



South College

CORRIDOR PLAN



SOUTH COLLEGE CORRIDOR PLAN

Adopted March 3, 2009



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Many business owners, property owners, residents, and members of the public participated in this planning effort. Thank you to all who contributed to this Plan.

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CHAPTER 1

PLAN FOUNDATIONS

Introduction

A corridor plan is a policy document prepared by a city to implement a community-based vision. It is a statement of how the community views itself, what the vision is for the future, and what actions will be required to implement that vision. As such, the Plan provides a framework of community-based principles, policies, and implementation strategies recommended by the Planning & Zoning Board and adopted by City Council to realize the community's vision for the Corridor.

Purpose of the South College Corridor Plan

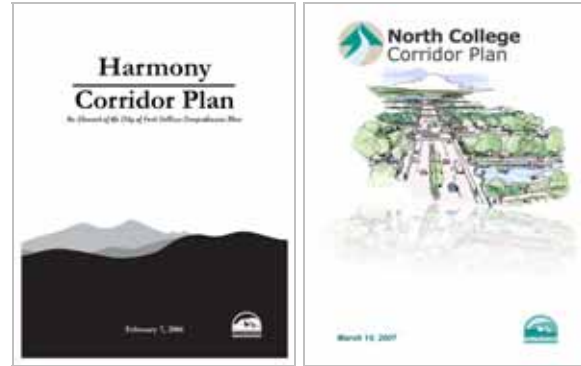
As one of Fort Collins' southern gateways, the future of South College has been discussed since the 1980s when it became part of the City of Fort Collins's Growth Management Area. Numerous studies, most recently the *South College Avenue (US 287) Access Control Plan Update Report* in 2002, *City Plan* in 2004, and the *US 287 Environmental Overview Study* in 2007, have made specific recommendations for this corridor.

WHAT IS A CORRIDOR PLAN?

A corridor planning process provides a community an opportunity to identify their goals and work with a city to achieve them. The *South College Corridor Plan*:

- Covers 608 acres, almost entirely within the city limits, along South College from Harmony Road to Carpenter Road;
- Includes primarily commercial or vacant properties near South College;
- Encompasses all of the functions and subject matter related to the future physical form of this corridor, such as land use, transportation, appearance and design, community partnerships, financing, and infrastructure; and
- Is long range (about 20 years).

Still, no planning process has provided an overall specific community-driven vision that considers the area's land use trends, constraints, and opportunities. Through the Southwest Enclave Annexation process, City Council recognized the need for a plan that encapsulates the desires of those who live or work in this corridor and integrates previous plans and information that have been emerging over the years.



In Fort Collins, other corridor plans encourage development to meet the community's vision.

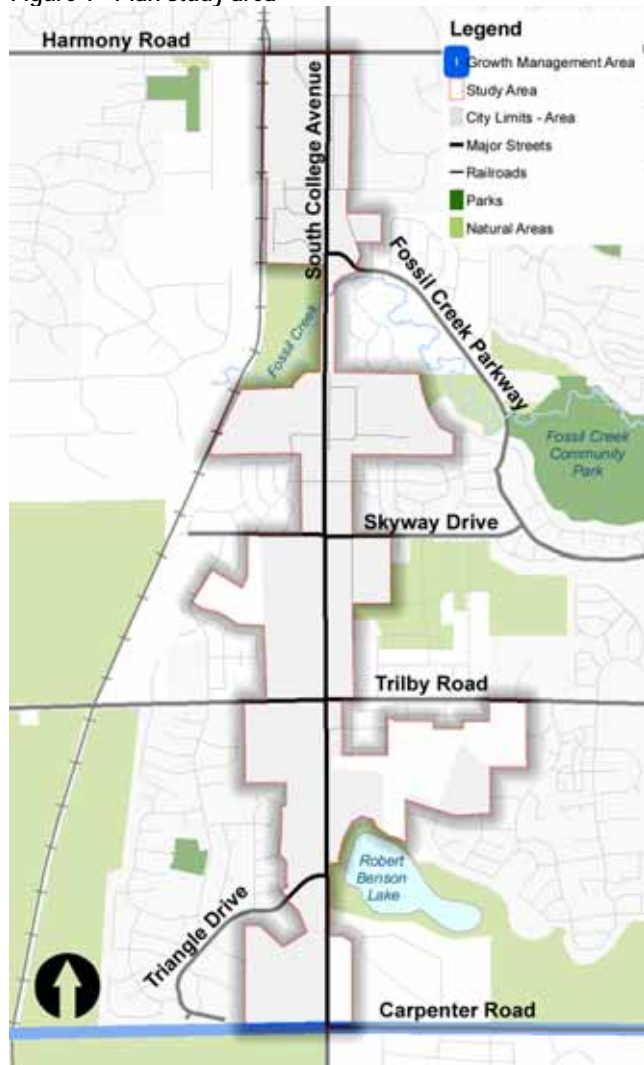
The purpose of the *South College Corridor Plan* is to meet that need by articulating a common vision that reflects the objectives of the many diverse stakeholders involved, including business and property owners, residents, the City of Fort Collins, the Colorado Department of Transportation (CDOT), and the broader community. As a policy document prepared by the City, it describes the goals, policies, and implementation strategies that can achieve the community's vision.

While this plan's content is important for the direction it provides to the community, the planning process itself has been invaluable for increasing collaboration and cooperation between stakeholders. However, this planning process is just the beginning for South College. For this plan to be successful, the City, business owners, property owners, residents, developers and others need to continue the engagement and continue working on the vision for South College.

South College Corridor

The South College Corridor study area centers on South College (or US 287) from Carpenter Road on the south to Harmony Road on the north (see Figure 1). The highway serves as a major north-south throughway for Fort Collins as well as between the Denver Metro area and Laramie, Wyoming. The highway is also the main access for many offices, shops, and neighborhoods. The study area extends about ½ mile east and west of South College. Existing neighborhoods were excluded from the study area because no significant changes are anticipated for these areas, although residents were actively involved in the planning process.

Figure 1 - Plan study area



Citizens of all ages participated in Plan meetings.

A Community Based Plan

Between November 2007 and December 2008, business owners, property owners and neighbors helped the City envision South College's future with eight public events, 2,200 surveys, a Council worksession, several City board meetings, and numerous phone calls, emails and visits:

- Public Kick-off Meeting - November 29, 2007
- Stakeholder Interviews - December 2007 to January 2008
- Business & Household Surveys - March to May 2008
- Business Forum - April 10, 2008
- Public Visioning Workshop - April 24, 2008
- Framework Plan Open Houses - July 30-31, 2008
- City Council Work Session - August 26, 2008
- Plan Van Tour - October 17, 2008
- Plan Recommendations Public Meeting - December 4, 2008
- Land Conservation Stewardship Board - January 14, 2009
- Planning and Zoning Board - January 15, 2009
- Transportation Board - January 21, 2009
- Parks and Recreation Board - January 28, 2009
- City Council Hearing - February 17, 2009

Through these events and numerous phone calls, emails, and one-on-one visits, citizens answered key questions about the corridor such as:

- "What are your specific issues with infrastructure, landscaping, transportation, building appearance, etc.?"
- "What is your vision for the corridor?"
- "What should be the type, character, location, and timing of new growth?"
- "What areas within the corridor are likely to be the focus of new development and redevelopment?"

Annexation

The South College Corridor contains a mixture of properties within city limits, properties soon to be annexed, and properties with no set annexation date.

Though highly contested, the Southwest Enclave Annexation was approved by City Council in 2006 and upheld by city voters in April of 2007. The annexation process will occur in four phases, continuing through 2014, as shown in Figure 2. Phases I and II were annexed in 2007. Phases III and IV will be brought into Fort Collins in 2010 and 2014. Various City services and regulations are being staged over time to ease the transition to City governance.

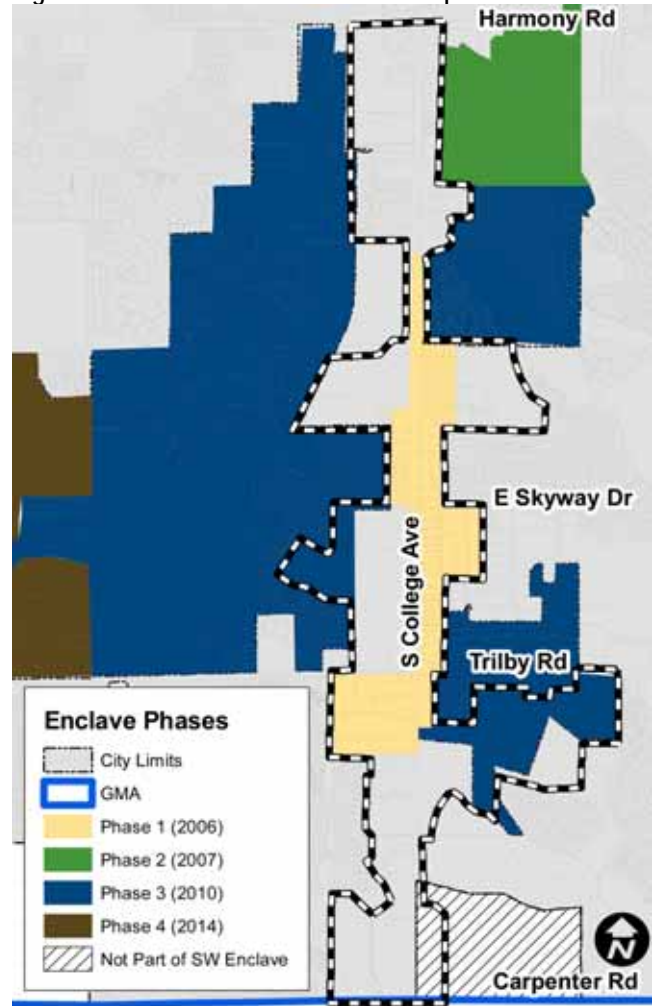
As a result of extensive meetings with businesses and residents during the Southwest Enclave Annexation, City Council directed planning staff to initiate a corridor plan - the *South College Corridor Plan* - to help local stakeholders create a vision for their area.

Existing Plan Foundations

Early planning efforts began with *A Plan for the Region Between Fort Collins and Loveland* in the early 1990s. In 1997, with an update in 2004, *City Plan* provided an overall framework of land uses. The *Transportation Master Plan* was also updated in 2004, identifying needed improvements to the transportation system in this corridor. *City Plan* was implemented by the Land Use Code, which applied zoning and development standards to the area. As a US highway, the Colorado Department of Transportation has regularly studied this corridor, most recently through the *South College Avenue (US 287) Access Control Plan Update Report* in 2002, followed by the *US 287 Environmental Overview Study* in 2007.

The relationship between these and other plans to the South College Corridor are discussed in the next sections.

Figure 2 - Southwest Enclave annexation phases



City Plan

In 2004, the City of Fort Collins updated *City Plan*, a forward-thinking, 20-year plan for the community that is premised on discouraging sprawl while encouraging infill and compact development, establishment of community separators, interconnectivity of multi-modal transportation options, diversity of housing options, and high quality development.

City Plan speaks to four basic place types, which comprise the structure of the community. The places include:

- Neighborhoods
- Districts
- Corridors
- Edges

According to *City Plan*, “the organization of these places - their ‘structure’ - gives meaning and form to our community’s vision. These are not intended to be thought of as single-use ‘zones’ in the sense of traditional land use zoning patterns, but rather as distinct and diverse places that contain mixtures of uses and activities.”

The South College Corridor contains three place types: districts, corridors and edges. Clearly, as its name suggests, the area is a major transportation corridor. While known primarily as a highway, it will also become increasingly important for its multi-modal transportation options including trail linkages and transit stops. The South College Corridor is also a distinct commercial district. As an edge, the South College Corridor is an important entry into Fort Collins. The City’s *Structure Plan* specifically addresses these three roles, and how this corridor will evolve following *City Plan*’s vision.

South College as a District

City Plan envisions seven types of districts, acting to promote a sense of place within the community and adding to the overall quality of life that Fort Collins offers to residents. It uses the South College Corridor as a specific example of how the City favors a new philosophy on traditional commercial development, by stating:

“Commercial Districts - now typically strip commercial development such as along parts of South College, will continue to accommodate a full range of commercial uses, including auto-related uses, but will be transformed over time. The shift will be from exclusively auto-oriented places, to places that are more walkable destinations, with a mix of activities.”



City Plan provides a citywide vision.

The principles and policies pertaining to Commercial Districts focus on promoting commercial areas that have a mix of uses, pedestrian-oriented design, and accessibility for a variety of multi-modal options. Because of the emphasis that *City Plan* places on infill and redevelopment, the South College Corridor is a district where the City’s new planning philosophy will be set into motion.

How Does the Corridor Relate to Other Plans?

As described below, other plans have viewed this corridor as:

- A district that becomes more walkable and contains a mix of activities over time.
- A corridor that increases mobility, provides transportation options, improves the aesthetics of the pedestrian/transit interface, and accommodates the flow of goods and people.
- A redevelopment and infill area that channels additional economic activity in areas that benefit existing residents and businesses.
- A regionally significant transportation corridor that improves regional mobility in a safe and efficient fashion.
- The southern transit connection for both typical bus service and the Mason Corridor Bus Rapid Transit system.
- A transit-oriented development area in areas close to the Mason Corridor.
- A community gateway and separator that creates an appropriate entryway into Fort Collins.
- A pedestrian and bicycle friendly area where new improvements should be directed.
- An area with important natural values, especially along the Fossil Creek Corridor and the Benson Lake area.

South College as a Corridor

Corridors serve the community on many levels; as arteries for the movement of goods and people, as drainageways, and as environmental and recreation refuges. *City Plan* includes four types of corridors, two of which pertain to the South College Corridor: Transportation Corridors and Water Corridors.

Transportation Corridors are based on existing roadways, with cars being the primary means of travel. *City Plan* states:

“Transportation Corridors are developed primarily to increase mobility, provide transportation options, enhance efficiency, improve the aesthetics of the pedestrian/transit interface, and accommodate the flow of goods and people.”

Principles and Policies for Transportation Corridors are aimed at establishing a well-functioning transportation network for the community that not only provides efficient vehicle movement, but safe and convenient pedestrian and transit access. Principles and Policies also speak to aesthetics to ensure a context-sensitive design of Transportation Corridors that are adjacent to open lands, and the continuation of design elements when surrounded by existing development.

While cars will remain the primary means for transportation, *City Plan* promotes transit, bikes, and walking as becoming more viable options for residents both to support greater choices in transportation and to promote economic health. *City Plan* states:

“Activity centers’ in our neighborhoods and districts - including our places of work and shopping - will be designed to support a variety of modes of transportation. Our transportation corridors will link our destinations and activities, making it easier and more enjoyable to move around our city. Enhanced Travel Corridors uniquely designed and reserved for high frequency transit, bicycling, and walking, will link our major activity centers.”

The Mason Corridor, which terminates within this Plan’s study area, is one of the Enhanced Travel Corridors recommended in *City Plan*.

Water Corridors are natural and man-made waterways and open space - serving the needs for drainage and water conveyance, as well as recreational, educational, and environmental uses. Collectively, Water Corridors comprise a network to link larger open lands, residential districts, and

other land uses. Examples of Water Corridors along South College are the Fossil Creek drainage and Robert Benson Lake.

South College as an Edge

City Plan Edges are to be clearly defined, promoting a compact land use pattern in order to avoid sprawling development. Edges will contribute to conserving environmentally sensitive areas, open space, rural lands, and to distinguish between what is “city” and what is not. While there are “soft” edges, consisting of land preserved through public open space or preservation easements or low-density rural development, there are areas of “hard” edges containing existing development that adjoin communities.

The South College Corridor contains both “soft” and “hard” edges. The Longview Open Space and areas of urban estate density along Carpenter Road east of College Avenue are examples of the soft-type edge, while a harder edge exists south of Carpenter Road due to pre-existing county-approved commercial and low-density residential development.

Open lands at the southern end of the Corridor help to establish the City’s unique identity and contrast it from the adjoining county development. Also, the design of a new Neighborhood Commercial District and surrounding residential and commercial development will be future components in defining the identity.

DATE	PLAN
1981	Master Street Plan
1989	South College Avenue (US 287) Access Control Plan
1990s	A Plan for the Region Between Fort Collins and Loveland
1998, 2000	Mason Corridor Plan (ongoing)
1999	Northern Colorado Separator Study
1997/2004	City Plan, Transportation Master Plan
2002	South College Avenue (US 287) Access Control Plan Update
2004	US 287 South College Avenue Bicycle Lane Project
2006	Land Conservation and Stewardship Plan
2007	US 287 Environmental Overview Study
In Progress	North I-25 Environmental Impact Statement

Targeted Redevelopment and Infill

City Plan identifies Targeted Redevelopment and Infill Areas within certain districts and corridors. One targeted area is along College Avenue as far south as the South Transit Center - partway into the South College Corridor study area. The purpose of targeted redevelopment areas is to channel growth where it will be beneficial and can best improve access to jobs, housing, and services with fewer and shorter auto trips. A major goal is to increase economic activity in the area to benefit existing residents and businesses. *City Plan* encourages additional planning efforts to define key redevelopment and infill areas. Key criteria that help identify these areas include:

- underutilized land
- areas already undergoing positive change, which is expected to continue
- areas where infrastructure capacity exists
- areas where public investment is warranted from a policy perspective
- areas with special opportunities, such as where major public or private investment is already planned
- transportation opportunities along travel corridors

As *City Plan* indicates, the South College Corridor presents a promising redevelopment opportunity near the South Transit Center, where these new planning philosophies can be infused.

A copy of *City Plan* can be downloaded at: fcgov.com/cityplan.

Transportation Master Plan

A companion document to *City Plan* is the *Transportation Master Plan (TMP)*. The *TMP* is a vision document that defines the long-term transportation system that Fort Collins needs in the future. The Plan also provides policy direction for how decisions regarding the implementation of the transportation system should occur. It is also a framework document that serves as a comprehensive reference guide regarding transportation issues in Fort Collins. Additionally, the Plan provides priorities for implementing projects to meet short-term deficiencies while working towards the ultimate transportation system the City is trying to achieve. Finally, the Plan identifies transportation issues that need to be resolved as part of the next Plan update or under specific department work plans.

Of specific application to South College are the prioritized transportation needs and costs listed in the Plan. Figure 3 lists future projects within the Corridor, their priority, and the cost.

Figure 3 - *Transportation Master Plan* prioritized projects

Location	Priority (Ranking)	2004 Costs (Millions)
Street Projects		
College, Fossil Creek to Harmony	High (11)	\$8.700
College @ Harmony	High (15)	\$4.000
Harmony, College to Lemay	High (15)	\$8.700
College @ Skyway	Medium (47)	\$2.000
Carpenter, College to Lemay	Medium (66)	\$6.000
College, Carpenter to Trilby	Medium (66)	\$10.680
College, Trilby to Fossil Creek	Medium (66)	\$10.680
Trilby, College to Lemay	Medium (66)	\$4.005
Trilby @ College	Medium (66)	\$3.000
Trilby, Shields to College	Medium (66)	\$4.005
College @ Carpenter	Medium (108)	\$3.000
Aran Street, Trilby to North of Skyway	Low (162)	\$2.003
Avondale Drive Extension, Avondale to Carpenter	Low (162)	\$0.668
College Parallel Streets, Trilby to Skyway	Low (183)	\$2.003
Carpenter, College to I-25	Not ranked	\$15.000
Subtotal Street Projects		\$84.444
Bicycle Projects		
Mason @ Harmony, Grade Separated Crossing	11	\$2.400
Carpenter, College to Timberline, Bike Lanes	37	included in street
Bikestation at South Transit Center	76	\$0.500
Trail Connection, BNSF RR to Taft Hill	83	included in rail
Pedestrian Projects		
College, Carpenter to Trilby Sidewalks	2	included in street
College, Trilby to Fossil Creek Parkway Sidewalks	3	included in street
College, Fossil Creek Parkway to Harmony Sidewalks	30	included in street
Grand Total		\$87.344

The *Master Street Plan (MSP)* is a map-based component of the *TMP* showing the functional classification (the category of street, e.g. arterial, collector, etc.) of the ultimate street network in the City of Fort Collins. The *MSP* also helps guide the development of the future street system for the City and its Growth Management Area. The *MSP* provides a reference for planning and layout of existing and future development's key transportation and circulation connections.

The MSP classifies South College as a Major Arterial. The standard cross-section for Major Arterials consists of six through lanes (three in each direction), a raised and landscaped center median, 8-foot bike lanes, 10-foot landscaped parkway strips, and 7-foot sidewalks. An example of this is the section between Harmony Road and Swallow Road, minus the 8-foot bike lanes. South of Harmony Road, South College consists of four through lanes; however, it is planned to be consistent with the City's standard for a Major Arterial between Carpenter Road (LCR 32) and Harmony Road, though with an 8' multi-use, off-street path and 9' parkway strips rather than the 7' sidewalks and 10' parkway strips. The lane and median widths meet or exceed CDOT requirements.

Trilby Road is designated as a four-lane arterial east of College Avenue. At the time of this writing, Carpenter Road was classified as a six-lane Major Arterial, but planned to be re-classified to a four-lane Minor Arterial in 2010. West of College, Trilby Road is classified as a two-lane arterial. The *MSP* also identifies several new collector roads parallel to College Avenue.

The *Master Street Plan* can be downloaded at: fcgov.com/transportation/msp-new.php.

South College Avenue Access Control Plan Update

The *South College Avenue Access Control Plan (ACP)* is the area's most familiar policy document. The *ACP* Update took place in 2002 with revisions to the original 1989 *ACP*, and included extensive public involvement through a cooperative effort of the City of Fort Collins, Larimer County, and the Colorado Department of Transportation (CDOT). As such, the City cannot make changes to the Plan without the consent of the other jurisdictions and agencies.

To restate the *ACP*'s purpose in the simplest form, it is to provide good mobility and a safe operating environment for all modes of transportation and to preserve the Corridor's vitality as development and traffic demands increase. The *ACP* recommends short-term and long-term access improvements, and possible funding sources for implementation. The short-term and long-term access plans for this Corridor affect any new development, which includes new structures as well as changes of land use.

Key short-term safety improvements that the *ACP* recommends at select locations along the Corridor include:

- raised medians in specific locations
- parallel streets
- redefined frontage roads
- driveways in designated locations
- potential bike/pedestrian connections

Long-term improvements recommended by the *ACP* are intended to reflect the projected transportation infrastructure necessary to accommodate the expected traffic volumes related to land use changes as well as regional traffic growth. Corridor-wide, long-term improvements include:

- construction of an arterial cross-section between Carpenter and Harmony Roads in accordance with the Larimer County Urban Area Street Standards and CDOT design requirements
- construction of parallel streets to provide circulation alternatives for local residents and businesses, connecting to existing public streets where possible

The Plan is used to help guide long-term transportation improvements along this Corridor by the City and CDOT. The planning horizon for these plans is 20 years, which means that improvements are designed for the growth in traffic that is projected to take place along this Corridor over the next 20 years. Therefore, some of the recommended access and roadway improvements are likely not to happen for many years - or until traffic conditions and development in this part of the community change enough to warrant the improvements.

However, some safety related improvements may be needed sooner based upon existing conditions such as traffic crash data/accident history, traffic volumes, sight distance problems, etc. In that case, the City of Fort Collins, Larimer County, and CDOT would work together to develop either interim and/or long-term safety solutions. Property owners, businesses, and residents in the affected area would be consulted within the decision making process when the improvements are designed. No public funding has been identified for these types of access-related improvements along South College at the time of this writing. It is most likely that changes will occur over time in conjunction with future development or redevelopment - or potentially through a publicly funded capital improvement project.

The South College Avenue *Access Control Plan* Update can be downloaded at: fcgov.com/transportationplanning/downloads.php

US 287 Environmental Overview Study

The *US 287 Environmental Overview Study (EOS)*, prepared by CDOT in 2007, is a study for a 7.1 mile stretch of U.S. 287 as shown in Figure 4. The report examines the impacts of street widening on business, scenic, aesthetic, historic, and environmental resources. A key outcome of the study was a right-of-way along the US 287 Corridor that provides for the following future improvements:

- roadway widening to six lanes to accommodate future travel demand and congestion
- intersection improvements to accommodate peak-hour demand
- priority at intersections for bus transit
- safety improvements including auxiliary lanes and medians
- pedestrian and bicycle linkages (including an 8' path along College Avenue, which is a refinement of the 7' sidewalk shown in the *ACP*)
- traffic signal timing to improve coordination between signals

The ultimate right-of-way will provide adequate roadway width throughout the Corridor for needed travel lanes, shoulders, raised center median, and left and right-turn lanes at selected intersections. The right-of-way will also provide room for pedestrian and bicycle linkages between Loveland and Fort Collins.

The *EOS* can be downloaded at: dot.state.co.us/us287

Figure 4 - US 287 Environmental Overview (EOS) study area



Mason Corridor Plan

The Mason Corridor is a five mile north-south transportation corridor with an emphasis on transit service, pedestrian and bicycle facilities and amenities. The Mason Corridor extends from Cherry Street on the north to south of Harmony Road. The Corridor is centered along the Burlington Northern Santa Fe (BNSF) Railway a few hundred feet west of College Avenue.

The vision of the Mason Corridor was approved by Fort Collins voters and City Council in 1998 and 2000. The Mason Corridor includes a new bicycle and pedestrian trail, as well as a planned Mason Express Bus Rapid Transit (MAX) system in a fixed guideway for the majority of the Corridor. Approximately 3-1/2 miles of a multi-purpose trail has already been constructed from the Fossil Creek Trail to Spring Creek Trail. The Mason Corridor will link major destinations and activity centers along the Corridor including the Downtown, Colorado State University, Foothills Mall, and South College retail areas. Additionally, future regional transit connections will link to the Mason Corridor.

MAX will address several key transportation and economic development challenges, such as:

- offer an alternative to driving on College Avenue - MAX will provide a faster and convenient option for travelers within the College Corridor
- boost transit ridership - the increased frequency and enhanced connectivity of MAX will improve travel times and increase the use of transit
- improve connectivity - MAX will improve connections to local and regional destinations
- economic development - MAX is anticipated to stimulate residential and commercial development along the Corridor

To encourage land uses, densities and design that enhance and support transit stations along the Mason Corridor, the Transit-oriented development (TOD) Overlay Zone was incorporated into the City's Land Use Code in 2007. The purpose of the TOD is to modify underlying zoning districts to allow for a greater mix of goods and services within convenient walking distance of transit stations; encourage the creation of stable and attractive residential and commercial environments; and provide for a desirable transition to the surrounding existing neighborhoods. Previous to the overlay zone, buildings could only be four or five stories high along the south end of the Corridor; now if developers meet certain requirements, buildings can reach up to eight stories.

Beginning in 2007, an Environmental Assessment (EA) was prepared under the requirements of the Federal Transit Administration (FTA) and the National Environmental Policy Act (NEPA) to evaluate the potential impacts of MAX. In 2008, the FTA determined that MAX would not result in significant impacts, allowing the project to compete for federal funding. The planned start date for transit service is in 2011.

The *Mason Corridor Plan*, *Mason Corridor Economic Analysis Report*, and Mason Corridor/MAX BRT Project Environmental Assessment can be downloaded at: fcgov.com/mason

Development Standards for the TOD Overlay Zone (Division 3.10) can be viewed through the City of Fort Collins Land Use Code at: fcgov.com/cityclerk/codes.php

Community Separator Studies

As urban development continues to push into rural areas and the spaces between communities, community separators in the form of open lands are increasingly important in maintaining the identity and distinct boundary of a community. Two plans address community separators for the South College Corridor.

A Plan for the Region Between Fort Collins and Loveland

A Plan for the Region Between Fort Collins and Loveland was a joint effort by the Cities of Fort Collins and Loveland and Larimer County to determine the future character and vision for the area between Fort Collins and Loveland. The Plan was completed in 1995. The study defined three planning subareas that are within or border the *South College Corridor Plan* study area.

- Area between Shields/Taft and Highway 287 (located on the west side of US 287 from 57th Street in Loveland to Trilby Road in Fort Collins) was preferred as “[m]ixed use in northern and southern sections, in master-planned campus setting...Agriculture or restored prairie in center section.” Open views along 287 were to be maintained.
- Area between Trilby Road and CR 32 (Carpenter Rd), east of 287 was preferred as “[m]ixed use” with drainage, wetlands, and views preserved near Benson Lake.
- Area between CR 32 and CR 30, east of 287, which is outside of this Plan’s study area, was preferred as “[u]rban and rural residential”.

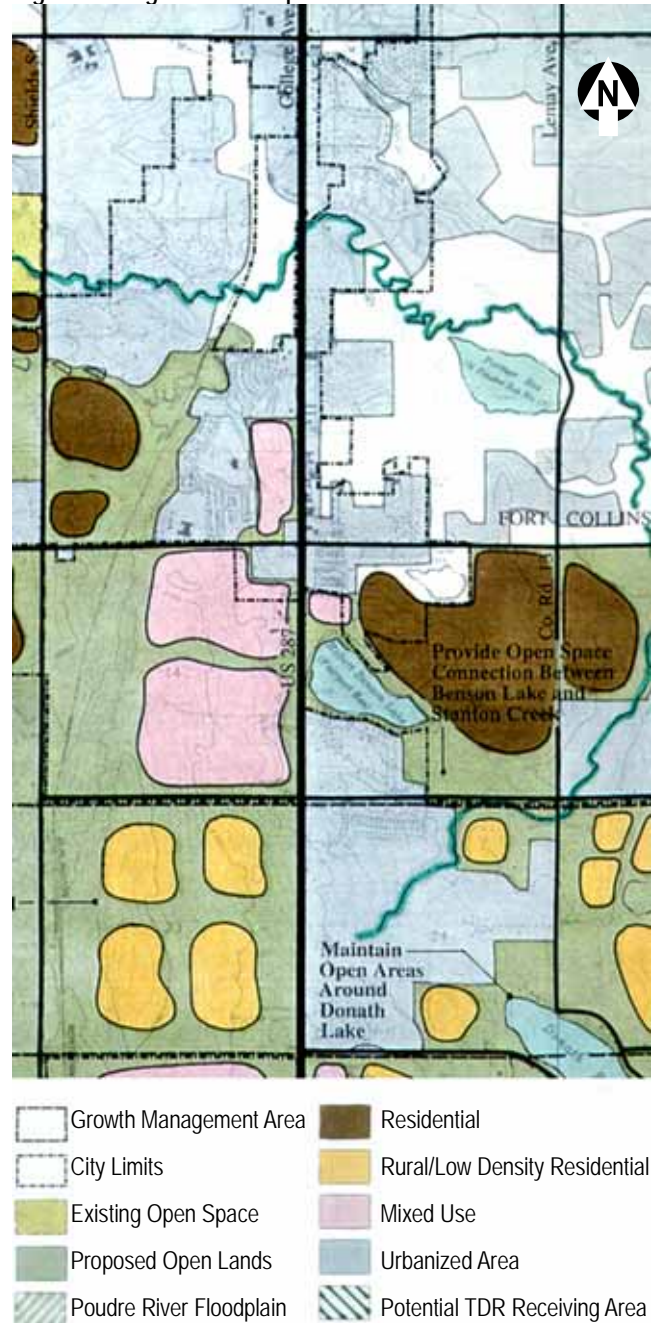
Figure 5 shows areas of new mixed uses from Skyway south to Carpenter on the west side of US 287. The term “mixed use” is not defined in the regional Plan. Much of the east and west sides of US 287 including Skyway, Kel-Mar, South 13, Victoria Estates and other subdivisions, are shown as “urbanized”.

Northern Colorado Separator Study

The *Northern Colorado Separator Study*, completed in 1999, is a regional plan to establish a system of community separators. The Plan emphasizes the existing Fort Collins - Loveland Community separator (Longview Farms) which is located at the southwestern intersection of US 287 and Carpenter Road.

The *Northern Colorado Separator Study* can be downloaded at: fcgov.com/advanceplanning

Figure 5 - Regional Plan’s preferred land use scenario



SH 392/Carpenter Road Environmental Overview Study

In 2006, an environmental overview study was prepared for Carpenter Road from College Avenue on the west to downtown Windsor on the east. The study provides the basis for long-term roadway improvements and also provides support for local planning decisions. The outcome of the process is a recommended right-of-way corridor for future transportation improvements along the existing SH 392 Corridor. The roadway needs to be widened to four lanes to accommodate the travel demand expected to be placed on it by 2030. The improved Corridor will be a key connection to and from South College.

The *SH 392/Carpenter Road Environmental Overview Study* can be downloaded at: dot.state.co.us/sh392EOS

US 287/South College Avenue Bicycle Lane Project

In 2004, the City of Fort Collins and CDOT initiated the *U.S. 287/South College Avenue Bicycle Lane Project* to develop a vision and conceptual design for bicycling facilities and trail connections along US 287/South College Avenue between Carpenter Road and Harmony Road. The main goals of the project were to provide facilities for both commuter and recreational cyclists and to provide a safe and user-friendly addition to the City's and the region's integrated system of on-street bike lanes and off-street trails. This project will also result in improved bicyclist access to transit routes along US 287/South College Avenue. As a result of this Plan, bike lanes were constructed along College Avenue in 2008.

The *US 287/South College Avenue Bicycle Lane Project* can be downloaded at:
fcgov.com/transportationplanning/scbl.php

North I-25 Environmental Impact Statement

In the late 1990s, CDOT and regional planning groups (North Front Range Transportation and Air Quality Planning Council, Upper Front Range Regional Planning Commission, and Denver Regional Council of Governments) undertook the North Front Range Transportation Alternatives Feasibility Study (TAFS) to evaluate an extensive range of alternative highway improvements, bus-transit alternatives, passenger-rail alternatives, and travel demand management programs from SH 7 to SH 14 within the I-25 Corridor. This study, published in March 2000, produced a vision that included inter-regional bus service, combination general purpose/high-occupancy vehicle lanes, and passenger-rail service.

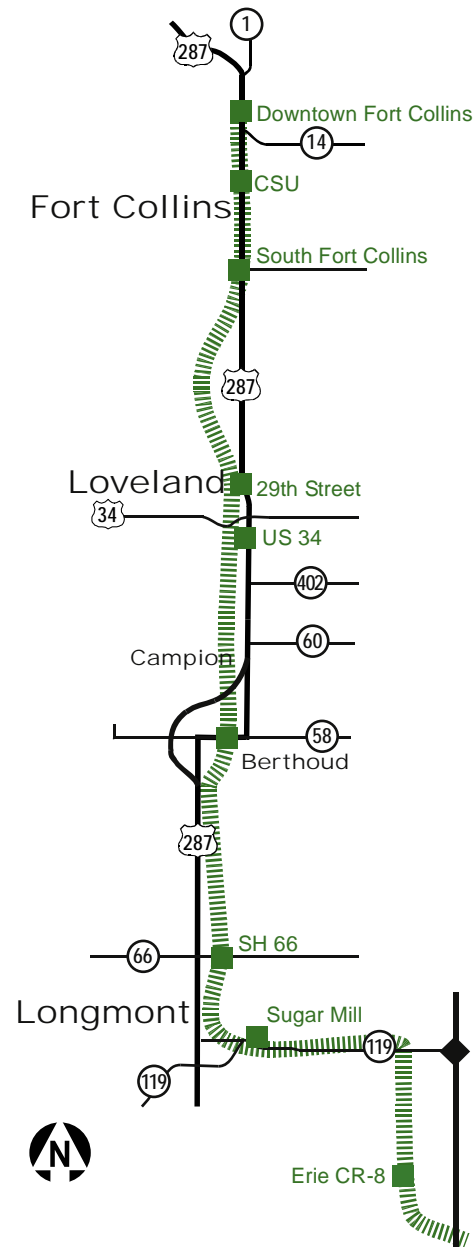
The Federal Highway Administration (FHWA) and the Federal Transit Administration (FTA), in cooperation with the Colorado Department of Transportation, then initiated preparation of an Environmental Impact Statement (EIS) to identify and evaluate multi-modal transportation improvements along approximately 70 miles of the I-25 Corridor and parallel roadways such as US 287 from the Fort Collins-Wellington area to Denver. The EIS is the next step in addressing regional and inter-regional movement of people, goods and services in the I-25 Corridor.

The *North I-25 Draft Environmental Impact Statement (DEIS) Package A* alternative considers a double-tracked commuter rail route that will extend from the end of the planned FasTracks North Metro end-of-line station in Thornton and terminate in Downtown Fort Collins. A Fort Collins commuter rail station would be co-located with the South Transit Station. The proposed commuter rail route follows the existing BNSF alignment which generally parallels the US 287 alignment within and south of Fort Collins. In total, Package A includes five new commuter rail stations in Loveland and Fort Collins, two feeder bus routes, and one additional general purpose lane on I-25 in each direction. A map of the commuter rail route with station locations is provided in Figure 6.

At the time of this printing, the *DEIS* has been published and comments were being taken. The public hearings will be held during this period. After the *DEIS* review and public hearings, a preferred alternative will be identified to be studied further in a Final Environmental Impact Statement. A Record of Decision (ROD) will describe the project or phase to be constructed and identify funding for the approved action. The final decision on the transportation improvements will be determined by the lead agencies, FHWA and FTA.

The *North I-25 Environmental Impact Statement* can be downloaded at: dot.state.co.us/northI25eis/index.cfm

Figure 6 - North I-25 Draft Environmental Impact Statement Package A commuter rail stations



Transit Strategic Plan

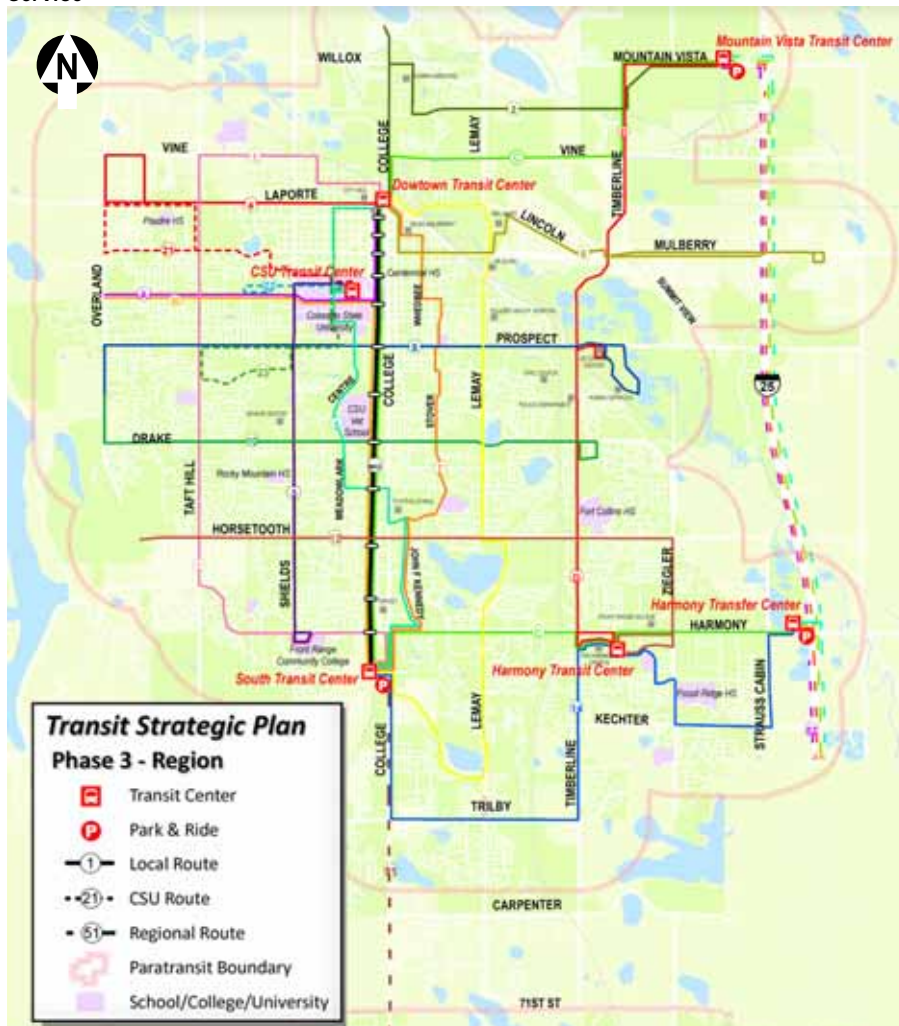
In 2008, the City of Fort Collins (in cooperation with the City of Loveland) began a process to update the *2002 Transfort Strategic Operating Plan*. The intent was to foster a dialogue with the community and region on transit opportunities and challenges; review existing fixed route service and performance standards; examine the existing four phased approach to a grid transit network; and address the financial solutions required to create and sustain a high-performing transit system for our community and region. At the time of this writing, transit service was proposed to be implemented in three phases.

The proposed first phase includes an operational MAX system and route changes to connect existing bus service to the South Transit Center (STC). A new signal is to be installed at Fairway Lane to accommodate the changes to Route 16, 17, 19 and Foxtrot.

Proposed Phase 2 includes new routes and additional re-routing to accommodate a true grid configuration. Nine routes total would connect to the STC, including a new route running from Lemay to Fossil Creek Parkway with 30 to 60 minute frequency and a new route running from Timberline to Trilby to College with 60 minute frequency. Foxtrot would be replaced by Route 51 and would match MAX operating hours with improved frequency of 30-60 minutes.

Proposed Phase 3 includes two additional routes along the MAX Corridor, in addition to the STC-Downtown Transit Center route. Route 51 (old Foxtrot) would extend down to Longmont. Other routes are the same or similar to Phase 2 (See Figure 7).

Figure 7 - Transit Strategic Plan Phase 3 proposed transit service



Land Conservation and Stewardship Plan

Adjacent to the South College Corridor are key open space lands and natural areas including Long View Farm, Pelican Marsh, Prairie Dog Meadow, Two Creeks and Redtail Grove. Completed in 2004, the *Land Conservation and Stewardship Master Plan* is the long-range vision document of the City of Fort Collins Natural Areas Program. The mission of the Natural Areas Program is to protect and enhance lands with existing or potential natural areas values, lands that serve as community separators, agricultural lands, and lands with scenic values. The Plan outlines the vision for two key areas that bisect the South College area, Fossil Creek Corridor and the Fort Collins - Loveland Separator. Additionally, the *Fossil Creek Natural Areas Management Plan* establishes land management guidelines for these properties.

Fossil Creek Corridor

Purpose: To expand protection in the ecologically sensitive Fossil Creek area. Land conservation will help protect rare species and riparian/wetland areas by expanding upon the existing Fossil Creek natural areas/open spaces, provide recreation opportunities, and extend the Fossil Creek trail. Additional land protection in this area contributes to community separation between Fort Collins and Loveland/Windsor and preserves views to the foothills and mountains along the I-25 Corridor.

Fort Collins - Loveland Separator

Purpose: To protect and expand the City's current inventory of Natural Areas in this area. Most of this area that is available for conservation has already been conserved and has thus protected scenic views, wildlife habitat, and the agricultural way of life. The open character between Loveland and Fort Collins on the western and eastern arterials helps give each community its own sense of character.

The *Land Conservation & Stewardship Plan*, and *Fossil Creek Natural Areas Management Plan* can be downloaded at: fcgov.com/naturalareas/plans-policies.php

How to Use This Plan

This *Plan* is intended to coordinate local stakeholder needs with the larger community's purpose (as represented in *City Plan*). It asks the question: "In recognition of the Corridor's unique challenges and opportunities, how should change occur differently than what would have typically occurred under the status quo (i.e., *City Plan* and the *Access Control Plan*)?" The recommendations contained within the Plan are intended to be used by City staff, Planning & Zoning Board, and City Council in understanding where the community, local leaders, and elected officials should focus their energy.

The *South College Corridor Plan* contains the following chapters and appendices:

Chapter 1: Plan Foundations describes the *Plan's* purpose, annexation history, and previous planning efforts.

Chapter 2: Existing Conditions and Issues describes the Corridor's unique opportunities and constraints, technical findings, and issues identified by the community.

Chapter 3: Vision translates stakeholder values into big ideas for the future.

Chapter 4: Framework Plan, Goals, and Policies represent the *Plan's* big ideas in physical form (the Framework Plan Map) and policy form (Goals and Policies), drafting a blueprint for each idea: Land Uses and Business Activity, a Complete Transportation System, Community Appearance and Design, Community Partnerships and Financing, and Natural Resources and Drainageways.

Chapter 5: Implementation outlines the barriers to change, catalyst projects, and a list of actions for the City, business and property owners, residents, and other partners to make the *Plan* a reality.

Two appendices contain supplemental information about:

A. South College Corridor Plan Survey Results:

This describes the methodology along with the responses from resident household and business/property owner surveys.

B. South College Corridor Market Assessment:

This assessment summarizes current market conditions and the project team's conclusions regarding the potential for additional development along the Corridor.

CHAPTER 2

EXISTING CONDITIONS AND ISSUES

Introduction

Constraints and challenges for the South College area are numerous: lack of business unity, sub-standard infrastructure, exclusively auto-dependent development, multiple mid-block driveway accesses, little or no landscaping, few pedestrian access and safety features, accident rates nearly twice that of North College Avenue, and lingering distrust of the City. Much of the area was subdivided and developed in an ad-hoc manner, creating a number of parcels that have become functionally obsolete due to small size, narrow shape, and lack of drainage systems and other urban infrastructure. At the same time, the area benefits from many unique opportunities and assets, including niche retail shops, undeveloped lands, expansive views, healthy neighborhoods, the Fossil Creek and Mason Corridor trails, the future South Transit Center and MAX service, open space and natural areas, and neighborhood interest and involvement.

This chapter highlights both issues identified by the community and findings of the project team. Additional findings from the household and property/business owner survey and market assessment are included in the appendices.

The many issues and technical findings identified to date are organized by the following headings:

- Land Use
- Business Activity
- Transportation System
- Appearance And Design
- Community Partnerships
- Financing
- Drainageways

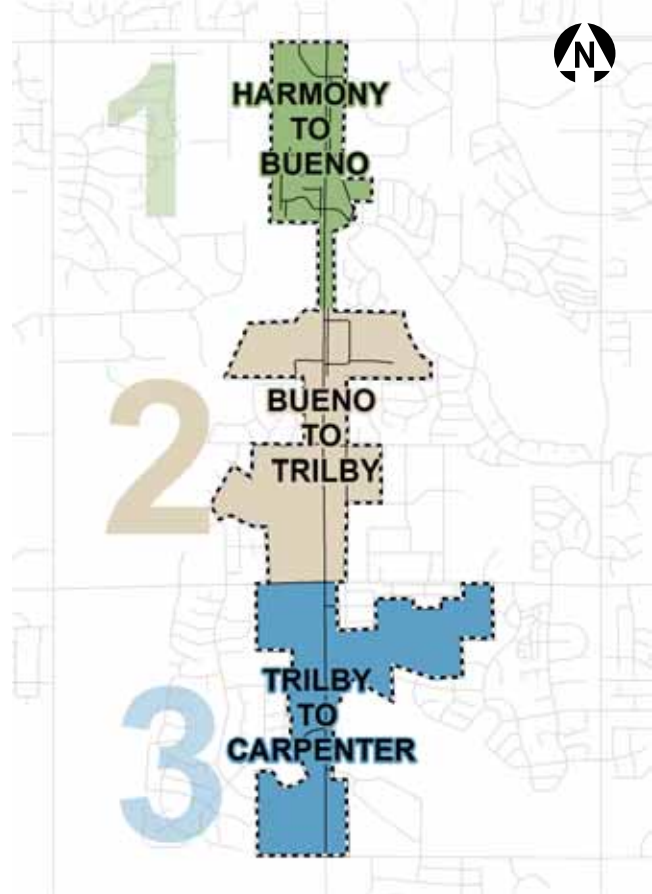
Land Use

Corridor Segments

Currently, the South College Corridor is comprised of three distinct geographical segments. While all share common characteristics and blend into one another, each segment possesses unique opportunities and constraints. The northernmost segment (1) occurs from Harmony Road south to Bueno Road, where the surrounding area is

strongly identified by its array of retail and office land uses adjacent to the highway that generally fit City standards. This area is greatly influenced by its proximity to Harmony Road. In the future, this area will be affected by the proposed South Transit Center and transit-oriented development opportunities along the Mason Corridor.

Figure 8 - Corridor segments



The middle segment (2) generally occurs from Bueno Road south to Trilby Road. The building type and lot size become much smaller, generally between 1-5 acres in the South 13, the Kel-Mar Strip, and Antique Row. There are also several large developable sites.

The southernmost segment (3) occurs from Trilby Road south to Carpenter Road, where retail strip uses change to a more low-density residential character. New neighborhoods adjacent to the Corridor and expansive views of Benson Lake and the Front Range dominate, as more than 75% of the land in this area is agricultural, vacant, or open space. The remainder is made up of several low-intensity commercial businesses. Carpenter Road marks the Growth Management Area boundary and the Fort Collins-Loveland Community Separator where unincorporated Larimer County and, further south, the City of Loveland begin.

Redevelopment versus Rehabilitation

Some buildings have been re-branded over time along the Corridor. Business owners have sought to distinguish themselves through signage or other unique details. Many of the current buildings and site layouts are well suited to local businesses that need flexible, low-end space not found elsewhere in the city. It may be that many buildings can continue to be rehabilitated or expanded over time to respond to business change and growth.

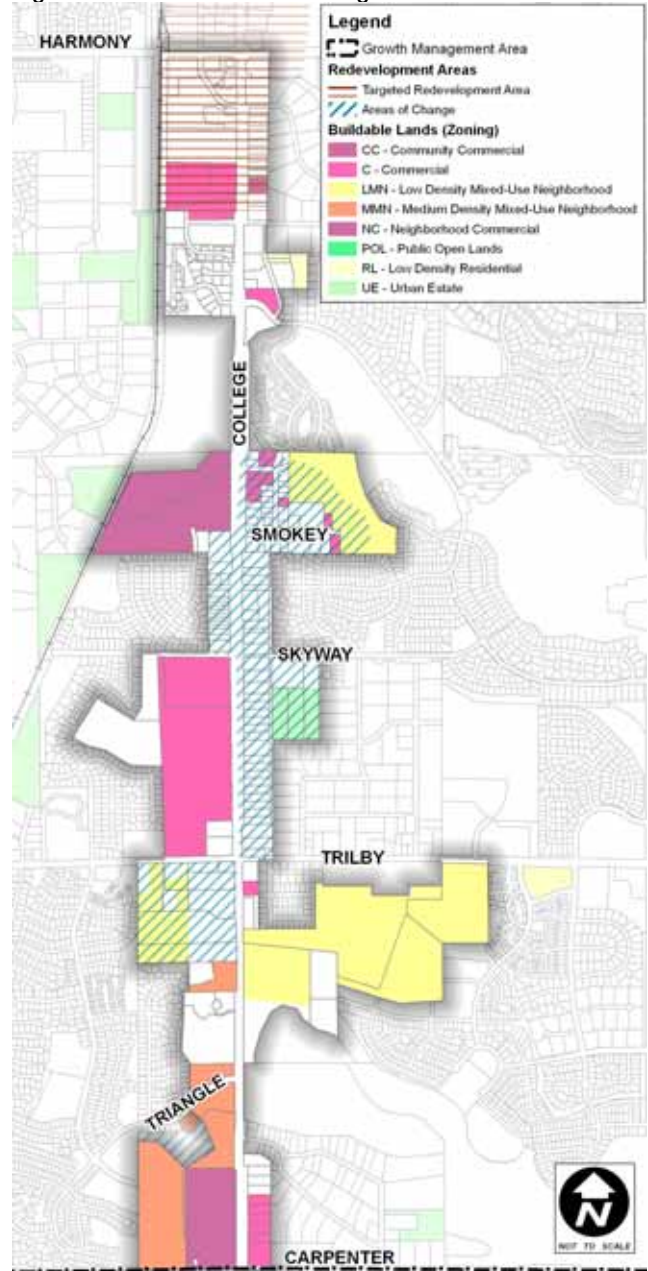
On the other hand, cohesive land use redevelopment may garner a greater level of business attraction and provide more economic opportunity in the area more than rehabilitation of existing buildings. Redevelopment can provide a fresh appearance, provide funding for much needed transportation improvements, and offer a greater variety of shopping opportunities along the Corridor. However, redevelopment also requires greater investment, and it is unclear whether redevelopment is realistic without some kind of public support. It may be that over time redevelopment becomes more attractive as property values rise.

Areas of Change

Two existing City planning maps identify areas of change. One such map is the City's Buildable Lands Inventory map, which shows a city-wide snapshot of vacant, buildable lands. The second map is the City Plan Redevelopment and Infill map. This map identifies two areas of change along the Corridor: (1) near Harmony Road, labeled as a Targeted Redevelopment Area; and (2) the area between Bueno Drive and just south of Trilby Road, labeled as a Potential Intensification Area. Targeted redevelopment areas are the focus of City efforts to promote redevelopment. Potential intensification areas have zoning that may result in further development. Figure 9 shows both vacant lands and redevelopment/infill areas within the South College Corridor.

The South College Market Assessment found most areas with existing businesses to be relatively stable. Thus, the strongest potential for change is on vacant sites. In the long term, developed parcels may have a stronger potential for redevelopment as owners consolidate properties and as more businesses and customers are attracted to the Corridor.

Figure 9 - Potential areas of change



Land Use Choices

From the Potential Areas of Change map and information from the April visioning workshop, the South College Land Use Choice Worksheet (Figure 10) was crafted in order to identify options for future land use on specific sites. The most significant issue with regard to land use is the need to confirm an appropriate future land use plan for vacant properties. While the *City Structure Plan* and current zoning establishes a foundation upon which to build, several areas were considered for changes in order to better align with *City Plan* policies, to evaluate site-specific issues, and to

respond to the input of businesses, property owners, and residents.

Figure 10 highlights land use options for seven Areas of Change (A - G). These areas are either currently vacant or are developed, and have the potential to change over time. The list below contains descriptions of the land use options on the map and citizen input on the options received at the July open houses.

Area A is shown as Commercial with a Transit-Oriented Development (TOD) Overlay. This is the current *City Structure Plan* designation, and the area is within the TOD Overlay District. Commercial Districts include a wide variety of community and regional retail uses, as well as offices, business and personal services, and to a lesser extent residential uses. Although they are typically the location of highway businesses and auto-related uses, they also offer opportunities to create new areas and transform existing developed areas, over time, from being exclusively auto-oriented places to being a series of mixed-use, multi-modal centers which relate better to the community as a whole and to surrounding residential neighborhoods. The TOD overlay zone encourages land uses, densities, and designs that enhance and support transit stations along the Mason Corridor. Area A has the most potential to support Mason Corridor, although transit supportive uses like housing or offices are not mandated. Citizen responses strongly support the concept of TOD at this location.

Area B includes two options: (1) Commercial and Residential (Low Density Mixed-Use Neighborhood), or (2) Mixed Commercial, Industrial, and Residential (Low Density Mixed-Use Neighborhood). Option 1 is the current designation and would allow a wide variety of commercial and residential uses, with the developed portion remaining C and the vacant portion remaining residential. Option 2 would allow a greater variety of land uses than Option 1. Option 2 was developed to better reflect the presence of warehouse uses and to accommodate the expansion or addition of those and other light industrial uses, and is the *Plan* recommendation. Citizen responses were somewhat split, with slightly greater numbers supporting Option 2.

Area C includes two options: (1) Community Commercial, or (2) Commercial. The current designation was Community Commercial, although in 2008 the front portion of the site was rezoned to Commercial at the request of the property owner. Option 2 would allow Commercial uses throughout the property. The site itself is vacant, with a significant natural feature on the west, residential subdivision on the south, and commercial to the east. Citizen comments were split on these options, and there was strong concern over protection of the natural features and the site's prominence.

Another option, Medium Density Mixed-Use Neighborhood (MMN), was developed by staff to better align the site with the *City Plan* policies, the approved Waterstone project, and the surrounding development. The MMN at this location meets the purpose of *City Plan* by providing a place for denser, attached, small lot and multiple-family housing built around an Employment District (adjoining Commercial and Service Commercial Districts). It also can contain other moderate intensity uses which can help provide a transition and a link between surrounding residential areas and the commercial area.

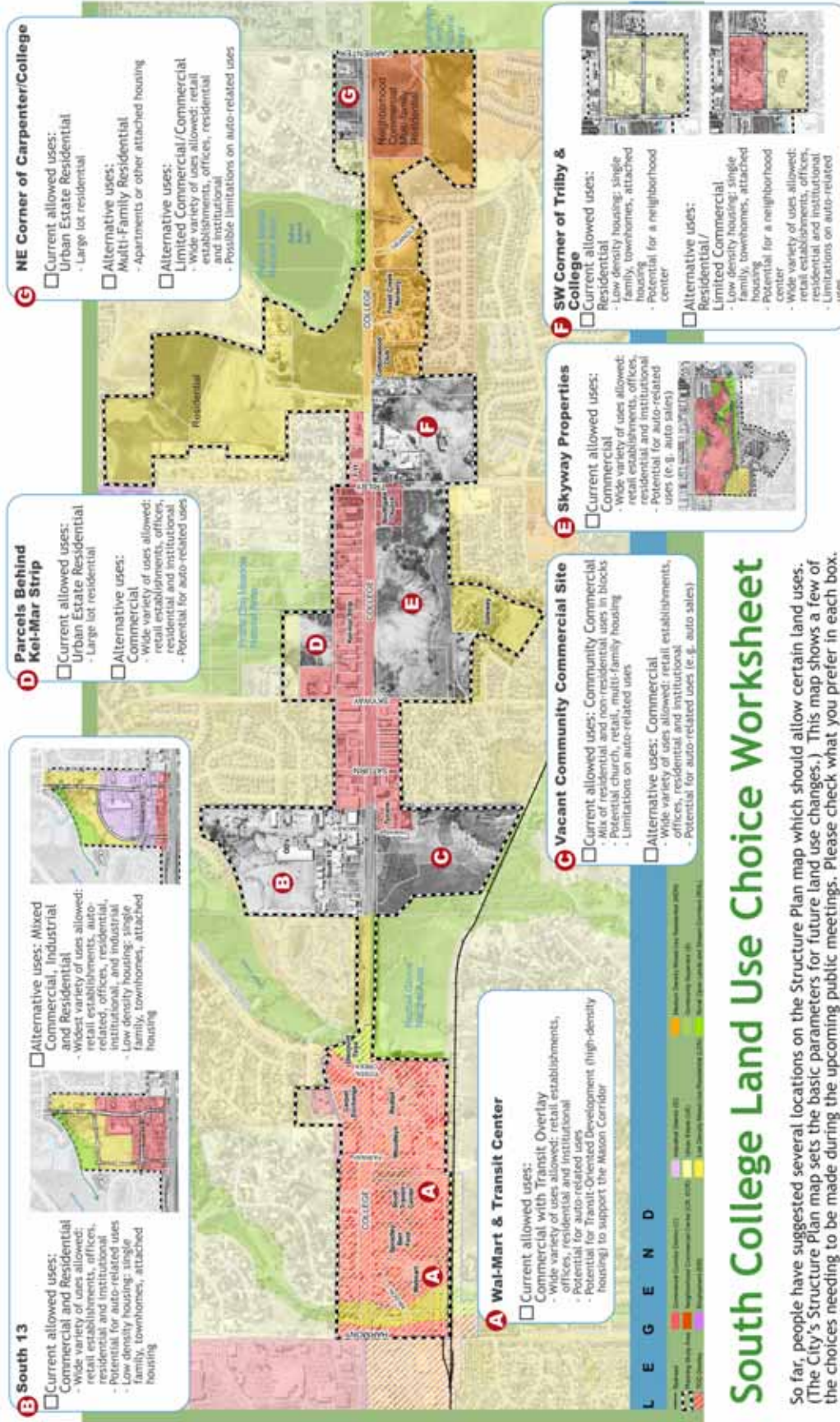
Area D includes two options: (1) Urban Estate, or (2) Commercial (Limited). Option 1 is the existing land use designation, allowing up to two dwelling units per acre. Option 2 allows a wide variety of commercial and residential uses. Option 2 recognizes that the site may be undesirable for large lot residential uses due to its proximity to the Kel-Mar Strip, and could accommodate low-intensity commercial uses. Citizen responses were split between the two options.

Area E shows a Commercial designation, which is its current zoning. There have been a variety of proposals on this site in the past, from a grocery store to an auto dealership. Citizen responses generally supported commercial uses, with some negative comments on auto sales uses.

Area F, at Trilby and College, includes two options: (1) Residential (Low Density Mixed-Use Neighborhood), and (2) Residential/Limited Commercial. Option 1 is the current designation, allowing residential densities of up to eight dwelling units per acre and a neighborhood center. Option 2 would also allow the same residential densities, but could accommodate additional commercial uses along the front half of the area. The front portion of this area has several existing commercial uses including a landscape supply yard, offices, a veterinary clinic, and small warehouses. Citizen responses were split between the two options.

Area G, at the intersection of two state highways - US 287 and State Highway 392 - includes three options: (1) Urban Estate, (2) Multi-Family Residential, or (3) Limited Commercial/Commercial. Option 1 is the existing land use designation, allowing up to two dwelling units per acre. Option 2 would allow multi-family housing. Option 3 places some restrictions on the types of commercial and residential uses that could be accommodated, such as excluding drive-in restaurants and other auto-related uses. Citizen responses favored Limited Commercial/Commercial, with a desire for adequate residential buffers.

Figure 10 - Land use choices worksheet



South College Land Use Choice Worksheet

So far, people have suggested several locations on the Structure Plan map which should allow certain land uses. (The City's Structure Plan map sets the basic parameters for future land use changes.) This map shows a few of the choices needing to be made during the upcoming public meetings. Please check what you prefer in each box. Are there other types of land uses you prefer in these locations? There is room on the next page to write any additional comments, use "A" and "B" etc. to indicate the area in question. Please drop this off at one of the three July open houses. See page 8 for open house info.

Business Activity

The South College Corridor offers an array of land uses, from single family homes to car dealerships to a landscape nursery. The visual quality of these land uses is likewise diverse with older metal pre-fab buildings, car lots, visible outdoor storage, single family houses, and a scattering of a few, newer commercial structures.

The South College Corridor fills niche markets that few other areas in the region offer. It functions as an employment cluster for light industrial, manufacturing, and construction trades in areas like the South 13 subdivision; as a cluster of antique shops between Saturn to Trilby Road; and as a social service resource at the Foothills Gateway campus.

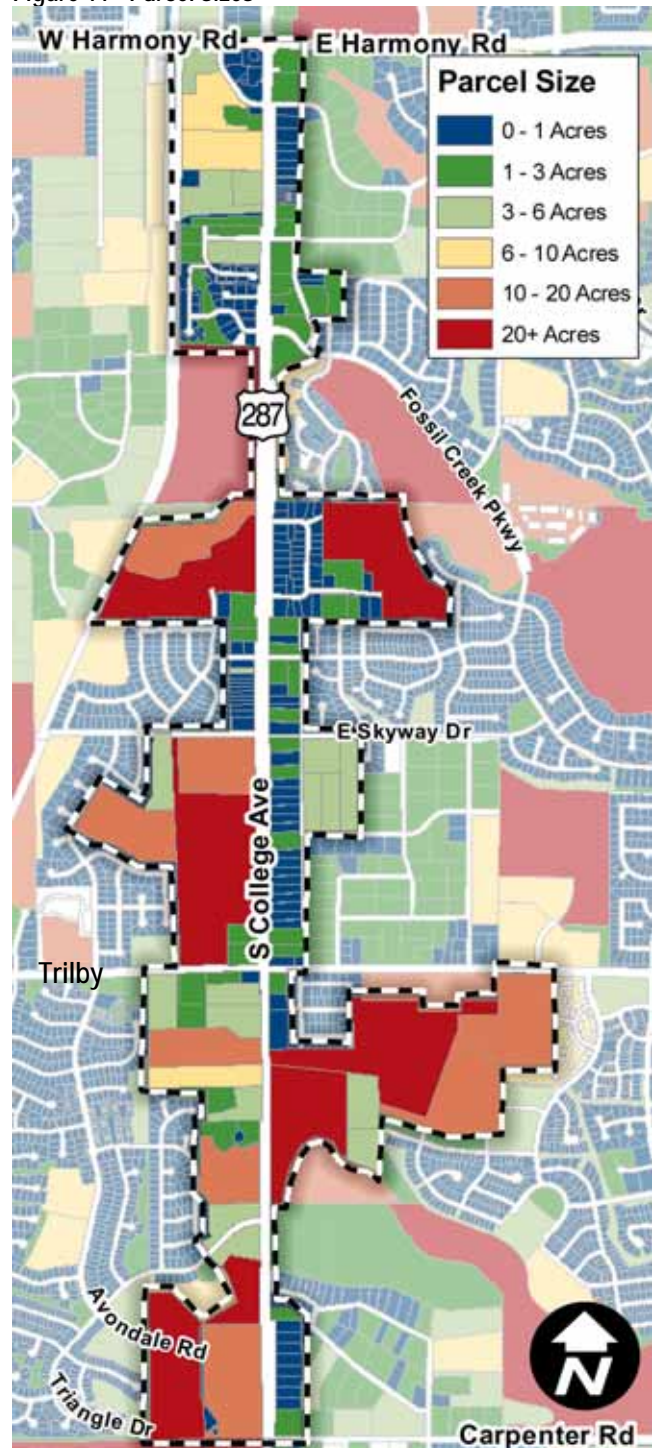
The Corridor's absence of big box development, limited primarily by parcel size and shape, is valued by business owners and consumers (see Figure 11). Instead of trending towards the conventional commercial development pattern found just north on College Avenue and east on Harmony Road, some stakeholders would prefer to see existing retail operations promoted to further reinforce their position in the community. Commercial property owners and business owners along the Corridor support the existing development and retail niche that the area provides. However, many of these businesses may not be well known beyond the local region.

Business growth and expansion is limited by unsafe traffic conditions, inadequate access and circulation, and small parcel sizes. The Corridor Survey, Market Assessment, and public meetings identified differences between what business and property owners want and what neighboring residential areas (i.e., a potential customer base) want. The focus of existing businesses is on regional goods and services; area residents desire neighborhood retail shops like grocers.

A land use issue, with particular significance to the Kel-Mar Strip, is the City's change of use development requirements. Under the Land Use Code, change of use, which is when a property changes from one land use category to another, is subject to the same development requirements as more substantial land use changes. The intent is to upgrade aging properties with better infrastructure, landscaping, etc. However, many property and business owners have found City regulations to be a constraint, particularly the costs associated with infrastructure improvements. The extraordinary costs associated with paying for the local portions of two streets - College and Aran - is a unique situation that appears to

have prevented many change of use projects from being completed.

Figure 11 - Parcel sizes



Corridor Survey Findings

The planning team supplemented outreach meetings with surveys of households and business owners in April and May 2008. Complete survey results can be found in Appendix A.

The household survey was randomly distributed to 1,700 households in the South College trade area. A total of 365 households responded (21%), resulting in a statistically valid survey. The survey sought information about people's shopping patterns and expenditures, along with questions about their top issues along the Corridor.

The business owner survey was distributed to 276 business and property owners along the South College Corridor in April 2008. A total of 139 returned the survey for a statistically valid response rate of 50%. In addition to the same issues questions of the household survey, businesses and property owners were also asked business profile questions and for information about future plans.

Business and Property Owners Characteristics

The survey found that the South College Corridor is largely made up of businesses that serve regional clients, with a small amount servicing Fort Collins directly; 74% of business respondents identified their clientele as Larimer County or the North Front Range Region. Businesses tend to be small in size (81% have fewer than 11 employees), and over half of respondents have owned their property for at least 11 years (56%).

South College Corridor property owners and businesses are generally not considering major expansions or redevelopment. The most common responses indicated a desire to stay the same size and expand at the existing location, which accounted for 36% and 27% of responses, respectively. In total, 70% of respondent businesses are either content with current conditions or plan to make small improvements to their business or property. Related to these results, 76% of businesses that own their property responded "no" when asked if they envisioned redeveloping their property. However, 26% of businesses responded positively to the same question, which is approximately the same amount that has interest in selling their property in the short term (one to five years). The fact that a quarter of property owning business in selling or redeveloping indicates that although the business landscape is stable, some potential for change within the South College Corridor exists.

Issue Priorities

In an effort to focus the Corridor *Plan's* recommendations, households and businesses prioritized a list of 14 possible issues to the Corridor (see Figure 12).

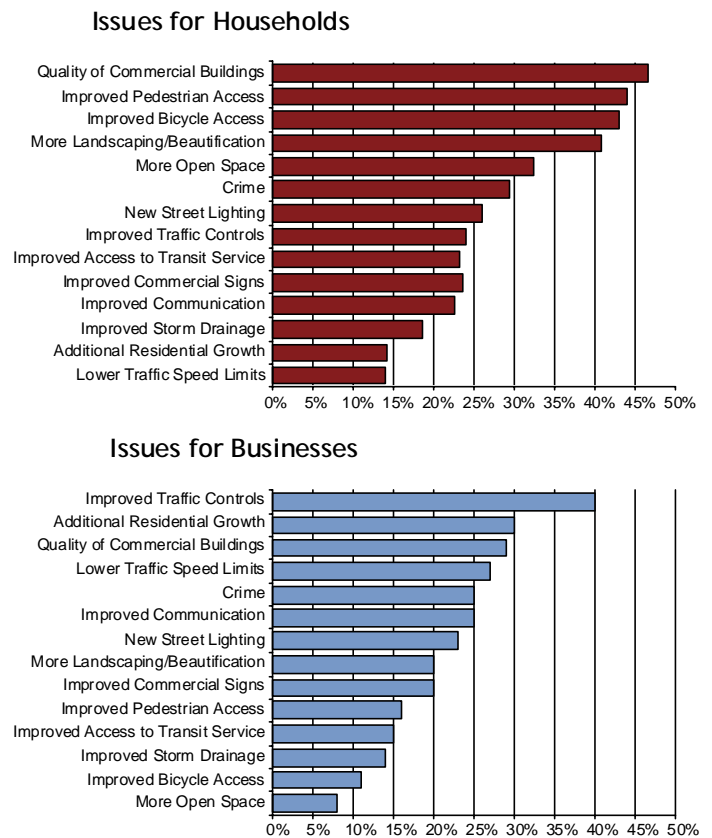
For households, the top five critical and serious issues are (in order of priority):

1. Quality of Commercial Buildings
2. Improved Pedestrian Access
3. Improved Bicycle Access
4. More Landscaping/Beautification
5. More Open Space

For businesses, the top five critical and serious issues are (in order of priority):

1. Improved Traffic Controls
2. Need for Additional Residential Growth
3. Quality of Commercial Buildings
4. Lower Traffic Speed Limits
5. Crime

Figure 12 - Issues in order of priority for household and business survey respondents



New Commercial Uses

Most household respondents visit the South College Corridor for shopping (32%), auto-oriented services (18%), and restaurants (16%). However, most visit less than once a month.

When asked what types of retail businesses they would like to see along the Corridor, household respondents identify small neighborhood-oriented retail stores (80%), restaurants/bars (68%), and grocery stores (67%) as the most desirable. Business respondents indicate these same three retail types as their top preferences. These and other findings suggest that new stores in the South College Corridor have the opportunity to serve local customers.

South College Market Assessment

In conjunction with the Corridor surveys, a market assessment studied the potential for future development along the Corridor as part of the *South College Corridor Plan* (see Appendix B on page 71). The assessment is based on the South College Corridor trade area, which was defined as the area between Harmony and Carpenter roads, and Taft Hill Road to the U.P. railroad line - i.e., larger than the immediate South College Corridor. Major findings include:

1. The population of the South College trade area has grown more rapidly than the City of Fort Collins or Larimer County since 1990. The primary trade area grew from a population of 5,523 in 1990 to 17,528 in 2007, which is an increase of 12,005. Between 1990 and 2000, the area maintained an annual average growth rate of 8.6 percent. Since 2000, the area continued to experience high growth, with households increasing by 1,780 between 2000 and 2007, or an annual growth rate of 4.9 percent annually, which remains higher than the overall Larimer County growth rate of 1.6 percent and the City of Fort Collins growth rate of 3.1 percent. Growth in the area is primarily characterized by single family detached units. The Buildable Land Inventory indicates the area can continue to grow by an additional 4,800 residents to reach a total of 23,600 by 2020.
2. Between 1990 and 2007, household incomes in the trade area have grown significantly, with the number of households earning \$75,000 or more increasing by nearly 3,000 households, or approximately 70 percent of the growth. Increasingly, the households moving into the primary trade area appear to be among higher income levels. This influx of income has helped the area become one of the most affluent areas in the City, with the average household income now estimated at \$102,000 annually.
3. This income range represents a key benchmark for many retailers when considering new store locations. The Corridor includes approximately 21 parcels totaling 280 acres of potential future redevelopment sites comprised of development and redevelopment sites. The majority of these development sites are located south of Trilby Road. In general, these sites are also characterized by larger parcel sizes that aid in attracting development to the Corridor.
4. The Buildable Lands Inventory indicates the Corridor itself can support approximately 1,800 new residential units. As the area approaches buildout, the demand for alternative residential products such as townhomes, duplexes, and apartments will increase. The Corridor's visibility (from US 287), freeway access (from Harmony Road and Carpenter Road), and convenience (employment and entertainment opportunities) make it especially appealing to apartment projects. The Corridor can likely support an apartment development of 150 to 250 units.
5. The trade area is currently underserved by neighborhood retail and community service uses. In particular, a typical supermarket anchored neighborhood shopping center between 75,000 to 125,000 square feet would be supportable immediately. A supermarket would typically consume between 55,000 and 65,000 square feet of space, with the remaining available retail space housing ancillary retailer and personal care services not currently in the area, such as a dry cleaner. A new supermarket has been proposed along College near Carpenter (and had been approved by the City only to expire for non-action), and so remains a possibility to accommodate neighborhood retail.
6. The demand for regional retail is anticipated to grow across the City of Fort Collins and Larimer County; however, the South College Corridor is not an ideal regional retail location, which will cause these uses to develop elsewhere in the city. Competitive disadvantages compared to other locations in the region include a comparative lack of anticipated residential growth, and competition from existing and planned regional centers (e.g., Harmony Road).
7. The current market conditions in Larimer County create an extremely competitive environment for additional office development. As such, the South College Corridor is not ideally suited for major office development; however, the Corridor can expect to capture a small amount (50,000 to 75,000 square feet) of additional community and neighborhood serving office space. Most of this development for South College is likely to occur between Harmony Road and Fossil Creek Drive - and may be completely absorbed by the Redtail Office Park, which

contains over 100,000 square feet of office space under construction.

8. Major industrial development will also be attracted to the ample land supply along or near Interstate 25, rather than to South College. However, many small vacant or under developed parcels could allow for small service industrial uses (e.g., car repair, appliance repair, sign construction, etc.) not available elsewhere. Service industrial uses typically cannot afford high rent or land prices; therefore, these uses will only be attracted to South College as long as land values remain low.

Transportation System

South College is a fairly typical example of highway entryway corridors, built before today's development standards. In much of the Corridor, a poorly planned pattern of subdivision and development formed a shallow linear strip of low intensity, largely automobile-oriented uses along the highway. Historically, direct access to businesses from the highway was the primary goal versus mobility and safety (see Figure 13).

Residents and businesses have identified improving traffic controls, traffic safety, pedestrian and bicycle access, and lowering speed limits as important issues. Many issues regarding travel through the Corridor have already been analyzed through previous planning efforts including the *South College Avenue (US 287) Access Control Plan Update Report*, the *US 287 Environmental Overview Study*, the *US 287 South College Avenue Bicycle Lane Project* and the *Master Street Plan*. One improvement project was completed in 2008, consisting of bicycle lanes and facilities on South College from Harmony Road to Carpenter Road.

Access and Roadway Safety

The *Access Control Plan* has received a lot of attention from businesses due to the concern over loss of direct highway access. At the same time, businesses, their customers, and surrounding neighborhoods desire safer roadways and more transportation options.

At present, fast speeds, uncontrolled access, inadequate signalization, congestion, insufficient street lighting, high accident rates, and lack of multi-modal infrastructure are top concerns. The highway's functions of speed and mobility dominate the Corridor's character, to the detriment of some retailers. South College carries an average daily traffic volume of 26,000 vehicles at Carpenter Road and 36,750 vehicles at Harmony Road (CDOT 2006) as one of four major corridors into the City of Fort Collins. The

Harmony Road/South College intersection carries more traffic than any other intersection in the City. As the Corridor continues to develop and traffic volumes increase, the lack of a complete street network and frontage roads will limit business access and customer and employee safety.

Figure 13 shows the existing street network. North-south traffic relies almost exclusively on the highway. There are a few local connections between neighborhoods, and no significant major north-south streets near the Corridor besides South College Avenue. The length of any new streets will be limited by the presence of the BNSF rail, natural areas, and existing development.

Other issues included unsafe left hand turns, insufficient turn lanes, and a desire for additional traffic signalization. Business survey respondents thought that the lack of adequate traffic controls was the most critical issue that needs to be addressed. It is not a coincidence then that the transportation plans described in Chapter 1 aim to resolve many of the issues repeatedly raised by the community. Short- and long-term strategies are in place to improve lighting, provide better transit access, increase the number and connectivity of sidewalks, and landscaping the right-of-way. These long-term plans propose improving the functionality of the Corridor not only for motorists, but for pedestrians, bicyclists, and transit users.

As a state highway, the final design of any potential traffic improvement on South College would be led by CDOT. Because the conceptual layout of improvements is tailored to this stretch of the highway rather than a one-size-fits-all, it provides greater flexibility for businesses to comply with CDOT standards than if an *ACP* were not in place.

As access control measures are implemented, businesses fear that customers may have difficulty reaching their stores. Should South College be widened, a back-loaded frontage road and reconfigured parking would be necessary for certain businesses. Property owners are concerned about the effects these improvements might have on property values and business functions.

As a result, property and business owners need to be closely involved with any future transportation projects. Stakeholders have requested that future highway design be context-sensitive, that costs are distributed fairly, and that as the Corridor evolves and as land uses intensify, highway improvement projects be built to balance transportation for all modes with the needs of adjacent businesses and development.

Figure 13 - Existing street network



Pedestrian and Bicycle Facilities

Customer movement between stores and across the highway is difficult because of the lack of sidewalks. The lack of sidewalks is an issue raised repeatedly by both residents and businesses and is identified in the *Transportation Master Plan* as a top priority.

Pedestrians must be able to cross the highway at regular intervals to access retail and neighborhood areas. There are 17 street intersections and multiple driveways along South College. Only five of the 17 street intersections are signalized to allow pedestrians and bicyclists to cross the highway, usually at the mile increment (or 5,200 feet). Pedestrians rarely will go more than 300 to 400 feet out of their way to take advantage of a controlled intersection. Consequently, pedestrians are critically underserved, and crossings at uncontrolled locations deserve serious consideration as urban arterial corridors redevelop.

The lack of pedestrian and bicycle connections has been the top issue of neighborhood residents. Bicycle and pedestrian travel between South College area neighborhoods and community destinations to the north is difficult because there are no facilities to get them there. While the bike lane on South College Avenue addresses one aspect of the problem, other aspects cannot be solved without a complete network of pedestrian and bicycle facilities on streets and off-street trails.

In addition, many businesses are missing bicycle racks, an important component of the bicycle network.

Transit Facilities

Residents have concerns over unsafe access to transit, infrequent service, and uncomfortable transit stops. Most bus stops lack shade structures, benches, sidewalks, landscaping, and are not ADA compliant. Improvements to these conditions, as well as more frequent service, would provide more transportation options for residents, employees, customers and clients of Foothills Gateway.

In particular, the transit stops at Skyway Drive and at Trilby Road need upgrading. They simply consist of a transit sign on the side of the highway (and for the northbound stop at Skyway, a bench). The poor condition of these stops is in sharp contrast to the southbound stop at Fossil Creek Parkway, which contains a shelter, bench, trash receptacle, and an adequate sidewalk connection.

Regional bus service (Foxtrot) is the only existing transit service along College Avenue. Service is hourly between

approximately 6:00 a.m. and 7:00 p.m. The spacing between stops varies, from less than a quarter mile near Harmony Road to a mile at Carpenter Road. On the north end of the Corridor, Route 1 provides more frequent service along Harmony Road.

Appearance and Design

There is widespread agreement by businesses and residents that the quality of commercial buildings and the appearance of the Corridor are significant issues. When asked to rank a list of 13 possible improvements, two of the top three priorities for household survey respondents were to improve the “quality of commercial buildings” and “more landscaping, street trees, and beautification.” Many of the buildings are older and have outdated layouts or facades. The sole emphasis for much of the Corridor is on vehicle access to parking, with neglect of other community design considerations such as safety, walkability, and visual quality. Landscaping is limited to a few, isolated locations where new development has occurred. These aspects provide a sense that the Corridor is focused more heavily towards highway users and away from local business and neighborhood needs.

Streetscapes

The highway streetscape lacks even the most basic elements of pedestrian lighting, street trees, sidewalks and landscaping. The installation of street trees or other vegetation, pedestrian scale lighting, and public pedestrian spaces along the highway would do the most to improve the Corridor’s appearance. As on any state highway, landscaping along the parkway and medians may be at odds with CDOT concerns about safety and the ease of maintenance. However, street trees and other streetscape features should have nearly equal importance to other highway elements like they do on College Avenue north of Harmony Road.

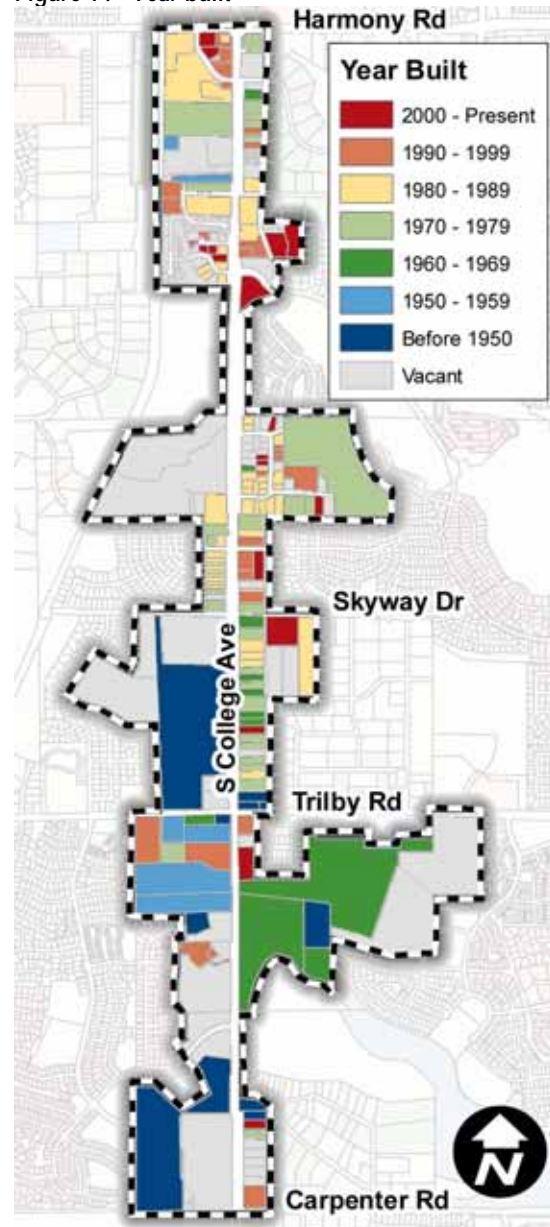
Building and Property Appearance

Varying jurisdictions and regulations in the past have led to a range of quality, design and aesthetics in the Corridor. The lack of consistency and cohesion amongst building appearances contributes to a lesser degree of visual quality throughout the area, a feeling of incongruity between business types, and a generally uninviting environment (see Figure 14). Most businesses serve specific niche markets, and don’t rely on high-end signage or building facades to draw in customers. Several buildings, especially those between Bueno and Trilby, are dated and are made of steel siding and are rectangular in shape. A mosaic of

architectural styles is the dominant theme for existing development. As the South College Corridor transitions from the highway-oriented commercial development seen today into a more diverse mix of uses, design will become increasingly important to distinguishing the Corridor, inviting consumers to the area, and strengthening its economic base. While no specific thematic design is suggested for the Corridor, a basic level of quality and design could enhance the area’s eclectic image.

In the near term, the overall appearance will most likely be influenced by new development on vacant lands meeting the City’s standards for quality design. Over time, it is probable some existing commercial properties will redevelop and/or some building facades will be improved.

Figure 14 - Year built



Gateway

The “sense of arrival” into the City of Fort Collins occurs for most drivers at Harmony Road, although the city limits begins at Carpenter Road (three miles south). Property owners recognize the importance of the Corridor’s highway and gateway functions, and how promoting the Corridor as a gateway could positively impact businesses. A gateway concept with bold landscaping, special signage and unique building architecture near Carpenter Road can also help with appearance.

Views and Natural Features

In contrast to the traditional perception of the South College Corridor as a neglected commercial strip, the area contains many large open space and natural areas. Fort Collins is well known for its preservation of natural features, within and outside of City boundaries. Most of the natural features in the Corridor are already protected by the Natural Areas Program and also serve as a community separator between the Cities of Fort Collins and Loveland, as shown in Figure 15.

Traveling south from Harmony Road along the Corridor, the first prominent natural feature is Fossil Creek. The *Natural Areas Policy Plan* emphasizes habitat protection in the ecologically sensitive Fossil Creek area, which includes all of the natural areas and features adjacent to the South College Corridor. The Redtail Natural Area contains Fossil Creek as well as wetlands, steep slopes, and riparian forests. The dramatic viewshed here carries across private, vacant properties. Approaching Bueno Road, the viewshed continues over vacant land comprised of grasslands, floodplains, wetlands, streams, areas of geologic interest, and small areas of steep slope.

Further south, a north-south irrigation ditch runs along the western property line of the vacant properties, and is the source of the wetlands, mature cottonwoods, and potential raptor nesting areas. On the east side of College, behind retail properties, Prairie Dog Meadow Natural Area contains wetlands and grasslands.

Heading south of Trilby, the Pelican Marsh Natural Area containing Robert Benson Lake, separates Provincetowne and developable land from Victoria Estates to the south. Views to the east from the highway are expansive, and the lake is a popular habitat for birds.

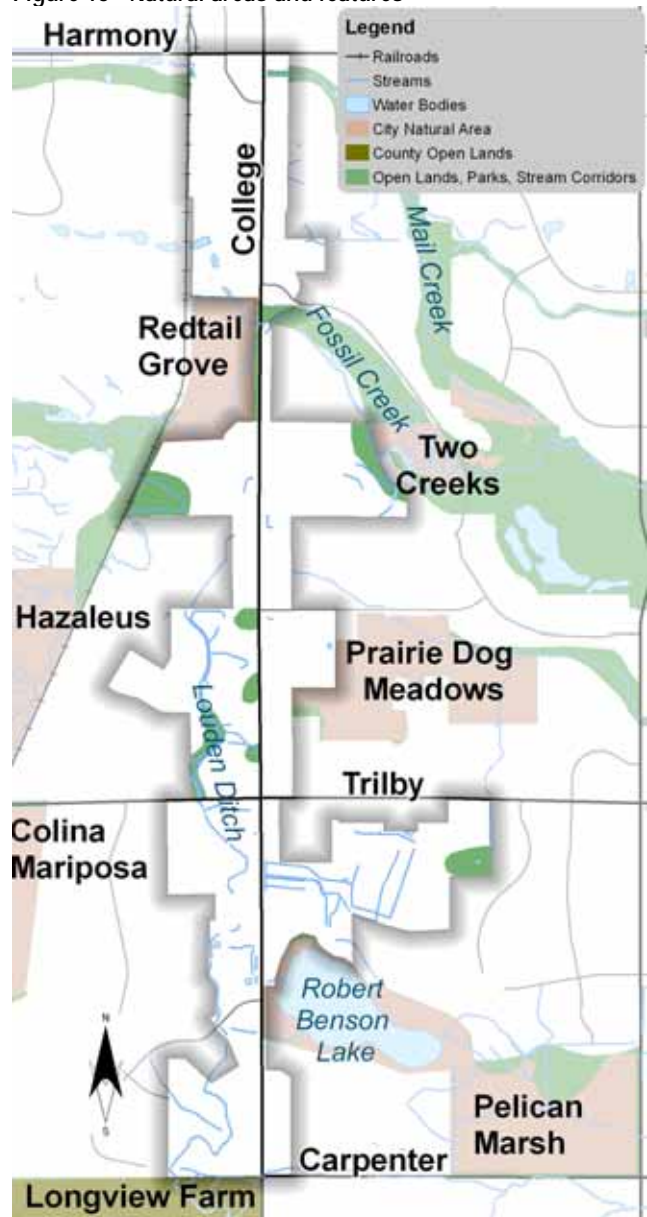
On the very south end of the Corridor, Long View Farms Open Space borders developable land within the

Neighborhood Commercial district. The Open Space clearly delineates the boundary between urban and rural.

Early on, many stakeholders voiced their desire to maintain the Corridor’s existing character in light of existing development pressure from both Fort Collins and Loveland. Foreseeable issues include the degradation of natural systems centered on existing creeks and drainages from urban runoff. Future development could also impact viewsheds across open space.

Opportunities to reinforce the natural values include buffering new development from natural features, treating water quality at the development site, and restoring natural areas and features.

Figure 15 - Natural areas and features



Community Partnerships

Perhaps the most important issue facing South College today is the lack of leadership and cooperation amongst area businesses for working towards a shared vision for their neighborhood. A lack of communication between business and property owners, and a residual distrust of government runs counter to the collaboration needed for positive changes. Unlike North College, which had the support of an active core group of business people to shepherd the area forward, South College businesses and property owners are not organized.

A formal business organization could improve communication amongst businesses and residents and provide advocacy on behalf of the area. While an organization will take a grass-roots initiative, the South College Corridor Plan may provide the catalyst.

Financing

Second in importance to community partnerships are financing issues. The cost for upgraded streets, utilities and drainage will be well over \$100 million. Standard development requirements will cover a significant portion, but there will still be sizable funding gaps. The private market alone may not be able to afford to deal with all of the complications and costs of upgrading and retrofitting infrastructure systems. In fact, the costs of dealing with transportation impacts - including lane widening, signal improvements, accel/decel lanes, new streets, etc. - have been cited as a reason that the Neighborhood Commercial District supermarket and other projects have not yet been constructed. The extraordinary costs affirm the need to clarify the public role in infrastructure financing.

Public financing may come from a number of sources, with involvement of city, state and federal government. A vision with strong public support is instrumental in defining and allocating any public funding. Such support has demonstrated success in the North College Corridor, which faces similar issues regarding transportation as South College. In 2008, support of stakeholders along South College may not be strong enough to initiate public financing mechanisms. However, over time this may change as stakeholders become more organized and start to align their interests with the interests of the Corridor as a whole.

Utilities

An assessment of the Corridor's existing utility systems (gas, electric, water, sewer, stormwater, cable, phone) found that there are no major limitations to accommodate new development or redevelopment. Water transmission lines and sanitary sewer trunk lines are in place and should be able to service development as presently proposed. Smaller water distribution and sanitary sewer collection lines to specific developments may have to be installed to connect these developments to existing mains, as is typical for any proposed project. There is adequate water pressure to serve new developments.

In 2008, the City of Fort Collins' Utilities Department was converting the Poudre Valley Rural Electric Association's power delivery system to meet City requirements. While no major utility impacts are foreseen at this time, condition of the systems will deteriorate over time, new methodologies for delivery of services may develop, and direction by future Boards and governing bodies may require significant additions and/or improvements to the utility system; hence the need for continuous coordination.

The City of Fort Collins *Fossil Creek Master Plan* and the Stone Creek Basin Master Plan have delineated floodplain and floodways within the Corridor, and provide a reasonable representation of the impacts that could be expected during various frequency storm events.

The Stone Creek basin, which is located along both sides of South College between the Skyview subdivision and Benson Lake, contains a small floodplain just within the South College Corridor study area adjacent to Provincetowne. The floodplain affects a portion of one vacant residential property. Thus, overall floodplain regulations will have limited impact on new development along the Corridor.

Detention and stormwater requirements constrain some vacant properties west of South College, as the highway acts as an impoundment to east-draining water. As a result, several small wetlands to the west of South College would need to be incorporated or mitigated into future development plans, and no new pipes are anticipated under South College.

CHAPTER 3

VISION

Introduction

In contemplating the future of South College, one is drawn to the Corridor's many unique opportunities and assets: niche retail shops, expansive views, well-established neighborhoods, the Mason and Fossil Creek Trails, the future Mason Corridor South Transit Center, and scenic natural areas. The Corridor serves as an important business center for south Fort Collins and the region. Also, as the southern gateway into Fort Collins, the South College Corridor is key to maintaining and enhancing the community's positive image and quality of life.

A "vision", as used in a plan, means an image described in words about what an area will look like in the future. It is important for a vision to be grounded in the values of those who live, work, and visit the area. The reality of certain "givens" - pre-existing development, the presence of a major highway, landforms, etc. - also means that some aspects are unlikely to change no matter the effort. The vision must extend from what is already provided.

Throughout the planning process, several common themes have been articulated by local businesses and the broader community, which, when combined, provide a unifying vision for the Corridor:

OVERALL VISION STATEMENT

South College will evolve over time as a healthy business district to become a clearly recognizable part of Fort Collins with upgrades to streetscapes and buildings, new uses that support neighborhoods and the Mason Corridor, stronger multi-modal transportation connections, and active civic partnerships.

The additional statements described below are facets or subsets of the overall vision.

*Land Uses and Business Activity***We envision business diversity.**

The Corridor will provide a broad, flexible mix of uses that accommodates highway users, neighborhood and community needs and supports the Mason Corridor.

The Corridor's commercial areas should retain the eclectic business mix while supporting new uses to strengthen the South College market. Many of the existing service commercial and retail uses fill a niche that is becoming rarer in the city and region markets. These businesses should be encouraged to expand and reinvest in newer and higher quality buildings when aging properties deteriorate. As market demand changes, the City will support redevelopment and consolidation of properties.

We envision prominence.

South College will continue to grow into a prominent business center in northern Colorado, attracting a variety of businesses and industries serving local and regional markets. The overall image of South College will evolve from a highway defined by its heavy vehicle traffic to a healthy business district defined by more multi-functional retail and service commercial activity. That overall image will not simply be a function of commercial intensity or type; rather, it will be achieved by balancing a mixture of land uses, including open space, new residential growth, supporting neighborhood retail, and recreational amenities.

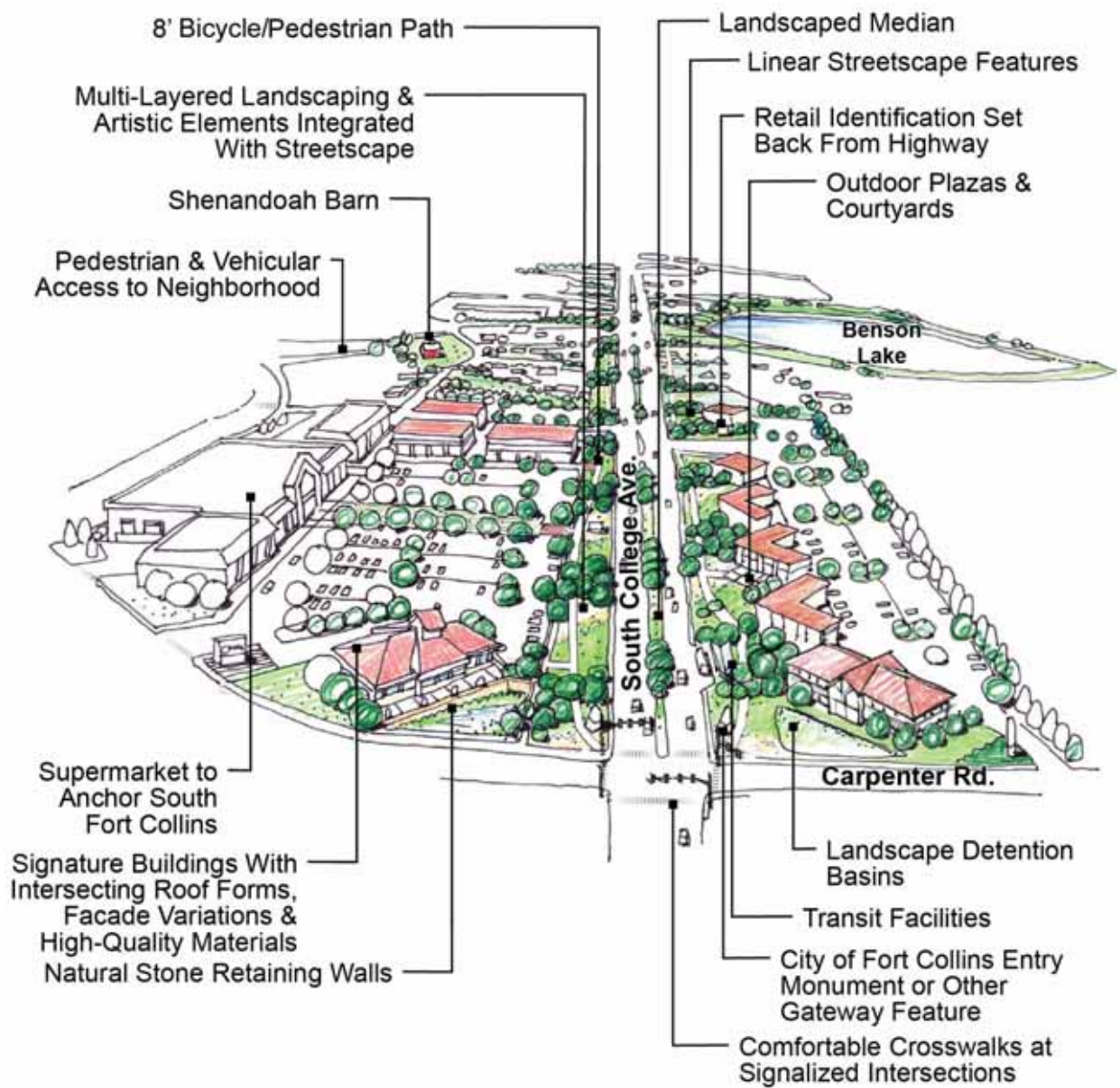
We envision neighborhood services.

Creating a desirable living and working environment for residents means more banks, restaurants, and shops catering to daily needs. Additional housing will increase market support for neighborhood-serving retail uses. New residential development will occur on vacant or underutilized lands. Existing neighborhoods will remain largely unchanged. With additional residential growth and neighborhood services, the Corridor will become a more complete district where all citizens - business owners, employees, and residents alike - have the opportunity to live near where they work, shop, and recreate. Additional travel options will be provided, thereby relieving the transportation system and reducing air pollution. Directing growth to the Corridor where utilities are already in place saves money and makes more efficient use of the existing public investment in infrastructure improvements.

From Carpenter Road to Trilby Road, we envision an inviting gateway.

Upon entering the City from the south at Carpenter Road, the first impression will be one of distinctiveness: travelers clearly know when they are entering Fort Collins. This uniqueness will be supported by the way buildings relate to the street, the attention to detail within the rights-of-ways, the multiple facilities for different types of travelers, the vibrancy of neighborhoods, and the way in which commercial development relates to the open vistas and natural areas of Long View Farm, Pelican Marsh Natural Area, and the picturesque Benson Lake.

Figure 16 - Concept sketch of gateway enhancements



From Trilby Road to Fossil Creek, we envision neighborhood compatibility.

Here the Corridor will continue to support community and neighborhood commercial uses with landscaping and building forms that lessen the negative impacts of the highway. Retail development activity will front South College and major street intersections, and new service commercial and light industrial uses, will be located behind retail uses in appropriate areas while adequately buffering adjacent residential uses. The highway will continue to influence land use, but the area will transform over time towards a more attractive pedestrian environment.

From Fossil Creek to Harmony Road, we envision a transit-oriented district.

Here the Corridor will capitalize on Mason Corridor and Transit-Oriented Development (TOD) opportunities: high intensity uses, increased densities and high quality designs. The Mason Corridor will act as a catalyst for economic development, pedestrian-environments, and enhanced transit service. As a transit-oriented hub, development in the area should be compact to promote retail and office uses that enable transit, pedestrians, and bicyclists. Buildings, spaces and street



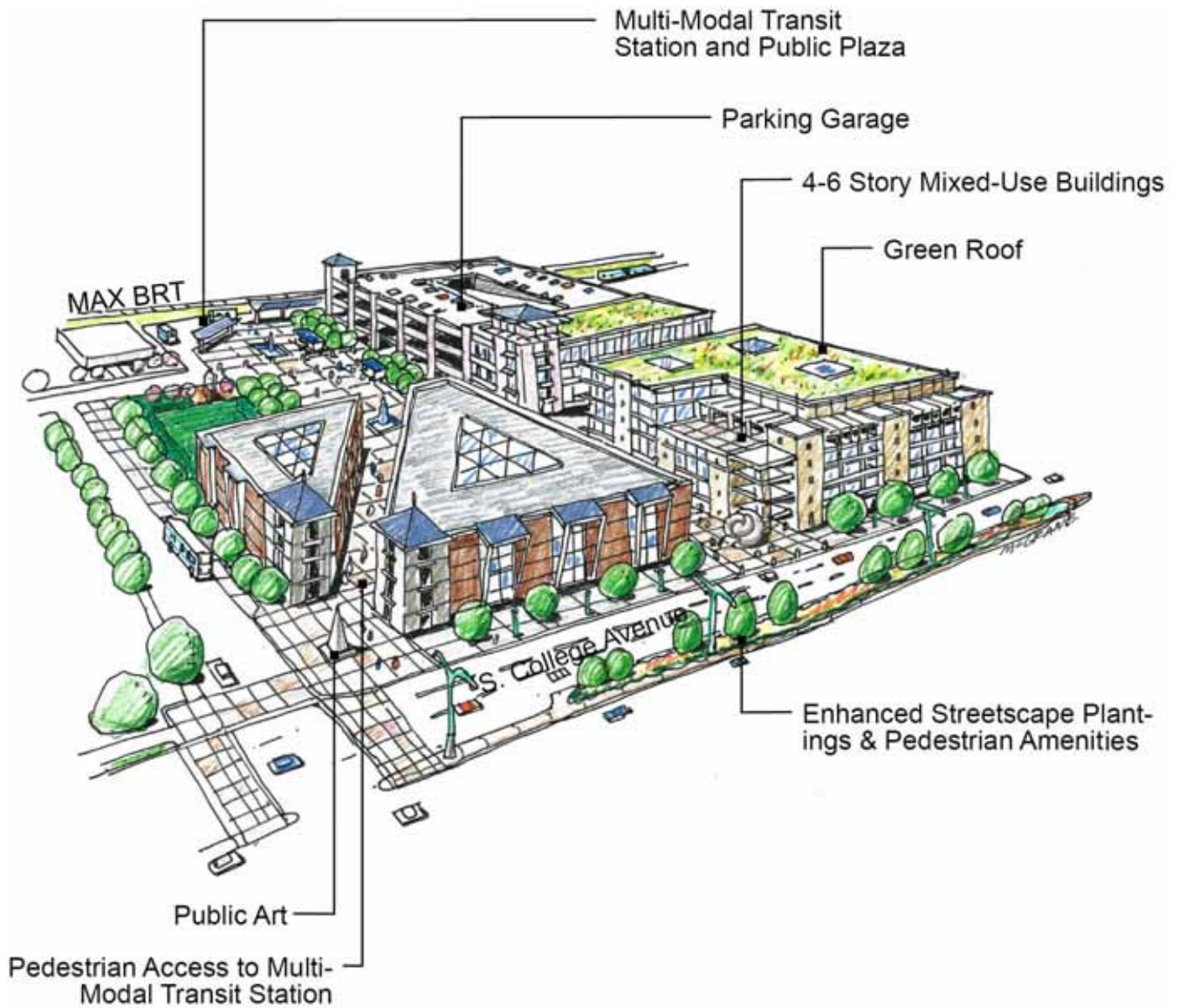
Commercial development at Harmony and College.

frontages should be well-designed and of high quality materials and workmanship, providing architectural details at a human scale to create visual interest and pedestrian comfort. The character, massing, and orientation of multi-story buildings fronting the edges of sidewalks will play a critical role in defining the public realm of the South Transit Center. Low activity uses that detract from the overall vitality of the Corridor will be discouraged or limited to appropriate locations.

Figure 17 - Concept sketch of a cross-section for transit-oriented development across College



Figure 18 - Concept sketch of transit-oriented development



A Complete Transportation System

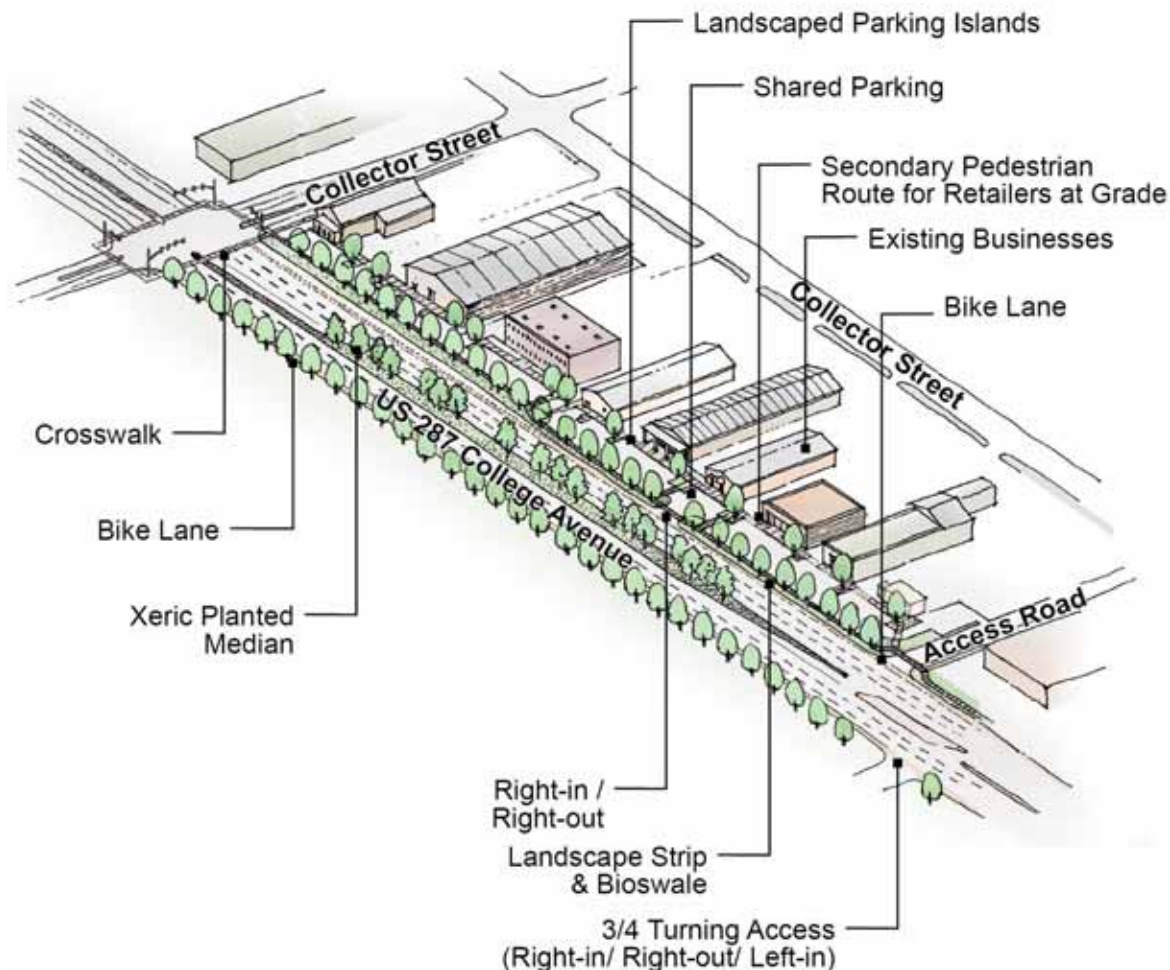
We envision the highway as an amenity.

As the Corridor evolves and becomes more urban, the overall function of the highway will change to better balance mobility and local access. Even though College Avenue will be six lanes wide, it will be enhanced with landscaping, sidewalks, medians, bike lanes, public art and other attractive public features. Thus, the highway will be an amenity that is enjoyable to visit and travel through for all transportation modes.

The street will also become a safer place with slower speeds and better traffic controls. New signalized intersections at Fairway Lane, Smokey Street/Crestridge Street, and Triangle Drive, and intersection improvements at Trilby Road will assist in side street access and provide safer turning movements.

As transportation circulation improves over time, buildings will relate to both the highway and roads parallel to College Avenue. Customers and employees will be able to safely reach businesses along these roads and on connecting walkways and bicycle facilities.

Figure 19 - Sketch showing possible components of long-term improvements



We envision coordination.

As a state highway, the final design of any potential traffic improvement along South College would be led by CDOT in close consultation with those most affected by the project. The CDOT and City approved *Access Control Plan* (ACP) provides greater flexibility for businesses to comply with CDOT standards than if an ACP were not in place. Any ACP elements proposed for implementation will have meaningful involvement of adjacent businesses and property owners. In many cases, the details of access to individual businesses within the ACP are unclear or may need to be customized for a particular site.

CDOT and the City will work to create more certainty about the location of access to existing businesses, particularly around rear road access.

Other circulation improvements for this area will require coordination with the City to facilitate transportation improvements that are not directly related to the state highway system. For example, the construction of Aran Street or Sneed Drive should be the focus of the City, since they do not need the approval of outside agencies.

Figure 20 - An example of access and circulation along a 6-lane highway

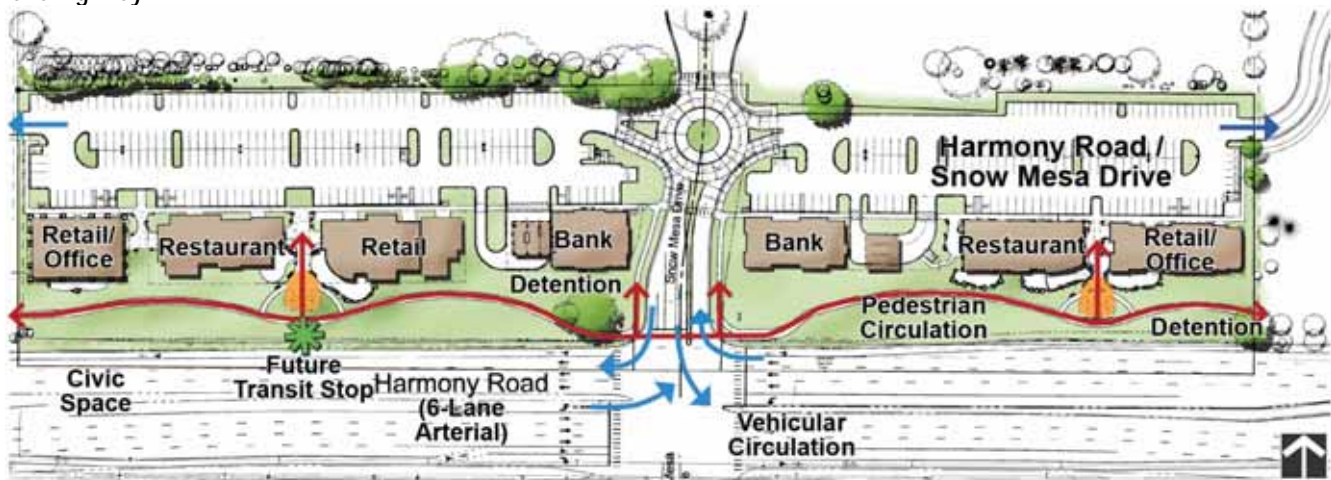


Figure 21 - Case study of circulation between Mitchell and South College



We envision connectivity.

A more complete street network of parallel streets (i.e., a grid system) will provide alternative access and good vehicle circulation adjacent to South College, as designated access points from the highway are determined over time. New street connections and rear access opportunities will provide good circulation to fit individual business circumstances. As land in this area develops or redevelops, good circulation through properties and/or along the rear of properties abutting South College will contribute to the vitality and success of the area, while reducing reliance on the state highway system and providing options for non-motorized travel.

We envision a variety of travel options.

Walking, biking, or riding the bus will become practical and enjoyable methods to shop, commute or recreate. Transportation improvements will balance the needs of pedestrians, bicyclists, motorists and businesses. New multi-use trails, highway crossings, pedestrian connections between businesses and neighborhoods, and transit improvements (transit stops, routes, and frequencies) will allow users to access businesses more conveniently. The South Transit Center (STC) will be a major hub for travelers, and new transit routes into the STC will help boost transit ridership. Transit stops will be conveniently located and well-designed, with walkways connecting to sidewalks and businesses.



A new trail could connect the Corridor from Carpenter Road to Fossil Creek ("Skyridge Trail").

Community Appearance & Design

We envision renewal.

Existing businesses, streets, and buildings stay, but do not stand still. Rather, each shows a fresh appearance driven in response to market demands. The eclectic ambience remains even as the quality of buildings improve and attractive design upgrades occur. The character of development south of Harmony Road will be in contrast to development further north, with the Corridor image driven by an appearance of individual storefronts and the inclusion of a variety of building forms and materials.

The street itself becomes a more inviting and interesting place for travelers passing through the area and for businesses, customers, and residents.

We envision an exciting gateway.

A distinct, identifiable entry greets travelers upon entering at Carpenter Road and Benson Lake. Distinctive private development and public streetscape improvements work together in unison, emphasizing the Corridor's integration into the larger Fort Collins community.



Gateway elements such as natural stone, public art, planted medians, lighting and monuments should highlight one's arrival into the City of Fort Collins.

Figure 22 - Photo and concept sketch of streetscape improvements with 6-lane expansion near Saturn/College



current conditions



possible improvements

Community Partnerships and Financing

We envision collaboration.

Community partnerships will form to strengthen economic activity and identity of the South College Corridor.

Motivated business owners, a sense of community, and a business friendly environment will create a collaborative environment among businesses, neighbors, and the City. Red tape and extraordinary costs are overcome through joint problem-solving. A grassroots business association fosters this spirit of cooperation by assisting in *Plan* implementation.

We envision fair costs and benefits.

Infrastructure upgrades will occur incrementally through individual property redevelopment and comprehensively through major capital projects. Private development will pay its fair share without penalizing progress. Creation of one or more special districts will finance improvements through a reliable revenue source, thus spreading the cost of improvements out over time and reducing the initial cost impact on property owners or developers.

Natural Resources and Drainageways

We envision creative, green infrastructure.

Natural features and open spaces will continue to define the character of much of the Corridor. Natural resources will be protected to the maximum extent possible. New buildings will be located away from natural features to minimize their impacts on wildlife habitats, views, and natural drainages. Trails will likewise be located away from natural features.

Natural drainageways and open areas will contain native plant and wildlife communities while serving as stormwater storage, treatment, and infiltration systems. System-wide strategies for conveyance and detention will include street cross-sections that incorporate bioswales and infiltration. As existing developments, topography, and minimal lot sizes constrain the feasibility of necessary stormwater infrastructure, coordination with surrounding owners, developers and the City will be indispensable. Existing irrigation ditches will become multi-purpose, serving as agricultural conveyance, natural corridors, and recreational paths.

CHAPTER 4

FRAMEWORK PLAN, GOALS, AND POLICIES

Introduction

This chapter's Framework Plan, goals, and policies are intended to reinforce the vision while matching the larger community's purposes (as represented in *City Plan*). Consequently, this document does not reiterate specific goals and policies of *City Plan*. Rather, it explores the question: "Recognizing the Corridor's unique challenges and opportunities, how should development occur differently than what would have typically occurred under the status quo?"

Framework Plan Map

The vision in Chapter 3 describes promising opportunities for long-term economic vitality, a more complete multi-modal transportation network, and a more distinct and appealing sense of place. The Framework Plan map and the goals and policies elaborate on the vision by identifying specific opportunity areas and ways in which the vision may be achieved in the future.

The Framework Plan map is based on over 12 months of community involvement. Prior to development of the map, alternatives were identified for several sites to provide choices in uses, intensities of development, and character (see Figure 8). The Framework Plan evolved from the alternatives, with consideration given to *City Plan* consistency, site-specific conditions, and community input.

As illustrated in Figure 23, the Framework Plan map combines existing and future land uses, the *Master Street Plan*, bicycle and pedestrian facilities, and future transit routes to:

- Maximize the use of existing services and facilities (streets and utilities);
- Promote the development of the Corridor as a high quality, stable business district;
- Identify the prime locations and types of new uses;
- Provide neighborhood shopping and light industrial service areas convenient to both residents and employees of the Corridor;
- Provide for a variety of housing types;
- Preserve and protect existing residential neighborhoods

- Protect areas that have important natural features and storm drainage functions.

In conjunction with the vision, the Framework Plan map will be used by decision makers to evaluate future growth and development of the South College Corridor. Additionally, it will serve as a tool for property owners to help inform their choices about land use improvements and redevelopment.

Figure 23 - Framework Plan diagram



Complementing the Framework Plan map (Figure 24) are goals and policies. The goals and policies are organized according to planning elements, and in many cases relate to specific locations along the Corridor. The goal statements help to support the vision, and the policies give specific guidance for how to achieve the goals. Each goal also includes a Framework Plan section, which provides more clarity around goals and ideas that relate to specific locations. Goals and policies follow the *Plan's* five main elements:

- Land Uses and Business Activity (LU)
- A Complete Transportation System (T)
- Community Appearance and Design (CAD)
- Community Partnerships and Financing (CP)
- Natural Resources and Drainageways (ND)

Land Uses and Business Activity

Goal LU 1: Retain the eclectic business mix while supporting new uses that strengthen the South College market.

Framework Plan: Existing commercial uses are shown as Commercial (red) on the map. Several future commercial areas are also shown as Commercial.

Several areas are identified for the Limited Commercial (CL) (magenta) district: (1) Two properties south of Skyway Drive and east of the Kel-Mar Strip; (2) Properties south of Trilby Road along the west side of College Avenue; and (3) Properties along the east side of College Avenue near Carpenter Road. The CL District is intended for areas primarily containing small commercial uses that are adjacent to residential areas. Limited Commercial could accommodate land uses that provide a transition between the highway and adjacent neighborhoods.

For the new CL District near Carpenter Road, the possibility of a drive-through restaurant was discussed. Although this use is not allowed in the CL District, a drive-through restaurant could help the site achieve a level of activity in support of the South College Gateway concept. Because such a use would be specific to this site, it should be evaluated in conjunction with a particular development proposal on a site-specific basis under the "Addition of a Permitted Use" Land Use Code process.

The South 13 Subdivision is designated for Service Commercial. Service commercial areas, as defined in other communities, typically consist of primarily non-retail commercial and light industrial uses, although retail uses can be present as well. Examples include storage and warehousing, custom woodworking, welding and machine shops, small appliance repair, and vehicle repair. This zone district would provide land use flexibility by accommodating expansion of existing uses (such as warehouses) and a wider range of new uses than a Commercial District.

POLICIES

LU 1.1 - Unique Businesses. Zoning will continue to allow for a broad mix of uses in commercial areas. Business expansion and reinvestment will be supported through site-specific problem solving, sharing of market information, and financing mechanisms to help with infrastructure costs.

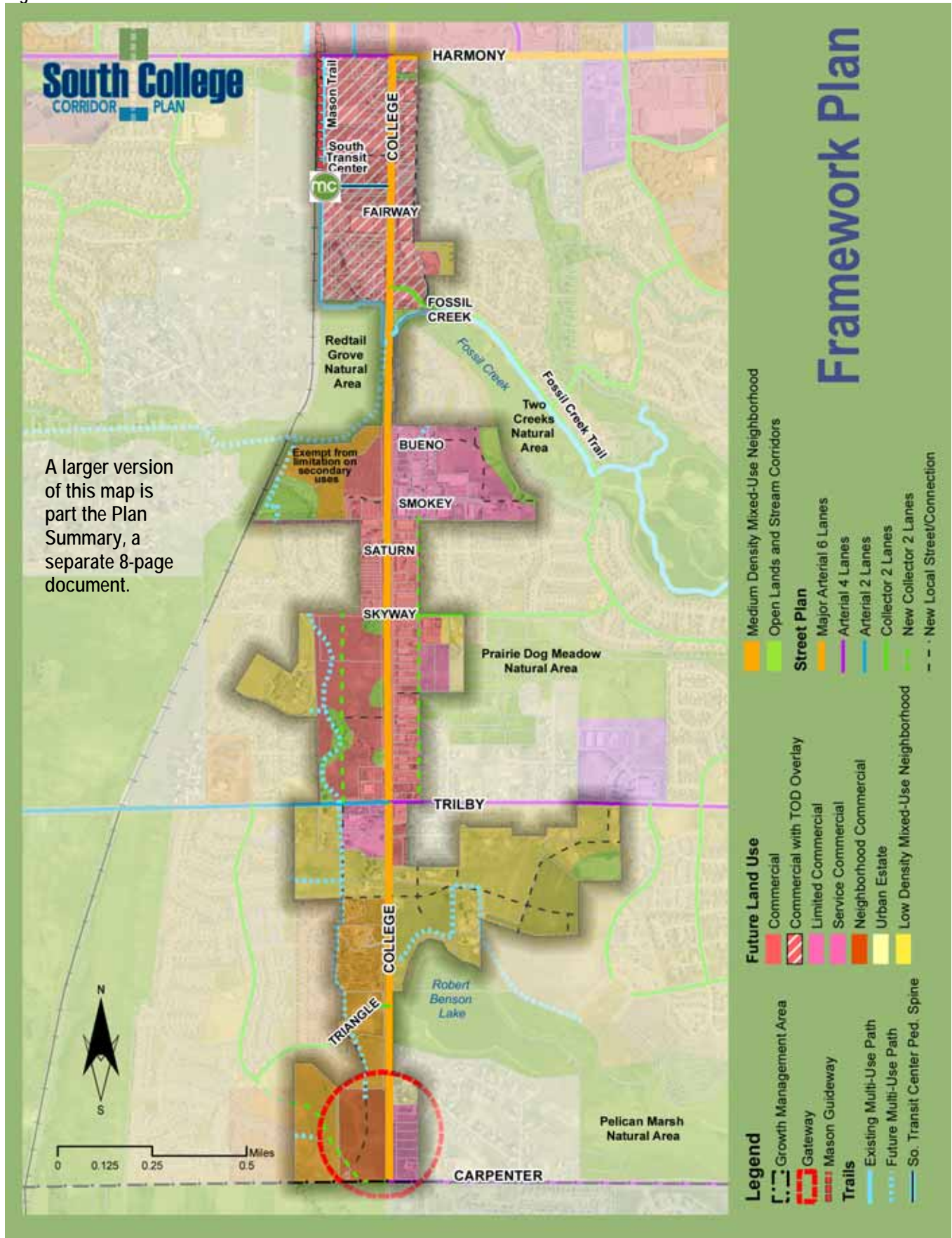
LU 1.2 - Redevelopment Projects. In response to private initiatives to assemble and redevelop properties which result in significant changes to the character of South College, the City will provide technical support through site visioning and the formation of streetscape options. The City will also support public outreach efforts and meetings between stakeholders.

LU 1.3 - Service Commercial. Zoning will allow for new service commercial uses in the South 13 subdivision while buffering adjacent residential uses.

LU 1.4 - Minimize Low Activity Uses. Uses that detract from the overall vitality of the Corridor, including used car lots, outdoor storage, and storage unit uses, are to be located away from the South College frontage.

LU 1.5 - Business Clusters. Support private efforts to create or enhance clusters of similar businesses with walkable connections between them.

Figure 24 - Framework Plan



Goal LU 2: Encourage neighborhood serving retail and commercial uses in locations convenient to adjacent neighborhoods.

Framework Plan: Three types of districts or areas shown on the Framework Plan can accommodate neighborhood-serving commercial uses. The primary district is the Neighborhood Commercial District at College and Carpenter. Another area is the Low Density Mixed-Use designated site north of Benson Lake, which could provide a Neighborhood Center with retail to serve adjacent neighborhoods. Finally, the Commercial and Limited Commercial Districts are secondary locations for neighborhood-serving retail.

During the preparation of this Plan, a stakeholder requested consideration of a unique destination commercial center in the vacant residential properties north of Benson Lake. This center was described as a walkable mixed-use retail, office, housing and recreation center - similar to either the City's Neighborhood Commercial District, though without a supermarket, or possibly even a Community Commercial District. The Plan does not recommend land use changes to re-designate this site for such a center at this time. There are significant issues that could not be resolved before the Plan was adopted, including access to South College Avenue, impacts to the adjacent natural area, and the precise definition of such a center. However, the Plan recognizes that a larger mixed-use center may be a good opportunity to create a more complete City Plan neighborhood with low and medium density neighborhoods clustered around a neighborhood commercial-type center. If the site issues are resolved, future amendments to the South College Corridor Plan may be warranted.

The vacant land north of the Skyview Subdivision is designated as a Medium Density Mixed-Use Neighborhood. This location could provide housing to support nearby employment areas or secondary uses to form a transition and a link between surrounding low density housing and the commercial area. For this particular location, the 15% limitation on secondary uses should not apply, allowing more land use flexibility to accommodate the unusual topography and natural feature constraints.

POLICIES

LU 2.1 - Supermarket. The highest priority for new land use is a supermarket. The primary location for a one is the northwest corner of College and Carpenter. The new anchor should form the basis for a larger walkable neighborhood commercial center.

LU 2.2 - Neighborhood Commercial Uses. In addition to the Neighborhood Commercial District, encourage small scale neighborhood serving uses in other areas convenient to residential neighborhoods (See Figure 25)

LU 2.3 - Residential Development. Encourage the development of additional residential uses to increase market support for neighborhood-serving retail uses.

Figure 25 - Potential neighborhood shopping opportunities

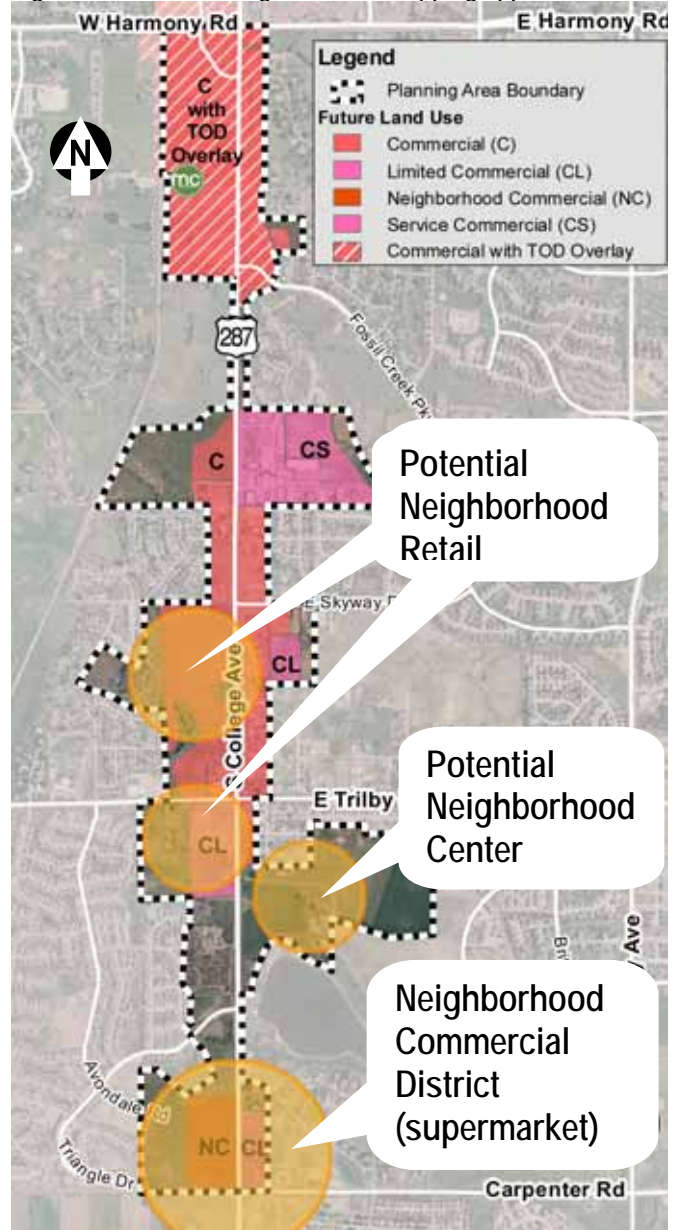
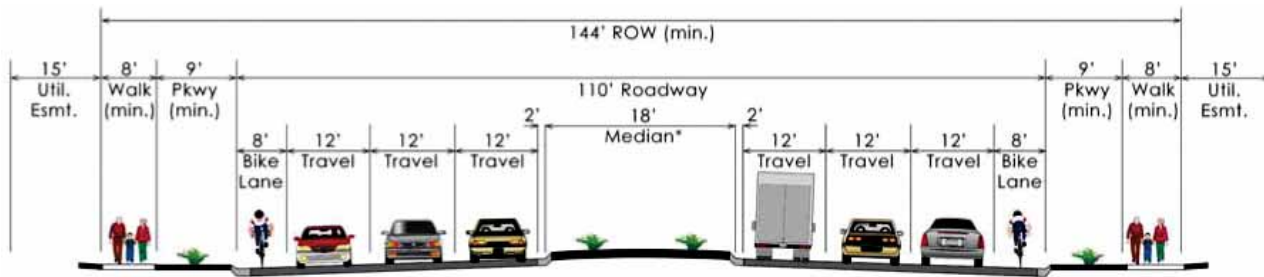


Figure 26 - US 287 cross-section north of 57th Street, from US 287 Environmental Overview Study



Goal LU 3: Capitalize on Mason Corridor and Transit-Oriented Development (TOD) opportunities.

Framework Plan: Shown as a red and white hatched pattern on the Framework Plan, the TOD Overlay would support evolution of a vibrant, walkable residential, office and retail district near the South Transit Center (STC). A central access pedestrian spine provides a direct connection between South College and the STC.

POLICIES

LU 3.1 - Catalyst Investment. The Mason Corridor will act as a catalyst for economic development, higher density pedestrian-environments, and enhanced transit service.

LU 3.2 - Transit-Oriented Uses. Uses that enhance the transit station - including high-density housing, offices, employment centers, and neighborhood commercial uses - are preferred over other uses. Such transit supportive uses will be the focus of City incentives.

LU 3.3 - Convenient Access. Convenient multi-modal access will be provided from South College to the proposed South Transit Center. A central access spine on the property between South College and the South Transit Center will provide a direct path from the highway to the Center for pedestrians and bicyclists. The spine will be designed as a wide pathway, walkable street or plaza enclosed by buildings, providing important and recognizable entry into the Mason Corridor network.

LU 3.4 - Building Character and Orientation. The character, massing, and orientation of multi-story buildings will play a critical role in defining this area. In general, fronting the edges of buildings at the sidewalk is encouraged to create a comfortable pedestrian environment. Providing interesting building details at a human scale also creates visual interest.

A Complete Transportation System

Goal T 1: Improve traffic safety along the highway for all users.

Framework Plan: Applies throughout the Corridor. The Plan reflects the planned transportation network identified in the *Transportation Master Plan*, *South College (US 287) Access Control Plan (ACP)*, and the *US 287 Environmental Overview Study (EOS)*, with the addition of a trail network and suggested local street connections.

POLICIES

T 1.1 - Implementation of the *Access Control Plan*.

Development projects and public highway improvement projects will implement the adopted *ACP*. Short-term and long-range improvements will balance the needs of pedestrians, cyclists, motorists and businesses. Any *ACP* elements proposed for implementation will have meaningful involvement of the adjacent businesses and property owners (See Figure 26).

T 1.2 - Location of Access. As individual properties redevelop, the *ACP* envisions that the majority of property will be accessed via rear access roads. Existing access drives will be maintained to the extent possible as allowed by the *ACP* and CDOT. The City will work with CDOT, property and business owners to determine safe and logical access strategies as properties redevelop and/or as safety concerns increase.

T 1.3 - Reduce the Impact of Parking. When possible, locate buildings toward the street and parking to the side and rear of buildings. Where this is not possible, reduce the impact of parking by adding pedestrian amenities and landscaping between the street and parking spaces. (see Figures 27 and 28. Widening College Avenue will require some existing parking lots to be reconfigured. Many locations may not be able to accommodate as much parking as shown below. Striping or other pavement treatments will be needed across parking lots or drive aisles to connect building storefronts.

T 1.4 - Adaptable Highway Function and Design. As the Corridor evolves and becomes more urban, the City will work with CDOT to ensure that the design and function of the highway adapts to changes in the urban form. The design of highway improvements will be compatible with changes in land uses, the evolving form of new development, and changing transportation needs.

Figure 27 - Existing parking conditions

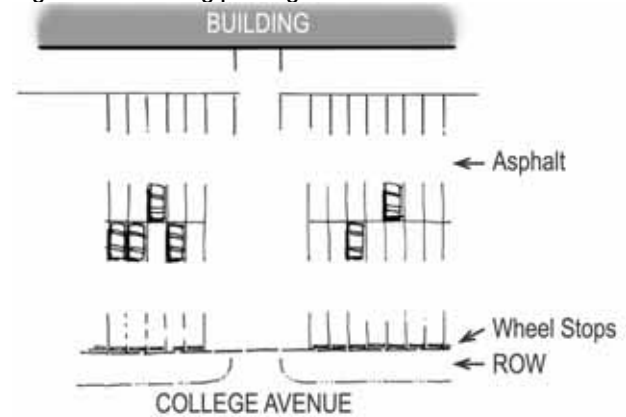
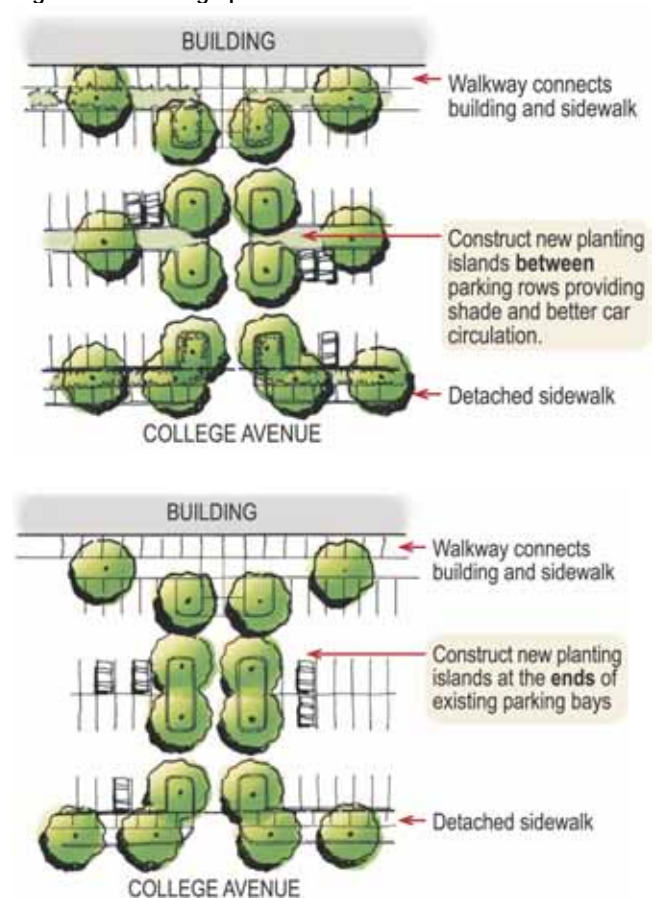


Figure 28 - Parking options



T 1.5 - New Signalized Intersections. Support actions that lead to signalized intersections at Fairway Lane, Smokey Street/Crestridge Street, and Triangle Drive to assist in side street access and to provide safer turning movements.

T 1.6 - Strategic Improvements. Outside of a public funding mechanism, it may be many years before long-term highway improvements are made. Thus, the City and CDOT should consider making smaller, strategic infrastructure improvements along the Corridor that improve safety and

increase mobility rather than waiting for a major capital project.

T 1.7 - Street Lighting. As highway improvements are made, add street lighting along South College to foster better Corridor safety during nighttime hours.

Goal T 2: Create a complete street network of local and collector roads.

Framework Plan: Applies throughout the Corridor, though most network improvements are needed between Trilby Road and Bueno Drive.

POLICIES

T 2.1 - Parallel Street System. Develop a new parallel street that provides alternative access and good vehicle circulation adjacent to South College, as access from the highway is restricted over time. One such street, Aran Street, will be constructed with two 12-foot travel lanes, two 6-foot bike lanes, a 6-foot sidewalk on the west side, and a 3-foot utility space on the east side (45 feet total).

T 2.2 - On-street Parking. Some new segments of the local street network should provide on-street parking to accommodate new parking demand, to mitigate the loss of parking as a result of US 287 widening, and to bring pedestrian activity to streets.

Goal T 3: Make walking and biking practical and enjoyable methods to access and traverse the Corridor.

Framework Plan: The Framework Plan shows several major components of a new bicycle and pedestrian system: 1) a multi-use path along South College; 2) a two-mile north-south trail (dubbed the Skyridge Trail) to parallel South College along the Loudon Ditch from Carpenter Road to the Fossil Creek Trail, and 3) soft-surface and hard-surface trails (dubbed the Pelican Marsh Trails) connecting South College at Triangle Road to Lemay Avenue and Carpenter Roads. While the map does not identify the locations of sidewalks, bike lanes and routes, and crosswalks, these facilities will be provided where they are currently absent in accordance with the various City transportation plans.

POLICIES

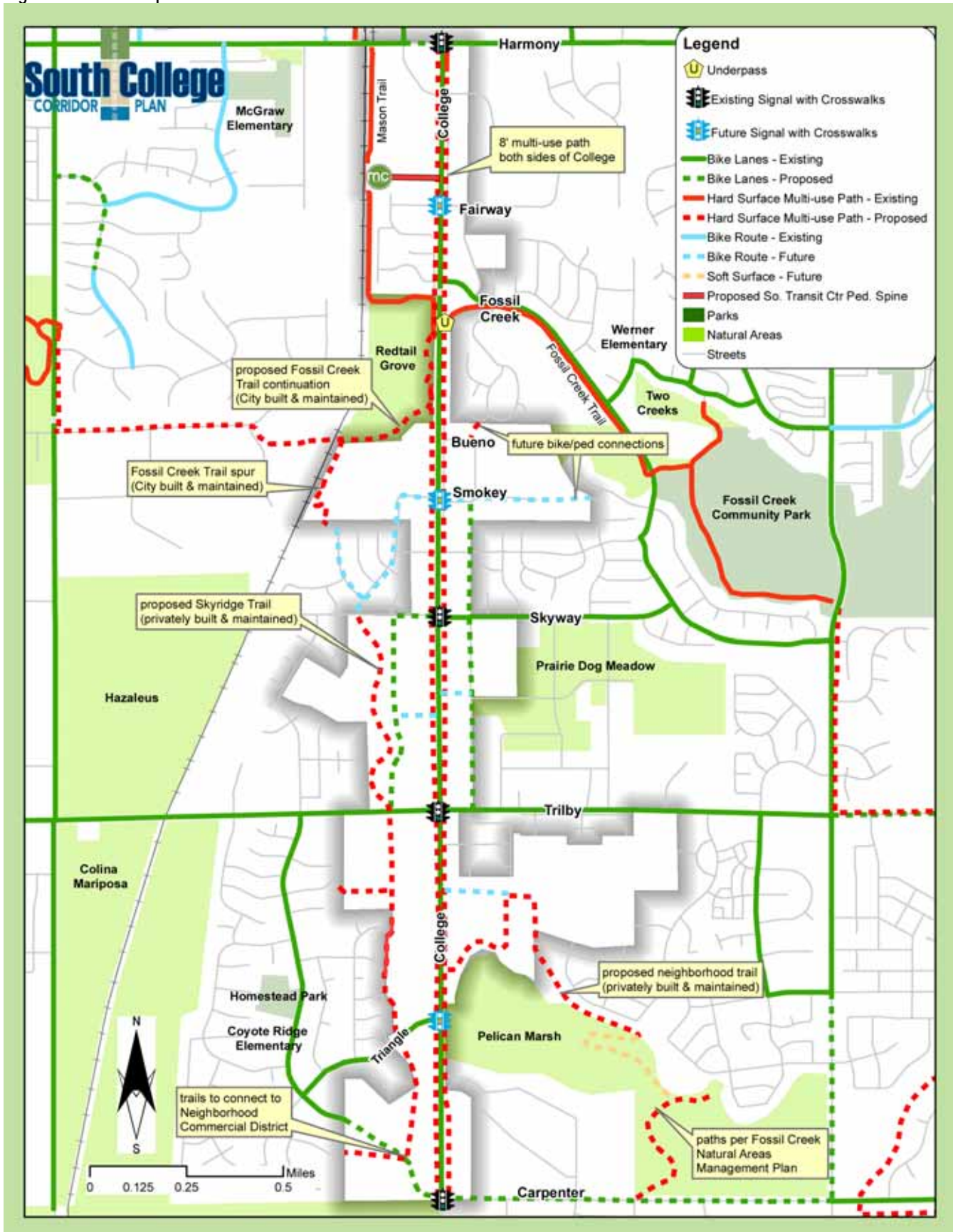
T 3.1 - South College Multi-Use Path. In addition to on-street bicycle lanes, pedestrian and bicycle circulation will be enhanced through an eight-foot detached, multi-use path paralleling South College (as identified in the US 287 Environmental Overview Study and the US 287/South College Avenue Bicycle Lane Project). This is a slight modification to the City's standard Six-Lane Arterial Cross-Section.

T 3.2 - Pedestrian Access to Businesses and Neighborhoods. Create pedestrian connections between the highway and businesses, and from building to building. Capitalize on opportunities to connect existing neighborhoods to South College businesses with short bicycle and pedestrian path segments.

T 3.3 - Highway Crossings. Improve east/west pedestrian crossings of South College for pedestrians as the highway and intersections are improved. The crossing at Skyway and College, and Trilby and College, are high priorities due to pedestrian movements between transit stops and Foothills Gateway. The future need to convey stormwater across South College may present opportunities to install underpasses that combine drainage functions, utilities, and pedestrian and bicycle connections, similar to the ped/bike underpass at Fossil Creek and College.

T 3.4 - Trail Connections. Create community trail systems that link important destinations through the Corridor. As a first priority, create an off-street trail system on the west side of College that links neighborhoods to the Fossil Creek and Mason Corridor trail systems. Create another trail on the north side of Benson Lake between South College and the Pelican Marsh Natural Area trail system. Support efforts to provide a regional trail system between Fort Collins and Loveland using the BNSF right-of-way or another location with the South College Corridor. Where environmental concerns or resource conflicts are identified, trails will be located, to the extent possible, to less sensitive areas (see Figure 29).

Figure 29 - Trails map



Goal T 4: Strengthen the existing transit network and support the expansion of regional and local transit links.

Framework Plan: The South Transit Center (STC) will be the hub of future transit service along the Corridor.

POLICIES

T 4.1 - Transit Improvements. Coordinate transit improvements with the recommendations contained in the Transit Strategic Plan, including new routes that connect with the STC and signalization of the Fairway Lane/College Avenue intersection.

T 4.2 - Regional Transit Connections. Continue to monitor and support efforts to create a regional transit system, particularly the influences of such a system on the South College Corridor.

T 4.3 - Transit Stops and Service. Transfort, Traffic Operations and CDOT should work together to identify and enhance existing bus stops. The priority should be better safety access to and design of transit stops. Efforts should include improving the frequency of transit, and connecting to the Mason Corridor, the STC, and I-25 Park and Rides. Also, the City should provide a new bus stop at Crestridge/Smokey and College when the intersection is signalized.



Example of a high-quality, attractive transit stop.

Community Appearance and Design

Goal CAD 1: South College’s image will evolve from a highway defined by heavy vehicle traffic to a healthy business district defined by retail activity.

Framework Plan: Applies throughout the Corridor.

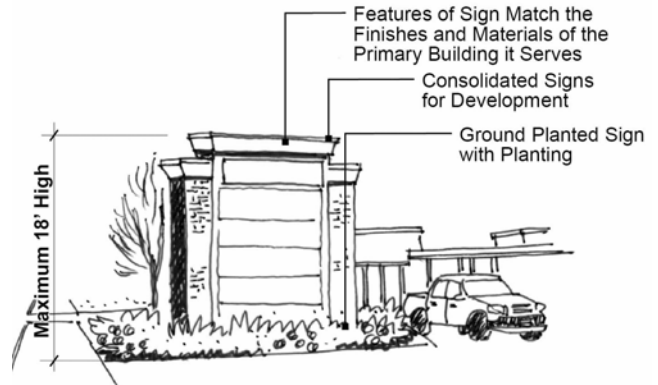
POLICIES

CAD 1.1 - Streetscapes. Highway streetscape improvements will provide continuous sidewalks, lighting, landscaped medians, and landscaping details to improve walkability and to emphasize the Corridor’s role as the southern gateway into Fort Collins. The streetscape will include elements - landscaping, signage, lighting, public art - that help make the highway feel less generic and part of an integrated community corridor (see Figure 19).

CAD 1.2 - Building Façades and Signage. Update and improve the building façades and signage in a manner that retains its local feel even as the Corridor evolves. In addition to consolidating pole mounted signs to monument signs, explore cohesive signage of areas rather than individual development pads (see Figure 30).

CAD 1.3 - Architectural Character. The overall image will continue to be defined by unique storefronts in individual buildings. While quality materials will continue to be important, creative building forms and a mixture of materials may be introduced to provide an eclectic ambience.

Figure 30 - Example of signage improvements along the Corridor



Existing monument sign at College/Cameron.



The Pads at Harmony project is an excellent example of how usable public spaces can be created along a major arterial.

Goal CAD 2: Create new public spaces.

Framework Plan: Applies throughout the Corridor.

POLICIES

CAD 2.1 - Public Realm Design. Seek opportunities through capital improvement and private development projects to create retail and civic destinations centered on public plazas, courtyards, attractive bus stops, and streetscape elements.

Goal CAD 3: Create a sense of arrival into the community.

Framework Plan: The community has identified a southern gateway into Fort Collins at Carpenter Road, making the future design of the highway, commercial developments, and natural area features paramount.

POLICIES

CAD 3.1 - Gateway Design. Incorporate gateway concepts such as monument signage, multi-layered landscaping and other special plantings, high quality construction materials and building architecture, artistic features, stone or brick retaining walls, and other distinctive elements that add interest to the area along South College near Carpenter Road. Together, public streetscape elements and the design of private development will help to define a distinct, identifiable entry, while remaining at an appropriate size and scale.

Community Partnerships and Financing

Goal CP 1: Increase collaboration and mutual understanding between Corridor business owners, property owners, and residents.

Framework Plan: Applies throughout the Corridor.

POLICIES

CP 1.1 - Formal Organization. Provide support to organizations that seek to increase collaboration in addressing issues along the Corridor. In particular, support grassroots efforts to establish and operate a formal business association to increase cooperation, advocacy, and assist in Plan implementation.

CP 1.2 - Infrastructure Improvements. Those affected by infrastructure and highway improvements will be closely involved during any design and construction processes.

Goal CP 2: Leverage and stimulate investment with infrastructure projects.

Framework Plan: Applies throughout the Corridor.

POLICIES

CP 2.1 - Financing of Infrastructure. Evaluate and pursue financing methods to pay for infrastructure upgrades. New development will provide some incremental improvements to the South College Corridor; however, a coordinated state or city capital project with a dedicated tax revenue (such as the ¼ cent Building Community Choices projects) will provide comprehensive improvements. In addition, the maintenance and operations costs should be factored into any necessary improvements.

CP 2.2 - Special Improvement Districts. Coordinated capital projects will likely require the development of Special Improvement Districts, a General Improvement District, Metro Districts, or an Urban Renewal Area. A business improvement district could provide supplemental services to the area. These districts enable the financing of improvements through property tax, special assessments, or tax increment financing. All these districts spread the cost of improvements and services out over time reducing the initial impact on property owners or developers.

Natural Resources and Drainageways

Goal ND 1: Natural resources within and adjacent to the South College Corridor will be protected and enhanced to the maximum extent feasible.

Framework Plan: Applies throughout the Corridor. Known natural features and drainages are shown in green; however, the Framework Map may not show all features that need protection.

POLICIES

ND 1.1 - Natural Area Improvements. Implement the recommendations of the *Fossil Creek Natural Areas Management Plan*.

ND 1.2 - Open Space Features. Natural areas and features such as Redtail Grove, Fossil Creek, and Pelican Marsh provide welcome breaks to the urban character of the Corridor. New development will be designed to respect these spaces as community assets and avoid the impacts of buildings on natural features.

ND 1.3 - Green Infrastructure. Provide green infrastructure where possible. Green infrastructure is the interconnected network of open spaces and natural areas, such as greenways, wetlands, parks, and native plant vegetation, that naturally manages stormwater, reduces flooding risk and improves water quality. Preserve and protect natural drainages where wetlands serve not only as areas for native flora and fauna but as treatment systems for stormwater runoff.

Goal ND 2: Solve drainage system needs to allow street and development projects while maintaining natural drainageways.

Framework Plan: Applies throughout the Corridor.

ND 2.1 - Fossil Creek Drainage Master Plan. Coordinate improvements in the basin to comply with the most recent *Plan* recommendations of the *Fossil Creek Drainage Master Plan*.

ND 2.2 - Stone Creek Basin Stormwater Plan. Implement recommendations contained in the *Stone Creek Basin Stormwater Plan*.

ND 2.3 - Louden Ditch. Retain the existing irrigation ditch rights-of-way for off-street path corridors. The location of this ditch near residential neighborhoods makes this a natural corridor for encouraging alternative modes of transportation, particularly by surrounding residents.

ND 2.4 - US 287 Drainage. Because highway improvements will require significant new area-wide drainage facilities, the City and CDOT will collaborate with owners and developers to implement highway-related drainage projects. Coordination is especially needed near the Carpenter/College intersection.

ND 2.5 - Drainage Corridors. Existing developments limit possible locations for stormwater conveyance structures and conduits for future developments. When redevelopment of an area is considered, design and review should include consideration of locations for conveyance of off-site flows through the redeveloped site.

ND 2.6 - Multiple Use Facilities. Consider designing and constructing future below-grade drainage “conduits” across South College to also serve as pedestrian and bike crossings. Areas where this would be beneficial and where the topography supports this type of crossing are located at Carpenter Road and at a point approximately one-quarter mile north of Trilby Road. Care should be taken to protect the natural values.

CHAPTER 5

IMPLEMENTATION

An outcome of the planning process was a community based vision of a healthy and complete business district that is a clearly recognizable part of Fort Collins. To be successful, the vision must be backed by upgrades to streetscapes and buildings, new uses that support neighborhoods and the Mason Corridor, stronger multi-modal transportation connections, and active civic partnerships. This chapter describes in detail eight important strategies that would do the most to achieve the vision. The chapter also lists other less critical actions involving the City, CDOT and other stakeholders.

Strategy 1 Foster Community Partnerships

Despite the numerous meetings sponsored by the City before and during the *South College Corridor Plan* process, there is still a lingering perception that the City won't be a dedicated partner in working with businesses and residents. Part of the problem is the lack of coordinated communications amongst businesses, owners and residents. There is no one entity to speak on behalf of the area.

Commitment, collaboration, and constructive communication are key elements to moving the *Plan* forward. Notwithstanding the challenges of the past, business and property owners, residents, CDOT, and City staff and elected officials must work together towards the vision of a healthy business district, as they have during the development of this *Plan*.

Strategies to foster and grow existing businesses include:

- Hold a meeting of local business leaders to discuss the potential for a grass-roots business organization.
- Create a formal business advocacy group such as a South College or South Fort Collins business association. This would enable business leaders and owners to identify their most important needs, work together on shared priorities, and pressure the City and others to respond to these priorities. Neighborhood homeowner association leaders could also be included in the business association. The Chamber of Commerce can provide facilitation and meeting services to a grassroots organization.

- If a formal business association is not created, Corridor stakeholders should identify liaisons from neighborhoods and local businesses that can constructively communicate with the City's organizational framework to better support business growth.
- Corridor stakeholders should actively participate in established local organizations and events that support economic development to keep the community, as a whole, focused on implementing the *Plan's* recommendations. Examples of supporting local organizations include the Fort Collins Area Chamber of Commerce, Northern Colorado Economic Development Corporation, Larimer County Small Business Development Center, and the Convention and Visitors Bureau.
- The City should conduct periodic outreach efforts to the local business community to address concerns and gauge satisfaction with City policies and actions. One method could be to conduct an annual survey using similar questions as provided on the *South College Corridor Plan* business/property owner survey.

"Consistently, persistently focus on specific priorities."

"The polite, squeaky wheel gets the grease."

"The City shares many of your same interests. They have good intentions and are willing to work with you."

David May, President & CEO, Fort Collins Area Chamber of Commerce

"Form an association that works with the City well."

"Your association will help make the area into what you want it to be."

"The City listens to us now. We have a voice. I think it makes a lot of difference."

Dean Hoag, President, North Fort Collins Business Association and Owner, Rocky Mountain Battery Service of Fort Collins

Strategy 2 Provide Opportunities for Business Expansion

The vision of a healthy business district includes achieving new gains in the economic growth of the Corridor. This most often means fostering business activity and jobs that reduce unemployment and increase the earnings of residents, which in turn will be reinvested into the community. Economic growth can be accomplished by attracting new businesses or more effectively, by nurturing and growing existing businesses. It has been widely acknowledged that nearly 80% of a community's economic growth results from the expansion of existing businesses.

The City is committed to business diversity along South College by supporting new uses that enhance the area as a whole while retaining an eclectic mix of businesses through land use designations. The market assessment conducted in 2008 as part of the planning process found that the area could support additional convenience-oriented retail, some limited regional retail and offices. It also found that the existing business mix was stable, with some longer term (over 5 years) potential for redevelopment of existing structures. The existing businesses overwhelmingly preferred maintaining the status quo over redevelopment along the Corridor.

Based on this information, the primary focus of land use changes will be on vacant, developable sites rather than redevelopment of existing properties. At the same time, support for reinvestment in existing properties is essential to the long-term health and viability of the Corridor. Strategies to help grow existing commercial locations while encouraging new development include:

- Encourage development of vacant or underutilized parcels as the first stage in Corridor revitalization. Support should be given to projects that contain uses, architecture and site designs that contribute to a positive identity of the Corridor as a whole. Support could be in the form of changes in land use designations (including those shown on the Framework Plan), support for "Addition of a Permitted Use" requests, an enhanced level of problem-solving during development review, and reimbursement agreements that reduce upfront costs for infrastructure. Projects that detract from a positive image - such as car lots, outdoor storage, and storage units - will be discouraged or limited to certain areas of the Corridor.
- In developed areas, work with property owners and businesses to evaluate and, if public support exists, initiate, Special Improvement Districts, an Urban Renewal Plan or other public finance techniques to:
 - Upgrade the substandard streets and/or infrastructure.
 - Establish and/or fund a façade improvement loan or grant program to encourage improvements to existing building stock. This will help to upgrade the character of structures and attract new customers.
- Continue to monitor and address barriers to Change of Use, Enlargement of Structures, and Redevelopment projects that meet the *Plan* vision. One barrier that has already been addressed during the *South College Corridor Plan* process is the deferral of funding for transportation improvements on minor Change of Use projects. There may be other issues that could have a similar, positive outcome for these types of projects.

Strategy 3

Coordinate the Implementation of Transportation Improvements

Significant work, prior to this *Plan*, went into identifying the location and type of future transportation improvements. The strategies in this *Plan* build on that prior work and are primarily refinements or clarifications. The most important overall strategy is for the various transportation partners - the City of Fort Collins transportation staff, CDOT staff, local property owners, residents and businesses - to continue discussing how the *Access Control Plan* would be implemented and how the concerns of businesses would be met.

The highest priority transportation improvements are:

- Sidewalks along College Avenue, particularly north of Trilby Road. The long-term highway cross-section shows an eight-foot off-street path within the public rights-of-way. The short-term plan does not describe pedestrian circulation improvements. A recommended interim solution is to connect building facades with sidewalks and striping or special paving between buildings, as shown in Figures 19 and 27, rather than at the frontage road.
 - Improvements to the Trilby intersection.
 - Sidewalks along Skyway, west of College, to connect Foothills Gateway to the transit stops.
 - Sidewalks along Trilby Road.
 - Safer access to transit stops at Skyway Drive.
- A conceptual design for areas with a frontage road to demonstrate how existing buildings and parking could work with to short- and long-term Access Control *Plan* improvements. Sketches in this *Plan* show possible solutions; however, a more comprehensive diagram is needed.
 - Three future traffic signals along College Avenue, including Fairway Lane, Crestridge/Smokey Streets, and Triangle Drive. Traffic conditions, changes in land use, and availability of funding will determine when signals are installed at these locations. Fairway Lane will be signalized when MAX is operational and the South Transit Center becomes needed. The Crestridge/Smokey intersection signal may be installed with development of the Vineyard Church site. It is not clear when the Triangle intersection would be signalized - possibly when the Neighborhood Commercial District and/or the Multi-family Mixed-Use Neighborhood are developed.
 - Bus stops improvements at College and Skyway, including shelters, benches, and safer walking surfaces. Future work on the Skyway intersection should include a more comfortable pedestrian crossing and sidewalk connections to the bus stops.

Strategy 4

Develop Public Funding Strategy for Capital Improvements

Since South College's economic future is closely tied to the retention and expansion of existing businesses, public support of its economic development "infrastructure" is essential for long-term health and viability. The primary issue for infrastructure is the development of a complete street network, including streets constructed to City standards, curb and gutters, sidewalks, bike lanes, landscaping, transit stops, and utility easements. Also, paying for adequate transit service and facilities is an issue. Delivering these essential improvements to the Corridor presents a huge financial challenge for the City and existing business and property owners in the study area.

The typical funding method outside of public funding is for developer to pay for the cost of improvements needed to serve that development. This will continue to be one of the primary infrastructure funding methods. However, many portions of transportation infrastructure are beyond the responsibility of a single developer, such as widening College Avenue.

This section describes the most likely public and district funding mechanisms for capital improvements in the South College Corridor. It does not describe federal, state or regional funding sources, or existing City programs such as the Street Oversizing Fund or the Stormwater Utility funds, though these are also possibilities. The funding mechanisms listed here specifically relate to transportation improvements, though some can also be used for other purposes. As a precondition to the consideration of any new funding source, the City (or another appropriate entity) needs to discuss the possibilities with area businesses and property owners. The creation of a formal business organization could help facilitate this discussion and provide support for a capital project (see Strategy 1).

Capital Improvement Program - City-Wide Sales Tax Initiative (i.e. "Building on Basics")

A voter-approved ¼-cent sales tax has been a typical method of paying for many large City capital projects. Such a program for South College could pay for a portion of the needed transportation improvements and leverage additional state and federal funds.

General Improvement District

A General Improvement District (GID) is a City-initiated special district approved by voters in a specified area that can levy a property tax and/or levy assessments or fees to pay for specified public improvements such as roads, transit, parks, utilities, or parking. A GID has operated successfully downtown since 1977. A GID can be created by the City in response to a petition by at least 200 or 30 percent of the electors, whichever is less.

The overall funding potential of such a district would be fairly modest in the South College Corridor, since it would likely be a tax based on property valuation. Still, it could be useful for certain urban design elements or for maintenance of certain improvements, with benefits proportional to the size and value of the district. At the time of this writing, the entire South College Corridor area is valued at about \$108 million. A 10-mil assessment would generate about \$300,000 per year at current valuations. A property valued at \$600,000 would pay about \$1,740 per year.

Tax Increment Financing (TIF)

An urban renewal plan could be created for the South College Corridor to provide tax increment financing for public improvements. Tax increment financing allows the City's Urban Renewal Authority (URA) to leverage the increased property taxes resulting from new development or improvements within a district. The URA (which is currently made up of members of Fort Collins City Council) could initiate an Urban Renewal Plan for any part of the area. TIF does not increase taxes; it simply allows the URA to capture a portion, or increment, of taxes already collected. TIF could be used to enhance transportation infrastructure, provide stormwater drainage or floodplain improvements, expand or upgrade utility infrastructure, and provide amenities that benefit the public including streetscapes, enhanced architecture and building materials, façade renovations, or special site improvements.

Special Improvement Districts

A municipality has the authority to create a Special Improvement District (SID) to finance the cost of local improvements. A SID can be initiated by petition of a majority of property owners. The City usually expects a super-majority of property owners be in favor. The City Council then considers a resolution of intent to create a district, sends notice of a hearing, and conducts a hearing on creation of the district.

Typically, a SID would be created to improve substandard streets so that they can become part of the City maintained system. One potential SID area is the South 13 subdivision, where some owners have discussed this possibility.

Strategy 5

Create Gateway at South College and Carpenter

The Carpenter Road and South College intersection is the most heavily traveled gateway into Fort Collins from the south. Because it provides the first impression of the community for many visitors, the intersection is an important opportunity to convey a positive and lasting image and to provide a clear sense of entry into Fort Collins.

A special gateway theme builds on general Land Use Code requirements. This theme is characterized by buildings located and designed to frame the intersection, a high level of architectural detail, coordinated landscaping across both sides of the highway, attractive pedestrian plazas and artistic elements between buildings and the highway, and sidewalks setback from the highway.

The purpose of the gateway theme is to highlight the southern-most entry into Fort Collins with unique and high quality streetscape and building architecture near the College/Carpenter intersection. The intent is to clearly distinguish the streetscape and adjacent development as unique places that the community can be proud of and that are inviting to the public.

Elements of the Gateway

Parcels along the east side of College Avenue near Carpenter Road are set back at least 50 feet from the ultimate edge of pavement. On the west side, buildings and parking will also be set back 50 feet from the ultimate edge of pavement. Within this setback area, special gateway landscaping will consist of groups of deciduous, evergreen, and ornamental trees repeated across both sides of the highway, including the median, in a coordinated massing pattern.

The massing pattern of tree groups and openings can be placed to manage views and reinforce features and spaces along the streetscape, e.g. a transit stop, signs, and outdoor spaces defined by buildings, and community identity features such as entry monuments, retaining walls, welcome signs, and public art.

The setback will also include an eight-foot multi-use, off-street path with a generous separation from the highway. The path will be designed in conjunction with landscape design, transit stops and street lighting. In addition, a distinctive pedestrian plaza will be provided within the setback area.

Buildings near the intersection will frame the intersection and be coordinated in terms of placement and image. All buildings will include roofs with visually interesting forms (e.g., sloped or barrel) and be multi-storied. Building masses will be varied with elements such as offsets, recesses and projections, reveals, harmonious variations in roof-shape or height, and vertical extensions at focal points.

Retaining walls will be constructed of stone or materials that match the architecture of the building.

Strategy 6

Improve Neighborhood Shopping Opportunities

In recent years, the area adjacent to the South College study area has experienced significant residential growth. The primary trade area grew from a population of 5,523 in 1990 to 17,528 in 2007, which is an increase of over 12,000. This residential growth has changed the character of the South College Corridor. The current retail supply along South College includes a widely diverse array of independent retailers that are attracted to the Corridor by competitively priced retail rents generally oriented to the highway. Nearby residents generally leave the area for their neighborhood retail and services needs. Spending in convenience goods is noticeably concentrated in the nearby College Corridor north of Harmony and the Harmony Corridor east of College, according to a 2008 market assessment. That study highlighted a supermarket as the major new retail opportunity.

Successfully expanding existing neighborhood retailers and attracting new neighborhood goods and services requires vibrant vehicle and pedestrian traffic, safe access, and residential growth. Improvements are needed to improve access and highway safety, the streetscape, and pedestrian facilities along South College. Furthermore, attracting neighborhood retail requires strategies to focus development in clusters along the Corridor, thereby concentrating visitation and retail purchases.

Strategies to attract additional neighborhood retail and services include:

- The key location for new neighborhood services, including a supermarket, is the Neighborhood Commercial District at the northwest corner of College and Carpenter roads. The best strategy for facilitating the supermarket is to coordinate transportation and stormwater improvements along both sides of College.
- Other small scale neighborhood centers could be constructed on the Low-Density Mixed-Use area north of Benson Lake, and the vacant commercial site located along the west side of College between Skyway and Trilby.
- The southwest corner of Trilby and College and the northeast corner of Carpenter and College are designated as Limited Commercial, which could also support neighborhood-serving retail uses.
- Where controversy over potential development exists, a collaborative process (known as “charettes”) should be instituted to identify and address site-specific issues and to build agreement between residents, developers and property owners on the design of development.

Strategy 7

Develop Off-Street Trail Network

The South College Corridor trails plan complements the trail systems shown in the Fort Collins' *Bike Plan* and *Parks and Recreation Policy Plan* by identifying additional regional and neighborhood trail segments in the South College area. These additional segments are intended to provide more fine-grained connections between neighborhoods and significant destinations like parks or neighborhood retail stores.

Priority should be given to those locations where new rights-of-way are not required and where the new trail provides an extension of existing facilities. Trails shall be located and designed to minimize disturbance of natural features. City-initiated and maintained trails include:

- Fossil Creek Trail connection to Cathy Fromme Prairie.
- Connection from the Fossil Creek Trail to Skyway Drive.

Specific segments will be completed as private development occurs. These segments include:

- Extension of a north-south Skyway Trail between Skyway Drive and Trilby Road.
- Extension of a north-south Skyway Trail between Trilby Road and Carpenter.
- Trail connection from South College to Provincetowne Park.

Strategy 8

MAX Bus Rapid Transit and Transit-Oriented Development on the Mason Corridor

The Mason Corridor MAX Bus Rapid Transit project (MAX BRT) will be a catalyst for not only multi-modal (pedestrian, bicycle, and transit) enhancements throughout the Corridor, but also for a new type of place along South College - transit-oriented development. MAX has the potential to significantly change the character of South College near Harmony Road. MAX may reduce the need for parking, allowing new projects to devote more land to housing, offices, retail and public spaces. New transportation connections could be made to enable users to conveniently access MAX. A key idea is to create a transportation "spine" from College Avenue to the South Transit Station.

A key strategy in encouraging transit-oriented development has already been adopted as part of the Land Use Code: "Development Standards for the Transit-Oriented Development Overlay Zone". Another strategy is to assist problem solving efforts on key sites to help them become "development-ready". This includes collecting site information, issues, barriers, etc., identifying a specific vision for each site, and marketing those sites to potential developers. A project has been initiated to conduct such a study, titled "Priming Sites for Refill".

Implementation Table

The information presented in the following table identifies specific actions the City and others can take to implement this *Plan*

Goal	Action	Responsible Parties	Timeline		
			Short Term 1-5 yrs	Mid Term 5-10 yrs	Long Term 10-20 yrs
LAND USE					
Goal LU 1: Retain the eclectic business mix while supporting new uses that strengthen the South College market.					
1.	Change <i>City Structure Plan</i> and rezone properties consistent with the Framework Plan.	City	X (with <i>Plan</i> adoption)		
2.	Amend the Commercial-North College Zone District (C-N) and rename to Service Commercial (C-S)	City	X (with <i>Plan</i> adoption)		
3.	Identify and resolve unusual development issues on new development projects that meet the <i>Plan</i> vision.	Developers, City	X	X	X
4.	Seek ways to reduce or defer upfront infrastructure costs for minor projects that contribute to the <i>Plan</i> vision.	City, Developers	X	X	
5.	If a special funding mechanism is created, use those funds to upgrade the infrastructure and consider establishing a façade improvement program.	City		X	X
6.	Continue to monitor and address barriers to Change of Use, Enlargement of Structures, and Redevelopment projects that further the <i>Plan</i> vision.	City	X	X	
Goal LU 2: Encourage neighborhood serving retail and commercial uses in locations convenient to adjacent neighborhoods.					
7.	Work to coordinate transportation and stormwater improvements near College and Carpenter in order to facilitate the development of a supermarket.	City, Developers	X	X	
8.	Utilize a collaborative process ("charettes") to build agreement on key development sites.	Developers, Property Owners, Residents, City	X	X	X
Goal LU 3: Capitalize on Mason Corridor and Transit-Oriented Development (TOD) opportunities					
9.	Collect site information and market sites identified for transit-oriented development.	City, Property Owners, Brokers	X	X	
TRANSPORTATION					
Goal T 1: Improve traffic safety along the highway for all users.					
10.	<p>The highest priority transportation improvements are:</p> <ul style="list-style-type: none"> ▪ Sidewalks along College Avenue, particularly north of Trilby Road. ▪ Short term <i>Access Control Plan</i> improvements particularly safety related. ▪ Sidewalks along Skyway west of College to connect Foothills Gateway to the transit stops. ▪ Improvements to the Trilby intersection. ▪ Sidewalks along Trilby Road. ▪ Safer access to transit stops at College/Skyway. 	City, CDOT	X	X	X

Goal	Action	Responsible Parties	Timeline		
			Short Term 1-5 yrs	Mid Term 5-10 yrs	Long Term 10-20 yrs
11.	Prepare a conceptual design in areas with a frontage road in order to determine how various street elements could be built in the short-term <i>Access Control Plan</i> .	City Transportation, CDOT, Business and Property Owners	X		
12.	Monitor traffic conditions at the three potential signal locations to determine if a signal is needed.	City Traffic Operations, CDOT	X	X	
Goal T 2: Create a more complete street network of local and collector roads.					
Goal T 3: Make walking and biking practical and enjoyable methods to shop or commute.					
13.	Construct a trail connection between the Fossil Creek Trail and Skyway.	City		X	X
14.	Implement the Skyridge and Provincetowne Park trails, and other neighborhood connections, through new development.	Developers		X	X
15.	Amend the City's <i>Bicycle Plan</i> to include the new routes identified in the <i>South College Corridor Plan</i> .	City Transportation Planning	X		
Goal T 4: Strengthen the existing transit network and support the expansion of regional and local transit links.					
16.	Improve the bus stops at College and Skyway with shelters, benches, and safer walking surfaces.	Transfort	X		
COMMUNITY APPEARANCE AND DESIGN					
Goal CAD 1: South College's image will evolve from a highway defined by cars to a healthy business district defined by retail activity.					
17.	Formulate a program of themes and elements that could be incorporated into design guidelines and various projects, signs, banners, marketing, etc.	Property and Business Owners, City Advance Planning	X		
Goal CAD 2: Create new public spaces.					
18.	Identify potential locations and designs for new public spaces that could be constructed through new development or street improvements.	City Advance Planning	X		
Goal CAD 3: Create a sense of arrival into Fort Collins.					
19.	Amend the Land Use Code to implement design standards for the South College Gateway Area.	City Advance Planning	X (with <i>Plan</i> adoption)		
COMMUNITY PARTNERSHIPS AND FINANCING					
Goal CP 1: Increase collaboration and mutual understanding between Corridor business owners, property owners, and residents.					
20.	Organize a meeting of local business leaders to discuss potential for a business organization.	City Neighborhood Services, Chamber of Commerce	X		
21.	Create a formal business advocacy group such as a South College or South Fort Collins business association. Or, in lieu of a formal business association, identify official liaisons from neighborhoods and local businesses that can speak on behalf of the area.	Property and Business Owners, with support from the Chamber of Commerce	X		
22.	Actively participate in local organizations and events that support economic development along South College.	Property and Business Owners	X	X	X

Goal	Action	Responsible Parties	Timeline		
			Short Term 1-5 yrs	Mid Term 5-10 yrs	Long Term 10-20 yrs
23.	Conduct periodic outreach efforts to the local business community to monitor <i>Plan</i> implementation and address Property and Business Owner concerns.	City Neighborhood Services	X	X	X
Goal CP 2: Leverage and stimulate investment with infrastructure projects.					
24.	Evaluate the use of public funding mechanisms including CIP, federal/state funds, special districts and tax increment financing (TIF).	City	X	X	
25.	If and when community support exists, initiate an appropriate funding mechanism primarily for improving infrastructure.	City		X	X
26.	In the Capital Improvement Program, consider increasing the priority of South College Corridor improvement projects that have been identified as high-priority in the <i>South College Corridor Plan</i> .	City Transportation	X	X	
27.	Initiate a Special Improvement District for the South 13 Subdivision.	Property Owners (City Engineering technical support)	X		
NATURAL RESOURCES AND DRAINAGEWAYS					
Goal ND 1: Natural resources within and adjacent to the South College Corridor will be protected and enhanced to the maximum extent feasible.					
28.	Buffer the impact of new development on all important natural features, including those within the Redtail Grove Natural Area, Prairie Dog Meadows Natural Area, and Pelican Marsh Natural Area.	Developers	X	X	X
Goal ND 2: Solve drainage system needs to allow street and development projects while maintaining natural drainageways.					
29.	Coordinate with the Loudon Ditch Company for improvements to the ditch corridor, which could include pedestrian and bike trails, and natural buffers between developments.	City, Loudon Ditch Company, Developers	X	X	X
30.	Incorporate sustainable Best Management Practices into improvements where practical.	City, CDOT	X	X	X
31.	Consider implementing regional detention and conveyance facilities.	City, Developers	X	X	X

A P P E N D I X A

SOUTH COLLEGE CORRIDOR SURVEY RESULTS

Introduction

Resident household and business owner surveys were conducted as part of the South College Corridor Plan. The household survey was mailed to households in the trade area surrounding the South College Corridor. The business survey was mailed to all property owners of business owners along South College. The consultant team, comprised of EDAW, EPS, and RRC Associates, in collaboration with City of Fort Collins staff, designed both surveys. City staff fielded and tabulated the household survey. RRC Associates fielded and tabulated the business survey. This memo describes the major findings of both the household and business owner survey.

Household Survey

The household survey was distributed to 2,000 randomly selected households from a mailing list of households within the Trade Area depicted in Figure 31. A total of 365 surveys (341 via mail and 24 internet surveys) were returned and tabulated (approximately 20 percent) resulting in a statistically valid survey. The primary findings are summarized in four sections: Survey Respondent Overview, Shopping Patterns, Community Investment Opinions, and Retail Development Opinions/Conclusions.

Survey Respondents Overview

Household survey respondents stretched a broad range of residency tenure in Fort Collins with a mixture of long and short term residents participating. Figure 32 shows the range of "10 to 19 years" and "30 years and more" contained the greatest number of survey respondents at 23.8 percent and 22.1 percent, respectively. The high percentage of respondents from "10 to 19 years" suggests residents, who moved to the trade area during the high growth period between 1990 and 2000 census years, have become significant stakeholders. Combined, respondents who have been in Fort Collins between zero to five years and five to nine years accounted for 37.9 percent of respondents and show the continued influence of new residents to the area.

Figure 31 - Years of residency in the Fort Collins area

Range	%
Less than 5 years	18.4%
5 to 9 years	19.5%
10 to 19 years	23.8%
20 to 29 years	16.1%
30 years or more	22.1%
Total	100.0%

Source: RRC Associates, Economic & Planning Systems

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Residents earning over \$90,000 per household comprised 56.3 percent of respondents, which is higher than the average of 20.8 percent for the trade area as a whole, as shown in Figure 33. The comparison for the trade area was derived using data from Claritas, a widely used demographic research company, which uses census information to derive current year trend data for specific geographies. A higher rate of response among higher income residents is typical for household surveys.

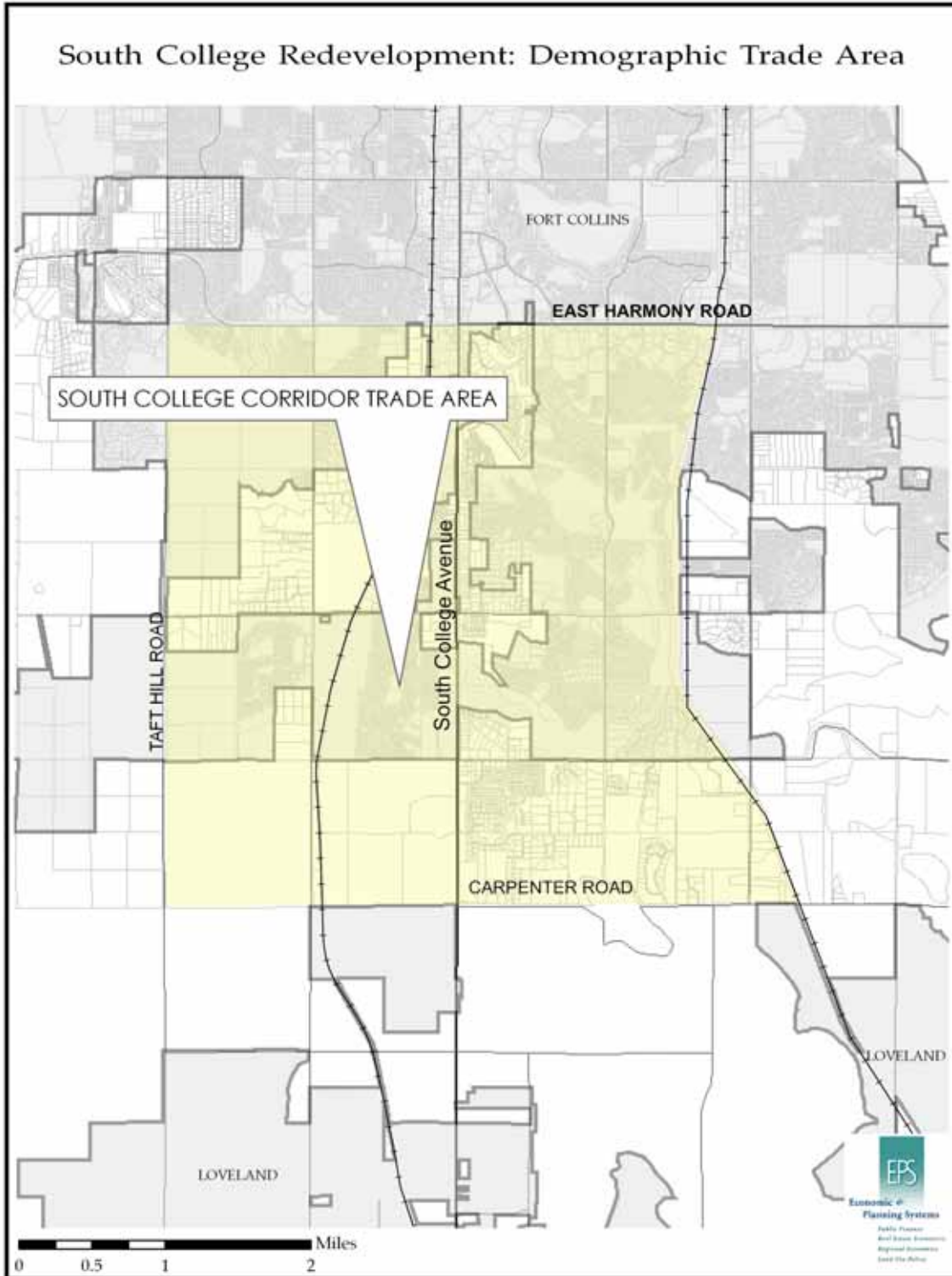
Figure 32 - Household survey respondents by income range

Income	Survey	Trade Area
	%	%
Less than \$10,000	0.9%	5.4%
\$10,000 to \$29,999	3.3%	18.5%
\$30,000 to \$49,999	7.9%	19.9%
\$50,000 to \$69,999	12.2%	21.5%
\$70,000 to \$89,999	20.4%	14.0%
\$90,000+	56.3%	20.8%

Source: RRC Associates, Claritas, Economic & Planning Systems

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Figure 33 - South College trade area



Spending Patterns

The first question, regarding consumer spending habits, asked respondents to estimate their total annual retail spending for 2007 by store type, without respect for location. On average, respondents estimated retail purchases total spending at \$15,339 annually, compared to an average of \$19,162 based on the US Census of Retail Trade estimates for the trade area. By store category, the survey responses mirror Census of Retail Trade estimates closely. However, the lower percentage of estimated purchases made at "Drugstores and Membership Warehouse" may suggest substitution at other retail store types due to the lack of available stores within these categories.

Household survey respondents were also asked to estimate the portion of retail purchases made by major location for special store categories. The results of the survey question are listed by store type in the Figure 34. The store type most frequented by respondents in the South College Corridor (study area) was "Beer, Wine, and Liquor", which accounted for 19.9 percent of the spending. "Supermarket/grocery and natural food" spending is the largest retail spending category overall, but accounts for only 6.1 percent of spending done by survey respondents in the South College Corridor.

Spending was noticeably concentrated in the nearby College Corridor, north of Harmony, and the Harmony Corridor, east of College. Spending in these corridors contained high percentages of spending in the category of supermarket/grocery (20.3 and 57.0 percent), drugstores (42.3 and 38.8 percent), specialty food stores (32.4 and 25.1 percent), and restaurants/bars (35.6 and 26.9 percent). The percentage of spending in retail categories away from the South College Corridor suggests new store opportunities in the South College Corridor, given the store types mentioned above typically serve residents at a neighborhood level. The College Corridor north of Harmony and Loveland geographies captured the largest percentage of survey respondents spending at "Discount Stores and Supercenters," which are 42.0 and 23.7 percent respectively. Loveland's large percentage of spending in the discount and supercenter category reflects the influence of the new Wal-Mart Supercenter on Garfield Avenue and 65th Street in North Loveland approximately 1.5 miles south of Carpenter Street.

Table 34 - Household survey respondents retail store spending

Type of Store	Estimated Survey Expenditures	Response % of TPI	Census of Retail Trade
Supermarket/Grocery & natural food	\$5,576	4.4%	6.0%
Drugstores	\$706	0.7%	1.4%
Beer, Wine, Liquor	\$578	0.6%	0.8%
Other Specialty Food Stores	\$310	0.3%	0.1%
Discount and Supercenter	\$1,994	2.0%	2.7%
Membership Warehouse	\$1,753	1.7%	3.5%
Hardware Stores	\$400	0.4%	0.4%
Home Improvement Centers	\$1,877	1.9%	1.4%
Restaurants/Bars	\$2,143	2.1%	2.6%
Total Annual Retail Purchases	\$15,339	\$15,339	\$19,162
Trade Area Average Annual HH Income (Claritas)	\$101,444	\$101,444	\$101,444

Source: RRC Associates, Claritas, Economic & Planning Systems

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Figure 35 - Household survey respondent retail purchases by location

Store Type	South College Corridor	College Corridor North of Harmony	Harmony Corridor East of College	Other Fort Collins	Loveland	Other Front Range	Total
Supermarket/Grocery	6.1%	20.3%	57.0%	9.5%	5.8%	1.3%	100%
Natural Food	1.9%	64.5%	9.2%	23.8%	0.0%	0.5%	100%
Drugstores	3.9%	42.3%	38.8%	10.5%	3.9%	0.6%	100%
Beer, Wine, Liquor	19.9%	25.1%	41.1%	9.5%	2.2%	2.2%	100%
Other Specialty Food Stores	1.8%	32.4%	25.1%	31.0%	4.9%	4.9%	100%
Discount and Supercenter	8.1%	42.0%	11.4%	12.9%	23.7%	1.8%	100%
Membership Warehouse	6.1%	5.5%	73.0%	5.7%	5.3%	4.4%	100%
Hardware Stores	6.3%	16.3%	63.4%	8.5%	4.6%	0.9%	100%
Home Improvement Centers	4.0%	10.2%	68.4%	7.9%	8.6%	0.9%	100%
Restaurants/Bars	5.9%	35.2%	27.3%	22.1%	6.4%	3.0%	100%
Other	34.5%	27.3%	14.6%	11.3%	4.2%	8.1%	100%

Source: RRC Associates, Economic & Planning Systems
 H:\17864-Fort Collins South College Corridor\Models\17864-Homeowner Survey Results.xls\Location

Figure 36 displays the surveyed motivations behind resident decisions to visit businesses in the South College Corridor. The highest activity response was shopping, which accounted for 31.2 percent of all responses, and indicates that residents are most likely to visit South College businesses for retail goods. The next two activities with the greatest proportion of responses were auto related activities at 17.4 percent and restaurants at 15.7 percent.

Figure 36 - Reasons for visiting South College Corridor by activity

Activity	Responses	% of Total Responses
Shopping	220	31.2%
Work	35	5.0%
Personal	58	8.2%
Business	21	3.0%
Auto	123	17.4%
Restaurants	111	15.7%
Entertainment	37	5.2%
Medical	30	4.3%
Other	5	0.7%
Do not patronize	65	9.2%
Total	705	100%

Source: RRC Associates, Economic & Planning Systems
 H:\17864-Fort Collins South College Corridor\Models\17864-Homeowner Survey Results.xls\Purpose

Although the results indicate the most common activity in the South College Corridor is retail spending, there is a low frequency at which this activity occurs. Figure 37 displays the frequency that household survey respondents visit businesses in the South College Corridor. A total of 57 percent of respondents visit businesses once a month or less. The highest response rate was seen in respondents who visit businesses less than monthly, at 29.8 percent. A total of 43 percent of respondents visit South College businesses once a week or more. The results indicate that the business mix is weighted towards specialized uses with infrequent patronage.

Figure 37 - Frequency of visits to Corridor

Frequency	Responses	% of Total Responses
Daily	31	9.6%
Few Times a week	45	14.0%
Once a week	64	19.9%
Once a month	70	21.7%
Less than monthly	96	29.8%
Never	16	5.0%
Total	322	100%
Avg.	54	

Source: RRC Associates, Economic & Planning Systems
 H:\17864-Fort Collins South College Corridor\Models\17864-Homeowner Survey Results.xls\Frequency

Community Investment Opinions

Multiple improvements to the South College Corridor are under consideration as part of the master plan. In an effort to prioritize future efforts, households were asked to rank a list of possible improvements to the Corridor. Respondents' answers to the prioritization of improvement possibilities are shown in Figure 38. The top three improvements, and the only to receive greater than ten percent of responses, include more open space, quality of commercial buildings, and street beautification measures. Of these, the quality of commercial buildings ranked the highest with 18.9 percent of total responses.

The top improvements which were second in importance differed slightly and included improved pedestrian access, improved bicycle access, quality of commercial buildings, and street beautification measures. The improvement receiving the highest amount of responses was quality of commercial buildings, with 18.6 percent of responses. When the two metrics of importance are combined, the quality of commercial buildings emerges as the improvement with the most responses, followed closely by street beautification.

Residents were also asked to prioritize improvements based on five levels of concern; the results are displayed in Figure 38. Improved bicycle access contained the highest amount of critical issue responses at 14.7 percent. Other issues ranking highly, with ten percent or more in the serious or critical category, included: pedestrian access, more open space, quality of commercial buildings, and street beautification measures.

Figure 38 - Household respondent improvement preferences

Improvement	Most Important		Second Most Important		Combined	
	#	% of Total Responses	#	% of Total Responses	#	% of Total Responses
Lower traffic speed limits	25	7.3%	9	2.9%	34	5.2%
Improved traffic controls (traffic signals, pavement markings, etc.)	30	8.7%	17	5.5%	47	7.2%
More landscaping, street trees, and beautification	52	15.1%	51	16.4%	103	15.7%
Quality of commercial buildings	65	18.9%	58	18.6%	123	18.8%
More open space	41	11.9%	16	5.1%	57	8.7%
Improved storm drainage or flood protection	9	2.6%	12	3.9%	21	3.2%
Improved access to transit/bus service	16	4.7%	15	4.8%	31	4.7%
Improved commercial signs	4	1.2%	9	2.9%	13	2.0%
Improved bicycle access	41	11.9%	40	12.9%	81	12.4%
Improved pedestrian access	15	4.4%	32	10.3%	47	7.2%
Improved communication among neighboring businesses and property owners	7	2.0%	11	3.5%	18	2.7%
Crime	25	7.3%	18	5.8%	43	6.6%
New street lighting	7	2.0%	10	3.2%	17	2.6%
Additional residential growth to support commercial uses	7	2.0%	13	4.2%	20	3.1%
Total	344	100%	311	100%	655	100%

Source: RRC Associates, Economic & Planning Systems

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Table 39 - Improvement priorities

Activity	Not a Priority	A Low Priority	A Moderate Issue	A Serious Issue	A Critical Issue
	% of Total Responses	% of Total Responses	% of Total Responses	% of Total Responses	% of Total Responses
Lower traffic speed limits	15.3%	5.9%	4.5%	3.9%	3.0%
Improved traffic controls (traffic signals, pavement markings, etc.)	8.2%	8.1%	7.2%	6.0%	6.3%
More landscaping, street trees, and beautification	4.3%	5.4%	8.2%	9.9%	10.6%
Quality of commercial buildings	3.4%	4.7%	7.9%	12.7%	10.4%
More open space	6.2%	6.6%	7.6%	6.5%	9.8%
Improved storm drainage or flood protection	6.5%	9.2%	8.2%	4.2%	4.8%
Improved access to transit/bus service	9.1%	7.9%	6.8%	6.3%	5.4%
Improved commercial signs	7.7%	8.1%	7.1%	6.9%	4.5%
Improved bicycle access	5.2%	5.9%	6.5%	7.7%	14.7%
Improved pedestrian access	4.3%	6.7%	6.3%	10.8%	11.2%
Improved communication among neighboring businesses and property owners	8.4%	7.7%	6.9%	6.7%	4.0%
Crime	5.7%	7.6%	7.7%	6.3%	8.3%
New street lighting	5.1%	7.1%	9.4%	7.7%	4.5%
Additional residential growth to support commercial uses	<u>10.7%</u>	<u>9.2%</u>	<u>5.8%</u>	<u>4.3%</u>	<u>2.4%</u>
Total	100%	100%	100%	100%	100%

Source: RRC Associates, Economic & Planning Systems
 H:\17864-Fort Collins South College Corridor\Models\17864-Homeowner Survey Results.xls\Improvement Issues

Retail Development Opinions/Conclusions

Household respondents were surveyed regarding their desire to see different types of retail stores. Figure 40 displays respondent preferences as measured by a simple “yes” or “no” regarding desire for a particular store type. Only three store types were positively rated by respondents for inclusion in the South College Corridor, with 67.5 percent in favor of a grocery store, 68.5 percent in favor of restaurants, and 79.6 percent in favor of small neighborhood retail.

Figure 40 - Desired retail stores

Business Type	Yes	No
	%	%
Auto Related Services	20.7%	79.3%
Antique malls	25.3%	74.7%
Grocery Stores	67.5%	32.5%
Drug stores/pharmacies	48.5%	51.5%
Restaurants/bars	68.5%	31.5%
Supercenters or warehouse stores	22.3%	77.7%
Small neighborhood oriented retail	79.6%	20.4%

Source: RRC Associates, Economic & Planning Systems
 H:\17864-Fort Collins South College Corridor\Models\17864-Homeowner Survey Results.xls\Business Desire

The findings of the household survey largely corroborate the retail demand conclusions which indicate strong demand for a supermarket/grocery store as well as restaurants/ bars. Additionally, general convenience oriented goods were shown to have unmet demand in the trade area, and could explain respondents’ desire for locally based neighborhood oriented retail.

Additional conclusions from the household survey are listed below.

- Household spending in the trade area closely follows average State of Colorado retail spending trends. The similarities between spending trends confirms the retail demand conclusions of the report.
- Almost all shopping for convenience oriented goods such as supermarkets/grocery stores occur away from the South College Corridor.
- Clear demand for supermarket/grocery stores exists based on respondents stated preferences and spending habits away from the Corridor, confirming previous retail demand conclusions.

Business Owner Survey

A survey was sent by mail to 297 businesses and property owners along South College Corridor. A total of 93 businesses returned the survey for a statistically significant response rate of 31 percent. Results from the survey are divided into three sections: business profile, future plans, and survey conclusions.

South College Corridor Business Profile

Business responses regarding the place of origin of their customers confirm the results of the homeowner survey. Figure 41 shows 49 percent of customers come from within Larimer County; however, only 13 percent originate in Fort Collins. The result of this finding provides indication the South College Corridor businesses serve regional clients with a small number servicing Fort Collins directly.

Figure 41 - Business customer origin

Place	% of Total Responses
Within Ft. Collins	13%
Within Larimer County (including Ft. Collins, Loveland, Windsor)	49%
North Front Range Region	23%
Statewide	16%

Source: RRC Associates, Economic & Planning Systems

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The businesses that responded to the survey can be characterized as “small” based on the results displayed in Figure 42. Over half of businesses (52 percent) responded that five or fewer people were employed full time. The next largest category included businesses with six to 10 employees, which accounted for 29 percent of respondents. Medium size businesses appear to be limited along the Corridor as businesses, with 16 or more employees accounted for only eight percent of respondents.

Figure 42 - Number of employees

Persons	% of Total Responses
1-5	52%
6-10	29%
11-15	9%
16-20	4%
21+	4%

Source: RRC Associates, Economic & Planning Systems

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In total, 68 percent of businesses that responded to the survey also own the property on which their business is located. The length of ownership for businesses that own their property is displayed in Figure 43. Significantly, 55 percent of property owners have owned their land for 11 or more years. The highest ownership range was between 11 and 20 years, which accounted for 30 percent of all respondents. The survey results indicate that the majority of businesses own their land and are likely to have a low cost basis as a result of long term land ownership.

Figure 43 - Years of ownership for businesses that own property

Range	% of Total Responses
Less than 1 year	3%
1-5 years	26%
6-10 years	16%
11-20 years	30%
21 years or more	25%

Source: RRC Associates, Economic & Planning Systems

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Future Plans for South College Corridor Businesses

To understand the stability of the business community along the South College Corridor, businesses were asked survey questions to provide insight into their future plans. As shown in Figure 44, the most common responses indicated a desire to stay the same size and expand at the existing location, which accounted for 36 percent and 27 percent of responses, respectively. In total, 70 percent of respondent businesses gave indication of stability by responding that they plan to stay the same size, expand at current location, or renovate the existing structure.

Figure 44 - Future plans for businesses

	% of Total Responses
Stay the same size	36%
Expand at the existing location	27%
Renovate existing structure	7%
Move elsewhere	14%
Downsize	1%
Other	15%

Source: RRC Associates, Economic & Planning Systems

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When asked, business survey respondents ranked the majority of improvements as, “not a priority.” The exception occurred when respondents were asked about improved traffic controls, in which 40 percent indicated that they were a serious or critical issue. The improvement question was rephrased and respondents were asked which improvement was the most important and second most important (see Figure 45). Consistent with the previous question, improved traffic controls had the highest prioritization, with 21 percent of respondents indicating it is the most or second most important improvement. The other significant improvement was the quality of commercial buildings, which had a combined average of 12.5 percent of respondents. The apparent satisfaction with South College Corridor conditions speaks to the current stability of businesses and the conditions under which they operate.

To provide further indication of Corridor stability, business owners that own the property on which their business is located were asked their timeframe for selling. A majority of 52 percent indicated that they were not interested in selling their property, as shown in Figure 46. An additional ten percent responded that they had interest in selling their property in a time period between 11 and 20 years.

Figure 45 - Business respondent improvement preferences

Improvement	Most Important	Second Most Important	Combined
	% of Total Responses	% of Total Responses	% of Total Responses
Lower traffic speed limits	14.0%	6.0%	10.0%
Improved traffic controls (traffic signals, pavement markings, etc.)	28.0%	14.0%	21.0%
More landscaping, street trees, and beautification	4.0%	13.0%	8.5%
Quality of commercial buildings	14.0%	11.0%	12.5%
More open space	4.0%	5.0%	4.5%
Improved storm drainage or flood protection	3.0%	3.0%	3.0%
Improved access to transit/bus service	3.0%	3.0%	3.0%
Improved commercial signs	7.0%	6.0%	6.5%
Improved bicycle access	1.0%	3.0%	2.0%
Improved pedestrian access	2.0%	3.0%	2.5%
Improved communication among neighboring businesses and property owners	3.0%	9.0%	6.0%
Crime	8.0%	10.0%	9.0%
New street lighting	1.0%	6.0%	3.5%
Additional residential growth to support commercial uses	10.0%	7.0%	8.5%

Source: RRC Associates, Economic & Planning Systems

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Related to these results, 76 percent of businesses that own their property responded “no” when asked if they envisioned redeveloping their property. However, 26 percent of businesses responded positively to the same question, which is approximately the same amount that has interest in selling their property in the short term (one to five years). The fact that a quarter of property owners are interested in selling or redeveloping indicates some potential for change within the South College Corridor.

Figure 46 - Interest in selling property

Range	% of Total Responses
1-5 years	26%
6-10 years	12%
11-20 years	10%
Not interested in selling	52%

Source: RRC Associates, Economic & Planning Systems

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Business Owner Survey Conclusions

The business survey results show consistent indicators of stability within the South College business Corridor. Specifically, the following conclusions can be derived from the survey data.

- The market is not currently exerting pressure on business owners to take on the risk associated with redeveloping their property.
- Economic conditions are such that businesses are content with current conditions or small improvement to their business/property.
- Stability of the business community and lack of market pressure has resulted in an unwillingness to sell amongst the majority of business owners surveyed.

A P P E N D I X B

SOUTH COLLEGE CORRIDOR MARKET ASSESSMENT

June 12, 2008

Prepared for:
City of Fort Collins

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EPS #17864

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I. INTRODUCTION & SUMMARY OF FINDINGS

City of Fort Collins retained Economic & Planning Systems as part of an interdisciplinary team, led by EDAW to develop a South College Corridor Plan. The report summarizes the market analysis and conclusions of EPS regarding the potential for additional development along the corridor.

BACKGROUND

The South College corridor stretches from Harmony Road on the north to Carpenter Road on the south. A portion of the corridor was recently annexed by City of Fort Collins. The entire study area considered during this study is within the City of Fort Collins boundary.

College Avenue, also know as US Highway 287, developed as an auto oriented corridor with a range of highway oriented retail, light manufacturing, and industrial land uses. A few farm homes remain along the corridor from its previously rural development pattern. In recent years, suburban residential development has begun occurring in the corridor, generally behind (to the east and west) of the highway oriented retail uses found immediately in the arterial corridor.

This market assessment was completed to provide input and direction to the corridor land use plan. The following tasks were undertaken:

- **Economic and Demographic Framework** - EPS summarized economic and demographic trends and forecasts for Fort Collins and the larger Larimer County market area as previously provided in theason Corridor Economic Analysis Report.
- **Household and Property Owners Surveys** - The results of two separate surveys conducted to provide input to the plan are summarized. The household survey provides data on existing retail expenditure patterns as well as resident opinions on desired corridor improvements. The property and business owner survey collected data on the existing business mix and property owner plans for the future including expansions and redevelopment.
- **Existing Real Estate Conditions** - EPS evaluated existing corridor land uses as well as real estate conditions and values in order to identify future redevelopment opportunities in the corridor.
- **Residential Development** - EPS analyzed recent for sale and for rent residential development trends and conditions and evaluated available and future land use recommendations. Based on this information, future residential development opportunities are identified.
- **Retail Development** - EPS analyzed existing retail conditions and forecast the market for future neighborhood and community level retail uses based on existing and future households and household income in the logical trade areas for the corridor. The results of the household survey quantifying existing retail expenditure patterns were used as input to this analysis.
- **Business and Industrial Development** - EPS summarized existing business and industrial development trends and forecasts in the Fort Collins market. Based on existing conditions and available land, an estimate of future development capture is made.

SUMMARY OF FINDINGS

- 1. The population of the South College Trade area has grown more rapidly than City of Fort Collins or Larimer County since 1990. The buildable land inventory indicates the area can continue to grow by an additional 4,800 residents to reach 23,600 by 2020.*

The primary trade area grew from a population of 5,523 in 1990 to 17,528 in 2007, which is an increase of 12,005. Between 1990 and 2000, the area grew by approximately 4,200 households or an annual average growth rate of 8.6 percent. The area continues to experience high growth, with households increasing by 1,780 households between 2000 and 2007 or an annual growth rate of 4.9 percent annually, which remains higher than the overall Larimer County growth rate of 1.6 percent and City of Fort Collins growth rate of 3.1 percent. Growth in the area is primarily characterized by single family detached units.

The buildable land inventory (updated by the City in 2007) estimates adequate land remains to construct approximately 1,800 households in the market area. Based on current conditions and historic absorption rates, these households are expected to be built by 2020. In total, the primary trade area is expected to contain 23,600 persons by 2020, which is an increase of 4,800 persons from current levels.

- 2. Between 1990 and 2007, household incomes in the trade area have grown significantly, with the number of households earning \$75,000 or more increasing by nearly 3,000 households, or approximately 70 percent of the growth. This influx of income has helped the area become one of the most affluent areas in the City with the average household income now estimated at \$102,000 annually.*

In addition to strong population and household growth, the trade area has experienced strong income growth. As evidence, between 1990 and 2007 households earning \$75,000 or more annually increased by over 3,000 or approximately 70 percent of all new households during this time period. This income range represents a key benchmark for many retailers when considering new store locations.

Increasingly, the households moving into the primary trade area appears to be among higher income levels. Between 1990 and 2000 43 percent of new households earned \$100,000 or more. Subsequently, in the period between 2000 and 2007 62 percent of new households earned \$100,000 or more. In total, over half (53 percent) of households in the trade area now earn \$75,000 or more annually. The implications of this demographic change will inform the retail and office development potential sections of this report.

- 3. Household survey results indicate market demand for convenience oriented retail as indicated by the low amount of shopping for associated categories in the South College corridor as well as stated desire to see supermarkets/grocery in the corridor.**

Household survey respondents were also asked to, “estimate the portion of retail purchases made by major location for special store categories” in what location spending for convenience goods occurs. The store type most frequented by respondents in the South College corridor (study area) was Beer, Wine, and Liquor which accounted for 19.9 percent of the spending. Supermarket/grocery and natural food spending is the largest retail spending category overall, but accounts for only 6.1 percent of spending done by survey respondents in the South College corridor.

Spending in convenience goods was noticeably concentrated in the nearby College Corridor North of Harmony and the Harmony Corridor East of College. Spending in these corridors contained high percentages of spending in the category of supermarket/ grocery (20.3 and 57.0 percent), drugstores (42.3 and 38.8 percent), specialty food stores (32.4 and 25.1 percent), and restaurants/bars (35.6 and 26.9 percent). Further, only three store types were positively rated by respondents for inclusion in the South College corridor, with 67.5 percent in favor of a grocery store, 68.5 percent in favor of restaurants, and 80.1 percent in favor of and small neighborhood retail with 79.6 percent in favor.

- 4. South College corridor property owners and businesses are generally not considering major expansions or redevelopments. The majority businesses are either content with current conditions or plan to make small improvements to their business/ property.**

The property owner and business survey asked questions regarding future expansion and development plans. The most common responses indicated a desire to stay the same size and expand at the existing location, which accounted for 36 percent and 27 percent of responses, respectively. In total, 70 percent of respondent businesses gave indication of stability by responding that they plan to stay the same size, expand at current location, or renovate the existing structure. Related to these results, 76 percent of businesses that own their property responded “no” when asked if they envisioned redeveloping their property. However, 26 percent of businesses responded positively to the same question, which is approximately the same amount that has interest in selling their property in the short term (one to five years). The consistency of a quarter of property owning business in selling or redeveloping indicates that although the businesses landscape is stable, some potential for change within the South College corridor exists dependent upon market conditions.

- 5. The corridor includes approximately 280 acres of potential future redevelopment sites comprised of large vacant parcels and functionally obsolete buildings.**

Potential redevelopment sites were screened using GIS analysis based on an FAR of 0.5 or less, an improvement-to-land value ratio of 1.0 or less, and parcel size of 2.0 acres or more. The initial analysis did not identify agricultural parcels as potential sites given the lower assessed value of agricultural land; however, these parcels were added to the analysis based on an FAR of 0.5 or less. In total, the analysis identified 21 parcels totaling approximately 277.5 acres, the majority of these development sites are located south of Trilby Road. In general, these sites are also characterized by larger parcel sizes that aid in attracting development to the corridor.

- 6. The City’s buildable land inventory indicates the corridor can support approximately 1,800 new single family residential units. However, as the area approaches buildout, the demand for alternative residential products will increase. The corridor can likely also support an apartment development of 150 to 250 units.**

The buildable lands inventory estimates that capacity remains in the trade area for approximately 1,800 additional homes. Most of these homes will be constructed in existing or planned subdivisions

along the streets running parallel to College Avenue. Development in these subdivisions may increase in density to include townhomes and duplexes as the area approaches buildout. The primary opportunity for residential development along the corridor is an apartment complex.

The South College corridor has two main characteristics that make it appealing for apartment development. These two characteristics are described below:

- **Visibility** - The site is located along a major transportation routes between Fort Collins and Loveland US Highway 287, which carries ample traffic each day. This visibility makes it a strong location for apartment development that benefits from proximity to drive-by traffic.
- **Convenience** - In addition, the proximity to this major transportation route provides the site with convenient access to much of the region. This includes access to the downtown Fort Collins, the Harmony Road employment corridor, and Loveland. All three locations provide ample opportunities for employment and entertainment.

A typical suburban apartment project would likely include between 150 and 250 units to achieve maximum management, leasing, and maintenance efficiency. This size of development will require approximately 15 acres of land; there are several potential sites along the corridor that could be considered for this land use.

7. The Trade Area is currently underserved by neighborhood retail and community service uses, which a single neighborhood retail center of 75,000 to 125,000 square feet could fill immediately.

Based on the anticipated future gap in sales, the trade area can support a supermarket/grocery store assuming an industry standard of approximately \$25 million in annual sales within the next 5 years. A new supermarket/grocery store can anchor a neighborhood shopping center.

A typical supermarket anchored neighborhood shopping center includes between 75,000 and 125,000 square feet of retail space. Either a Safeway or a King Soopers would be candidates to anchor a neighborhood shopping center. A supermarket will consume between 55,000 and 65,000 square feet of space. The remaining available retail space will house ancillary retailer and personal care services not currently in the area, such as a dry cleaner.

8. The demand for regional retail is anticipated to grow across City of Fort Collins and Larimer County; however, the South College corridor is not an ideal regional retail location, which will cause these uses to develop elsewhere in the City.

The South College corridor would have to compete with a variety of other regional retail sites in the City and in the adjacent communities (Front Range Village, I-25 and Mulberry, I-25 and Prospect, I-25 and Harmony, and I-25 and Highway 392) for a finite amount of development potential. The corridor has several competitive disadvantages compared to other locations with the region, as described below:

- **Anticipated Growth** - Growth adjacent to the corridor will continue increasing the population from 16,972 in 2007 to approximately 21,762 by 2020. However, the anticipated amount of growth combined with the existing population falls short of the demographic targets of many regional retailers. Regional retailers typically expect a population of approximately 50,000 to 100,000 within a 3- to 5-mile radius.

- **Adjacent Competitive Regional Retail Nodes** - The South College corridor is adjacent to two of the main regional retail concentrations within the City; the College from Prospect to Harmony and Harmony Road from College east to Zeigler. The latest regional retail development is currently under construction in this area at the northwest corner of Zeigler and Harmony. These regional retail agglomerations depend on the residents of the South College corridor trade area, which largely falls within the 3- to 5-mile radius trade area of these centers.
 - **Land Availability** - The largest available parcel of land is approximately 50 acres. This would support approximately 325,000 square feet based on an average floor-area-ratio (FAR) of 0.15 gross. A typical regional retail center ranges from 500,000 (a small power center) to 1.5 million square feet (a super regional enclosed mall). Therefore, the corridor does not have the capacity for a regional retail center. A limited number of regional retailers will develop in a stand-alone configuration. These include Wal-Mart Supercenter, Home Depot, and Lowes. Each of these retailers already has adequate market penetration in the Fort Collins area (accounting for future plans).
9. *The South College corridor is not ideally suited for major office development; however, the corridor can expect to capture a small amount (50,000 to 75,000 square feet) of additional community and neighborhood serving office.*

The current market conditions in Larimer County create an extremely competitive environment for additional employment development. Based on current zoning, over 700 acres of employment land exists in the City largely clustered along Harmony Road and near existing employment uses.

Some of this land exists along the northern end of the corridor near the intersection of College Avenue and Fossil Creek Drive. Plans for the area include up to six additional office buildings totaling approximately 100,000 square feet of development. This planned office development will consume approximately 6.5 percent of the forecast growth in office development between 2006 and 2015. It is unlikely the corridor will capture additional office development south of this node.

Industrial development may also be attracted to the Harmony corridor because of the ample land supply and access to Interstate 25. It is unlikely that any major users will consider the South College corridor for development. However, many small parcels exist along the corridor that is currently zoned to allow for small service industrial uses (e.g., car repair, appliance repair, sign construction, etc.). Service industrial uses cannot afford high rent or land prices; therefore, these uses will only be attracted to the corridor as long as land values remain low.

II. ECONOMIC & DEMOGRAPHIC FRAMEWORK

This section presents an overview of economic and demographic growth trends for Fort Collins and the local market area. The regional employment forecasts provide a basis for forecasting office and industrial development potentials. The market area population and household forecast provide a basis for an estimate of housing demand. The additional household growth also provides a means for forecasting retail demand.

FORT COLLINS

The recent *Mason Corridor Economic Analysis* provides a comprehensive evaluation of economic and demographic trends within Fort Collins and Larimer County. The report is available from City of Fort Collins. The following key findings are relevant to the *South College Corridor Market Assessment*:

- **Estimated Population and Households at Build-Out** - Based on the buildable lands inventory (revised by the City in 2007) and estimates of redevelopment potentials, City of Fort Collins is anticipated to grow to approximately 85,000 households and 230,000 residents at buildout. Current market conditions and historic absorption rates indicate buildout will occur sometime between 2030 and 2035. However, as the supply of available vacant land diminishes the amount of redevelopment within the City will increase. Therefore, the City will likely continue to grow beyond 2035 through redevelopment.
- **Household Income** - The average household income in the City grew to approximately \$69,000 in 2006 up from approximately \$56,000 in 2000, an annual average growth rate of 3.2 percent. The Consumer Price Index (CPI), a measure of inflation, grew by 2.2 percent annually during the same period. Therefore, City of Fort Collins experienced approximately 1.0 percent in average annual real income growth.
- **Housing Construction** - From 2000 through 2006, there were a total of approximately 9,400 residential permits issued in Fort Collins, which equates to just over 1,300 per year. Housing construction decreased in 2006 to approximately 600 units, a reduction of approximately 40.5 percent from 2005, when approximately 1,000 permits were issued. This decline in permit activity is seen across all residential permit types. Furthermore, this trend can be seen across the entire Front Range. This downward trend in housing construction coincides with rising mortgage interest rates and the implosion of the sub-prime lending market.
- **Employment Growth** - Larimer County has experienced significant employment growth over the last decade. Nearly 25,000 jobs in Larimer County were added between 1990 and 2000, which fueled associated population and household growth. Although employment declined in 2002 and 2003 along with the rest of the nation, the region's economy rebounded in 2004 and 2005 with healthy employment gains (approximately 20 percent) and declining unemployment rates. Job growth averaged 1.0 percent growth between 2000 and 2005, adding nearly 1,200 jobs per year.

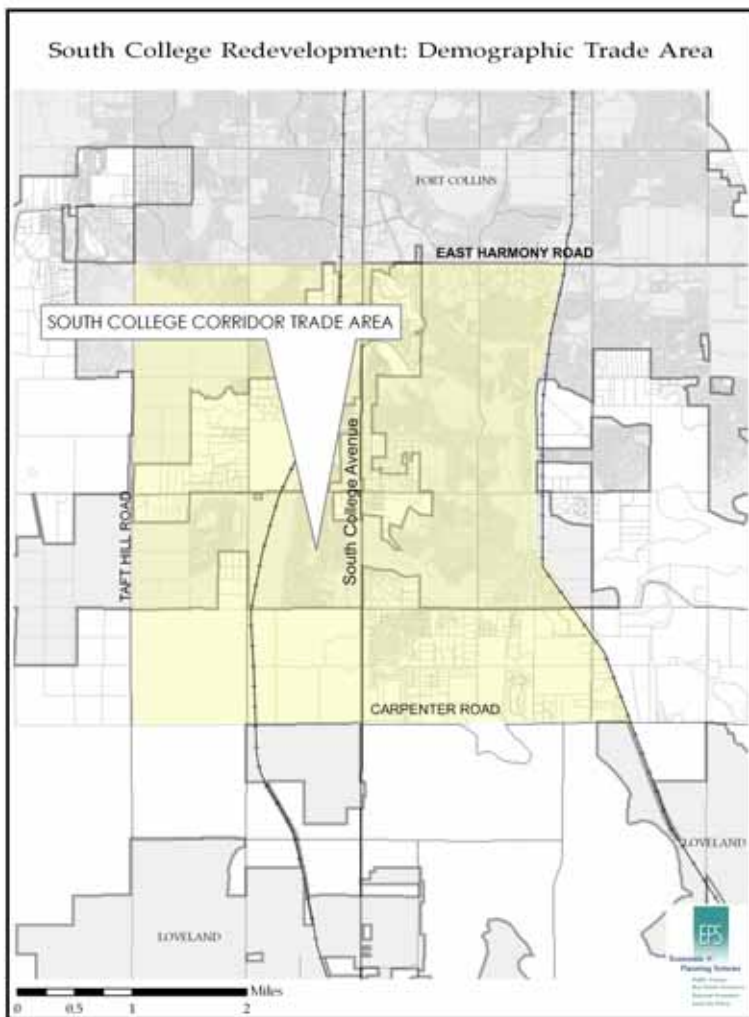
SOUTH COLLEGE MARKET AREA

A market area typically includes either the majority of competitive projects or majority of potential consumers. Therefore, the *South College Corridor Market Assessment* will use several different market areas to analyze development potentials. For the purpose of evaluating residential and

employment opportunities the market area will be defined as City of Fort Collins and Larimer County excluding Estes Park.

The retail development potentials analysis will rely on two market areas; a primary and secondary market area, which will allow for an analysis of both convenience and regional retail uses. The South College corridor primary trade area is defined as the area comprising the majority of potential convenience retail consumers. The trade area spans from Harmony Road on the north to County Road 30 on the South from Taft Hill Road on the West to the Union Pacific Rail line on the east, as shown in Figure 1. The secondary trade area for the retail analysis will include all of Larimer County excluding Estes Park and portions of western Weld County (the same trade area used in the I-25 retail opportunity analysis).

Figure 1
Primary Retail Market Area
South College Corridor Market Assessment



POPULATION & HOUSEHOLDS

The primary trade area grew from a population of 5,523 in 1990 to an estimated 17,528 in 2007 an increase of 12,005, as shown in Table 1. During the period between 1990 and 2000 the area grew by approximately 4,200 households or an annual average growth rate of 8.6 percent. The area continues to experience high growth, with households increasing by 1,780 households between 2000

and 2007 or an annual growth rate of 4.9 percent annually, which remains higher than the overall Larimer County growth rate of 1.6 percent and City of Fort Collins growth rate of 3.1 percent. Growth in the area is primarily characterized by single family units, which have accounted for approximately 61 percent of new development in the entire City.

Table 1
Trade Area Historic Household & Population Growth
South College Corridor Market Assessment

	1990	2000	2007	1990 - 2000 Change		2000 - 2007 Change	
				#	Ave. %	#	Ave. %
Population¹	5,523	12,544	17,528	7,021	8.55%	4,984	4.90%
Total Households²	1,966	4,480	6,260	2,514	8.58%	1,780	4.90%

¹2000-2007 based on historic population per household

²Households based on building permit activity assuming 5% vacancy

Source: Claritas, City of Ft. Collins; Economic & Planning Systems

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The buildable land inventory, updated by the City in 2007, estimates adequate land remains to construct approximately 1,800 households in the market area. Based on current conditions and historic construction rates these households will likely be constructed by 2020. The expected annual average growth rate during this time period is estimated at 2.09 percent, which at roughly 2 percent less than the current rate of growth, and represents a gradual slowing of the market as single family development opportunities are constrained by land availability. In total, it is estimated that the Primary trade area will contain 23,600 persons by 2020, which is a difference of 4,800 persons from current levels.

Table 2
Trade Area Projected Households
South College Corridor Market Assessment

	2008	2010	2015	2020	2010 - 2020 Change	
					#	Ann. %
Total Households	6,286	6,479	7,474	8,060	1,774	2.09%
Population¹	16,972	17,493	20,180	21,762	4,790	2.09%

¹ Based on current population per household

Source: Claritas, City of Ft. Collins; Economic & Planning Systems

H:\17864-Fort Collins South College Corridor\Data\Trade Area Household Projection.xls\Projected Housing Units

HOUSEHOLD INCOMES

In addition to strong population and household growth, the trade area has experienced strong income growth. As evidence, between 1990 and 2007 households earning \$75,000 or more annually increased by over 3,000 or approximately 70 percent of all new households during the same time period. This income range represents a key benchmark for many retailers when considering new store locations.

Increasingly, the households moving into the primary trade area appears to be among higher income levels, as shown in Table 3. Between 1990 and 2000 43 percent of new households earned \$100,000 or more. Subsequently, in the period between 2000 and 2007 62 percent of new households earned \$100,000 or more. In total, over half (53 percent) of households in the trade area now earn \$75,000 or more annually. The implications of this demographic change will inform the retail and office development potential sections of this report.

Table 3
Trade Area Income Distribution by Households
South College Corridor Market Assessment

Income	1990	2000	2007	1990 - 2000 Change		2000 - 2007 Change	
				#	Ann. %	#	Ann. %
Less than \$10,000	169	92	115	-77	-5.90%	23	3.26%
\$10,000 - \$29,999	548	609	705	61	1.05%	97	2.13%
\$30,000 - \$49,999	469	661	755	192	3.49%	94	1.92%
\$50,000 - \$74,999	439	1,063	1,335	624	9.24%	272	3.31%
\$75,000 - \$99,999	182	813	1,006	631	16.16%	194	3.10%
\$100,000 - \$149,999	125	695	1,332	570	18.69%	637	9.73%
\$150,000 or more	33	547	1,010	514	32.40%	463	9.16%
Total	1,966	4,480	6,260	2,514	8.58%	1,780	4.90%
\$75,000 or more	340	2,055	3,349	1,715	19.71%	1,294	7.23%

Source: Claritas, City of Ft. Collins, Economic & Planning Systems

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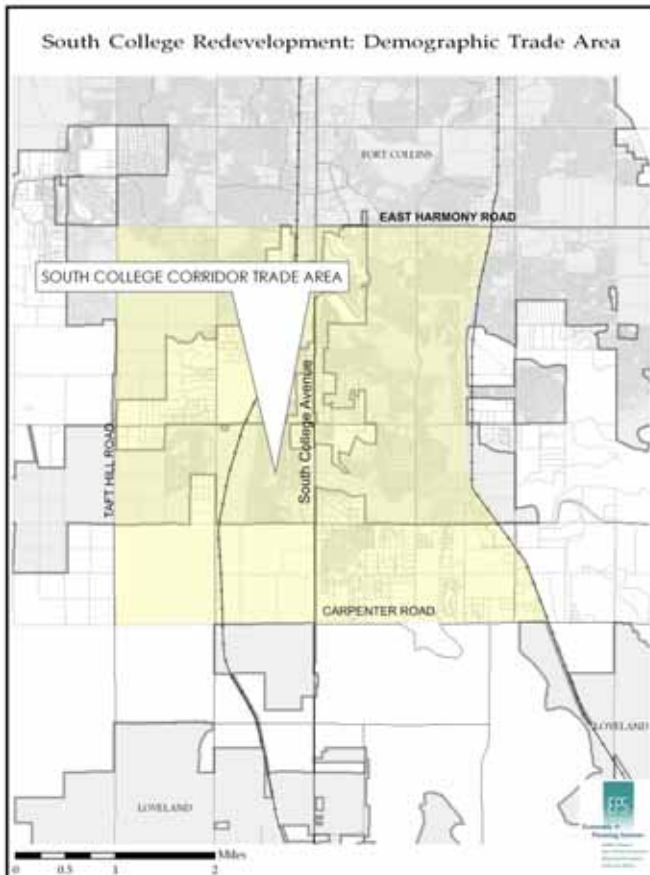
III. HOUSEHOLD AND BUSINESS OWNER SURVEYS

A resident household and business owner survey were conducted as part of the South College Corridor Plan. The household survey was mailed to households in the trade area surrounding the South College corridor. The business survey was mailed to all property owners of business owners along South College. The consultant team, comprised of EDAW, EPS, and RRC Associates, in collaboration with City of Fort Collins staff designed both surveys. City staff fielded and tabulated the household survey. RRC Associates fielded and tabulated the business survey. This memo describes the major findings of both the household and business owner survey.

HOUSEHOLD SURVEY

The household survey was distributed to 2,000 randomly select households from a mailing list of households within the Trade Area depicted in **Figure 2**. A total of 365 surveys (341 via mail and 24 internet surveys) were returned and tabulated, or approximately 20 percent, resulting in a statistically valid survey. The primary findings are summarized in four sections: Survey Respondent Overview, Shopping Patterns, Community Investment Opinions, and Retail Development Opinions/Conclusions.

Figure 2
South College Trade Area
South College Corridor Market Assessment



SURVEY RESPONDENTS OVERVIEW

Household survey respondents stretched a broad range of residency tenure in Fort Collins with a mixture of long and short term residents participating. Table 4 shows that the range of 10 to 19 years and 30 years and more contained the greatest number of survey respondents at 23.8 percent and 22.1 percent, respectively. The high percentage of respondents from 10 to 19 years suggests that residents who moved to the trade area during the high growth period between 1990 and 2000 census years have become significant stakeholders. Combined, respondents who have been in Fort Collins between 0 to 5 years and 5 to 9 years accounted for 37.9 percent of respondents and show the continued influence of new residents to the area.

Table 4
Years of Residency in Fort Collins Area
South College Corridor Market Assessment

Range	%
Less than 5 years	18.4%
5 to 9 years	19.5%
10 to 19 years	23.8%
20 to 29 years	16.1%
30 years or more	22.1%
Total	100.0%

Source: RRC Associates, Economic & Planning Systems

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Residents earning over \$90,000 per household comprised 56.3 percent of respondents which is higher than the average of 20.8 percent for the trade area as a whole, as shown in Table 5. The comparison for the trade area was derived using data from Claritas, a widely used demographic research company, which uses Census information to derive current year trend data for specific geographies. A higher rate of response among higher income residents is typical for household surveys.

Table 5
Household Survey Respondents by Income Range
South College Corridor Market Assessment

Income	Survey	Trade Area
	%	%
Less than \$10,000	0.9%	5.4%
\$10,000 to \$29,999	3.3%	18.5%
\$30,000 to \$49,999	7.9%	19.9%
\$50,000 to \$69,999	12.2%	21.5%
\$70,000 to \$89,999	20.4%	14.0%
\$90,000+	56.3%	20.8%

Source: RRC Associates, Claritas, Economic & Planning Systems

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SPENDING PATTERNS

The first question regarding consumer spending habits asked respondents to estimate their total annual retail spending for 2007 by store type without respect for location. On average, respondents estimated retail purchases total spending at \$15,339 annually compared to an average of \$19,162 based on the U.S. Census of Retail Trade estimates for the trade area. By store category, the survey responses mirror Census of Retail Trade estimates closely. However, the lower percentage of estimated purchases made at Drugstores and Membership Warehouse may suggest stabilization at other retail store types due to the lack of available stores within these categories, as shown in Table 6.

Table 6
Household Survey Respondents Retail Store Spending
South College Corridor Market Assessment

Type of Store	Estimated Survey Expenditures	Response % of TPI	Census of Retail Trade
Supermarket/Grocery & natural food	\$5,576	4.4%	6.0%
Drugstores	\$706	0.7%	1.4%
Beer, Wine, Liquor	\$578	0.6%	0.8%
Other Specialty Food Stores	\$310	0.3%	0.1%
Discount and Supercenter	\$1,994	2.0%	2.7%
Membership Warehouse	\$1,753	1.7%	3.5%
Hardware Stores	\$400	0.4%	0.4%
Home Improvement Centers	\$1,877	1.9%	1.4%
Restaurants/Bars	\$2,143	2.1%	2.6%
Total Annual Retail Purchases	\$15,339	\$15,339	\$19,162
Trade Area Average Annual HH Income (Claritas)	\$101,444	\$101,444	\$101,444

Source: RRC Associates, Claritas, Economic & Planning Systems

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Household survey respondents were also asked to, “estimate the portion of retail purchases made by major location for special store categories” in what location spending for convenience goods occurs. The results of the survey question are listed by store type in the Table 7. The store type most frequented by respondents in the South College corridor (study area) was Beer, Wine, and Liquor which accounted for 19.9 percent of the spending. Supermarket/grocery and natural food spending is the largest retail spending category overall, but accounts for only 6.1 percent of spending done by survey respondents in the South College corridor.

Spending was noticeably concentrated in the nearby College Corridor North of Harmony and the Harmony Corridor East of College. Spending in these corridors contained high percentages of spending in the category of supermarket/grocery (20.3 and 57.0 percent), drugstores (42.3 and 38.8 percent), specialty food stores (32.4 and 25.1 percent), and restaurants/bars (35.6 and 26.9 percent). The percentage of spending in retail categories away from the South College corridor suggests new store opportunities in the South College corridor given that store types mentioned above typically serve residents at a neighborhood level. The College Corridor North of Harmony and Loveland geographies captured the largest percentage of survey respondents spending at Discount Stores and Supercenters, which are 42.0 and 23.7 percent respectively. Loveland’s large percentage of spending in the discount and supercenter category reflects the influence of the new Wal-Mart Supercenter on Garfield Avenue & 65th Street in North Loveland approximately 1.5 miles south of Carpenter Street which is the southern border of the study area.

Table 7
Household Survey Respondents Retail Purchases by Location
South College Corridor Market Assessment

Store Type	South College Corridor	College Corridor North of Harmony	Harmony Corridor East of College	Other Fort Collins	Loveland	Other Front Range	Total
Supermarket/Grocery	6.1%	20.3%	57.0%	9.5%	5.8%	1.3%	100%
Natural Food	1.9%	64.5%	9.2%	23.8%	0.0%	0.5%	100%
Drugstores	3.9%	42.3%	38.8%	10.5%	3.9%	0.6%	100%
Beer, Wine, Liquor	19.9%	25.1%	41.1%	9.5%	2.2%	2.2%	100%
Other Specialty Food Stores	1.8%	32.4%	25.1%	31.0%	4.9%	4.9%	100%
Discount and Supercenter	8.1%	42.0%	11.4%	12.9%	23.7%	1.8%	100%
Membership Warehouse	6.1%	5.5%	73.0%	5.7%	5.3%	4.4%	100%
Hardware Stores	6.3%	16.3%	63.4%	8.5%	4.6%	0.9%	100%
Home Improvement Centers	4.0%	10.2%	68.4%	7.9%	8.6%	0.9%	100%
Restaurants/Bars	5.9%	35.2%	27.3%	22.1%	6.4%	3.0%	100%
Other	34.5%	27.3%	14.6%	11.3%	4.2%	8.1%	100%

Source: RRC Associates, Economic & Planning Systems

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Table 8 displays the surveyed motivations behind resident's decisions to visit businesses in the South College corridor. The highest activity response was shopping, which accounted for 31.2 percent of all responses, which indicates that residents are most likely to visit South College businesses for retail goods. The next two activities with the greatest proportion of responses were auto related activities at 17.4 percent and restaurants at 15.7 percent.

Table 8
Reasons for Visiting South College Corridor by Activity
South College Corridor Market Assessment

Activity	Responses	% of Total Responses
Shopping	220	31.2%
Work	35	5.0%
Personal	58	8.2%
Business	21	3.0%
Auto	123	17.4%
Restaurants	111	15.7%
Entertainment	37	5.2%
Medical	30	4.3%
Other	5	0.7%
Do not patronize	65	9.2%
Total	705	100%

Source: RRC Associates, Economic & Planning Systems

H:\17864-Fort Collins South College Corridor\Models\17864-Homeowner Survey Results.xls\Purpose

Although the results indicate the most common activity in the South College corridor is retail spending there is a low frequency at which this activity occurs. Table 9 displays the frequency by which household survey respondents visit businesses in the South College corridor. A total of 57 percent of respondents visit businesses once a month or less. The highest response rate was seen in respondents who visit businesses less than monthly at 29.8 percent. A total of 43 percent of

respondents visit South College businesses once a week or more. The results indicate that the business mix is weighted towards specialized uses with infrequent patronage.

Table 9
Frequency of Visits to Corridor
South College Corridor Market Assessment

Frequency	Responses	% of Total Responses
Daily	31	9.6%
Few Times a week	45	14.0%
Once a week	64	19.9%
Once a month	70	21.7%
Less than monthly	96	29.8%
Never	16	5.0%
Total	322	100%
Avg.	54	

Source: RRC Associates, Economic & Planning Systems

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COMMUNITY INVESTMENT OPINIONS

Multiple improvements to the South College corridor are under consideration as part of the master plan. In an effort to prioritize future efforts, households were asked to rank a list of possible improvements to the corridor. Respondents' answers to the prioritization of improvement possibilities are shown in Table 10. The top three improvements, and the only to receive greater than 10 percent of responses, include more open space, quality of commercial buildings, and street beautification measures. Of these, the quality of commercial buildings ranked the highest with 18.9 percent of total responses.

The top improvements which were second in importance differed slightly and included improved pedestrian access, improved bicycle access, quality of commercial buildings, and street beautification measures. The improvement receiving the highest amount of responses was quality of commercial buildings with 18.6 percent of responses. When the two metrics of importance are combined the quality of commercial buildings emerges as the improvement with the most responses followed closely by street beautification.

Table 10
Household Respondent Improvement Preferences
South College Corridor Market Assessment

Improvement	Most Important		Second Most Important		Combined	
	#	% of Total Responses	#	% of Total Responses	#	% of Total Responses
Lower traffic speed limits	25	7.3%	9	2.9%	34	5.2%
Improved traffic controls (traffic signals, pavement markings, etc.)	30	8.7%	17	5.5%	47	7.2%
More landscaping, street trees, and beautification	52	15.1%	51	16.4%	103	15.7%
Quality of commercial buildings	65	18.9%	58	18.6%	123	18.8%
More open space	41	11.9%	16	5.1%	57	8.7%
Improved storm drainage or flood protection	9	2.6%	12	3.9%	21	3.2%
Improved access to transit/bus service	16	4.7%	15	4.8%	31	4.7%
Improved commercial signs	4	1.2%	9	2.9%	13	2.0%
Improved bicycle access	41	11.9%	40	12.9%	81	12.4%
Improved pedestrian access	15	4.4%	32	10.3%	47	7.2%
Improved communication among neighboring businesses and property owners	7	2.0%	11	3.5%	18	2.7%
Crime	25	7.3%	18	5.8%	43	6.6%
New street lighting	7	2.0%	10	3.2%	17	2.6%
Additional residential growth to support commercial uses	7	2.0%	13	4.2%	20	3.1%
Total	344	100%	311	100%	655	100%

Source: RRC Associates, Economic & Planning Systems

H:\17864-Fort Collins South College Corridor\Models\17864-Homeowner Survey Results.xls\Improvement Issues (2)

Residents were also asked to prioritize improvements based four levels of concern, which are displayed in Table 11. Improved bicycle access contained the highest amount of critical issue responses at 14.7 percent. Other issues ranking highly with 10 percent or more responses in the serious or critical category, included: pedestrian access, more open space, quality of commercial buildings, and street beautification measures.

Table 11
Improvement Priorities
South College Corridor Market Assessment

Activity	Not a Priority	A Low Priority	A Moderate Issue	A Serious Issue	A Critical Issue
	% of Total Responses	% of Total Responses	% of Total Responses	% of Total Responses	% of Total Responses
Lower traffic speed limits	15.3%	5.9%	4.5%	3.9%	3.0%
Improved traffic controls (traffic signals, pavement markings, etc.)	8.2%	8.1%	7.2%	6.0%	6.3%
More landscaping, street trees, and beautification	4.3%	5.4%	8.2%	9.9%	10.6%
Quality of commercial buildings	3.4%	4.7%	7.9%	12.7%	10.4%
More open space	6.2%	6.6%	7.6%	6.5%	9.8%
Improved storm drainage or flood protection	6.5%	9.2%	8.2%	4.2%	4.8%
Improved access to transit/bus service	9.1%	7.9%	6.8%	6.3%	5.4%
Improved commercial signs	7.7%	8.1%	7.1%	6.9%	4.5%
Improved bicycle access	5.2%	5.9%	6.5%	7.7%	14.7%
Improved pedestrian access	4.3%	6.7%	6.3%	10.8%	11.2%
Improved communication among neighboring businesses and property owners	8.4%	7.7%	6.9%	6.7%	4.0%
Crime	5.7%	7.6%	7.7%	6.3%	8.3%
New street lighting	5.1%	7.1%	9.4%	7.7%	4.5%
Additional residential growth to support commercial uses	10.7%	9.2%	5.8%	4.3%	2.4%
Total	100%	100%	100%	100%	100%

Source: RRC Associates, Economic & Planning Systems

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RETAIL DEVELOPMENT OPINIONS/CONCLUSIONS

Household respondents were surveyed regarding their desire to see different types of retail stores. Table 12 displays respondents' preferences as measured by a simple "yes" or "no" regarding desire for a particular store type. Only three store types were positively rated by respondents for inclusion in the South College corridor, with 67.5 percent in favor of a grocery store, 68.5 percent in favor of restaurants, and 80.1 percent in favor of and small neighborhood retail with 79.6 percent in favor.

Table 12
Desired Retail Stores
South College Corridor Market Assessment

Business Type	Yes %	No %
Auto Related Services	20.7%	79.3%
Antique malls	25.3%	74.7%
Grocery Stores	67.5%	32.5%
Drug stores/pharmacies	48.5%	51.5%
Restaurants/bars	68.5%	31.5%
Supercenters or warehouse stores	22.3%	77.7%
Small neighborhood oriented retail	79.6%	20.4%

Source: RRC Associates, Economic & Planning Systems

H:\17864-Fort Collins South College Corridor\Models\17864-Homeowner Survey Results.xls\Business Desire

The findings of the household survey largely corroborate the retail demand conclusions which indicate strong demand for a supermarket/grocery store as well as restaurants/ bars. Additionally, general convenience oriented goods were shown to have unmet demand in the trade area, and could explain respondents' desire for locally based neighborhood oriented retail.

Additional conclusions from the household survey are listed below.

- Household spending in the trade area closely follows average State of Colorado retail spending trends. The similarities between spending trends confirms the retail demand conclusions of the report.
- Almost all shopping for convenience oriented goods such as supermarkets/grocery stores occur away from the South College corridor.
- Clear demand for supermarket/grocery stores exists based on respondents stated preferences and spending habits away from the Corridor, confirming previous retail demand conclusions.

BUSINESS OWNER SURVEY

A survey was sent by mail to 297 businesses and property owners along South College corridor. A total of 93 businesses returned the survey for a statistically significant response rate of 31 percent. Results from the survey are divided into three sections: business profile, future plans, and survey conclusions.

SOUTH COLLEGE CORRIDOR BUSINESS PROFILE

Business responses regarding the place of origin of their customers confirm the results of the homeowner survey. Table 13 shows that 49 percent of customers come from within Larimer County; however, only 13 percent originate in Fort Collins. The result of this finding provides indication that South College corridor businesses serve regional clients with a small amount servicing Fort Collins directly.

Table 13
Business Customer Origin
South College Corridor Market Assessment

Place	% of Total Responses
Within Ft. Collins	13%
Within Larimer County (including Ft. Collins, Loveland, Windsor)	49%
North Front Range Region	23%
Statewide	16%

Source: RRC Associates, Economic & Planning Systems

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The businesses that responded to the survey can be characterized as small based on the results displayed in Table 14. Over half, 52 percent, of businesses responded that five or fewer people were employed full time. The next largest category included businesses with six to 10 employees which accounted for 29 percent of respondents. Medium size businesses appear to be limited along the corridor as businesses with 16 or more employees accounted for only 8 percent of respondents.

Table 14
Number of Employees
South College Corridor Market Assessment

Persons	% of Total Responses
1-5	52%
6-10	29%
11-15	9%
16-20	4%
21+	4%

Source: RRC Associates, Economic & Planning Systems

H:\17864-Fort Collins South College Corridor\Models\17864-Business owner Survey Results.xls\Persons Employed

In total, 68 percent of businesses that responded to the survey also own the property on which their business is located. The length of ownership for businesses that own their property is displayed in Table 15. Significantly, 55 percent of property owners have owned their land for 11 or more years. The highest ownership range was between 11 and 20 years which accounted for 30 percent of all respondents. The survey results indicate that the majority of businesses own their land and are likely to have a low cost basis as a result of long term land ownership.

Table 15
Years of Ownership for Businesses that Own Property
South College Corridor Market Assessment

Range	% of Total Responses
Less than 1 year	3%
1-5 years	26%
6-10 years	16%
11-20 years	30%
21 years or more	25%

Source: RRC Associates, Economic & Planning Systems

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FUTURE PLANS FOR SOUTH COLLEGE CORRIDOR BUSINESSES

To understand the stability of the business community along the South College corridor, businesses were asked survey questions to provide insight into their future plans. As shown in Table 16, the most common responses indicated a desire to stay the same size and expand at the existing location, which accounted for 36 percent and 27 percent of responses, respectively. In total, 70 percent of respondent businesses gave indication of stability by responding that they plan to stay the same size, expand at current location, or renovate the existing structure.

Table 16
Future Plans for Businesses
South College Corridor Market Assessment

	% of Total Responses
Stay the same size	36%
Expand at the existing location	27%
Renovate existing structure	7%
Move elsewhere	14%
Downsize	1%
Other	15%

Source: RRC Associates, Economic & Planning Systems

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When asked, business survey respondents ranked the majority of improvements as, “not a priority.” The exception occurred when respondents were asked about improved traffic controls in which 40 percent indicated that they were a serious or critical issue. The improvement question was rephrased and respondents were asked which improvement was the most important and second most important, the results are displayed in Table 17. Consistent with the previous question, improved traffic controls had the highest prioritization with 21 percent of respondents indicating that it is the most or second most important improvement. The other significant improvement was the quality of commercial buildings which had a combined average of 12.5 percent of respondents. The apparent satisfaction with South College corridor conditions speaks to the current stability of businesses and the conditions under which they operate.

Table 17
Business Respondent Improvement Preferences
South College Corridor Market Assessment

Improvement	Most Important	Second Most Important	Combined
	% of Total Responses	% of Total Responses	% of Total Responses
Lower traffic speed limits	14.0%	6.0%	10.0%
Improved traffic controls (traffic signals, pavement markings, etc.)	28.0%	14.0%	21.0%
More landscaping, street trees, and beautification	4.0%	13.0%	8.5%
Quality of commercial buildings	14.0%	11.0%	12.5%
More open space	4.0%	5.0%	4.5%
Improved storm drainage or flood protection	3.0%	3.0%	3.0%
Improved access to transit/bus service	3.0%	3.0%	3.0%
Improved commercial signs	7.0%	6.0%	6.5%
Improved bicycle access	1.0%	3.0%	2.0%
Improved pedestrian access	2.0%	3.0%	2.5%
Improved communication among neighboring businesses and property owners	3.0%	9.0%	6.0%
Crime	8.0%	10.0%	9.0%
New street lighting	1.0%	6.0%	3.5%
Additional residential growth to support commercial uses	10.0%	7.0%	8.5%

Source: RRC Associates, Economic & Planning Systems

H:\17864-Fort Collins South College Corridor\Models\17864-Business owner Survey Results.xls\Improvement Issues (2)

To provide further indication of corridor stability, business owners that own the property on which their business is located were asked their timeframe for selling. A majority of 52 percent indicated that they were not interested in selling their property, as shown in Table 18. An additional 10 percent responded that they had interest in selling their property in a time period between 11 and 20 years.

Related to these results, 76 percent of businesses that own their property responded “no” when asked if they envisioned redeveloping their property. However, 26 percent of businesses responded positively to the same question, which is approximately the same amount that has interest in selling their property in the short term (one to five years). The consistency of a quarter of property owning business in selling or redeveloping indicates that although the businesses landscape is stable, some potential for change within the South College corridor exists dependent upon market conditions.

Table 18
Interest in Selling Property
South College Corridor Market Assessment

Range	% of Total Responses
1-5 years	26%
6-10 years	12%
11-20 years	10%
Not interested in selling	52%

Source: RRC Associates, Economic & Planning Systems

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BUSINESS OWNER SURVEY CONCLUSIONS

The business survey results indicate consistent indications of stability within the South College business corridor. Specifically, the following conclusions can be derived from the survey data.

- The market is not currently exerting pressure on business owners to take on the risk associated with redeveloping their property.
- Economic conditions are such that businesses are content with current conditions or small improvement to their business/property.
- Stability of the business community and lack of market pressure has resulted in an unwillingness to sell amongst the majority of business owners surveyed.

IV. EXISTING REAL ESTATE CONDITIONS

This section evaluates the existing conditions along the South College corridor using County assessor records. The analysis identified sites that may have a potential for redevelopment given low land utilization.

CORRIDOR OVERVIEW

The South College corridor contains a diverse array of land uses typically found along a state highway in a transitional area of the City, including: older farm homes, car dealerships, a nursery, and light manufacturing/industrial uses. The trade area includes many functionally obsolete properties, which have been converted to other commercial use, including flea markets and antique galleries.

As previously noted, the Corridor can be split into three distinct districts each with a unique identity and function. In general, the commercial development on the north end of the corridor includes a larger proportion of office development while development on the southern end trends towards light manufacturing/industrial uses. Overall, the corridor lacks a cohesive retail and neighborhood service focal point or concentration. As a result, many of the trade area residents leave the area for most shopping trips (as shown in the survey summary section of the report).

CURRENT CONDITIONS

Three criteria were used to evaluate land utilization and incorporated in a GIS analysis of the South College corridor study area. The analysis includes floor area ratio (FAR), improvement-to-land value ratio, and parcel size. The criteria are described below:

- Floor Area Ratio (FAR) is a measure of the relative density of a particular parcel. The FAR of a parcel is determined by comparing the square feet of improvement (building) to the square feet of land. This ratio provides a measure of the effective usage of a given parcel with a lower FAR indicating possible opportunities for more intensive land uses. Publicly owned parcels were excluded from the analysis.
- **Improvement-to-Land Value Ratio** is determined by comparing the assessed value of the improvement (building) to the assessed value of the land. Value can accrue to the land while the value of an improvement can depreciate over time. Therefore, parcels where the improvement value is less than the land value have not realized full economic potential. These parcels signify good redevelopment opportunities because there is the opportunity to add value through redevelopment.
- Parcel size is self-explanatory; the suburban context of the South College corridor includes large parcels that provide development opportunities. Many perspective users and/or developers prefer these larger greenfield sites. In addition, large parcels under single ownership avoid the difficulties associated with land acquisition presenting a greater opportunity for development.

REDEVELOPMENT OPPORTUNITIES

Potential redevelopment sites were screened based on an FAR of 0.5 or less, an improvement-to-land value ratio of 1.0 or less, and parcel size of 2.0 acres or more. The initial analysis did not identify

agricultural parcels as potential sites given the lower assessed value of agricultural land; however, these parcels were added to the analysis based on an FAR of 0.5 or less.

In total, the analysis identified 21 parcels totaling approximately 277.5 acres depicted in **Figure 3** and summarized in **Table 19**. The majority of these development sites are located south of Trilby Road. In general, these sites are also characterized by larger parcel sizes that aid in attracting development to the corridor.

Table 19
South College Corridor Redevelopment Potential
South College Corridor Market Assessment

Label	Name	# of Parcels	Land (Acres)
1	Wal-Mart Shopping Center	2	10.79
2	South Transit Center	2	13.80
3	Vineyard Church Site	2	36.21
4	Smokey Street Property	1	24.60
5	Lithia & Adjacent Property	2	50.20
6	Pioneer Sand Company & Adjacent Properties	3	19.33
7	Robert Benson Lake Parcels	2	53.52
8	Fossil Creek Nursery & Adjacent	3	18.95
9	King Soopers Site	4	50.13
Total		21	277.54

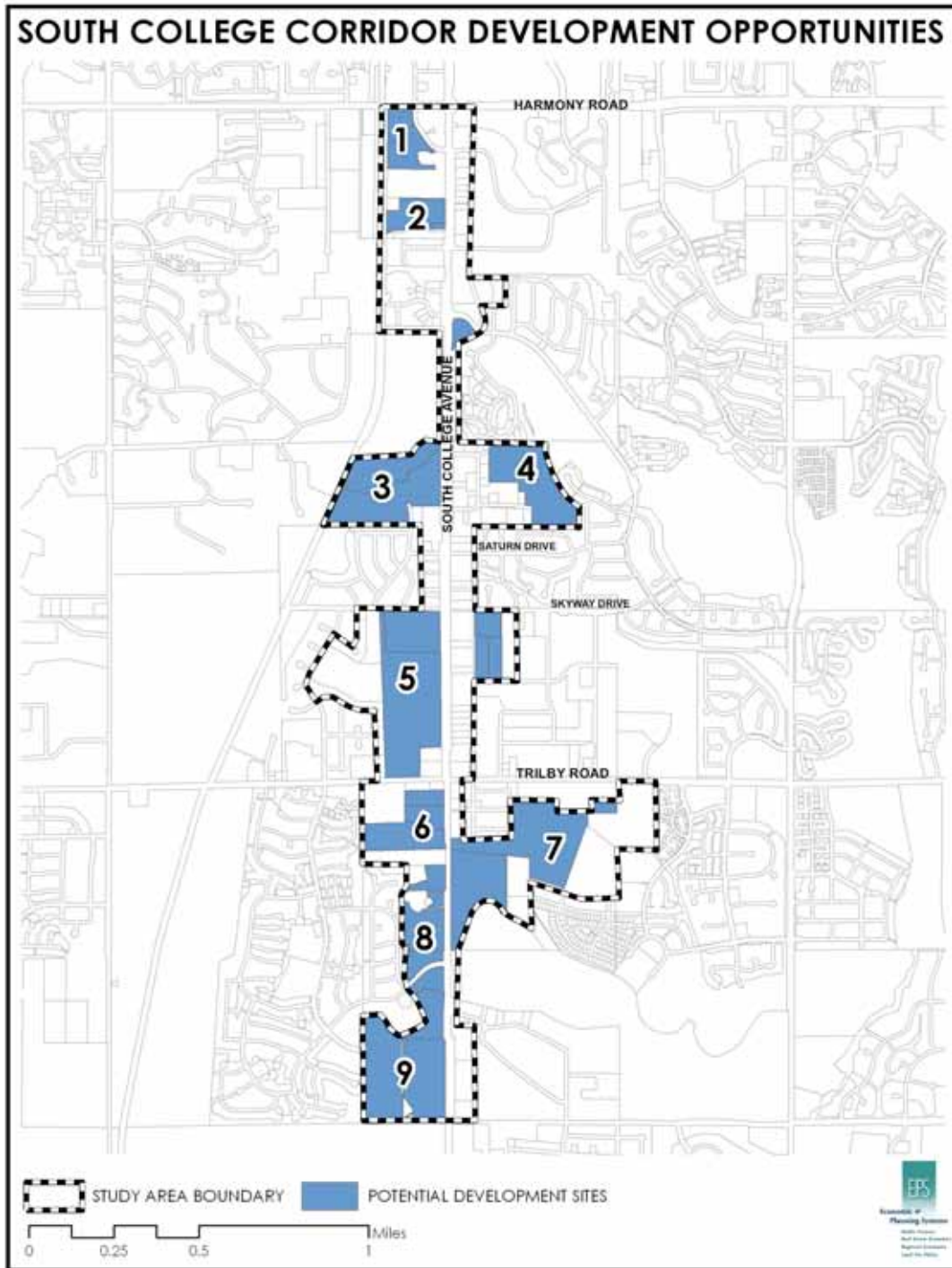
Source: Economic & Planning Systems

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- **Wal-Mart Shopping Center** - The Arbor Plaza shopping center was anchored by an older Wal-Mart discount department store. Wal-Mart closed this store in 2007 after the expansion of several Supercenters in the surrounding trade area. The FAR and improvement-to-land value analysis suggests that the entire shopping center could present a redevelopment opportunity for TOD. The underlying ownership of the parcel is unclear and may require assemblage prior to redevelopment.
- **South Transit Center** - City of Fort Collins owns approximately 2.0 acres at the proposed transit center and has improved the parcel for trailhead parking. The Fossil Creek Trail can be accessed from the station location via the recently completed bike and pedestrian trail along the rail corridor. The remaining 11.80 acres owned by Spradley Automotive are vacant.
- **Vineyard Church Site** - The Church site combined with the adjacent parcel to the north provide 36.2 acres of developable land. The site extends from College Avenue on the east to the Burlington Northern Railroad alignment on the west. Residential development abuts the property to the west and south. The Redtail Grove open space provides the northern boundary to the site. The Church has begun to consider submitting an application to develop a large facility on site.
- **Smokey Street Property** - A private residence occupies the 24.6 acre site located along Smokey Street east of College Avenue. The property is surrounded by a single family development to the north, south, and east, and light manufacturing/industrial development to the west including the South 13 project. It is unclear if the private owner has interest in selling or redeveloping the property.

- **Lithia & Adjacent Property** - The two parcels combined provide approximately 50.2 acres of developable land. The parcels are constrained by topography, natural resource issues, and required transportation improvements. Two separate car dealers have considered the site but neither has moved forward.
- **Pioneer Sand Company & Adjacent Properties** - Combined the three parcels provide 19.3 acres of developable land. Several of the parcels are currently listed for sale. The collection of parcels does not include the hard corner of College Avenue and Tribly Road. In addition, any development of this site would require the assembly of land adding additional cost to a potential project.
- **Robert Benson Lake Parcels** - These two parcels located north of Robert Benson Lake provide approximately 53.5 acres of developable land. The two parcels are currently vacant. The northern most parcel is adjacent to recent single family development. It is likely that these parcels will develop as additional single family residential. There may be the opportunity for commercial development along College Avenue to buffer the homes.
- **Fossil Creek Nursery & Adjacent** - These parcels provide 19.0 acres of developable land. The owner of the nursery has indicated they may entertain a move allowing the site to redevelop. In addition, a 3.8 acre parcel, which is part of the Shenandoah subdivision, has a submitted a proposal for a long-term care facility. In addition, the subdivision has 30,000 square feet of office and 5,000 square feet of daycare as part of the original entitlement that has not been developed.
- **King Soopers Site** - Dillon Companies, Inc controls 50.1 acres at the northwest corner of Carpenter Road and College Avenue. King Soopers previously proposed a 123,000 square foot Marketplace concept store. The retailer had approval for a smaller store but that entitlement has lapsed. The earliest King Soopers could open a store would be 2011.

Figure 3
South College Corridor Redevelopment Opportunities
South College Corridor Market Assessment



V. RESIDENTIAL DEVELOPMENT

This chapter of the report reviews residential development trends in Fort Collins based on analysis completed during the *Mason Corridor Economic Analysis*. The review includes for-sale and apartment market conditions. As stated in Section III, the Buildable Land Inventory (recently updated) estimates the study area has the capacity to continue to grow over the next 10 to 15 years. The additional capacity is largely zoned for single family residential development.

FOR-SALE MARKET CONDITIONS

For-sale average home prices over the past ten years have steadily increased in the Fort Collins market, as shown in Table 20. The average residential sales price in 1996 was \$147,500, increasing to approximately \$248,800 by 2006. The ten-year price appreciation was an estimated 5.4 percent annually. Prices appreciated at a higher rate from 1999 through 2001, averaging approximately 10 percent annually for the three-year boom.

Throughout the ten-year period, from 1996 to 2006, the number of residential sales, including both attached and detached products, remained fairly steady. Despite a national housing market decline in 2006, sales in Fort Collins remained strong at 3,700 sales, near the ten year average of approximately 3,800 sales per year.

Table 20
Residential Sales and Average Price, 1996-2006
Mason Corridor Economic Analysis

Year	# Sold	Avg. \$	% Price Change
1996	3,109	\$147,503	3.0%
1997	3,165	\$153,725	4.2%
1998	3,834	\$159,686	3.9%
1999	3,855	\$175,036	9.6%
2000	3,674	\$194,042	10.9%
2001	4,059	\$213,042	9.8%
2002	4,175	\$217,314	2.0%
2003	3,821	\$228,541	5.2%
2004	4,087	\$230,589	0.9%
2005	4,008	\$245,494	6.5%
2006	3,701	\$248,767	1.3%
2007	3,613	\$253,578	1.9%
Average	3,758	---	5.0%

Source: The Group, Inc; Economic & Planning Systems

H:\17830-Mason Corridor Economic Study\Data\17830-FT Collins Res Market.xls\Summary

APARTMENT MARKET CONDITIONS

The apartment market in City of Fort Collins remains stable. The following findings are summarized from *Fort Collins Area Apartment Vacancy and Rent Survey* data analyzed during the *Mason Corridor Economic Analysis*:

- **Vacancy Rates** - One bedroom units show the lowest average vacancy rate over the past five years, ranging from 7.8 percent at its peak in 2003 to 2.8 in 2006. The vacancy rate increased again for the one bedroom units to 6.5 percent in 2007. Three bedroom units typically have the largest vacancy rates, ranging from 19.5 percent in 2003 to 12.9 percent in 2007. While there have been some fluctuations in the vacancy rate over the past five year, the average vacancy rate for all units has decreased from 12.2 percent in 2003 to 8.8 percent in 2007.
- **Rent Per Square Foot** - Rent per square foot for all apartment types grew by \$0.03 per square foot per year, a rate of 4.1 percent annually from 1996 to 2001. This growth rate dropped from 2001 to 2006 to 0.7 percent across all unit types, with slightly negative growth in the one bedroom units. Studio units, unlike all other unit types, grew by a higher percentage from 2001 to 2006, at 7 percent, than it did from 1996 to 2001, at 4.3 percent.

RESIDENTIAL DEVELOPMENT POTENTIALS

The buildable lands inventory estimates that capacity remains in the trade area for approximately 1,800 additional homes. Most of these homes will be constructed in existing or planned subdivisions along the streets running parallel to College Avenue. Development in these subdivisions may increase in density to include townhomes and duplexes as the area approaches buildout. The primary opportunity for residential development along the corridor is an apartment complex.

The South College corridor has two main characteristics which make it appealing for apartment development. These two characteristics are described below:

- **Visibility** - The site is located along a major transportation routes between Fort Collins and Loveland US Highway 287, which carries ample traffic each day. This visibility makes it a strong location for apartment development that benefits from proximity to drive-by traffic.
- **Convenience** - In addition, the proximity to this major transportation route provides the site with convenient access to much of the region. This includes access to the downtown Fort Collins, the Harmony Road employment corridor, and Loveland. All three locations provide ample opportunities for employment and entertainment.

These characteristics make the corridor attractive for apartment development. A typical suburban apartment project will include between 150 and 250 units to achieve maximum management, leasing, and maintenance efficiency. This size of development will require approximately 15 acres of land; there are several potential sites along the corridor.

VI. RETAIL DEVELOPMENT

This chapter evaluates the market potential for additional convenience or neighborhood oriented retail development within the South College corridor. The analysis is based on the projected increase of population and households in the trade area. Regional retailers are also summarized from previous market analysis studies completed by EPS.

RETAIL MARKET AREA

Retail businesses derive their sales from local area residents, residents of the larger region, and visitors including both tourists and business travelers. The Urban Land Institute (ULI) defines a trade area as the geographic location from which a retail facility (existing or proposed) consistently draws the majority of its customers. The actual boundaries of the trade area are based on logical geographic boundaries (e.g., roads, railroads, or natural features) and the location of existing competitive retail centers.

Residents of a trade area make purchases both inside and outside of the defined trade area. Retail sales derived from inside the trade area are considered sales to residents and sales derived from outside the trade area are considered retail inflow or sales to visitors. Retail analysis often considers both a primary and a secondary trade area. Based on the nature of retail these trade areas can range from a 1.5-mile radius to Citywide.

The primary trade area encompasses an area approximately 2 miles either side of the corridor focusing on the potential for convenience or neighborhood oriented retail development. The regional retail trade area includes City of Fort Collins and portions of Larimer County. This trade area provides an understanding of the regional retail market potentials for the site.

SOUTH COLLEGE TRADE AREA

The South College corridor primary trade area is defined as the area comprising the majority of potential convenience retail consumers. The trade area spans from Harmony Road on the north to County Road 30 on the South from Taft Hill Road on the West to the Union Pacific Rail line on the east. This trade area encompasses a significant number of residents that currently rely on established retail shopping destinations outside of the trade area for convenience goods. Based on a tour of the corridor, the opportunity for additional convenience oriented goods (e.g., supermarket/grocery, health and beauty, etc.) is evident based on the lack of retailers offering these goods currently. Also, according to the household survey approximately 92.8 percent of South College residents' supermarket/grocery spending occurs outside of the South College corridor.

REGIONAL RETAIL TRADE AREA

The regional trade area includes several major existing regional retail locations such as Foothills Mall on College Avenue north of Horsetooth, additional discount department stores and power centers north and south of the Mall on College, and the historic central business district. These retail centers attract a significant portion of their sales from the larger region including the South College corridor primary trade area. The secondary trade area also includes the remainder of Larimer County excluding Estes Park. This portion of the trade area includes communities oriented to Fort Collins for major commercial services. Residents from these communities primarily shop in Fort Collins for goods not available in their own communities. Furthermore, Fort Collins acts as an

entertainment and cultural destination for this larger trade area. Visitors to Fort Collins for these alternative purposes also frequent the shops and eating and drinking establishments within the City.

Outside City of Fort Collins, a major regional retail node has developed at the intersection of I-25 and Highway 34 in City of Loveland. Approximately 13 miles south of Highway 14 along I-25, the intersection includes several large format retailers and mass merchandisers totaling approximately 1.5 million square feet of retail space. The initial development included a 260,000 square foot outlet mall. Target and a number of chain restaurants opened in 1998, and Lowe's opened in 2005. The most recent addition in the area is the Promenade Shops at Centerra, a lifestyle center that opened in October 2005. The project includes approximately 700,000 square feet anchored by Macy's, Best Buy, Barnes & Noble, Dick's Sporting Goods, and a range of national lifestyle and mass merchandise tenants.

EXISTING RETAIL SUPPLY

The existing retail supply in the South College can be characterized by a widely diverse selection of independent retailers that are attracted to the corridor by competitively price retail rents providing a mix of low-priced convenience and shoppers. In addition, a concentration of antique stores are found in several antique malls comprised of multiple consignment shops under central management in a single building exists goods in functionally obsolete locations. The existing retail development of the corridor is described below and shown in **Figures 4 and 5**.

- **Building Materials & Garden** - The corridor includes a variety of Building Material & Garden retailers scattered along the corridor. These building supply retailers include a cluster of siding, windows, carpet, and painting supply stores located along Frontage Drive which runs parallel to South College Road north of Smokey Drive. In addition, the retailers include Pioneer Sand Company located at the southeast corner of Trilby and College and Front Range Nursery across from Robert Benson Lake along College.
- **Neighborhood Retail** - The corridor currently includes two neighborhood retail sites, including Arbor Plaza at the southwest corner of Harmony and College and the proposed King Soopers site at the northwest corner of Carpenter and College.
 - **Arbor Plaza** was formerly anchored by a Wal-Mart, which recently closed due to two new superstores opening nearby including one in north Loveland on US 287, 4.5 miles to the south and one at Lemay and Mulberry 5.0 miles to the north. The ownership underlying the shopping center is fragmented making redevelopment difficult. It is likely the Wal-Mart store will be leased to a new tenant(s). Therefore, the shopping center is likely to remain in its current configuration for the near future.
 - **King Soopers** owns approximately 50 acres at the northwest corner of Carpenter and College. A development application for a grocery store was previously approved by City Council but has recently lapsed without action. Currently the retailer is evaluating the possibility of developing a 126,000 square feet Marketplace concept store. It is unlikely the site will develop before 2011.
- **Gas/Convenience** - The corridor also includes a variety of auto-service and convenience stores. The auto-service facilities include several gasoline stations, a RapidLube service center, and several retailers providing aftermarket parts for 4x4s and RVs. These uses are located at several of the major intersections including Carpenter and Trilby.

- **Eating & Drinking Establishments** - There are a few restaurants scattered along the corridor. The most discernable restaurant location is found at the northeast corner of Skyway and South College at Hat Tricks Bar & Grill.
- **Auto Dealerships** - There are currently two auto dealerships along the corridor including the Spradley Bar Ford Dealership at College Avenue south of Arbor Plaza shopping center and Tynan's Nissan Dealership located at Crestridge Drive and College Avenue. In addition, several auto-dealers have evaluated the corridor as a potential expansion or relocation site with no plans announced to date.
- **Antique Row** - Also known as, the Kelmar Strip is a distinctive conglomeration of antique stores located between Trilby Road and Skyway Drive along South College, although it continues north of Skyway Drive as well. Antique Row is typified by 10,000 to 15,000 square feet stand alone buildings containing multiple consignment shop businesses. In addition, a large number of pool and spa supply stores are intermingled amongst the antique stores.

Figure 4
Existing Trade Area Retail Development
South College Corridor Market Assessment

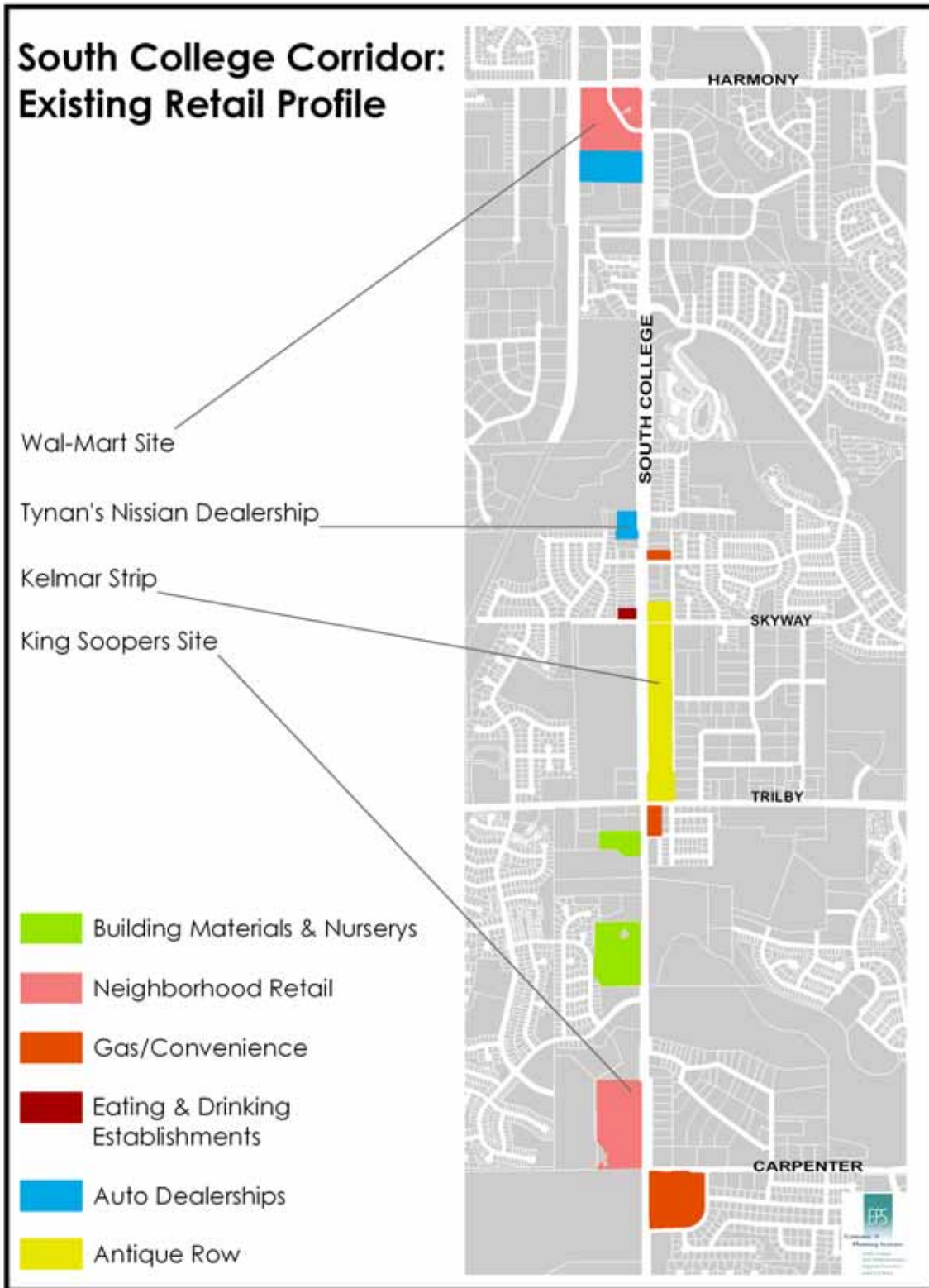


Figure 5
Existing Retail Development Pictures
South College Corridor Market Assessment



SE Corner of Carpenter & College



SW Corner of Carpenter & College



SE Corner of Tribly & College



Rapid Lube – SE of Tribly & College



Kelmar Strip/Antique Row



South Gate Church

SALES POTENTIAL

As discussed in Section II, the growth of the primary trade Area has significant implications for retail trade given the amount and incomes of household growth in the area. To understand the spending potential of the survey area and the resulting store possibilities a retail expenditure analysis was conducted. Retail expenditure potentials can be estimated based on the percent of trade area income spent on average by store category as outlined in the steps below:

- Total personal income (TPI) within the trade area is estimated by multiplying the population times per capita income (or alternatively, households times average household income).
- Based on the Census of Retail Trade for the State of Colorado, the percent of TPI spent by store category is calculated for the State as a whole based on historical shopping patterns. This calculation expected retail spending patterns, but at a level of geography large enough to negate the impacts of inflows and outflows of sales.
- The average percent of TPI spent by store category in the State is applied to the applicable South College corridor primary trade area TPI to estimate current expenditure potentials regardless of location of purchase.
- The growth in primary trade area expenditure potential is estimated by the same calculation applied to the estimated growth in TPI by time period. TPI calculations are made in constant dollars (no inflation).

The trade area TPI is estimated at \$635 million in 2007, as shown in Table 21. Income levels are assumed to increase at the pace of inflation (as measured by CPI) from 2007 to 2020. Based on projected household growth, the trade area TPI is anticipated to grow to \$657 million by 2010, \$758 million by 2015, and \$818 million by 2020.

Table 21
Total Personal Income, 2007-2020
South College Corridor Market Assessment

Location	2007	2010	2015	2020	Avg. Ann. Increase	
					2007-2010	2010-2020
S. College Trade Area						
Households	6,260	6,479	7,474	8,060	1.2%	2.2%
Average Household Income	<u>\$101,444</u>	<u>\$101,444</u>	<u>\$101,444</u>	<u>\$101,444</u>	<u>0.0%</u>	<u>0.0%</u>
Trade Area Personal Income (\$000s)	\$635,039	\$657,256	\$758,192	\$817,639	1.2%	2.2%

Source: City of Fort Collins; Claritas; Economic & Planning Systems

H:\17864-Fort Collins South College Corridor\Models\17864-TradeArea-TPI.xls\TPI

Total retail expenditure potential within the trade area is estimated to increase to \$262 million in 2020 up from \$204 million in 2007, based on the Census of Retail Trade average of 32.1 percent of TPI spent at retail stores. The retail expenditure potential is estimated to net nearly \$58 million over the time period, as shown in Table 22. An increase of \$15 million in retail expenditure potential is anticipated in Convenience Goods, a \$27 million increase in Shoppers Goods, a \$9 million increase in Eating and Drinking, and \$7 million in Building Materials and Garden categories.

Table 22
Trade Area Expenditure Potential by Consumer Good
South College Corridor Market Assessment

Store Type	Pct. Of TPI	Resident Expenditure Potential			Net New Sales		
		2007 (\$000s)	2010 (\$000s)	2020 (\$000s)	2007-2010 (\$000s)	2010-2020 (\$000s)	2007-2020 (\$000s)
Total Personal Income		\$635,039	\$657,256	\$817,639	\$22,216	\$160,383	\$182,599
Convenience Goods							
Supermarkets / Grocery	6.0%	\$38,100	\$39,400	\$49,100	\$1,300	\$9,700	\$11,000
Specialty Food Stores	0.2%	\$1,300	\$1,300	\$1,600	\$0	\$300	\$300
Convenience Stores	0.1%	\$600	\$700	\$800	\$100	\$100	\$200
Beer, Wine, & Liquor Stores	0.8%	\$5,100	\$5,300	\$6,500	\$200	\$1,200	\$1,400
Health and Personal Care	1.4%	\$8,900	\$9,200	\$11,400	\$300	\$2,200	\$2,500
Total Convenience Goods	8.5%	\$54,000	\$56,000	\$69,000	\$2,000	\$13,000	\$15,000
Shopper's Goods							
General Merchandise							
Department Stores & Other	1.5%	\$9,500	\$9,900	\$12,300	\$400	\$2,400	\$2,800
Discount Dept. & Supercenters	5.1%	\$32,400	\$33,500	\$41,700	\$1,100	\$8,200	\$9,300
Total General Merchandise	6.6%	\$41,900	\$43,400	\$54,000	\$1,500	\$10,600	\$12,100
Clothing & Accessories	2.1%	\$13,300	\$13,800	\$17,200	\$500	\$3,400	\$3,900
Furniture & Home Furnishings	1.6%	\$10,200	\$10,500	\$13,100	\$300	\$2,600	\$2,900
Sport, Hobby, Book, & Music Stores	1.5%	\$9,500	\$9,900	\$12,300	\$400	\$2,400	\$2,800
Electronics & Appliances	1.3%	\$8,300	\$8,500	\$10,600	\$200	\$2,100	\$2,300
Miscellaneous Retail	1.5%	\$9,500	\$9,900	\$12,300	\$400	\$2,400	\$2,800
Total Shopper's Goods	14.6%	\$92,700	\$96,000	\$119,500	\$3,300	\$23,500	\$26,800
Eating and Drinking	5.2%	\$33,000	\$34,200	\$42,500	\$1,200	\$8,300	\$9,500
Building Material & Garden	3.8%	\$24,100	\$25,000	\$31,100	\$900	\$6,100	\$7,000
Total Retail Goods	32.1%	\$203,800	\$211,200	\$262,100	\$7,400	\$50,900	\$58,300

Source: 2002 Census of Retail Trade; City of Fort Collins; Economic & Planning Systems

H:\17864-Fort Collins South College Corridor\Models\17864-TradeArea-TPI.xls\Expend Growth

Table 23 converts the retail expenditure sales growth into an overall estimate of supportable retail square feet by dividing the expenditure potential by average annual sales per square foot figures by store category. These sales per square foot figures are estimated based on several factors including sales at comparable retail centers and stores in the region and ULI averages for centers in the region.

The growth in expenditure potential from 2007 to 2020 is estimated to support 196,500 square feet of retail space across all store categories. Expenditures are estimated to support the addition of 45,000 square feet of Convenience Goods by 2020, 90,000 square feet of Shoppers Goods, 38,000 square feet of Eating and Drinking establishments, and 23,000 square feet of Building Material and Garden stores.

Table 23
Supportable Square Feet, 2007-2020
South College Corridor Market Assessment

Store Type	Sale Per SqFt	Supportable Square Footage			Net Supportable Square Feet
		2007	2010	2020	
Convenience Goods					
Supermarkets / Grocery	\$400	95,300	98,500	122,800	27,500
Specialty Food Stores	\$350	3,700	3,700	4,600	900
Convenience Stores	\$300	2,000	2,300	2,700	700
Beer, Wine, & Liquor Stores	\$250	20,400	21,200	26,000	5,600
Health and Personal Care	\$250	<u>35,600</u>	<u>36,800</u>	<u>45,600</u>	<u>10,000</u>
Total Convenience Goods		157,000	163,000	202,000	45,000
Shoppers Goods					
General Merchandise					
Department Stores & Other	\$250	38,000	39,600	49,200	11,200
Discount Dept. & Supercenters	\$350	<u>92,600</u>	<u>95,700</u>	<u>119,100</u>	<u>26,500</u>
Total General Merchandise		130,600	135,300	168,300	37,700
Clothing & Accessories	\$350	38,000	39,400	49,100	11,100
Furniture & Home Furnishings	\$250	40,800	42,000	52,400	11,600
Sport, Hobby, Book, & Music Stores	\$300	31,700	33,000	41,000	9,300
Electronics & Appliances	\$250	33,200	34,000	42,400	9,200
Miscellaneous Retail	\$250	<u>38,000</u>	<u>39,600</u>	<u>49,200</u>	<u>11,200</u>
Total Shoppers Goods		312,300	323,300	402,400	90,100
Eating and Drinking	\$250	132,000	136,800	170,000	38,000
Building Material & Garden	\$300	80,300	83,300	103,700	23,400
Total Retail Goods		681,600	706,400	878,100	196,500

Source: 2002 Census of Retail Trade; City of Fort Collins; Economic & Planning Systems

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RETAIL DEVELOPMENT POTENTIALS

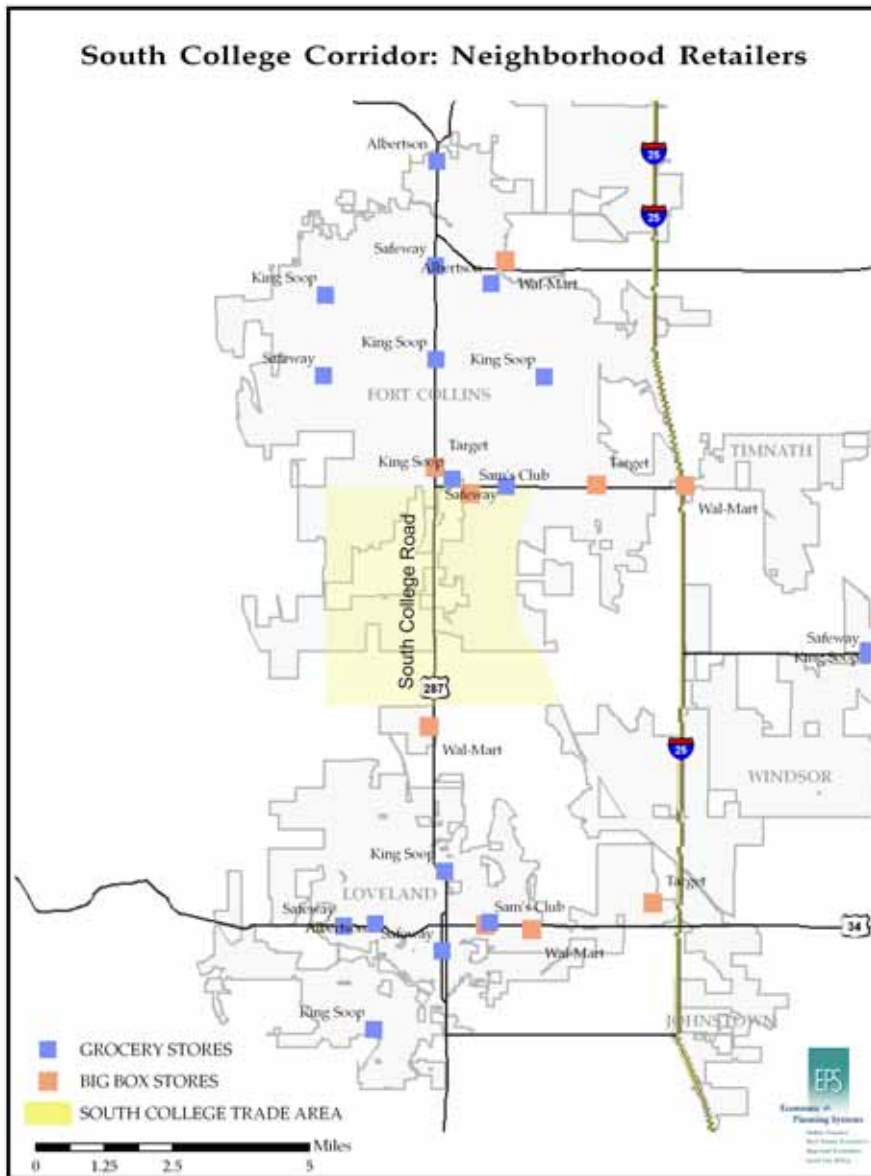
Expenditure potential and supportable square feet alone do not directly translate to new retail opportunities. All retailers have minimum size thresholds and other site requirements that must be achieved for particular tenant to consider a site. These thresholds and requirements must also be considered when evaluating the retail development potential of the corridor. The retail analysis focuses on the potential for a neighborhood retail center, but also provides a summary of the regional retail potentials based on analysis conducted for previous studies.

NEIGHBORHOOD CENTER DEVELOPMENT

Anchors drive retail development; neighborhood retail centers are no different from large shopping centers in this manner. Supermarkets are the primary anchor for neighborhood shopping centers. The South College corridor is currently underserved by supermarkets, as shown in **Figure 6**.

Within the supermarkets/grocery category it is expected that an additional \$11 million in additional demand will be present in the market by 2020. To analyze the extent to which current and future demand is being met in this category a GIS analysis was performed. The analysis assumed a two-mile radius trade area and the existing competitive supermarkets in the area. The percentage of each center's trade area that fell within the South College corridor primary trade area was used to estimate the total amount of sales that each grocery store captures from within the trade area. The sales from each grocery store were taken from 2006 City of Fort Collins sales tax receipts.

Figure 6
South College Corridor Convenience Retail
South College Corridor Market Assessment



In 2007, the expenditure potential for supermarket/grocery stores was an estimated \$38.1 million in the local trade area, as shown in Table 24. The existing grocery stores would be expected to derive approximately \$17.6 million in sales from the South College trade area, based on the GIS analysis. Therefore, the existing grocery stores would be expected to capture approximately 46 percent of the estimated expenditure potential of the local trade area, leaving an unmet potential of \$20.5 million. This is close to enough potential sales to attract a new supermarket based on average sales of between \$20 and \$25 million per store. Actual capture rates are likely much higher due to the lack of nearby store locations for South College residents to shop at. By 2020, the expenditure potential of the South College trade area is expected to reach an estimated \$49.1 million. This would leave an unmet potential of approximately \$31.5 million.

Table 24
Trade Area Supermarket/Grocery Expenditure Potential
South College Corridor Market Assessment

Store	% of Store Sales	Estimated Sales	
		2006	2020
Existing Grocery Stores			
Kings Soopers	40.14%	\$10,443,000	\$10,443,000
Safeway	28.97%	\$7,112,000	\$7,112,000
Total Grocery Sales		\$17,555,000	\$17,555,000
Supermarket / Grocery Expenditure Potential (2007)		\$38,102,366	\$49,058,318
Unmet Potential		\$20,547,366	\$31,503,318

Source: City of Ft. Collins; Economic & Planning Systems

H:\17864-Fort Collins South College Corridor\Models\17864-Grocery Demand Analysis.xls\Grocery Sales

The unmet sales potential of \$31.5 million is more than sufficient to attract a new supermarket. Based on projected population growth, the \$25 million in sales potential will be reached in the next five years, assuming an industry standard of \$25 million in sales. The estimated future local capture of expenditure potential would be 87 percent. A new supermarket/grocery store can anchor a neighborhood shopping center. Further evidence of unmet demand is provided in the survey results in which 67.5 percent of respondents indicated positive desire for a grocery store.

A typical supermarket anchored neighborhood shopping center includes between 75,000 and 100,000 square feet of retail space. Either a Safeway or a King Soopers would be candidates to anchor a neighborhood shopping center. A supermarket will consume between 55,000 and 65,000 square feet of space. The remaining available retail space will house ancillary retail and personal care services not currently in the area. Typical tenets include coffee shops, dry cleaners, small neighborhood restaurants, banks, and video stores. Resident survey results underscored demand for uses complementary to neighborhood oriented retail with 68.5 percent of respondents in favor of new restaurant/bars and 79.6 percent in favor of small neighborhood oriented retail.

REGIONAL RETAIL DEVELOPMENT

Regional retail development potentials were not addressed within the limits of this study. The regional potentials are summarized from the recently completed Mason Corridor Economic Study below:

- The population of the regional trade area (including the South College corridor) is currently estimated at 300,356 and will grow to approximately 513,100 by 2030. This growth in population will translate into additional total personal income (TPI) within the market area. TPI is calculation by multiplying the estimated population by the per capita income for the trade area.
- The current TPI within the trade area is estimated at \$8.6 billion. By 2030, the total personal income within the market area will grow by approximately \$6.5 billion dollars based on population forecasts.
- Between 2006 and 2030 the distribution of TPI will shift dramatically as the Weld County portion of the trade area grows more rapidly than Larimer County. City of Fort Collins will decrease from

47.5 percent of total TPI to 42.4 percent by 2030. The rest of Larimer County will remain constant at approximately 46.6 percent, while the portions of Weld County in the trade area will increase from 5.9 percent to 11.0 percent by 2030.

- The increase in TPI will translate into approximately \$2.1 billion in retail expenditure potential (sometimes referred to as buying power) by 2030. This additional retail expenditure potential will support approximately 6.9 million square feet of retail space.
- In the near term, approximately 1.7 million square feet of regional retail (excludes convenience oriented retail uses such as grocery stores) will be supportable between 2006 and 2015 within the trade area. Based on the previous analysis completed on the Front Range Village project, the net new sales estimated at this center will reduce the supportable retail space during this time period to 1.5 million square feet of regional retail.

The South College corridor would have to compete with a variety of other regional retail sites (Front Range Village, I-25 and Mulberry, I-25 and Prospect, I-25 and Harmony, and I-25 and Highway 392) for the finite development potential. The corridor has several competitive disadvantages compared to other locations with the region. These disadvantages are described below:

- **Anticipated Growth** - Growth adjacent to the corridor will continue increasing the population from 16,972 in 2007 to approximately 21,762 by 2020. However, the anticipated amount of growth combined with the existing population falls short of the demographic targets of many regional retailers. Regional retailers typically expect a population of approximately 50,000 to 100,000 within a 3- to 5-mile radius.
- **Adjacent Competitive Regional Retail Nodes** - The South College corridor is adjacent to two of the main regional retail concentrations within the City; South College Road from Prospect to Harmony and Harmony Road from College east to Zeigler. The latest regional retail development is currently under construction in this area at the northwest corner of Zeigler and Harmony. These regional retail agglomerations depend on the residents of the South College corridor trade area, which largely falls within the 3- to 5-mile radius trade area of these centers.
- **Land Availability** - The largest available parcel of land is approximately 50 acres. This would support approximately 325,000 square feet based on an average floor-area-ratio (FAR) of 0.15 gross. A typical regional retail center ranges from 500,000 (a small power center) to 1.5 million square feet (a super regional enclosed mall). Therefore, the corridor does not have the capacity for a regional retail center. A limited number of regional retailers will develop in a stand-alone configuration. These include Wal-Mart Supercenter, Home Depot, and Lowes. Each of these retailers already has adequate market penetration in the Fort Collins area (accounting for future plans).
- **Lack of Community Support** - A total of 77.7 percent of household surveys responded negatively when asked of desire to see retailers in the category of supercenters or warehouse stores. In addition, 42 percent of respondents currently use discount and supercenters in College Corridor North of Harmony and 23.7 percent in Loveland. Further, 73 percent of respondent visit membership warehouse retail in Harmony Corridor East of College. The use of regional retail in close Proximity to the South College corridor indicates that current South College resident demand is satisfied given the give mile trade area associated with regional retailers.

Based on the finite demand for regional retail and the over-supply of available regional retail centers already in the region it is unlikely that the South College corridor will include any significant regional retail developments.

ANTIQUÉ STORES

The concentration of antique stores in the South College corridor is a specialized regional retail attraction and is therefore discussed separately below. The long term viability of antique shops depends on several market conditions. The following general rules apply:

- Antique stores generate a cumulative attraction and therefore benefit from locating together. Similar to the concentration of general merchandise and apparel stores in a mall, the trade area and market penetration of a group of stores is larger than the individual stores located in separate locations.
- Antiques stores (with the exception of a few high end specialty stores) are relatively low sales volume and low rent functions. They typically locate in older outmoded retail space which has been vacated by primary retail uses.
- As the property owner survey indicates, many antique stores are really cooperatives, consignment shops, or a single business renting out to subtenants. There is a large degree of variance in the amount of investments involved in each individual enterprise.
- Shopping at antique stores is a specialized function. The businesses therefore are not specifically neighborhood focused but rather serve a relatively large trade area market that patronizes these businesses infrequently.

Many Fort Collins area residents value the benefits of being able to patronize the cluster of antique businesses on South College. Maintaining these uses at their current location, however, is difficult to mandate through planning and zoning controls. These attributes of antique shops and flea markets make it hard to establish a district that preserves these uses without infringing on the opportunities and desires of the property owner to redevelop for higher value uses.

If these businesses are successful in the marketplace, they would start carrying higher value goods and become more specialized businesses. To the extent that opportunities for other retail businesses grow at a higher level, these uses would most likely be pushed out of the area as land values rise and opportunities for redevelopment to higher value uses increase. However, strong evidence exists from the business survey to suggest that property owners and businesses are not feeling redevelopment pressures. Approximately 52 percent of respondents indicated that they were not interested in selling their property with 75 percent responding that they did not envision redeveloping their property.

The role of planning is therefore to address the quality, safety, and character of the business environment and not the specific tenant mix of the commercial space.

VII. BUSINESS AND INDUSTRIAL DEVELOPMENT

This section reviews the existing office and industrial conditions in the County as well as the trade area. In addition, it evaluates the demand for additional space along the South College corridor.

COMMERCIAL MARKET OVERVIEW

Larimer County employment has grown by approximately 4,900 jobs per year, or 4.6 percent annually from 1995 to 2000, as shown in Table 25. This rate decreased to 1.1 percent annually from 2000 to 2006, for the addition of 1,300 jobs annually. The strongest year for employment was 2001, with the addition of 2,800 jobs, and was followed by a period of negative job growth in Larimer County due to the post 9/11 national recession and the technology/telecommunications bust. However, by 2004 job growth began to rebound with the addition of 2,300 jobs, followed by 2,600 jobs in 2005.

Table 25
Larimer County Employment Trends, 1995-2005
Mason Corridor Economic Analysis

Year	Larimer County		
	Employment	Ann. Change	Ann. % Change
Total Employment			
1995	94,896	---	---
2000	119,093	-557	4.6%
2001	121,880	2,787	2.3%
2002	121,436	-444	-0.4%
2003	120,046	-1,390	-1.1%
2004	122,369	2,323	1.9%
2005	124,999	2,630	2.1%
2006	126,874	1,875	1.5%
Change			
1995-2000	24,197	4,839	4.6%
2000-2006	7,781	1,297	1.1%
1995-2006	31,978	2,907	2.7%

Source: US Bureau of Labor Statistics; Economic & Planning Systems

H:\17830-Mason Corridor Economic Study\Models\17830-empl_demand OFFICE.xls\1-Growth Rate

Larimer County has approximately 5.9 million square feet of office inventory in 554 buildings. The inventory for industrial space is approximately 11.9 million square feet in 448 buildings, as shown in Table 26. Rental rates in County grew to approximately \$20.00 on average for office space in 2006, up from \$16.83 in 2001. Rental rates in the industrial market are significantly lower, rising from \$6.13 in 2001 to \$7.48 in 2006.

Table 26
Office & Industrial Historical Inventory & Rent, 2001-2006
Mason Corridor Economic Analysis

Period	Existing Inventory		Quoted Rates
	# Bldgs	Total RBA	
Office			
2001	357	4,318,909	\$16.83
2002	373	4,551,990	\$18.75
2003	379	4,583,225	\$17.89
2004	516	5,533,447	\$18.23
2005	535	5,747,411	\$18.66
2006	554	5,940,153	\$19.89
Industrial			
2001	330	8,985,141	\$6.13
2002	339	9,424,002	\$6.26
2003	346	9,610,678	\$6.75
2004	432	11,561,084	\$6.95
2005	442	11,820,148	\$7.26
2006	448	11,938,050	\$7.48

Note: Jump between 2003 and 2004 due to a change in reporting methodology by CoStar

Source: CoStar Group, Inc.; Economic & Planning Systems

H:\17830-Mason Corridor Economic Study\Data\17830-Industrial Historical.xls\Inventory Summary

Vacancy in the Larimer County office market has averaged 13.2 percent, and the industrial market has averaged 9.3 percent in 2006, as shown in Table 27. Vacancy rates peaked in 2004 for office space, at 14.5 percent with approximately 803,000 square feet of vacant space. The vacancy peak for industrial space occurred in 2003, with a vacancy rate of 10.1 percent, and 971,000 vacant square feet. Much of this vacant space was absorbed by 2004, when vacancy dropped to 5.8 percent in the industrial market. Net absorption has fluctuated greatly in both the office and industrial markets.

Table 27
Office & Industrial Historical Vacancy & Absorption, 2001-2006
Mason Corridor Economic Analysis

Period	Vacancy		Net Absorption
	Vacant SF	Vacancy %	
Office			
2001	261,099	6.0%	344,905
2002	609,616	13.4%	(115,436)
2003	576,720	12.6%	64,131
2004	803,329	14.5%	(35,061)
2005	674,153	11.7%	343,140
2006	786,044	13.2%	80,851
Industrial			
2001	493,010	5.5%	312,289
2002	908,228	9.6%	23,643
2003	970,554	10.1%	124,350
2004	670,911	5.8%	514,574
2005	851,337	7.2%	78,638
2006	1,110,247	9.3%	190,622

Note: Increase between 2003 and 2004 due to a change in reporting methodology by CoStar

Source: CoStar Group, Inc.; Economic & Planning Systems

H:\17830-Mason Corridor Economic Study\Data\17830-Office & Industrial Historical.xls\Vacancy & Absorpt. Summary

CORRIDOR MARKET CONDITIONS

The South College corridor includes approximately 1.5 million square feet of commercial space (office and industrial, based on a Sperry Van Ness report) or approximately 8.2 percent of the total Larimer County inventory. The trade area inventory includes a range of products from new office space to functionally obsolete industrial space used for light manufacturing and storage. Approximately 91,000 square feet of the trade area inventory is currently vacant, which equates to a vacancy rate of approximately 6 percent.

Lease rates, for commercial space in the trade area, range from \$4 to \$22 triple net (NNN). The wide range of lease rates corresponds to the range of products available. New and recently constructed office space is asking \$17 to \$22 NNN. Existing Class B and Class C office space ranges from \$11 to \$16 NNN. Functionally obsolete industrial space leases at the low end of the range from \$4 to \$10 NNN.

EMPLOYMENT DEVELOPMENT POTENTIALS

The current market conditions in Larimer County create an extremely competitive environment for additional employment development. Based on current zoning, over 700 acres of employment land exists in the City largely clustered along Harmony Road and near existing employment uses.

Approximately 5.0 acres of employment land is located at the northern end of the corridor near the intersection of College Avenue and Fossil Creek Drive. Plans for the area include up to six additional

office buildings totaling approximately 100,000 square feet of development. This planned office development will consume approximately 6.5 percent of the forecast growth in office development between 2006 and 2015. This is an adequate amount of land for future office space in the corridor. It is unlikely the corridor will capture additional office development south of this node, at least until this project is built out.

Industrial and RTD development will be attracted to the Harmony corridor because of the ample land supply and access to Interstate 25. It is unlikely that any of these major employment uses will consider the South College corridor for development. However, many small parcels exist along the corridor currently zoned to allow for small service industrial uses (e.g., car repair, appliance repair, sign construction, etc.). Service industrial uses cannot afford high rent or land prices; therefore, these uses will only be attracted to the corridor as long as land values remain low.