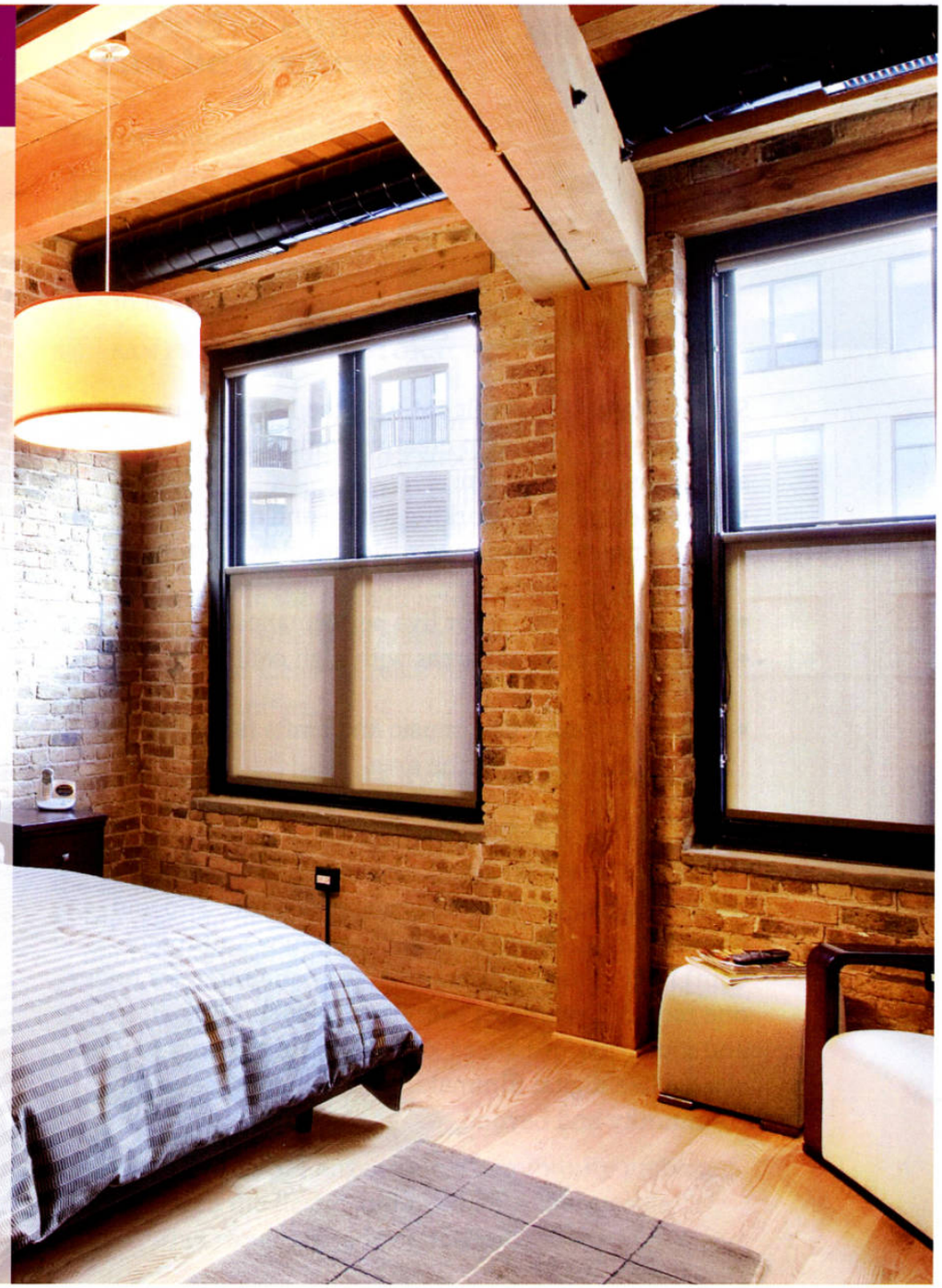
- Flexible, open, co-working studio and office environments at various scales to allow start-ups to grow within the facility.
- A black box theater for live performances.
- Minimally built-out areas with high ceilings suitable for art creation.
- A weekly food truck, music and crafts fair to provide amenities lacking in the area.

Third, 5M marketed itself as a creative melting pot. Although Forest City developed the entire facility, the marketing had the feel of a grassroots effort. Hip and non-corporate, the project website (www.5mproject.com) highlights the diversity of uses and interests under one roof. 5M promotes user events—such as theater and music performances, open social gatherings, public classes like digital filmmaking, and craft fairs—to the community and beyond.

Now in its third year, 5M is home to 2,000 artists, makers and start-ups ranging from 1 to 100-plus workers. The project's success has bred plans for expansion: Forest City appears likely to announce a formal development plan in 2012 for the adjacent parking lots. Although details are scarce, this second phase should include housing, retail, and more than 1,000,000sf of commercial space.

APPENDIX **D**

RESIDENTIAL MARKET POTENTIAL



Residential Market Potential

Overview

In January 2012, Laurie Volk of Zimmerman Volk Associates completed an analysis of potential demand for housing in East Franklinton as part of the City of Columbus's creative community planning initiative. Analyzing various sources—including data for population mobility, migration, and target-market analysis—she conservatively projected that demand over ten years could support construction of at least 1,800 units of rental and ownership housing with a wide range of unit types—including live/work space for artists—and a mix of market-rate and affordable units.

This appendix presents the analysis that produced the final projections, including an explanation of methodology. As with all other analyses undertaken for this plan, the projections rest on conservative assumptions about market absorption, rents and prices, and financing.

SUMMARY OF FINDINGS

Residential Market Potential

East Franklinton
Creative Community District
City of Columbus, Franklin County, Ohio

January, 2012

This study identifies the depth and breadth of the market for newly-introduced market-rate and affordable housing units—created both through adaptive re-use of existing non-residential buildings as well as through new construction—that could be developed over the next several years within the East Franklinton Creative Community District, in the City of Columbus, Franklin County, Ohio. The boundaries of the study area include the railroad tracks to the north and east, the Scioto River to the south, and the West Innerbelt Freeway to the west.

For purposes of this analysis, housing units that could be considered to be affordable are those that can be rented or purchased by households earning between 80 and 120 percent of the Columbus Area Median Family Income (AMI), which was determined to be $67,500 for a family of four as of December 11, 2011. In many cases, especially with for-sale housing, subsidies may be required to ensure affordability. Market-rate units are those that can be rented or purchased by households with annual incomes above 120 percent AMI.

The current constrained market—characterized throughout most of the United States by weak housing prices; higher than typical levels of unsold units, both builder inventory units as well as foreclosed and/or abandoned houses; and high levels of mortgage delinquencies by speculators and investors as well as homeowners—has resulted in restrictive development financing and mortgage underwriting, taking a significant percentage of potential homebuyers out of the market. However, contrary to typical performance during economic recessions with high unemployment levels, rental occupancies have, in general, risen over the past year.

These market constraints do not reduce the size of the potential market; however, depending on the timing of market entry, the initial percentage of the potential market able to overcome the constraints of the deep recession and restrictive mortgage underwriting could be reduced.

The findings of this analysis reflect the impact on the study area of local, regional, and national demographic and housing trends. The remarkable transformation of American households—particularly the emerging predominance of one- and two-person households—over the past decade, combined with steadily increasing traffic congestion and rising gasoline prices and home heating/cooling costs, is contributing to significant changes in neighborhood and housing preferences. A shift has become discernable away from single-family detached houses in lower-density exurban locations to a diverse mix of apartments, townhouses, and higher-density detached houses in downtowns and in walkable, mixed-use neighborhoods. This fundamental transformation of American households and housing preferences is likely to continue for at least the next decade, representing an unprecedented demographic foundation on which cities can re-build their downtowns and in-town neighborhoods.

In brief, using the target market methodology, Zimmerman/Volk Associates determined:

- Where the potential renters and buyers for new affordable and market-rate housing units in East Franklinton Study Area are likely to move from (the draw areas);
- How many have the potential to move to the study area if appropriate housing units were to be made available (depth and breadth of the market);
- What their housing preferences are in aggregate (rental or ownership, multi-family or single-family);
- Who currently lives in the draw areas and what they are like (the target markets);
- What their alternatives are (other relevant housing in the Greater Downtown Columbus area);
- What they will pay to live in the study area (market-rate rents and prices); and
- How quickly they will rent or purchase the new units (absorption forecasts).

Where will the potential market for housing in the East Franklinton Study Area move from?

As derived from migration, mobility and target market analysis, the draw area distribution of market potential (those households with the potential to move to the East Franklinton Study Area) is as follows:

Market Potential by Draw Area
EAST FRANKLINTON CREATIVE COMMUNITY DISTRICT
City of Columbus, Franklin County, Ohio

City of Columbus (Primary Draw Area):	54.5%
Balance of Franklin County (Local Draw Area):	6.3%
Delaware, Fairfield, Licking, Pickaway and Madison Counties (Regional Draw Area):	0.7%
Cuyahoga, Montgomery and Hamilton Counties (Urban Draw Area):	6.5%
Balance of US (National Draw Area):	32.0%
Total:	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2012.

How many households are likely to rent or purchase new or existing units each year in the East Franklinton Study Area?

As derived by the target market methodology, up to 1,800 households represent the annual potential market for new market-rate and affordable higher-density housing units in the East Franklinton Creative Community District. (*See* Table 1.) These households comprise just 2.4 percent of the approximately 70,885 households that represent the potential market for new and existing market-rate and affordable housing units in all of the City of Columbus, a share of the total market that is consistent with Zimmerman/Volk Associates' experience in other cities.

Who is the potential market?

As noted above, the increasing market interest in urban neighborhoods—walkable, with a mix of uses and a variety of housing types—is the result of dramatic changes in American household composition, the growing cost of commuting by private automobile, and the profound impact of the Great Recession—which began in 2007—on both households and builder/developers.

The changing composition of American households may have the most lasting influence, however, because of the changing housing preferences of the two largest generations in the history of America: the Baby Boomers (currently estimated at 77 million), born between 1946 and 1964, and the estimated 78 million Millennials, who were born from 1977 to 1996 and, in 2010, surpassed the Boomers in population.

As determined by the target market analysis, and reflecting these trends, the annual potential market—represented by lifestage—for new affordable and market-rate housing units in the East Franklinton Study Area can be characterized by general household type as follows (*see* Table 2):

- Younger singles and childless couples—including, among others, office workers, junior executives, university affiliates, artists or artisans, and retail and service employees (71 percent);
- Empty nesters and retirees, 30 percent of whom would be moving from elsewhere in the city (16 percent); and
- A range of urban families (13 percent).

What are their housing preferences?

As derived from the tenure and housing preferences of the target households, the distribution of higher-density rental and for-sale housing types is as follows (*see again* Table 1):

Annual Potential Market for New Housing Units
Higher-Density Housing Units
EAST FRANKLINTON CREATIVE COMMUNITY DISTRICT
City of Columbus, Franklin County, Ohio

HOUSING TYPE	NUMBER OF HOUSEHOLDS	PERCENT OF TOTAL
Rental Multi-Family (lofts/apartments, leaseholder)	1,005	55.8%
For-Sale Multi-Family (lofts/apartments, condo/co-op ownership)	265	14.8%
For-Sale Single-Family Attached (townhouses/ live-work, fee-simple, condominium ownership)	350	19.4%
For-Sale Single-Family Detached (urban houses, fee-simple ownership)	180	10.0%
Total	1,800	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2012.

The market potential delineated by tenure (rental vs. for-sale) and housing type represents a long-term sustainable mix for the East Franklinton Creative Community District. The initial residential mix, however, should be biased significantly to rental housing due to higher rental absorption paces, the long-term lack of any investment-grade multi-family development in the neighborhood, and the greater willingness of renters to move to an emerging neighborhood.

A majority of rental development in the near-term residential mix is critical for several important reasons.

- New quality rental housing is the linchpin of urban redevelopment and should be introduced to the market as quickly as possible.

- Rental apartments are required for the establishment of "critical mass," because rentals are absorbed at higher rates than for-sale units.
- Rentals are the most efficient way to incorporate units affordable to households with a range of incomes.
- Rentals allow households to experiment with living in an area without the mortgage commitment of home ownership.
- The perception of declining home values creates a lack of confidence in the for-sale market.
- Renters form a pool of potential purchasers of for-sale condominiums, and townhouses that can be built in later phases, when the market has recovered.

Although there is often the perception that multi-family rentals reduce the value of nearby ownership housing units, this is not the case in new construction with appropriate site planning. In fact, there is growing academic evidence that new apartment developments may actually increase values of nearby single-family houses by adding choice to an area that is made more attractive through planning and design.

Because of these fundamental dynamics—as well as currently constrained financing, both for potential developers and for potential homebuyers—the target mix of housing units to be developed within the East Franklinton Study Area over a 10-year time frame should include approximately 56 percent rental housing. Over time, however, as the pent-up market potential for urban rentals in the neighborhood is met, the balance should shift toward for-sale dwelling units.

What are their current housing alternatives?

There are several rental properties located in Downtown Columbus, across the Scioto River from the East Franklinton Study Area, with rents ranging from approximately $575 per month for a small one-bedroom apartment to over $2,100 per month for a two-bedroom, two-and-a-half bath townhouse (*see* Table 3 *for further detail*).

There has been extensive for-sale development activity in Greater Downtown Columbus over the past several years. The majority of downtown condominium development has consisted of projects of 50 or fewer units, with prices currently starting at just under $140,000 for a 700-square-foot condominium to $1.275 million for a 4,000-square-foot penthouse (*see* Table 4 *for further detail*).

The Optimum Market Position for the East Franklinton Creative Community District

The successful establishment of new housing options in disinvested neighborhoods or in previously non-residential areas has often been initially dependent upon "risk-oblivious" households. "Risk-oblivious" households are mostly young singles and couples, often with a large contingent of gays and a high percentage of artists and artisans seeking inexpensive space for combined living and working. These pioneers will often begin neighborhood transformation by living illegally in commercial space. Eventually, restaurants, bars, clubs and unique or unusual retail establishments begin to define the neighborhood character and raise its profile. At this point, these neighborhoods become sought after by "risk-tolerant" households, a mix of younger and older singles and couples who are almost always childless. The "risk-tolerant" includes those willing to make investments in ownership housing—sometimes they are the former "risk oblivious" seeking to recoup years of sweat equity.

In every case, however, the neighborhood established by these households has grown to encompass more than simply housing; its flavor and tone has been reinforced by the non-residential uses—*avant garde* shops, cutting-edge galleries, trendy clubs and stylish eating and drinking establishments—that follow the risk-oblivious and risk-tolerant households and make the neighborhood acceptable for the "risk-aware" households that follow.

The target market analysis has indicated that there is a significant number of risk-oblivious and risk-tolerant households who already live within the city limits, and who represent the majority of the market for new housing units in the East Franklinton Creative Community District.

However, despite significant market potential, there are major challenges to new residential development in the East Franklinton Study Area. These include:

- High costs: The high costs of materials and labor, in addition to the typically high cost of adaptive re-use, are, without incentives or subsidies, likely to drive rents and prices beyond the reach of many potential residents.

- Financing challenges: Restrictive mortgage underwriting and development finance are a challenge to developers and mortgage qualification continues to be difficult for many potential buyers.
- Neglected and vacant properties: Derelict and vacant properties are a deterrent to potential urban residents, as they contribute to the perception that the neighborhood is neglected and/or dangerous.

It is unlikely that the rents and prices outlined below will be achievable without the development of a catalytic project of sufficient scale to alter public perceptions. The project will need to be large enough to achieve development efficiency, to have a significant perceived impact on the neighborhood, and to support a high-profile marketing campaign.

Within the East Franklinton Study Area, the development of the Housing Authority property adjacent to the Scioto River has the greatest potential to be that catalyst. The site is large enough to support between 800 and 1,000 units, in a mix of rental and for-sale, affordable and market-rate units, including the potential for retail uses on the ground floors of the buildings that front Rich Street.

A catalytic project on the Housing Authority site does not have to foreclose the possibility of smaller-scale, quirky and unusual projects more likely to appeal to less affluent artists and artisans. There are a number of buildings in the study area that represent redevelopment potential as artists' live-work studios or creative commercial space. However, depending on acquisition and construction costs, it is likely that many of these projects will require financing assistance, subsidies and/or tax incentives to make redevelopment of these buildings economically feasible.

What is the market currently able to pay?

As noted in the introductory paragraphs, affordable housing units have been designated to be those that are affordable to households earning between 80 and 120 percent of the Columbus AMI, and market-rate units are generally those that are affordable to households with annual incomes above120 percent AMI.

For affordable housing, then, an income qualification range established between 80 percent and 120 percent AMI would mean an income range of approximately $37,800 to $56,700 for a single-person household; $43,200 to $64,800 for a two-person household, $48,600 to $72,900 for a three-person household, and so on. To qualify for new market-rate units, households would generally need annual incomes above 120 percent AMI.

A single-person household with an income at 80 percent AMI, or $37,800 per year, paying no more than 30 percent of gross income for rent and utilities—which is HUD's affordability standard—would qualify for a rent—including utilities—of $945 per month. A two-person household, with an annual income just under 120 percent AMI, or $72,000 per year, paying no more than 30 percent of gross income for rent and utilities, would qualify for a rent—including utilities—of $1,600 per month.

The distribution by rent range of the 1,005 target households—with incomes above 80 percent of the AMI (*as shown on* Table 5)—that represent the potential market for new rental units in the East Franklinton Study Area is as follows:

Distribution by Rent Range
Target Groups For New Multi-Family For Rent
EAST FRANKLINTON CREATIVE COMMUNITY DISTRICT
City of Columbus, Franklin County, Ohio

MONTHLY RENT RANGE	HOUSEHOLDS PER YEAR	PERCENTAGE
$750–$1,000	284	28.3%
$1,000–$1,250	250	24.9%
$1,250–$1,500	195	19.4%
$1,500–$1,750	144	14.3%
$1,750 and up	132	13.1%
Total:	1,005	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2011.

As noted above, for affordable housing, the income limitation of 80 percent to 120 percent AMI would mean an income range of $37,800 to $56,700 for a single-person household; $43,200 to $64,800 for a two-person household, $48,600 to $72,900 for a three-person household, and so on, and to qualify for new market-rate units, households would generally need annual incomes above 120 percent AMI.

A single-person household with an income at 80 percent AMI, or approximately $37,800 per year, paying no more than 30 percent of gross income for housing costs, including mortgage principal, interest, taxes, insurance and utilities, could qualify for a 30-year mortgage of $100,000 at a 4.5 percent interest rate. The down payment—contributed by the buyer, or subsidized through a soft second mortgage, another mechanism, or some combination—would be required to make up the difference between $100,000 and the purchase price. A two-person household, with an income just under 120 percent AMI, or $64,800 per year, under the same criteria, could qualify for a 30-year mortgage of $200,000 at a 4.5 percent interest rate. Again, the down payment would be required to make up the difference between $200,000 and the purchase price.

The distribution by price range of the 265 target households—with incomes above 80 percent of the AMI (*as shown on* Table 6)—that represent the potential market for new for-sale multi-family units (condominiums) in the East Franklinton Study Area is as follows:

Distribution by Price Range
Target Groups For New Multi-Family For Sale (Condominiums)
EAST FRANKLINTON CREATIVE COMMUNITY DISTRICT
City of Columbus, Franklin County, Ohio

PRICE RANGE	HOUSEHOLDS PER YEAR	PERCENTAGE
$125,000–$150,000	70	26.4%
$150,000–$175,000	55	20.8%
$175,000–$200,000	50	18.9%
$200,000–$225,000	30	11.3%
$225,000–$250,000	20	7.5%
$250,000–$275,000	20	7.5%
$275,000–$300,000	10	3.8%
$300,000 and up	10	3.8%
Total:	265	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2012.

The distribution by price range of the 350 target households—with incomes above 80 percent of the AMI (*as shown on* Table 7)—that represent the potential market for new for-sale single-family attached units (townhouses and live-work units) in the East Franklinton Study Area is as follows:

Distribution by Price Range
Target Groups For New Single-Family Attached For Sale (Townhouses/Live-Work)
EAST FRANKLINTON CREATIVE COMMUNITY DISTRICT
City of Columbus, Franklin County, Ohio

PRICE RANGE	HOUSEHOLDS PER YEAR	PERCENTAGE
$150,000–$200,000	100	28.5%
$200,000–$250,000	92	26.3%
$250,000–$300,000	90	25.7%
$300,000–$350,000	38	10.9%
$350,000 and up	30	8.6%
Total:	350	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2012.

The distribution by price range of the 180 target households—with incomes above 80 percent of the AMI (*as shown on* Table 8)—that represent the potential market for new for-sale single-family detached units (urban houses) in the East Franklinton Study Area is as follows:

Distribution by Price Range
Target Groups For New Single-Family Detached For Sale (Urban Houses)
EAST FRANKLINTON CREATIVE COMMUNITY DISTRICT
City of Columbus, Franklin County, Ohio

PRICE RANGE	HOUSEHOLDS PER YEAR	PERCENTAGE
$225,000–$250,000	25	13.9%
$250,000–$275,000	30	16.7%
$275,000–$300,000	30	16.7%
$300,000–$325,000	35	19.4%
$325,000–$350,000	30	16.7%
$350,000 and up	30	16.7%
Total:	180	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2012.

Therefore, based on the tenure preferences of draw area households and their income and equity levels, the general range of rents and prices for newly-developed affordable and market-rate residential units in the East Franklin Study Area that could currently be sustained by the market is as follows (*see* Table 9):

General Rent, Price and Size Ranges
Newly-Created Housing (Adaptive Re-Use and New Construction)
EAST FRANKLINTON CREATIVE COMMUNITY DISTRICT
City of Columbus, Franklin County, Ohio

HOUSING TYPE	RENT/PRICE RANGE	SIZE RANGE	RENT/PRICE PER SQ. FT.
FOR-RENT (MULTI-FAMILY)—			
Hard Lofts *	$750–$1,400/month	550–1,150 sf	$1.22–$1.36 psf
Soft Lofts †	$850–$1,600/month	600–1,250 sf	$1.28–$1.42 psf
Luxury Apartments	$1,050–$1,850/month	700–1,350 sf	$1.37–$1.50 psf
FOR-SALE (MULTI-FAMILY)—			
Hard Lofts *	$125,000–$175,000	700–1,250 sf	$140–$179 psf
Soft Lofts †	$145,000–$225,000	750–1,350 sf	$167–$193 psf
Luxury Condominiums	$195,000–$300,000	900–1,450 sf	$207–$217 psf
FOR-SALE (SINGLE-FAMILY ATTACHED)—			
Townhouses	$185,000–$365,000	1,000–1,750 sf	$185–$209 psf
Live-Work	$235,000–$375,000	1,200–1,800 sf	$196–$208 psf

continued on following page . . .

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HOUSING TYPE	PRICE RANGE	SIZE RANGE	PRICE PER SQ. FT.
FOR-SALE (SINGLE-FAMILY DETACHED)—			
Urban Houses	$245,000–$395,000	1,200–2,000 sf	$198–$204 psf

* Unit interiors of "hard lofts" typically have high ceilings and commercial windows and are either minimally finished, limited to architectural elements such as columns and fin walls, or unfinished, with no interior partitions except those for bathrooms.

† Unit interiors of "soft lofts" may or may not have high ceilings and are fully finished, with the interiors partitioned into separate rooms.

SOURCE: Zimmerman/Volk Associates, Inc., 2012.

The above rents and prices are in year 2012 dollars, within the economic capability of the target households, and are exclusive of consumer options or upgrades, or floor or location premiums, and cover the broad range of rents and prices for newly-developed units currently sustainable by the market. However, as noted above, it is unlikely that these rents and prices will be achievable without the development of a catalytic project of sufficient scale to alter public perceptions of the study area.

How fast will the units lease or sell?

As noted previously in this study, the current constrained market is characterized in many locations by reduced housing prices, high levels of unsold units, high levels of mortgage delinquencies and foreclosures, and restrictive mortgage underwriting and development finance. Partly as a result, there has been a significant shift in market preferences from home ownership to rental dwelling units, particularly among younger households. This results in a higher share of consumer preference for multi-family rentals even among relatively affluent consumers than would have been typical just three years ago.

Given current economic conditions, which are not likely to improve significantly for new for-sale housing over the near term, Zimmerman/Volk Associates has determined that an annual capture of approximately eight to 10 percent of the potential market for each for-sale housing type could be achievable over the next five years. (Nationally, prior to the housing collapse in 2008, new dwelling units represented 15 percent of all units sold; in the last quarter of 2011, new dwelling units represented just 8.3 percent of all units sold.)

In contrast to the constrained for-sale housing conditions, Zimmerman/Volk Associates has determined that for new multi-family rentals, an annual capture of 12 to 15 percent of the potential market is likely to be achievable.

Based on these market capture forecasts, the East Franklinton Study Area should be able to support between 186 to 230 new affordable and market-rate housing units per year over the next five years, as follows (*see again* Table 9:

Annual Capture of Market Potential
EAST FRANKLINTON CREATIVE COMMUNITY DISTRICT
City of Columbus, Franklin County, Ohio

HOUSING TYPE	NUMBER OF HOUSEHOLDS	NUMBER OF NEW UNITS	ANNUAL CAPTURE RATE
Rental Multi-Family (lofts/apartments, leaseholder)	1,005	124 to 148	12.3% to 14.7%
For-Sale Multi-Family (lofts/apartments, condo/co-op ownership)	265	20 to 28	7.5% to 10.6%
For-Sale Single-Family Attached (townhouses/live-work, fee-simple ownership)	350	28 to 36	8.0% to 10.3%
For-Sale Single-Family Detached (urban houses, fee-simple ownership)	180	14 to 18	7.8% to 10.0%
Total	1,800	186 to 230 units	

SOURCE: Zimmerman/Volk Associates, Inc., 2012.

These capture rates are well within the target market methodology's parameters of feasibility.

NOTE: Target market capture rates are a unique and highly-refined measure of feasibility. Target market capture rates are *not* equivalent to—and should not be confused with—penetration rates or traffic conversion rates.

The **target market capture rate** is derived by dividing the *annual* forecast absorption—in aggregate and by housing type—by the number of households that have the potential to purchase or rent new housing within a specified area *in a given year*.

The **penetration rate** is derived by dividing the *total* number of dwelling units planned for a property by the *total* number of draw area households, sometimes qualified by income.

The **traffic conversion rate** is derived by dividing the *total* number of buyers or renters by the *total* number of prospects that have visited a site.

Because the prospective market for a location is more precisely defined, target market capture rates are higher than the more grossly-derived penetration rates. However, the resulting higher capture rates are well within the range of prudent feasibility.

Mansion buildings should be strictly regulated in form, but flexible in use. However, flexibility in use is somewhat constrained by the handicapped accessibility regulations in both the Fair Housing Act and the Americans with Disabilities Act.

- Townhouse: Similar in form to a conventional suburban townhouse except that the garage—either attached or detached—is located to the rear of the unit and accessed from an alley or auto court. Unlike conventional townhouses, urban townhouses conform to the pattern of streets, typically with shallow front-yard setbacks. To provide privacy and a sense of security, the first floor should be elevated significantly above the sidewalk.

- Live-work is a unit or building type that accommodates non-residential uses in addition to, or combined with living quarters. The typical live-work unit is a building, either attached or detached, with a principal dwelling unit that includes flexible space that can be used as office, retail, or studio space, or as an accessory dwelling unit.

  Regardless of the form they take, live-work units should be flexible in order to respond to economic, social and technological changes over time and to accommodate as wide as possible a range of potential uses. The unit configuration must also be flexible in order to comply with the requirements of the Fair Housing Amendments Act and the Americans with Disabilities Act.

- Urban House: A two- to three-story single-family detached house on a narrow lot. The garage is located to the rear of the house and accessed from an alley or auto court. Urban houses also conform to the pattern of streets, typically with shallow front-yard setbacks or dooryards.

City of Columbus; Balance of Franklin County; Delaware, Fairfield, Licking, Pickaway, and Madison Counties; Cuyahoga, Montgomery, and Hamilton Counties, Ohio; Balance of U.S. Draw Areas

TABLE 1

Annual Market Potential

Derived From Rental And Purchase Propensities Of Draw Area Households With The Potential To Move To The East Franklinton Study Area Each Year Over The Next Five Years

EAST FRANKLINTON STUDY AREA—CITY OF COLUMBUS, FRANKLIN COUNTY, OHIO

Sources: Nielsen Claritas, Inc.; Zimmerman/Volk Associates, Inc.

Total Target Market Households With Potential To Rent/Purchase In City of Columbus, Franklin County, Ohio	70,885
Total Target Market Households With Potential To Rent/Purchase In The East Franklinton Study Area	1,800

Annual Market Potential

	Multi-Family		Single-Family				
			Attached	Detached			
	For-Rent	For-Sale	All Ranges	Low-Range	Mid-Range	High-Range	Total
Total Households:	1,005	265	350	225	200	175	2,220
{Mix Distribution}:	45.3%	11.9%	15.8%	10.1%	9.0%	7.9%	100.0%

Target Residential Mix
(Excluding Large-Lot Single-Family Detached)

	Multi-Family		Single-Family		
			Attached	Detached	
	For-Rent	For-Sale	All Ranges	Urban	Total
Total Households:	1,005	265	350	180	1,800
{Mix Distribution}:	55.8%	14.8%	19.4%	10.0%	100.0%

NOTE: Reference Appendix One, Tables 1 Through 12.

TABLE 2

Annual Market Potential By Household Type

Derived From Rental And Purchase Propensities Of Draw Area Households With The Potential To Move To The East Franklinton Study Area Each Year Over The Next Five Years

THE EAST FRANKLINTON STUDY AREA—CITY OF COLUMBUS, FRANKLIN COUNTY, OHIO

Sources: Nielsen Claritas, Inc.
Zimmerman/Volk Associates, Inc.

		Multi-Family			*Single-Family*	
					Attached	*Detached*
	Total	*For-Rent*	*For-Sale*	*All Ranges*	*Urban*
Number of Households:	1,800	1,005	265	350	180
Empty Nesters & Retirees	16%	8%	15%	21%	44%
Traditional & Non-Traditional Families	13%	11%	0%	19%	36%
Younger Singles & Couples	71%	81%	85%	60%	19%
	100%	100%	100%	100%	100%

TABLE 3

Summary Of Selected Rental Properties

GREATER DOWNTOWN COLUMBUS, FRANKLIN COUNTY, OHIO—DECEMBER, 2011

Source: Zimmerman/Volk Associates, Inc.

Property *Address*	*Number of Units*	*Reported Base Rent*	*Reported Unit Size*	*Rent per Sq. Ft.*	*Additional Information*
			Near East Side		
Skyview Towers					
525 Sawyer Blvd.	1br/1ba	$575 to $675	545 to 730	$0.92 to $1.06	*Fitness center, indoor basketball court, billiard room, gaming center. Utilities included.*
VTT Properties	2br/1ba	$850	900	$0.94	
			Arena District		
Flats on Vine	**226**				**99% occupancy**
205 Vine Street	Studio/1ba	$805 to $885	508 to 517	$1.58 to $1.71	*Clubhouse, fitness center, pool, whirlpool, business center, lounge.*
Village Green	1br/1ba	$975 to $1,395	722 to 887	$1.35 to $1.57	
	2br/2ba	$1,465 to $1,850	988 to 1,255	$1.47 to $1.48	
Arena Crossing	**252**				**98% occupancy**
423 North Front Street	Studio/1ba	$805 to $950	510 to 644	$1.48 to $1.58	*Fitness center, outdoor pool, spa, fire pit.*
Village Green	1br/1ba	$1,085 to $1,245	798 to 956	$1.30 to $1.36	
	2br/2ba	$1,535	1,146 to 1,266	$1.21 to $1.21	
	2br/2ba TH	$1,925	1,673	$1.15	
			River South District		
Annex at RiverSouth	**213**				
186 S. Front Street			**Annex East**		*Fitness center, sundeck.*
Lifestyle Communities	1br/1ba	$825 to $1,010	661 to 725	$1.25 to $1.39	
	2br/2ba	$1,250 to $1,435	980 to 1,135	$1.26 to $1.28	
			Annex West		
	2br/2.5ba TH	$1,730 to $1,845	1,255 to 1,687	$1.09 to $1.38	
	2br/2.5.5ba TH	$1,900 to $2,115	1,612 to 1,865	$1.13 to $1.18	

TABLE 3 *(continued)*

Summary Of Selected Rental Properties

GREATER DOWNTOWN COLUMBUS, FRANKLIN COUNTY, OHIO—DECEMBER, 2011

Source: Zimmerman/Volk Associates, Inc.

Property (Date Opened) *Address*	*Number of Units*	*Reported Base Rent*	*Reported Unit Size*	*Rent per Sq. Ft.*	*Additional Information*
			Brewery District		
Brewers Yard	**303**				
100 Frankfort Square	1br/1ba	$950 to	710 to	$1.26 to	*Clubhouse,*
Elford Development		$1,295	1,024	$1.34	*fitness center, pool,*
	1br/1ba/den	$1,020 to	944	$1.08 to	*sundeck, lounge,*
		$1,195		$1.27	*movie theater,*
	2br/2ba	$1,250 to	1,074 to	$1.16 to	*aerobics/yoga room.*
		$1,550	1,291	$1.20	
Liberty Place	**135**				
250 Liberty Street	1br/1ba	$995 to	664 to	$1.47 to	*Business center, clubhouse*
Winther Investments		$1,325	903	$1.50	*fitness center,*
	1br/1ba/study	$1,455	1,033	$1.41	*pool, spa,*
	2br/1ba	$1,296	976	$1.33	*BBQ/picnic area.*
	2br/2ba	$1,595 to	1,150 to	$1.36 to	
		$1,755	1,291	$1.39	
	3br/2ba	$1,995	1,697	$1.18	

TABLE 4

Summary Of Selected For-Sale Multi-Family And Single-Family Attached Developments

GREATER DOWNTOWN COLUMBUS, FRANKLIN COUNTY, OHIO—DECEMBER, 2011

Source: Zimmerman/Volk Associates, Inc.

Development (Date Opened) *Address*	*Unit Type*	*Base Price Range*	*Unit Size Range*	*Base Price Per Sq. Ft.*	*Total Units*	*Sold Units*
Hartman Lofts	**CO**		Current Listings		**24**	**18**
150 E. Main Street	1br/1ba	$139,900	703	$199		**Phase One**
Plaza Properties	1br/1ba	$159,900	762	$210		
	1br/1ba	$166,830	762	$219		
	1br/1ba	$186,519	942	$198		
	1br/1ba	$189,516	942	$201		
	2br/2ba	$287,900	1,457	$198		
The York on High	**CO**		Current Listings		**25**	**15**
1276 North High Street	1br/1ba	$149,900 to $154,900	726	$213		
The New Victorians	1br/1ba/loft	$179,900 to $184,900	926	$194		
	2br/2ba	$339,900	1,881	$181		
	2br/2ba/loft	$229,900 to $289,900	1,500 to 1,734	$159 to $193		
Lofts at 106	**CO**		Current Listings		**48**	**23**
106 N. High Street	1br/1ba	$149,900	800	$187		
	1br/1ba	$179,900	996	$181		
	2br/2ba	$199,900	1,152	$174		
	2br/1.5ba	$234,900	1,337	$176		
	2br/1.5ba	$259,900	1,583	$164		
	2br/2ba	$274,900	1,667	$165		
	2br/2ba	$479,900	2,542	$189		
	Remaining unsold units are rented.					
Carlyle's Watch	**CO**		Current Listings		**54**	**49**
100 East Gay Street	1br/1ba	$154,900	882	$176		
	1br/1ba	$159,900	882	$181		
	2br/2ba	$209,900	1,185	$177		
	2br/2ba	$211,900	1,185	$179		
	2br/2ba	$259,900	1,475	$176		

TABLE 4 *(continued)*

Summary Of Selected For-Sale Multi-Family And Single-Family Attached Developments

GREATER DOWNTOWN COLUMBUS, FRANKLIN COUNTY, OHIO—DECEMBER, 2011

Source: Zimmerman/Volk Associates, Inc.

Development (Date Opened) *Address*	*Unit Type*	*Base Price Range*	*Unit Size Range*	*Base Price Per Sq. Ft.*	*Total Units*	*Sold Units*
Ohio Lofts	**CO**		Current Listings		**21**	**n/a**
139 East Main Street	2br/1ba	$159,900	1,163	$137		
	1br/1ba	$169,900	1,238	$137		
Buggyworks	**CO**				**34**	
400 W. Nationwide Blvd.	Open lofts	$160,000 to $600,000	852 to 2,207	$188 to $272		**Phase Two**
Kyle Katz, Developer						
Terraces on Grant	**CO**		Current Listings		**44**	**27**
195 S. Grant Avenue	2br/2ba	$165,900 to $231,900	1,154 to 1,304	$144 to $178		
One Ninety Nine	**CO**		Current Listings		**28**	**10**
199 S. Fifth	1br/1.5ba	$199,900 to $324,900	1,275 to 1,383	$157 to $235		
	1br/1ba	$214,900	807	$266		
	2br/2ba	$229,900 to $439,900	1,241 to 1,898	$185 to $232		
	2br/2.5ba	$267,900 to $319,900	1,331 to 1,453	$201 to $220		
Burnham Square Condos.	**CO**		Original Prices		**98**	**n/a**
250 Daniel Burnham Square	1br/1ba	$229,000 to $850,000	970 to 2,370	$236 to $359		
			Resales			
	1br/1ba	$269,000	1,021	$263		
	2br/2ba	$379,900	1,445	$263		

TABLE 4 *(continued)*

Summary Of Selected For-Sale Multi-Family And Single-Family Attached Developments

GREATER DOWNTOWN COLUMBUS, FRANKLIN COUNTY, OHIO—DECEMBER, 2011

Source: Zimmerman/Volk Associates, Inc.

Development (Date Opened) *Address*	*Unit Type*	*Base Price Range*	*Unit Size Range*	*Base Price Per Sq. Ft.*	*Total Units*	*Sold Units*
8 on The Square	**CO**		Original Prices		**23**	**19**
8 East Broad Street	1br/1ba to	$239,400	to 946	$253 to		
Casto Development	2br/2.5ba	$1,060,000	2,800	$379		
			Current Listings			
	2br/2.5ba	$779,000	2,800	$278		
		$799,000	2,800	$285		
		$819,000	2,800	$293		
		$850,000	2,800	$304		
Miranova (1999)	**CO**		Currrent Listings		**113**	**107**
One Miranova Place	1br/1.5ba	$275,000	1,471	$187		
	1br/1.5ba	$499,900	1,453	$344		
	2br/2.5ba	$579,000	2,021	$286		
	2br/2.5ba	$675,000	2,573	$262		
	Penthouse	$850,000	3,045	$279		
	Penthouse	$1,275,000	4,031	$316		
Jackson on High	**CO**		Current Prices		**44**	**24**
1127 N. High Street	2br/2ba flat	$279,900 to	1,253 to	$223 to		
JBH Holdings		$499,900	1,964	$255		
	2br/3ba TH	$319,900 to	1,741 to	$184 to		
		$1,699,800	5,141	$331		
Neighborhood Launch	**CO**		Current Listings		**300**	**62**
Between 4th & 6th Streets,	Bishop's Walk	$289,900	1,134	$256		
and Gay and Long Streets	**TH**					
Edwards Companies	Contemporary	$385,500	1,534	$251		
	Bishop's Walk	$399,900 to	1,594	$251 to		
		$517,900	1,991	$260		

TABLE 4 *(continued)*

Summary Of Selected For-Sale Multi-Family And Single-Family Attached Developments

GREATER DOWNTOWN COLUMBUS, FRANKLIN COUNTY, OHIO—DECEMBER, 2011

Source: Zimmerman/Volk Associates, Inc.

Development (Date Opened) *Address*	*Unit Type*	*Base Price Range*	*Unit Size Range*	*Base Price Per Sq. Ft.*	*Total Units*	*Sold Units*
North Bank Park	**Lofts**				**# 21**	**4**
300 W. Spring Street	A&P Warehouse	$376,000 to	1,536 to	$245 to		
Nationwide Realty		$655,000	2,554	$256		
	CO				**88**	**67**
	The Tower	$425,000 to	1,905	$223 to		
		$873,000	2,414	$362		

TABLE 5

Target Groups For New Multi-Family For-Rent

EAST FRANKLINTON STUDY AREA

CITY OF COLUMBUS, FRANKLIN COUNTY, OHIO

Sources: Nielsen Claritas, Inc.; Zimmerman/Volk Associates, Inc.

Empty Nesters & Retirees	*Number of Households*	*Percent*
Urban Establishment	10	1.0%
Suburban Establishment	5	0.5%
Affluent Empty Nesters	5	0.5%
New Empty Nesters	5	0.5%
Cosmopolitan Couples	5	0.5%
Mainstream Retirees	5	0.5%
Middle-Class Move-Downs	15	1.5%
No-Nest Suburbanites	25	2.5%
Middle-American Retirees	5	0.5%
Multi-Ethnic Retirees	5	0.5%
Subtotal:	85	8.5%
Traditional & Non-Traditional Families		
Nouveau Money	5	0.5%
Unibox Transferees	5	0.5%
Full-Nest Suburbanites	10	1.0%
Full-Nest Urbanites	15	1.5%
Multi-Ethnic Families	20	2.0%
Blue-Collar Button-Downs	30	3.0%
Multi-Cultural Families	25	2.5%
Subtotal:	110	10.9%
Younger Singles & Couples		
The Entrepreneurs	5	0.5%
e-Types	20	2.0%
Fast-Track Professionals	20	2.0%
The VIPs	20	2.0%
Upscale Suburban Couples	30	3.0%
New Bohemians	60	6.0%
Twentysomethings	75	7.5%
Suburban Achievers	215	21.4%
Small-City Singles	95	9.5%
Urban Achievers	270	26.9%
Subtotal:	810	80.6%

TABLE 6

Target Groups For New Multi-Family For-Sale

EAST FRANKLINTON STUDY AREA

CITY OF COLUMBUS, FRANKLIN COUNTY, OHIO

Sources: Nielsen Claritas, Inc.; Zimmerman/Volk Associates, Inc.

Empty Nesters & Retirees	*Number of Households*	*Percent*
Urban Establishment	5	1.9%
New E,mpty Nesters	5	1.9%
Mainstream Retirees	5	1.9%
Middle-Class Move-Downs	5	1.9%
No-Net Suburbanites	15	5.7%
Middle-American Retirees	5	1.9%
Subtotal:	40	15.1%
Younger Singles & Couples		
The Entrepreneurs	5	1.9%
e-Types	10	3.8%
Fast-Track Professionals	10	3.8%
TheVIPs	10	3.8%
Upscale Suburban Couples	15	5.7%
New Bohemians	10	3.8%
Twentysomethings	25	9.4%
Suburban Achievers	70	26.4%
Small-City Singles	25	9.4%
Urban Achievers	45	17.0%
Subtotal:	225	84.9%
Total Households:	**265**	100.0%

TABLE 7

Target Groups For New Single-Family Attached For-Sale

EAST FRANKLINTON STUDY AREA

CITY OF COLUMBUS, FRANKLIN COUNTY, OHIO

Sources: Nielsen Claritas, Inc.; Zimmerman/Volk Associates, Inc.

Empty Nesters & Retirees	*Number of Households*	*Percent*
Old Money	5	1.4%
Urban Establishment	10	2.9%
Suburban Establishment	5	1.4%
Affluent Empty Nesters	5	1.4%
New Empty Nesters	5	1.4%
Cosmopolitan Couples	5	1.4%
Mainstream Retirees	5	1.4%
Middle-Class Move-Downs	10	2.9%
No-Net Suburbanites	20	5.7%
Middle-American Retirees	5	1.4%
Subtotal:	75	21.4%
Traditional & Non-Traditional Families		
Nouveau Money	5	1.4%
Unibox Transferees	5	1.4%
Full-Nest Suburbanites	10	2.9%
Full-Nest Urbanites	10	2.9%
Multi-Ethnic Families	10	2.9%
Blue-Collar Button-Downs	15	4.3%
Multi-Cultural Families	10	2.9%
Subtotal:	65	18.6%
Younger Singles & Couples		
The Entrepreneurs	5	1.4%
e-Types	5	1.4%
Fast-Track Professionals	10	2.9%
TheVIPs	15	4.3%
Upscale Suburban Couples	20	5.7%
New Bohemians	10	2.9%
Twentysomethings	30	8.6%
Suburban Achievers	65	18.6%
Small-City Singles	30	8.6%
Urban Achievers	20	5.7%
Subtotal:	210	60.0%

TABLE 8

Target Groups For New Urban Single-Family Detached For-Sale

EAST FRANKLINTON STUDY AREA

CITY OF COLUMBUS, FRANKLIN COUNTY, OHIO

Sources: Nielsen Claritas, Inc.; Zimmerman/Volk Associates, Inc.

Empty Nesters & Retirees	*Number of Households*	*Percent*
Old Money	15	8.3%
Urban Establishment	15	8.3%
Small-Town Establishment	5	2.8%
Cosmopolitan Elite	5	2.8%
Suburban Establishment	5	2.8%
Affluent Empty Nesters	5	2.8%
New Empty Nesters	10	5.6%
Mainstream Retirees	5	2.8%
Middle-Class Move-Downs	5	2.8%
No-Net Suburbanites	5	2.8%
Middle-American Retirees	5	2.8%
Subtotal:	80	44.4%
Traditional & Non-Traditional Families		
The Social Register	5	2.8%
Nouveau Money	10	5.6%
Unibox Transferees	15	8.3%
Late-Nest Suburbanites	5	2.8%
Full-Nest Suburbanites	15	8.3%
Full-Nest Urbanites	5	2.8%
Multi-Ethnic Families	5	2.8%
Blue-Collar Button-Downs	5	2.8%
Subtotal:	65	36.1%
Younger Singles & Couples		
The Entrepreneurs	15	8.3%
Fast-Track Professionals	5	2.8%
TheVIPs	5	2.8%
Upscale Suburban Couples	10	5.6%
Subtotal:	35	19.4%
Total Households:	**180**	100.0%

TABLE 9

Optimum Market Position

EAST FRANKLINTON STUDY AREA

CITY OF COLUMBUS, FRANKLIN COUNTY, OHIO

Sources: Zimmerman/Volk Associates, Inc.

Percent of Units	*Housing Type*	*Rent/Price Range**	*Unit Size Range*	*Rent/Price Per Sq. Ft.**	*Market Capture*
55.8%	**Multi-Family For-Rent**				**124**
	Hard Lofts	$750 to	550 to	$1.22 to	to
	Open Floorplans/1ba	$1,400	1,150	$1.36	**148**
					units
	Soft Lofts	$850 to	600 to	$1.28 to	
	Studios to Two-Bedrooms	$1,600	1,250	$1.42	
	Luxury Apartments	$1,050 to	700 to	$1.37 to	
	{New Construction}	$1,850	1,350	$1.50	
	One- and Two-Bedrooms				
14.8%	**Multi-Family For-Sale**				**20**
	Hard Lofts	$125,000 to	700 to	$140 to	to
	Open Floorplans/1ba	$175,000	1,250	$179	**28**
					units
	Soft Lofts	$145,000 to	750 to	$167 to	
	One- and Two-Bedrooms	$225,000	1,350	$193	
	Luxury Condominiums	$195,000 to	900 to	$207 to	
	{New Construction}	$300,000	1,450	$217	
	One to Three-Bedrooms				
19.4%	**Single-Family Attached For-Sale**				**28**
	Townhouses	$185,000 to	1,000 to	$185 to	to
	Two- and Three-Bedrooms	$365,000	1,750	$209	**36**
					units
	Live-Work	$235,000 to	1,200 to	$196 to	
	One- and Two-Bedrooms	$375,000	1,800	$208	
	2- and 3-story		500 sf work space		
10.0%	**Single-Family Detached For-Sale**				**14**
	Urban Houses	$245,000 to	1,200 to	$198 to	to
	Two- and Three-Bedrooms	$395,000	2,000	$204	**18**
					units
100.0%					**186**
					to
					230
					units

NOTE: Base rents/prices in year 2012 dollars and exclude floor or view premiums, options or upgrades.

Assumptions and Limitations—

Every effort has been made to insure the accuracy of the data contained within this analysis. Demographic and economic estimates and projections have been obtained from government agencies at the national, state, and county levels. Market information has been obtained from sources presumed to be reliable, including developers, owners, and/or sales agents. However, this information cannot be warranted by Zimmerman/Volk Associates, Inc. While the methodology employed in this analysis allows for a margin of error in base data, it is assumed that the market data and government estimates and projections are substantially accurate.

Absorption scenarios are based upon the assumption that a normal economic environment will prevail in a relatively steady state during development of the subject property. Absorption paces are likely to be slower during recessionary periods and faster during periods of recovery and high growth. Absorption scenarios are also predicated on the assumption that the product recommendations will be implemented generally as outlined in this report and that the developer will apply high-caliber design, construction, marketing, and management techniques to the development of the property.

Recommendations are subject to compliance with all applicable regulations. Relevant accounting, tax, and legal matters should be substantiated by appropriate counsel.

Rights and Study Ownership—

Zimmerman/Volk Associates, Inc. retains all rights, title and interest in the methodology and target market descriptions contained within this study. The specific findings of the analysis are the property of the client and can be distributed at the client's discretion.

APPENDIX **E**

TRANSPORTATION AND UTILITIES

Transportation & Utilities

Transportation Infrastructure

East Franklinton continues to undergo significant land use and transportation changes. The closing of the Riverside Bradley complex, construction of the new bridges to downtown at Town and Main, and the emergence of the Arena District have all contributed to changes in transportation patterns. Even the most recent data don't reliably capture "typical" conditions. Proposed changes in downtown circulation and plans to make Town and Rich two-way streets will further alter travel patterns throughout the plan area.

Mobility in East Franklinton reflects land use, demographics, and travel patterns. As development occurs and travel patterns change, the area's mobility needs will change as well. For a neighborhood circumscribed by water and SR 315, understanding existing and potential mobility conditions will play a central role in developing sound recommendations to reinforce the neighborhood's vision for revitalization. The limits and opportunities of existing transportation patterns set the stage for subsequent analysis and recommendations.

ROADWAY NETWORK

The existing transportation network within East Franklinton largely reflects the needs of east-west automobile travel. SR 315 defines the western edge of the neighborhood, with Broad Street (State Road 40), Town Street (State Road 62), and Rich Street (State Road 62) as major arterials traveling east-west across through the area. The Rich Street and Broad Street bridges connect East Franklinton to downtown. The Town Street Bridge, recently opened, has added another link to downtown.

The continuing buildout of the interstate system around downtown Columbus has reduced vehicular traffic crossing East Franklinton to and from Downtown. SR 315 remains an important regional connection, and Broad Street in particular continues to provide a direct connection to downtown, but even these represent a primarily peak hour phenomenon.

Major Roads

- WEST BROAD STREET
  West Broad Street—also known as National Road, Route 40, and Victory Highway—serves as a major, east-west thoroughfare that connects to downtown Columbus to the east and Interstate 70 to the west. The roadway has two to three travel lanes in each direction and experiences an average daily traffic volume of 16,615 cars (MORPC, 2011). The only signalized intersection is at Skidmore Street, and some blocks use the far right-hand lane for on-street parallel parking. Although sidewalks line both sides of the street and have pedestrian-scale lighting and street trees, multiple curb cuts degrade walking conditions throughout the corridor.

The *Downtown Columbus Circulation Study* (2005) and *East Franklinton Community Mobility Plan* (2010) investigated multiple options for narrowing Broad Street. To advance these efforts, the City of Columbus has issued a scope of service for pedestrian-safety improvements and a parking study along Broad from Central Avenue to Washington Boulevard. In conjunction, the Ohio Department of Transportation plans a complete traffic study of Broad Street. Current projections show traffic volume reaching 33,300 daily trips (both directions combined) in 2030.[1]

- WEST TOWN STREET
  West Town Street—or Route 3 and US Route 62—extends to Washington Boulevard at the Scioto River and west underneath SR 315 to Interstate 70. From Washington, West Town continues into downtown on the recently opened Town Street Bridge. In East Franklinton, Town measures about 50 feet wide, with three one-way westbound lanes and parallel parking on both sides. West Town sees average daily traffic of 3,081 (City of Columbus 2012). It has a signalized intersection at the ramp to SR 315. Projections for 2030 traffic volumes show 17,100 trips over the bridge and 16,400 headed toward SR 315.

[1] *In the coming months, the responsible agencies will generate new projections that more closely reflect traffic volumes today.*

- WEST RICH STREET
  West Rich Street—or Route 3 and US Route 62—is a one-way two-lane thoroughfare and the eastbound companion to West Town. To the east, West Rich connects over a bridge to West Main Street in the River South District; to the west, it crosses under SR 315 and continues almost to Interstate 70. West Rich has both entry and exit ramps to SR 315. In East Franklinton, the roadway experiences an average daily traffic volume of 4,373 cars (City of Columbus, 2012), but traffic volume projections anticipate 11,800 daily trips by 2030. Some blocks have on-street parallel parking, and there are several signalized intersections: the entrance to SR 315, South Gift Street, and McDowell Street.

Neighborhood Streets

- WEST STATE STREET
  West State Street is an east-west road that runs between Belle Street on the east and SR 315 on the west. The street features one lane in each direction, a right-hand turn lane to access McDowell Street, and has parallel parking on some blocks, with angled parking on the south side from McDowell to Belle Street. West State experiences an average daily traffic volume of 908 (MORPC, 1998).

- SOUTH GIFT STREET
  Primarily one-way northbound, Gift Street runs between railroad tracks on the north and Sullivant Avenue on the south. It has one northbound lane plus a parallel-parking lane on the western side, except for the two-way segment between West State and West Town, with parallel parking on both sides. South Gift intersects several east-west streets, with stop signs and a

traffic signal at West Rich. The roadway experiences an average daily two-way traffic volume of 5,119 cars (City of Columbus, 2012).

- MCDOWELL STREET
  A primary north-south thoroughfare in East Franklinton, McDowell connects West Broad to West Rich streets and Scioto Blvd. The roadway has one travel lane in each direction, plus intermittent parallel parking on the eastern side, and it experiences an average two-way daily traffic volume of 181 cars (City of Columbus, 2012). Signalized intersections occur at West Rich and West Town.

Roadway Capacity

East Franklinton's few trip generators, multiple vacant parcels, and low rate of building occupancy translate into low usage for its streets. Figure F1 shows current daily traffic volumes from 2012 on the district's major streets.

FIGURE E1 **Current Traffic Volumes**

The *Downtown Columbus Circulation Study Final Report* projected traffic volumes for 2030 and found no intersections within East Franklinton at or near capacity in the morning peak period, leading to the conclusion that existing lane and intersection configuration on Town and Rich streets can accommodate projected traffic volumes for the next 20 years.

Given these projected volumes and the opening of the Town Street Bridge to downtown, the city issued an engineering contract for converting both Town and Rich to two-way traffic operation by October 2013. Two-way streets generally carry traffic at lower speeds, but traffic volumes suggest that these streets have sufficient capacity to accommodate this change.

Parking

On-street parking can serve important functions, including buffering pedestrians from traffic and providing short-term parking to support businesses and other commercial activities. Even though most businesses and residential buildings in the plan area have dedicated off-street surface parking, most streets incorporate free on-street parking, either parallel or angled, head-in. Most of these spaces see only light use, largely due to the district's abundant vacant and underused parcels. Some pockets of activity draw more heavy use, particularly near COSI, where the city manages on-street parking with meters on Town, Belle, and Starling streets and Washington Boulevard.

Broad Street, East Franklinton's retail corridor, has no on-street parking except for some one-hour spaces only available during limited periods during the day. Alleys provide rear access to parking and loading areas, precluding a need for curb cuts along Broad Street.

TRANSIT

The Central Ohio Transit Authority (COTA) provides public transit in the study area with fixed-route bus and paratransit service. Forty-nine of its 64 bus routes operate through downtown, with roughly 65 percent (41,600) of its daily bus riders boarding or alighting at downtown stops. In East Franklinton, COTA operates buses along Broad, Town, and Rich streets that connect to and from downtown. Six local and three express lines serve the neighborhood, with local service running seven days a week.

Broad Street Corridor

Express routes #53, #56, and #68 travel Broad Street between suburban park-and-ride facilities and downtown during morning and afternoon peak periods. Local lines #10 and #12 operate along West Broad to and from downtown throughout the day with headways of 20 minutes or less. After 10 p.m., headways increase, and bus frequency in East Franklinton drops to hourly. Broad Street (east-west) and High Street (north-south) through downtown carry the most transit service.

COTA Service : West Broad Street

	ROUTE	TOTAL DAILY BOARDINGS/ E. FRANKLINTON BOARDINGS	TOTAL DAILY ALIGHTINGS/ E. FRANKLINTON ALIGHTINGS	DAYS OF SERVICE	PEAK HEADWAYS
EXPRESS	53: Lincoln Village	59 / n/a	57 / n/a	5 (M-F)	30 mins
	56: Tuttle	43 / 0	42 / 0	5 (M-F)	25 mins
	68: Hillard/Westbelt	n/a	n/a	5 (M-F)	n/a
LOCAL	10: East/West Broad	8,016 / 179	7,420 /168	7	7–10 mins
	12: McKinley/Fields	596 /39	618 /30	7	20 mins

Town and Rich Streets Corridors

COTA operates four local lines on the Town and Rich streets corridor with headways of 15 to 40 minutes throughout the day. The four routes serve distinct destinations:

- Route 3 connects downtown and the Wal-mart Supercenter on Georgesville Road.
- Route 6 connects downtown and Westland Mall.
- Route 14 links the Statehouse with COSI and the southern portion of East Franklinton.
- Route 15 operates between Grove City and downtown.
- Route 14 operates along Town and Rich streets between East Franklinton and downtown but only during peak commuting periods.

Upon completion of the Rich Street bridge in the summer of 2012, Routes 3, 6, 14, and 15 will enter East Franklinton along Rich Street.

COTA Service: Town and Rich Streets Corridor

	ROUTE	TOTAL DAILY BOARDINGS/ E. FRANKLINTON BOARDINGS	TOTAL DAILY ALIGHTINGS/ E. FRANKLINTON ALIGHTINGS	DAYS OF SERVICE	PEAK HEADWAYS
LOCAL SERVICE	3: W Mound/Northwest Blvd.	1,747/30	1,675/29	7	20 mins
	6: Mt Vernon/Sullivant	2,989/43	2,952/44	7	15 mins
	14: Harmon/Greenlawn	9/1	10/0	5 (M-F)	35 mins
	15: Grove City	719/18	679/17	7	20 mins

Franklinton Service

Transit serving East Franklinton generally provides access to areas west and northwest of the area and downtown. Community members have expressed some interest in seeing route #18 connect the neighborhood directly (and without the downtown transfer now required) to destinations including the Arena District, the OSU campus, Riverside Hospital and the Mall at Tuttle Crossing with a single bus line.

Amenities

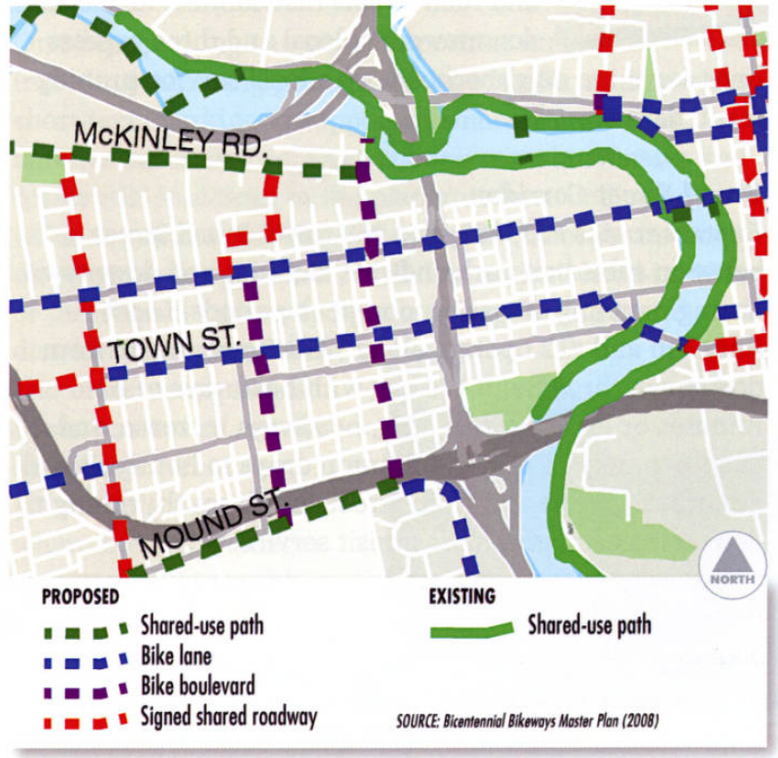
COTA transit service offers basic amenities to passengers such as clear signage at bus stops (which the authority owns), bus shelters, and trash cans.

BICYCLING

Columbus has built 50 miles of shared-use paths along the Olentangy and Scioto rivers, Alum Creek, and I-670, and six miles of on-street bicycle lanes. Given its topography, rivers, large college-age population, and growing economy, Columbus is well poised to become a great city for bicycling. East Franklinton currently has few bicycle facilities outside of a shared-use path along the Scioto. Although new bridges have enhanced bicycle travel between East Franklinton and downtown and a pedestrian bridge has been proposed, the Broad Street Bridge could still benefit from improvements.

Multiple recent planning efforts—including the *Downtown Columbus Circulation Study* (2006), the

FIGURE E2 **Existing and Proposed Bicycle Network**



Columbus Bicentennial Bikeways Plan (2008), and the *Franklinton Community Mobility Plan* (2008)—focus on improving conditions for bicycling citywide and in East Franklinton, but none has yet produced any significant change in conditions. Although cyclists are encouraged to ride on streets, uneven pavement, potholes, and a general unfriendliness toward cyclists all represent obstacles to safe cycling.

Downtown Columbus Circulation Study

The *Downtown Columbus Circulation Study* identifies strategies to bridge the Scioto River to downtown and the I-70/I-71 freeway to Franklinton. It also recommends expanding downtown bicycle-parking facilities. In East Franklinton, the plan lists bike lanes on Broad, Rich, and Town streets as "important portals" to downtown and recommends creation of bike lanes on Grant Avenue.

Columbus Bicentennial Bikeways Plan

The *Bicentennial Bikeways Plan* recognizes the poor east-west connections between downtown and East Franklinton. It recommends on-street bicycle-facility improvements on Broad and Town and wayfinding to direct bicyclists to the shared-use path network along the Scioto. In addition to the new Town Street bridge, the plan recommends building a "signature bicycle and pedestrian bridge at the confluence of the Scioto and Olentangy Rivers" to link East Franklinton and the Arena District.

Franklinton Community Mobility Plan

The Franklinton Community Mobility Plan makes several recommendations to support bicycling, including improving access to properties (e.g., installation of sidewalk bike racks outside of the walking zone) and bicycle school buses (groups of children who bike together to school under adult supervision). The report also proposes traffic-calming and road-diet measures that further enhance cyclist safety and free up roadway capacity for bike lanes. The *Mobility Plan* identifies West Broad street as a top citywide candidate for bikeway facilities and recommends a design that includes lanes on both sides of the street.

WALKING

Streets with wide travel lanes and excess capacity tend to carry traffic at higher speeds and often discourage pedestrian use. The design of Broad, Town, and Rich streets, major east-west connectors within Columbus, have put auto mobility ahead of all other considerations. Recent planning efforts have centered on improving pedestrian conditions on these streets.

Pedestrian Priorities

The *Franklinton Community Mobility Plan* identified West Broad as a pedestrian priority street, in part because of its safety record. Between 2000 and 2006 it experienced

FIGURE E3 **Street Quality**

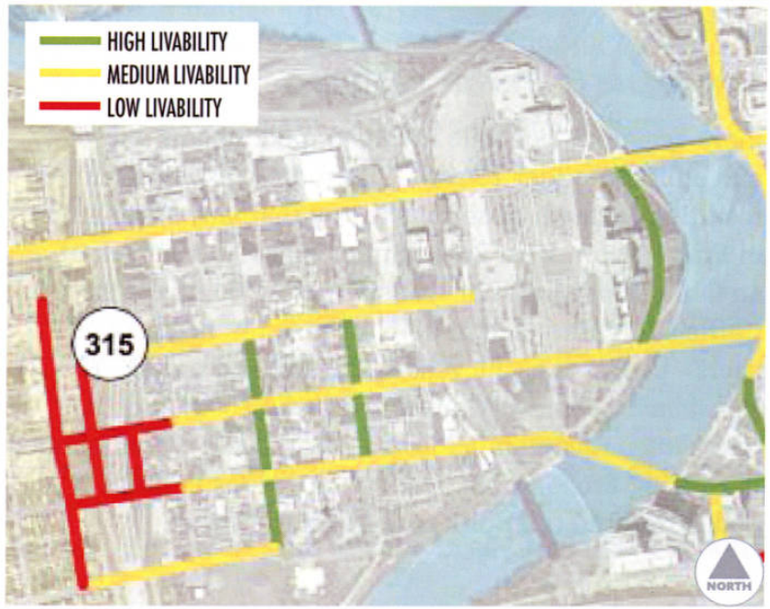
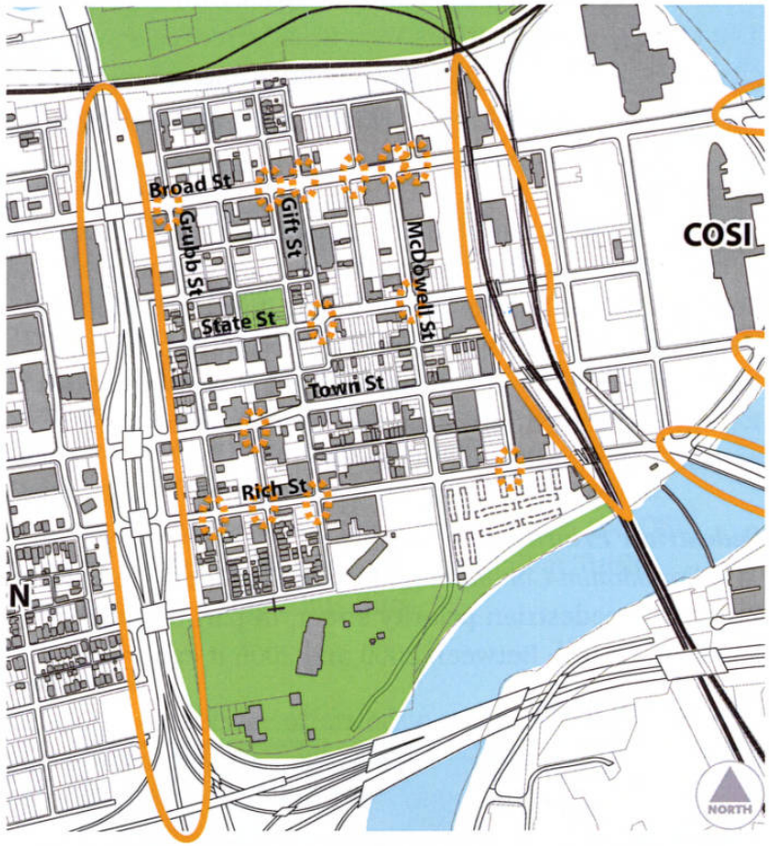


FIGURE E4 **Barriers to Pedestrian Access**



more accidents per mile involving pedestrians, bicycles, and children under 15 as well as more crashes per mile resulting in death or serious injury than any other street in Franklinton. West Broad Street is also the subject of an Ohio Department of Transportation "complete street" traffic study intended to help balance the needs of all users—pedestrians, bicyclists, drivers, and transit. *The Downtown Columbus Circulation Study* (2006) and *East Franklinton Community Mobility Plan* (2010) recommended narrowing Broad Street, and the city plans to make pedestrian-safety improvements on the street.

The Downtown Columbus Circulation Study ranked the level of livability on East Franklinton streets. According to the plan, highly livable streets have:

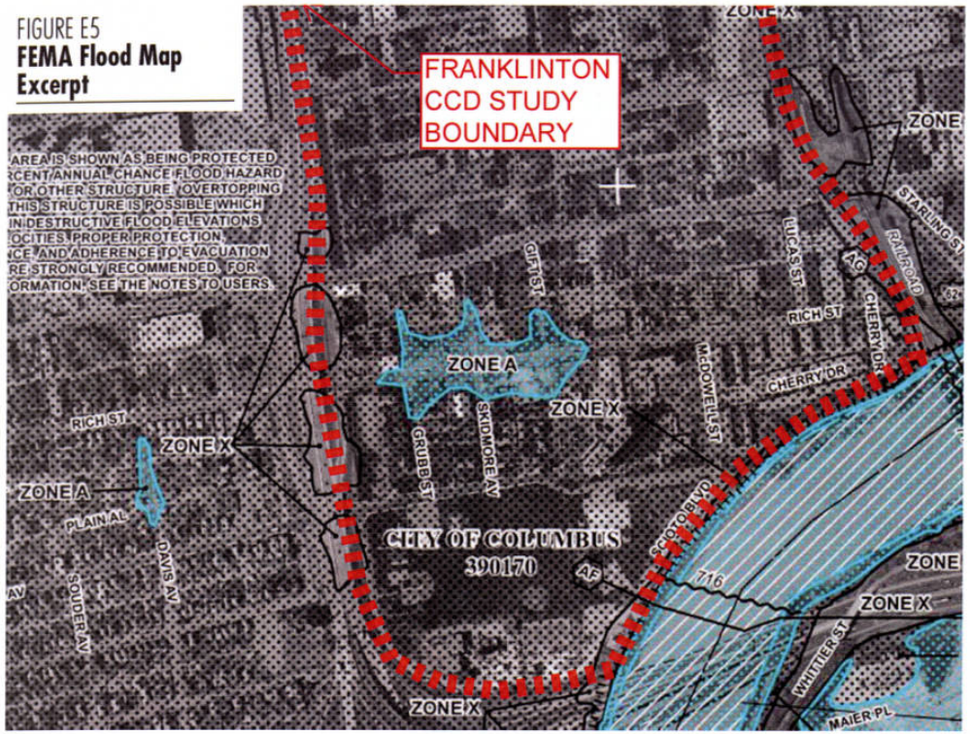
- slow vehicle speeds,
- attractive pedestrian facilities,
- street trees, and
- a buffer between pedestrians and vehicles

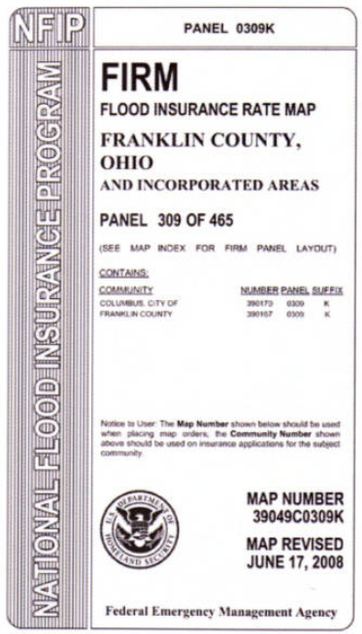
Only three streets in East Franklinton—McDowell and Gift streets and Washington Boulevard—ranked as highly livable. Broad, Town, Rich, and State streets and Sullivant Avenue all received a medium-livability ranking. Figure F3, taken from the study, shows how those East Franklinton streets examined in the study fared on the livability scale.

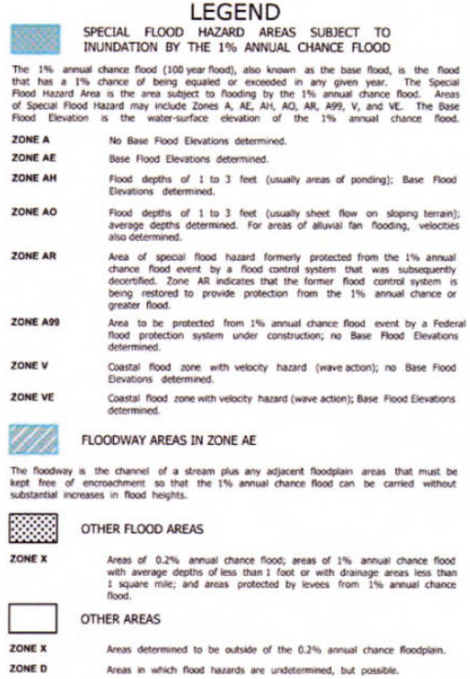
Except for Broad, Rich, and Town, most of East Franklinton's narrow streets carry relatively low traffic volumes at low speeds. Most have sidewalks on both sides, although some spots, where weeds grow through the sidewalk, require repair. Crosswalks and other crossing enhancements are largely absent.

In addition to the low quality of pedestrian infrastructure, the limited number of connections to adjacent neighborhoods poses a major barrier to walking. Connections across SR 315 to Franklinton are poor at West Broad Street and completely absent at West Town and West Rich. Proximity to downtown makes East Franklinton well suited for development, but walking between the two districts remains difficult, particularly along the Rich Street Bridge. Figure F4 shows barriers to pedestrian access as well as intersections that lack crosswalks or signals needed to provide a safe location for crossing the street on foot.

FIGURE E5
FEMA Flood Map Excerpt







Utility Infrastructure

GENERAL

An established network of sewer-collection and water-distribution systems serve the current land uses within the planning area. Most major and neighborhood streets have sewer mains, water mains or, in many cases, both running inside the street right-of-way, with service taps and connections to adjacent parcels and buildings. These systems range in age from brick sewers installed at the turn of the 20th century to more modern installations that address system maintenance, flow and capacity requirements, and the needs of development projects.

Low-lying Franklinton has historically been highly susceptible to flooding. However, with the completion and dedication of the Franklinton Floodwall in 2004, lands within the study boundary have been reassigned from Zone X (0.2% annual chance flood hazard) to Zone X (protected from the 1% annual chance flood hazard by levee, dike or other structure), as designated on FEMA flood insurance (FIRM) mapping panel 39049C0309K dated June 17, 2008. Exhibit A20 shows the FEMA map. This major achievement gives development efforts a certainty of protection from future flooding along the Scioto.

In conjunction with the floodwall's construction, the Army Corps of Engineers and City of Columbus developed a flood-control action plan that requires City personnel to activate gates, stop logs and other protective barriers across portions of low-lying streets and rail connections. The plan also requires the closing of certain sewer gates to prevent backflow of rising river water through the area's storm sewers. In addition to the action

plan, stormwater pump stations at Rennick Run and Dodge Park collect and pump water into the river from the majority of the interior drainage area. This keeps water from ponding behind the floodwall in the event that high river levels coincide with high-intensity rainfall.

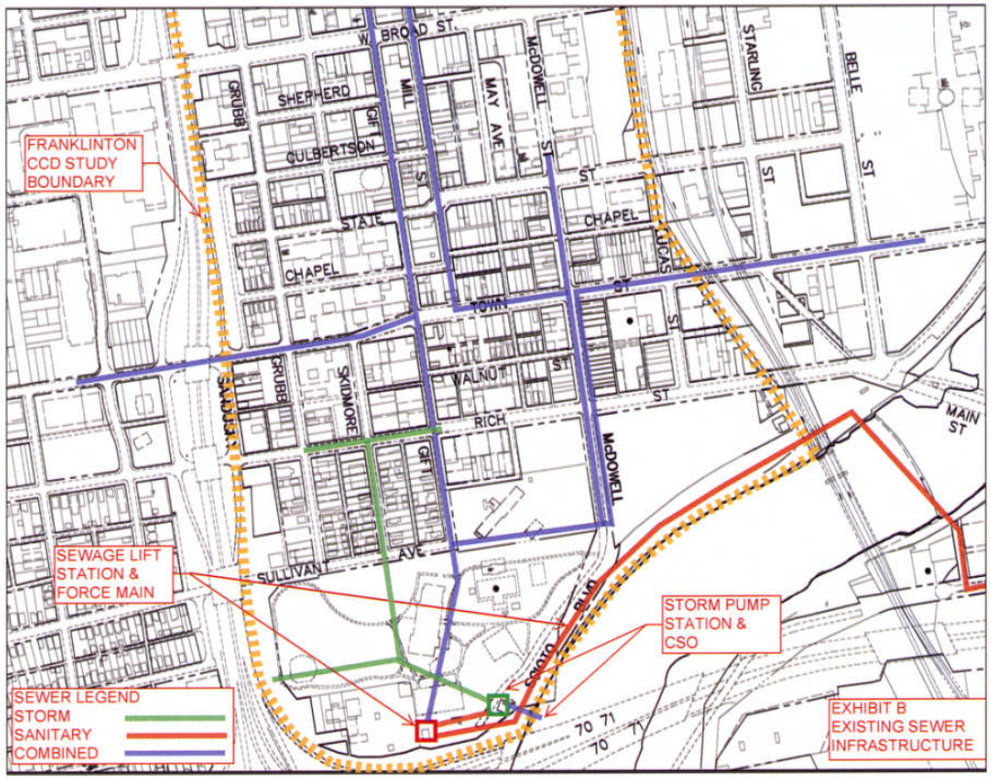
The Columbus Downtown Development Corporation (CDDC) has pursued further improvements to the Scioto River within the area. Currently the CDDC plans to remove the Main Street Dam and deepen the river channel. The intent is to restore the river to a more natural state with a narrower channel and increased flow rates. Narrowing the channel will expose new portions of the banks, creating additional space for recreation and bike trails. This work would reduce the river profile through downtown by up to eight feet, which should further reduce flooding along the river corridor.

STORM, SANITARY AND COMBINED SEWERS

Some of the oldest sewers in Columbus—with brick construction dating to the late 1800s—lie beneath East Franklinton. As was common well into the 20th century, a single pipe handled both sewage waste and stormwater runoff. While this represented an efficient way to transport waste water, heavy rainfalls could exceed the pipe flow capacity and cause a hydraulic surcharge. The surcharge would flow out of manholes, carrying a mix of raw sewage and stormwater runoff overland and into local waterways. Design advances introduced controlled surcharge points (combined sewer overflow or CSOs) that opened directly into the waterways, eliminating contact between raw sewage and human populations.

The combined sewer systems and overflow points represent challenges to contemporary high standards of water quality. Most major North American cities have begun eliminating antiquated combined systems and the overflows they produce, separating sanitary and storm flows into different pipe networks. On the leading edge of meeting this goal, Columbus has numerous projects under way to achieve it. Franklinton is an area that will benefit from the city's flow-separation work.

FIGURE E6 **East Franklinton Storm Sewer and Sanitary Sewer Facilities Along the Scioto River**



The entire East Franklinton watershed is drained by combined sewer mains. Many existing properties have separated storm and sanitary pipe systems on-site, but they discharge to combined-flow collector mains—as do all street drains. The destination of the combined flow is a system of regulators and sewage pump stations near Dodge Park. Sanitary flow is collected and pumped through a force main that crosses the river and enters the Olentangy Scioto Interceptor Sewer (OSIS) on the eastern bank.

A large, 72-inch storm pipe from a separate Dodge Park stormwater pump station system empties into the Scioto. This system handles the stormwater network in the plan area drainage boundary. To help protect the sewage pump station from potentially heavy combined flows originating upstream, an 18-inch overflow pipe to the stormwater pump station was put in place. This connection creates a potential CSO point where the 72-inch storm pipe empties into the Scioto (identified as Station ST-26 by the city and Ohio EPA). Overflow events are monitored to determine biological effects on the waterway, but no such event has been recorded since 2002 when the force-main and sewage-pump-station system opened (Exhibit B, Existing Sewer Infrastructure).

WATER SUPPLY

A complete grid network of water-supply piping lies within the major and neighborhood street rights-of-way in East Franklinton. Major distribution lines exist along Broad (16-inch main) and Town (12-inch main). A large 36-inch transmission main also exists along Grubb Street; it turns east at the plan area's southern boundary, crosses the river near McDowell, and enters downtown on the eastern bank. Secondary connections along cross streets primarily comprise existing 6-inch pipe systems. Since the existing primary land use is residential, this water network appears to provide adequate water flow and pressure to the neighborhood. As with the sewer system, however, many of the pipes are very old and most likely suffer from internal buildup of debris and calcification, reducing their intended flow characteristics.

The water supply system serves numerous public fire hydrants. Overall fire hydrant spacing and coverage within the planning area appears adequate for current land uses.

Utility Infrastructure Improvements

GENERAL

The existing sewer and water infrastructure within East Franklinton can likely provide sufficient service for new development concepts recommended in this plan. The proposed new land uses and densities do not appear significantly more demanding than the area's existing mixed uses. The City of Columbus Public Utilities Department has a record of preemptively addressing utility upgrades for areas undergoing redevelopment. The department has shown an understanding that dollars spent on redevelopment should work in concert with utility infrastructure to provide both efficient utility servicing and systems longevity.

STORM, SANITARY AND COMBINED SEWER

Sewer upgrades in East Franklinton will primarily involve separation of stormwater and sanitary flows within the local collection system. The City of Columbus has historically used capital improvement project (CIP) funds to address similar conditions. For example, combined

sewers around South Campus Gateway near the OSU campus were converted to sanitary-only pipes after being rehabilitated with cured-in-place pipe liners. An infrastructure-improvement agreement introduced new storm sewers for public right-of-way drainage and redeveloped parcels, which were built as part of the overall public street and utility upgrades for the project. The new storm-drainage system connected to an outlet point for separated storm flows previously built under a different CIP. Figures F7–F9, at the end of the appendix, show recommended improvements for the three phases of East Franklinton development.

WATER

Water infrastructure upgrades in East Franklinton will likely be more selective and require the involvement of the City Water Division engineering staff in determining which lines require attention. Since the lines consist mostly of 6-inch pipes more than 100 years old, the Water Division's records of problem lines or lines requiring repeated repair should serve as the indicator of which lines should have priority for upgrades. Alternate methods, like cleaning and relining existing piping, may offer cost savings over traditional trenching. Figures F10–F12, at the end of the appendix, show recommended improvements for the three phases of East Franklinton development.

ELECTRIC AND TELECOMMUNICATIONS

Most public streets in the planning area carry overhead pole lines, often on both sides of the street. These lines primarily serve electric and telecommunications systems. Electric lines vary from large, three-phase transmission lines and distribution lines to local service lines down to transformers and feeders to existing buildings. The area also contains underground electric systems, including a large, 138KV transmission line under Rich Street and duct-and-manhole systems beneath Broad Street. This report assumes that underground systems will remain in place and can be worked around as part of the master plan improvements.

Telecommunication lines include phone, data and cable television facilities. They also include main distribution feeds down to local service lines and feeders to existing buildings. As with the electricity supply, underground ducts and manholes are present, primarily in Broad Street.

Although this document does not evaluate the costs of burying utility lines, which can be considerable, burying does enhance streetscape design and is recommended along Broad Street. In other instances, the plan recommends consolidating pole lines and/or routing them along alleys behind buildings.

MISCELLANEOUS PRIVATE UTILITIES

Found throughout East Franklinton, underground gas piping occurs primarily within street rights-of-way and should not require adjustment or relocation except in rare exceptions. Gas-main capacity and its ability to serve the redevelopment will require further evaluation and will need to take into account the types of buildings added by new development.

SUMMARY

The East Franklinton Creative Community District Plan assumes phased development of the district. The required utility-infrastructure upgrades should be consolidated within a master plan that reflects development phasing and is developed with the help of the city's sewer and water divisions.

Large redevelopment projects in Columbus have typically involved entire city blocks, making it easier to determine the boundaries of the utility improvements required. East Franklinton will likely have multiple development sites, including those with frontage along one side of a street. The city will most likely require water-line upgrades, sewer separation, and drainage improvements for an entire right-of-way and not simply a portion of it. This plan attempts to identify work limits in a way that maximizes the efficiency and economy of recommended improvements, while generally respecting the plan boundaries.

The plan includes recommendations for utility-infrastructure upgrades for each phase of the master plan (3–5 years, 5–7 years, and 10–20 years). A defined boundary for each plan implementation area and the associated utility improvements appear on separate exhibits for sewer, water and overhead utility lines.

FIGURE E7 **Recommended Sewer Improvements for the 3- to 5-Year Development Phase**

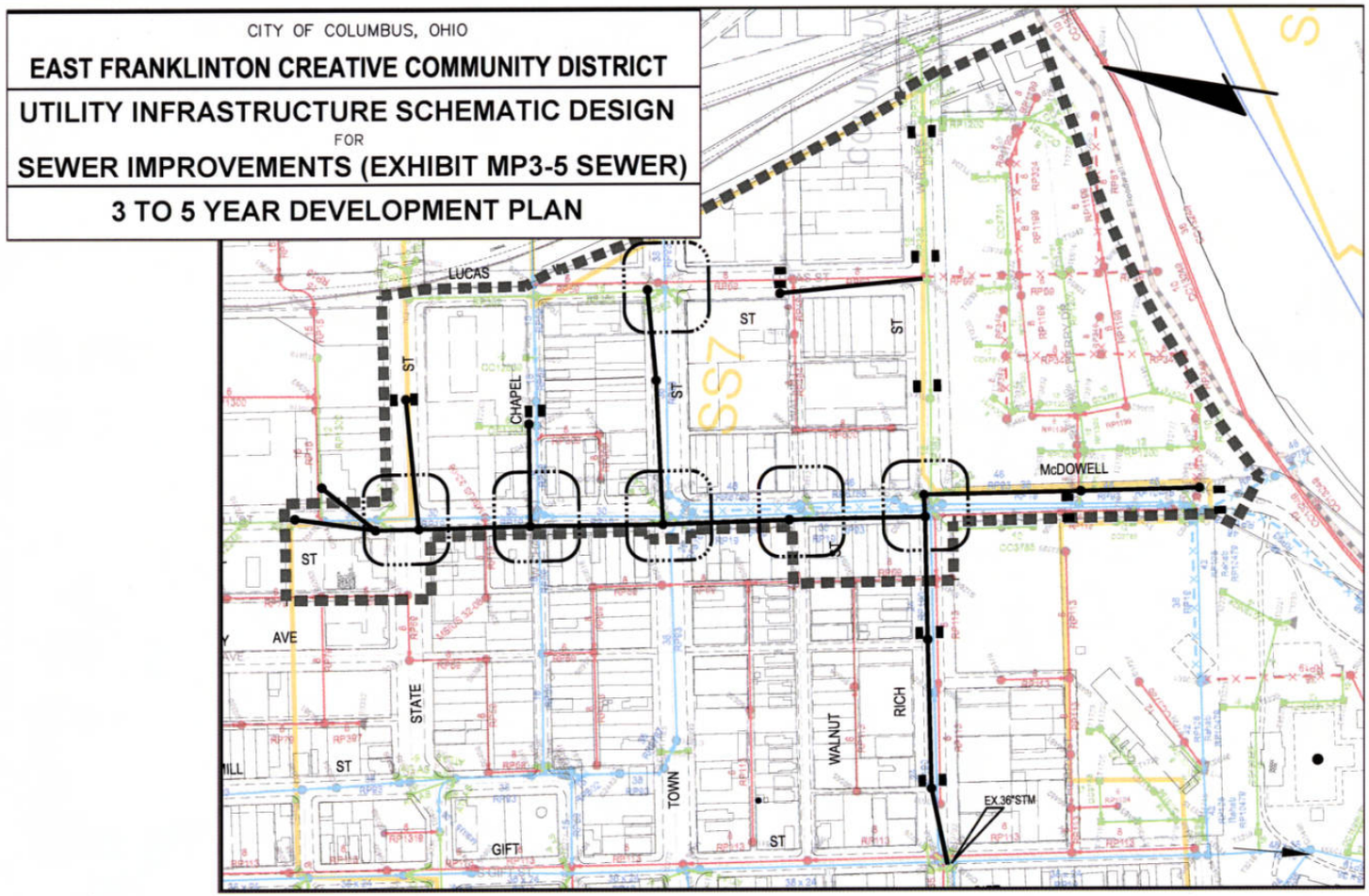


FIGURE E8 **Recommended Sewer Improvements for the 5- to 7-Year Development Phase**

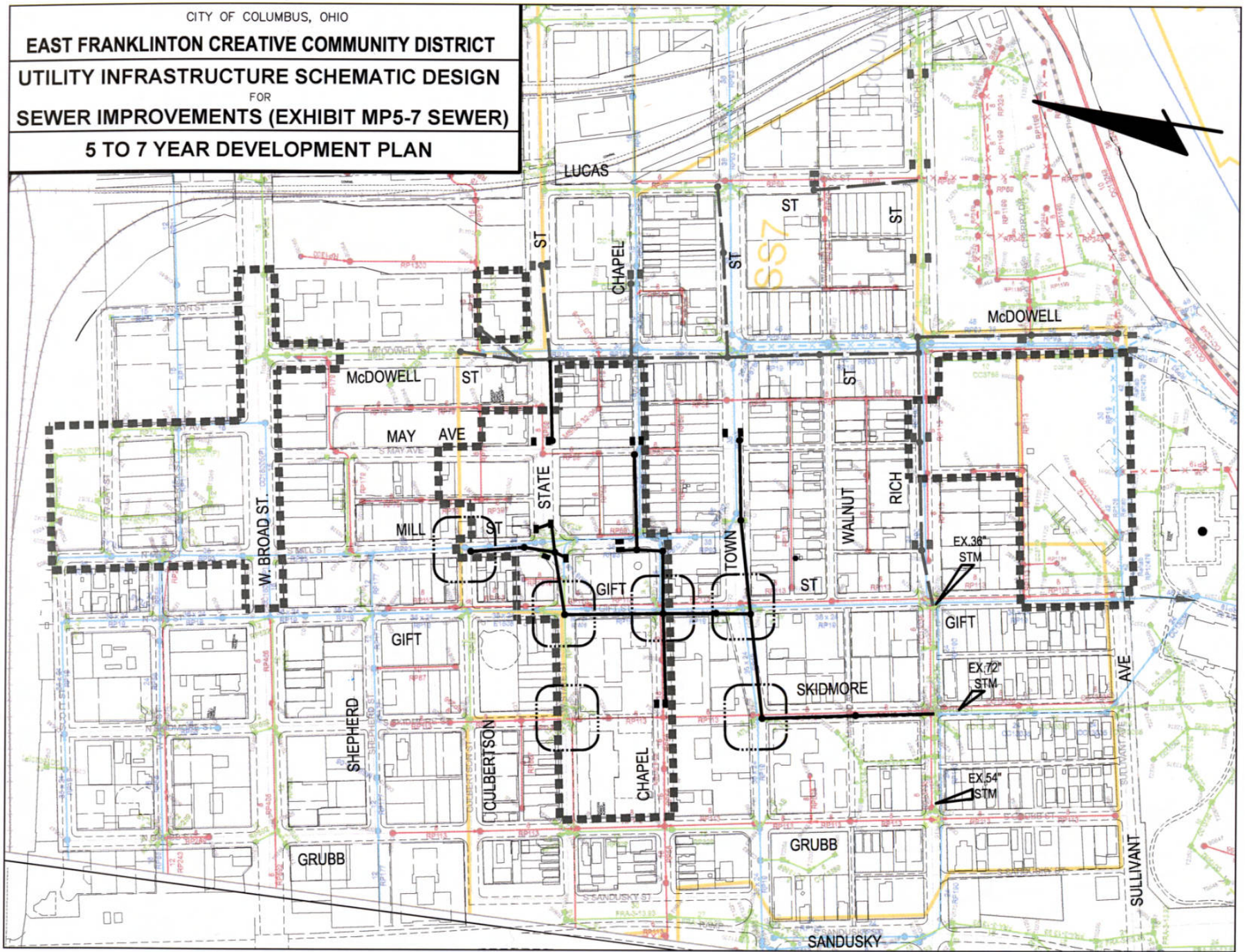


FIGURE E9 **Recommended Sewer Improvements for Development 10 Years and Beyond**

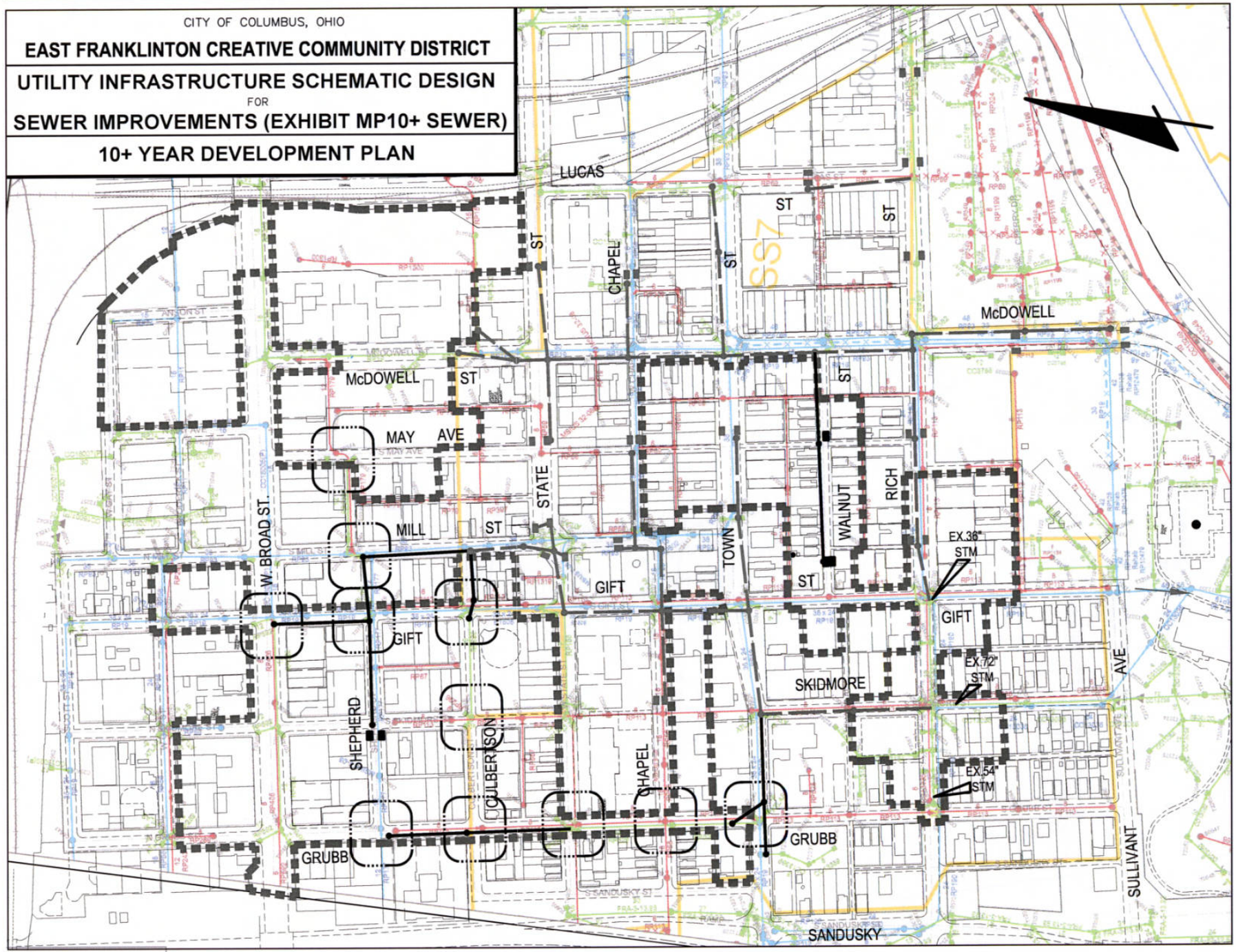


FIGURE E10 **Recommended Water Improvements for the 3- to 5-Year Development Phase**

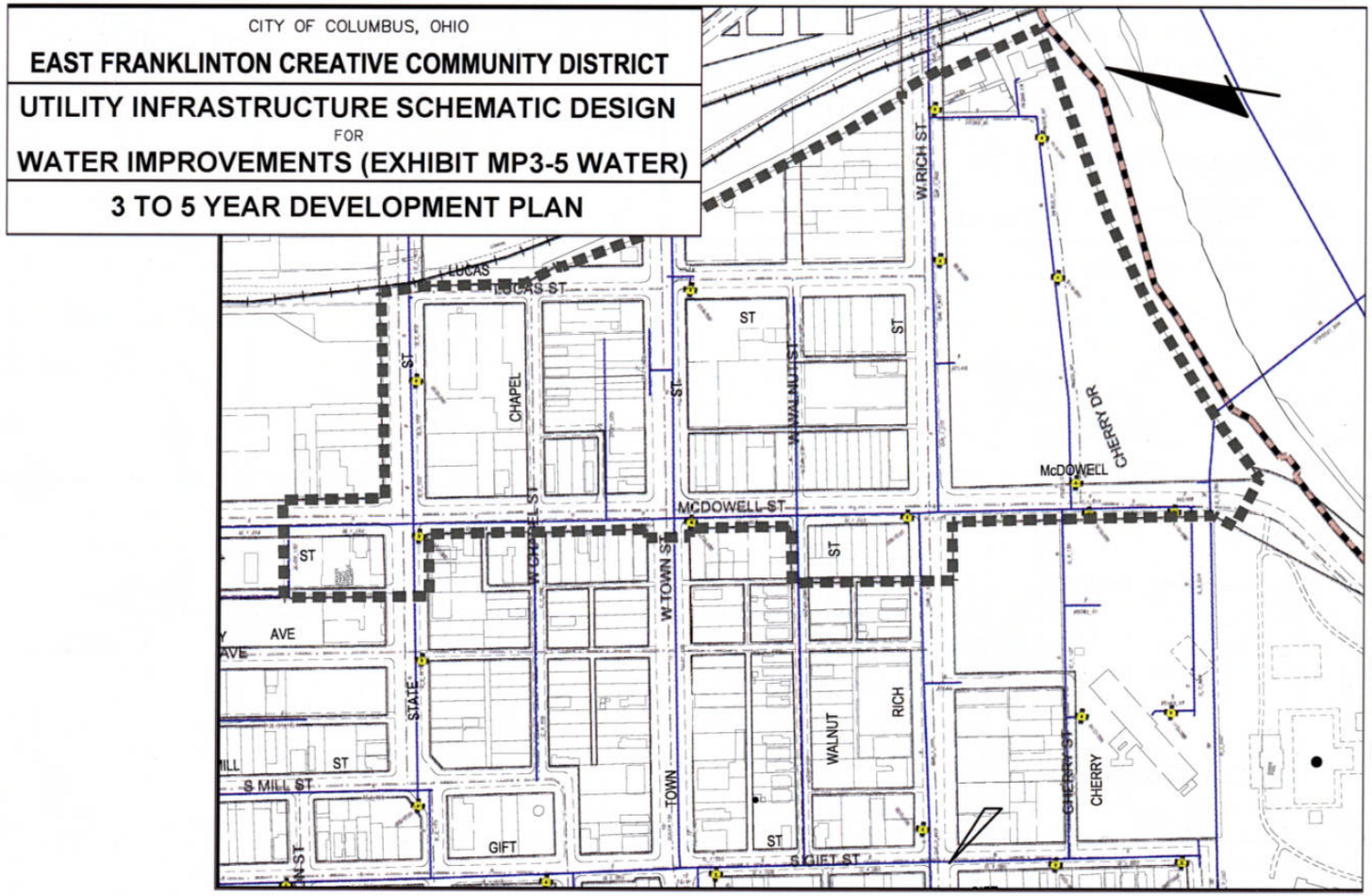


FIGURE E11 **Recommended Water System Improvements for the 5- to 7-Year Development Phase**

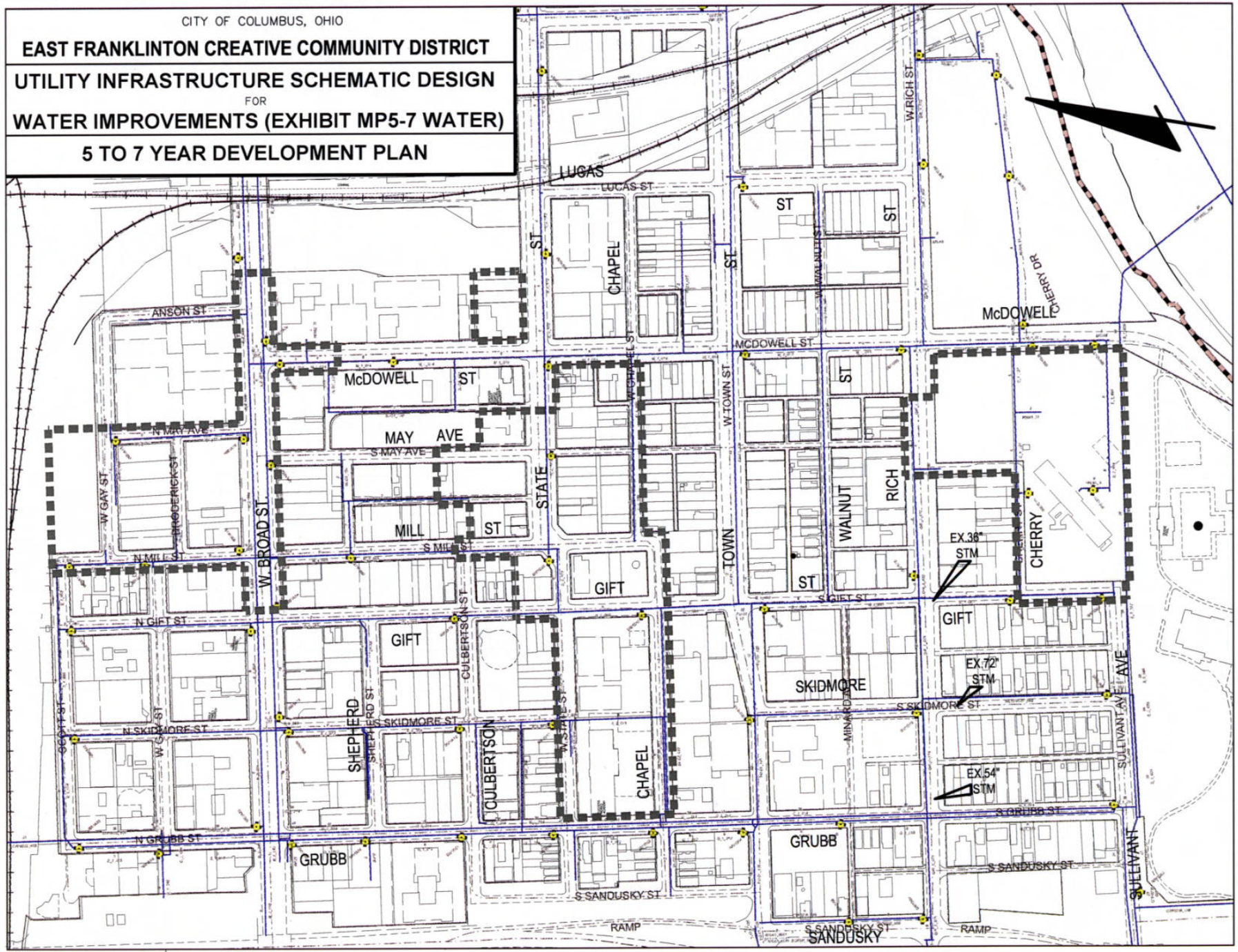
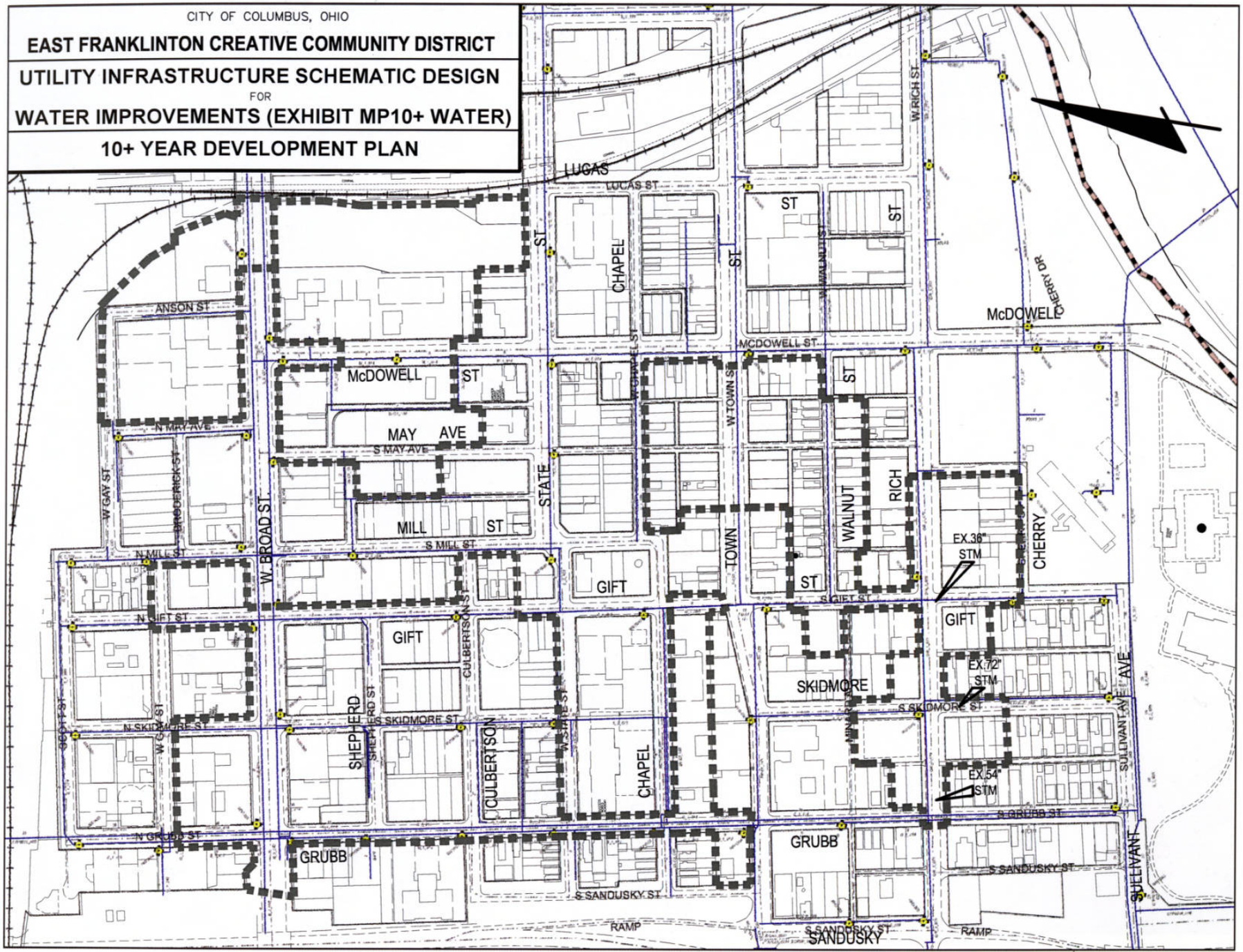


FIGURE E12 **Recommended Water System Improvements for Development 10 Years and Beyond**



APPENDIX **F**

DEVELOPMENT STANDARDS

Development Standards

Excerpts for the East Franklinton Creative Community District Plan

These development standards are intended to be used in the review of development applications and will be applied in tandem with the regulatory approach selected for implementing this plan in the form of adopted design guidelines.

Land Use and Design

LAND USE COMPATIBILITY

- When a proposed use is compatible with adjacent uses, it should be supported.
- When a proposed use may have potential conflicts with adjacent uses, such conflicts should be remedied or minimized through project redesign.

DENSITY

- Density of infill development should be consistent with the recommendations of the East Franklinton plan.
- Infill development proposed at densities higher than the plan recommendations should utilize an extraordinary high level of design and materials to provide compatibility with nearby architecture and design (appropriate setbacks, roof pitch and shape, building materials, windows and doors, height, width, massing, porches, etc.), as well as design solutions to mitigate impacts (stepping down the height of structures, screening, etc.).
- Building heights should be consistent with the urban design standards recommended in the plan and height map on page 4.18. Buildings between three and five stories should provide an additional building setback above the third floor. Buildings that exceed five stories should provide at least one additional setback above the fifth floor and employ design solutions that protect views.

ARCHITECTURE – MIXED-USE, COMMERCIAL, MULTIFAMILY AND INSTITUTIONAL BUILDINGS

- Architectural should be provided that establishes and defines a building's appeal and enhances the industrial character of East Franklinton.
- Historic and other contributing buildings should be preserved to the extent possible and if necessary, incorporated into new development.
- New construction should be integrated with the existing fabric and scale of development in surrounding neighborhoods.
- A wide range of architectural styles are appropriate for East Franklinton, with preference for contemporary building design and materials.
- In cases where a traditional style is proposed, new buildings should never be literal duplications of historic styles. Instead, new designs should be contemporary interpretations of traditional buildings, especially styles found throughout the city. These interpretations should be similar in scale and overall character to historical precedents, but should differ in terms of detailing.
- All sides of a building should be coherently designed and treated. A consistent level of detailing and finish should be provided for all sides of a building ("four-sided" architecture).
- Building frontages that exceed 50 feet in width should consider using vertical piers or other vertical elements, spaced at intervals of 15 feet to 30 feet along the entire building elevation.
- New buildings should be consistent in mass and scale to recommendations in the East Franklinton plan. Larger buildings should be divided into smaller modules or bays. Floor-to-floor heights should appear to be similar to those in nearby traditional buildings, especially first floor windows.
- Street-level facades are recommended to be as transparent as possible to create an attractive pedestrian environment, except for residential spaces on ground floors. For a primary façade, at least 60 percent of the first-floor wall area (between two feet and ten feet) should be clear/non-tinted window glass, which permits a view of the building's interior to a minimum depth of four feet. At least 25 percent of upper-floor wall areas should be clear/non-tinted window glass.
- Buildings with ground-floor residential spaces should have direct access to the public sidewalk and incorporate front stoops or small plazas to contribute to street activity. Multi-story buildings with residential units should incorporate balconies for the same reason.

RETAIL USES

- Retail uses are appropriate throughout the neighborhood, consistent with the East Franklinton plan, provided applicable code requirements are met.
- Corner stores and offices are an appropriate use, particularly at intersections. Any potential negative impacts should be mitigated.
- Sidewalk dining should be supported that enhances restaurant, dining and entertainment businesses, provided ADA requirements are accommodated, per DPS approvals.
- Drive-through pickup windows and coverings should not be located on building frontages and may be located to the rear and sides of the principal building only when adjacent property is not residentially used or zoned.

SERVICE, LIGHT INDUSTRIAL AND LIGHT MANUFACTURING USES

- The development character of East Franklinton includes a variety of businesses, including services, light industrial and light manufacturing. Unless otherwise noted in the plan's zoning recommendations, such uses are expected to continue in the neighborhood. It should be noted that certain artistic methods are industrial in nature, such as metal work and fabrication, and stone cutting.
- New buildings constructed for these uses should exhibit an architectural character in keeping with the neighborhood, relative to materials, design, and color. Loading, storage, and other external activities that generate noise, etc., should not face public sidewalks or residential or institutional uses. Screening of loading and outdoor storage and activities should comply with applicable city code.

MIXED USES

- Mixed uses can occur vertically in a building (i.e., first-floor retail, second-floor office, third and higher floors residential) or horizontally in a development among various buildings (in these cases, the uses should be integrated and not segregated).
- Ground-floor uses in mixed-use buildings should include retail, restaurants, services, cultural facilities and amenities, personal services and offices.
- A variety of housing unit types and sizes should be provided in the residential portions of mixed-use developments.

SINGLE- AND TWO-FAMILY USES

- New single- and two-family housing is especially appropriate in the southwest quadrant of East Franklinton, where such uses already are dominant.
- The minimum setback for a principal single- and two-family building should be zero feet and the maximum setback for a principal building should be ten feet from the public sidewalk.
- Accessory buildings (including, but not limited to, detached garages) should be located at the rear of the principal building (garages should not access directly onto public streets). A curb cut and driveway from a public street is only supportable were no alley exists.
- The primary façade for single- and two-family buildings must abut a city street (i.e., be a building frontage).
- New housing should be compatible with nearby housing in terms of building height and width, building materials, porches, roof pitch, setbacks, and windows and door size, width, and spacing.
- Single-family and two-family structures should include covered front porches that are at least eight feet deep.

ACCESSIBILITY

- Promote accessibility and "visitability" in all new construction and in rehabilitation and redevelopment of existing buildings.

Parking

- Surface parking should be located to the rear or side of street-oriented buildings, with preference for the rear of buildings and screened per code. The use of pervious surfaces for surface parking is encouraged to minimize storm water runoff and increase infiltration.

- The minimum setback for parking lots is five feet; parking located adjacent to a public sidewalk, however, can be located closer than five feet, provided that it fully meets all screening requirements. Parking lots and accessory buildings should be located at the rear of the principal building. Where access to the rear of the property is not possible from a public alley or street, up to 50 percent of the parking may be located at the side of the principal building.
- Structured parking should be considered for higher-density projects, as appropriate, and designed to minimize visual impacts. Building materials, detailing and landscape should be used that complement the surrounding area. Primary elevations should include ground floor uses (e.g., commercial space) or be screened with residential uses. Parking structures should be set back no more than 10 feet.
- Parking reductions may be appropriate for higher-density, mixed use projects. Shared parking arrangements may be appropriate.

Signage

Note: It is assumed that if a new zoning district or overlay is created for East Franklinton, that more definitive signage standards will be prepared.

- In general, signage should be pedestrian in orientation and scale. Walls and blade signs are preferred. Pole signs are generally discouraged. The dimensional standards of the city graphics code should be used unless new standards are developed specific to East Franklinton.
- Signs are recommended to be placed and sized on buildings such that they area in keeping with the scale and size of the building facades and general streetscape so as not to obscure or interfere with architectural lines and details.
- Sign design and materials should relate to the general theme of the surrounding district and incorporate the building architecture. Examples include hand-crafted, artisan design and materials.
- Freeway-oriented signs, pole signs, sign benches, billboards and other off-premises signs should not be supported.

Site Design and Landscaping

BUILDING ORIENTATION AND SETBACKS

- Buildings should be located parallel to the street on which they front. The primary façade should be located on the major street abutting the building and the secondary façades should be located adjacent to secondary streets, service drives, and alleys. Buildings on corner lots should be oriented to the corner and to the street fronts, and should make a strong tie to the building lines of each street.
- The minimum setback for a principal building is zero feet and the maximum setback for a principal building is ten feet, except where a Public-Private Setback Zone is provided. Where a Public-Private Setback Zone is provided, a maximum setback of 15 feet is permitted for up to 50 percent of the building frontage.
- Buildings, parking structures and other structures taller than four stories should provide additional space for pedestrians adjacent to the public sidewalk if the existing sidewalk is five feet or less in width.
- The minimum setback for fences and masonry or stone walls is three feet. Fences or walls along a Public-Private Setback Zone may be located zero feet from the sidewalk.

- Primary entrances to buildings should be oriented to the primary public street with at least one operable door on the primary public street. Buildings located at a corner should orient the main entrance to the corner instead of to one of the two abutting streets (only one operable door is necessary).
- Secondary entrances can be located on side and rear elevations to meet fire code and to service adjacent parking.

BUFFERING AND SCREENING

- Between non-residential and residential uses, screening should be a six-foot board-on-board fence or other comparable material; chain link is not acceptable.
- Service and loading zones should be located to the rear, side or in an internal location where visibility from public rights-of-way and views from neighboring buildings and properties will be minimized or screened to their full height.
- Roof-mounted mechanical units should be screened to their full height should complement the building in terms of color and materials.
- Ground-mounted mechanical units and dumpsters should be located to the rear of buildings and screened to their full height on all sides by screening that is complementary to the building in terms of color and materials, or by evergreen plant material.

PUBLIC SPACES

- Developments over 1.5 acres in size in urban settings should include public spaces, such as plazas and courtyards.

LANDSCAPING

- Landscape materials and design should enhance structures, create and define public and private spaces, and provide shade, aesthetic appeal, and environmental benefits.
- Paved areas should be shaded, especially parking lots.
- Public, semi-public/private, and private spaces should be demarcated clearly through the use of landscape, walls, fences, gates, pavement treatment, signs, and other methods to denote boundaries and/or buffers.
- Barriers to views or light should be reduced by selecting appropriate tree types, pruning thick hedges, and large overhanging tree canopies.
- Landscaping should be used to support storm water management goals for filtration, percolation and erosion control, including rain gardens.
- Landscape adjacent to natural features should be used to soften the visual appearance of a development and provide a natural transition between the development and open space areas.

STREET TREES AND STREETSCAPE

- Street trees are recommended on all public and private streets, with species and spacing approved by the City of Columbus forester.
- Tree-lined residential and commercial streets should be either established or maintained.
- Landscaping on private property bordering sidewalks should be designed with new elements, such as a new plant form or material, at a scale and intervals appropriate to the site. This is not intended to discourage a uniform street tree or landscape theme, but to add interest to the streetscape and enhance the pedestrian experience.

LANDSCAPE MATERIALS

- All trees (including street trees) should meet the following minimum size at the time of planting: shade trees 2 inches caliper; ornamental trees 1 1/2 inches caliper; and evergreen trees five feet in height. Tree caliper is measured six inches from the ground.
- All trees and landscaping should be well maintained. Dead items should be replaced within six months or the next planting season, whichever occurs first. The size of the new material should equal the size of the original material when it was installed.

SECURITY

- Crime Prevention through Environmental Design (CPTED) measures should be incorporated, as necessary to reduce incidences of fear and crime, and design safer environments.
- Development should be designed to encourage visible space that will serve as a means to discourage and to deter crime through the location of physical features, activities and people to maximize visibility.
- Landscaping and screening along property and parking lot perimeters should provide for visual openings into the site between three and eight feet above the sidewalk. This can be accomplished by staggering plantings and using walls and fences with openings.
- Clear boundaries between public, semipublic/private, and private spaces should be defined.
- On-site lighting for security purposes should illuminate buildings and surfaces only, such as sidewalks and parking lots. Lighting should not be designed to illuminate the entire site, including adjacent property and rights-of-way, or the sky above the site.

WIRELESS FACILITIES

- The visual impact of wireless facilities should be minimized.
- Wireless facilities should be concealed in existing structures when possible; otherwise, use appropriate camouflage and screening techniques to hide or blend them into the surrounding area.
- Facilities should be designed to be aesthetically pleasing and respectful of the neighborhood context.
- Mechanical equipment and devices associated with wireless facilities should be placed in underground vaults or unobtrusive structures.

LIGHTING

- Lighting should be appropriate to its location and utilized to enhance security and highlight distinguishing characteristics of buildings.
- Lights should have fully shielded, recessed lamps directed downward to prevent glare and shine above the horizontal plane.
- Light standards (poles) should not exceed 18 feet in height.
- For aesthetic compatibility, light standards should be of the same or similar type and color.
- Lighting levels should provide sufficient illumination to ensure security, but without glare, hot spots, or light spillage through residential windows.
- Where appropriate, lighting should highlight special architectural or landscape features and/or prominent buildings and gateways.
- Wall-mounted lights should be directed downward. Soffit-mounted light fixtures should be recessed in the soffit or otherwise fully shielded from view from any property line.

- Ground-mounted or other upward directional lighting should be permissible only where some form of shield or light baffling is provided to create a soft, uniform light quality and minimize light spillage beyond trees, landscaping, walls or signs being illuminated.

Transportation Network

- Off-street parking for bicycles should be provided per code. Major development should consider facilities beyond that required by code, such as bike lockers and water facilities.
- Bike lanes and sharrows provided by DPS in its implementation of the Bicentennial Bikeways Plan must be balanced with the need for on-street parking in East Franklinton.
- Existing street and alley grids should be maintained or reestablished.
- Developments should maintain any existing brick streets, existing street widths and intersection/turn radii, and minimize the number of curb cuts.
- Crosswalks should be provided at all signalized intersections where appropriate, per DPS.
- Traffic-calming devices should be proposed for new streets adjacent to schools, parks, libraries, and other community facilities, per DPS.
- The use of walls, gates and other barriers that separate residential neighborhoods from the surrounding community and commercial areas should be discouraged.
- Public sidewalk system should be maintained per code. Buildings, parking structures and other structures taller than four stories should provide additional space for pedestrians adjacent to the public sidewalk if the existing sidewalk is five feet or less in width.
- Pedestrian connections should be made to the emerging regional trail system.
- Accessibility should be provided per ADA guidelines and design standards.
- Bus stops and shelters should be provided per COTA standards.
- Development should provide pedestrian access to transit stops.
- Average gross residential densities that support transit are at least 12 dwelling units per acre.