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Design Management



# CITY SPRINGS

## MASTER PLAN

# TECHNICAL ADDENDUM

ADOPTED DECEMBER 20, 2022





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APPENDIX

**A.**

# Record of Accomplishments

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# RECORD OF ACCOMPLISHMENTS

This matrix summarizes previously completed and ongoing actions by the City of Sandy Springs as a result of the Implementation Strategies of the City Center Master Plan adopted in 2012.

*Plan Theme: "Create mixed-use neighborhoods designed for people."*

#	STRATEGY	ACTION	COMPLETE	IN PROGRESS/ ONGOING	NOT STARTED	NOTES/COMPETION YEAR (IF APPLICABLE)
1	"Define neighborhoods within City Center."	"Define unique neighborhoods in the City Center character area based on their activities and appearance."		■		A semblance of "neighborhoods" has started to appear since the previous plan was adopted. The transformation in the District's urban form has converted from suburban commercial corridor to transitioning town center.
2	"Bring a mix of activities together."	"Revise City Center development regulations to strongly encourage high value mixed-use development while accommodating improved single-use development along Roswell Road."		■		The City adopted a new Development Code and Zoning Map in September of 2017 which has guided use and form to accommodate mixed-use development and improved single-use development along Roswell Road. This action is still ongoing and may entail additional revisions to the City's regulations that capture the community's vision which may have evolved since the adoption of the 2012 Master Plan.
		"Develop a zoning code that defines coordinated land use and the design standards for sites, buildings and streetscapes."	■			The City adopted a new Development Code and Zoning Map in September of 2017. City will begin an exercise to create design standards in 2023.
3	"Support mixed-use neighborhoods with a network of walkable streets."	"Define a range of street types according to their function. Use the street type definitions to indicate appropriate land uses and building/site design approaches along them."	■			Completed from a regulatory standpoint (Dev. Code 10.4); various public improvements have occurred and are currently underway.
		"For each street type, incorporate characteristics of walkable streets."	■			Completed from a regulatory standpoint (Dev. Code 10.4) and all streets include sidewalks; additional various public improvements have occurred and are currently underway. (i.e. Sidepath on Sandy Springs Circle); Sandy Springs Technical Manual outlines requirements for streetscape updates.

#	STRATEGY	ACTION	COMPLETE	IN PROGRESS/ ONGOING	NOT STARTED	NOTES/COMPETITION YEAR (IF APPLICABLE)
3	"Support mixed-use neighborhoods with a network of walkable streets." (Con't)	"Refine the existing road layout into a finer grained network of walkable streets."		■		The City has incorporated elements of a street grid, adopted Block Measurement standards (Dev. Code 10.3.1.B); ongoing public and private improvements will continue to refine the road layout; A street grid has been identified for the area since the adoption of the City Center Master Plan (2012).
		"Improve streets in ways that enhance mobility for both vehicles and pedestrians."		■		The City is mindful of needed vehicular and pedestrian improvements. Intersection improvements, road widenings, bicycle and pedestrian projects, and studies are currently underway. (Comprehensive list included in Existing Conditions Report - i.e. Boylston Drive Side Path, Hammond Drive Widening, etc.); The Roswell Road Access Management Plan is currently underway; All new transportation projects consider pedestrian improvements, such as bringing a sidewalk up to standard, new sidepaths, and improvements for pedestrian crossings at intersections. The Development Code streetscape requirements also improve pedestrian and vehicular mobility and safety.
		"Implement an access-management strategy to improve Roswell Road traffic flow, pedestrian safety and appearance."		■		The Sandy Springs Development Code does not allow new access points and requires interparcel connectivity. The Roswell Road Access Management Plan is currently underway (to be completed by end of 2023) and will identify specific improvements; Example: new development between Hilderbrand Drive and Sandy Springs Place was approved with stipulations for Right in/Right out only access on Roswell Road, driveways were consolidated, a new street (Denmark Drive) was implemented to better access a parallel street (Boylston Drive) and facilitate interparcel access to remove driveway traffic from Roswell Road.

#	STRATEGY	ACTION	COMPLETE	IN PROGRESS/ ONGOING	NOT STARTED	NOTES/COMPETITION YEAR (IF APPLICABLE)
3	"Support mixed-use neighborhoods with a network of walkable streets." (Cont'd)	"Enhance the convenience and safety of bicycling in City Center."		■		Side paths to accommodate multi-modal travel have been implemented to enhance convenience and safety, however additional connections are needed to form a comprehensive network.
		"Accommodate and encourage the reduced parking and driving needs associated with mixed-use."		■		In 2018, the City adopted Development Code Section 8.1.5 Vehicle Parking Options to accommodate various intentions. This 2022 Study further examines parking.
		"Enhance the availability and convenience of transit services."		■		The City has also added new bus shelters on this stretch of the corridor, improved sidewalk to access transit, and explored the use of Transit Signal Priority. MARTA also modified Route 148 so there is now a direct bus route from City Springs to Sandy Springs MARTA Station via Mount Vernon Highway.
4	"Take a cost effective approach to utility infrastructure."	"Manage stormwater using new retention facilities that serve whole areas within the City Center."	■			The implementation of Marsh Creek Rain Garen Park has aided in the management of regional stormwater; Beneath the City Green a 300,000-gallon cistern captures 100% of the drainage from the onsite buildings and is used to irrigate the green spaces at City Springs as well as provide water to supply the five on-site fountains. The stormwater collected by the cistern substantially reduces the amount of storm water introduced into the city's storm drains. During dry periods, the cistern is designed to hold enough runoff water to supply the entire complex for just over two weeks.
		"Bury or relocate overhead utilities where cost effective benefits to property value and public open spaces are possible."		■		New development helps to achieve this; City Springs campus hides utilities. CC-10 included underground utilities along Sandy Springs Circle. Denmark Drive was designed and constructed without overhead utilities. TS191 will underground utilities from Roswell Road to the Fulton County Library on Johnson Ferry Road and Mount Vernon Highway, and on Boylston Drive from Mount Vernon to Hilderbrand Drive.
		"Screen the power substation along Hilderbrand Drive and Mt. Vernon Highway."	■			New fencing, trees, and shrubs were planted along roadways and property edges.
		"Enable installation of district energy infrastructure such as cogeneration facilities."			■	

Plan Theme: "Create places of community that serve all of Sandy Springs."

#	STRATEGY	ACTION	COMPLETE	IN PROGRESS/ ONGOING	NOT STARTED	NOTES/COMPETITION YEAR (IF APPLICABLE)
5	"Expand Sandy Springs' network of parks and greenways."	"Create a City Green to serve as a center of community activity and identity."	■			City Green, a 4-acre park, opened in 2018 and hosts free community events and concerts throughout the year.
		"Create smaller parks and plazas throughout City Center to help enhance value and sense of place."		■		Veterans Park is currently under construction, Allen Road Park, just south of the study area was updated in 2021 with a new playground. Marsh Creek Rain Garden Park opened in 2016.
		"Create green network connections among parks, plazas and greenways."		■		Most of City Springs District is projected to be served by proposed trails in the 2019 Trails Master Plan, however there are opportunities to expand upon connected greenspace in the study area.
6	"Attract more arts, cultural and civic events to City Center."	"Create a Civic Facility with a multipurpose venue that can accommodate cultural events as well as city government activities."	■			City Springs opened in 2018 and is home to City Hall, City Green, restaurants, retail, and residences as well as the 1,096 seat Performing Arts Center and Conference Center spaces including the 5,000 SF flexible space Studio Theatre.
		"Work with local and regional arts organizations to expand programming."		■		The City's Create team works to bring world-class performances of all genres to the Performing Arts Center, and manages the City's free annual Signature Events. Art Sandy Springs works with the City on the annual Sculpture Contest. Partnerships with CREATE Sandy Springs, the Atlanta Jewish Film Festival, Sandy Springs Arts Foundation, and other partner organizations have been established.

Plan Theme: Plan Theme: "Encourage Investment."

#	STRATEGY	ACTION	COMPLETE	IN PROGRESS/ ONGOING	NOT STARTED	NOTES/COMPETITION YEAR (IF APPLICABLE)
7	"Establish a clear, predictable process for development in City Center."	"Streamline development review and approval."	■			The City adopted a new Development Code in September of 2017, which addressed development review and approval processes.
		"Create public-private partnerships where appropriate to enable private development investments."		■		City Springs campus completed through Public-Private Partnership; this plan will explore additional opportunities.
		"Actively promote investment opportunities to potential developers, businesses and residents. Work with the Sandy Springs Chamber of Commerce and other organizations to promote City Center's new opportunities and identity. Recruit businesses, developers and/or others who would add value to the mix of uses in City Center."		■		City staff in the Economic Development Department work to promote the City and City Springs District as an excellent place to do business to decision-makers, and as a destination of choice for residents and visitors to shop, dine, and play. Community Development staff support business owners and developers through the permitting process and work closely with developers on aligning their plans with City goals.

#	STRATEGY	ACTION	COMPLETE	IN PROGRESS/ ONGOING	NOT STARTED	NOTES/COMPETITION YEAR (IF APPLICABLE)
8	"Continue to focus on key Roswell Road improvements."	"Improve infrastructure by redesigning intersections, burying electrical distribution lines, synchronizing traffic flow, and adding medians where possible."		■		Mount Vernon Highway/Johnson Ferry Road/Roswell Road intersection improvement project is underway. ATMS 2 installed adaptive signal timing on the corridor to improve traffic flow. TS191 will underground utilities from Roswell Road to the Fulton County Library on Johnson Ferry Road and Mount Vernon Highway, and on Boylston Drive from Mount Vernon Highway to Hilderbrand Drive.
		"Unlock business and property reinvestment with incentives."		■		The City established an Economic Development Incentive Program that makes available incentives for businesses that meet certain capital investment, job creation, and wage level thresholds. The Sandy Springs Development Authority has worked on several redevelopment projects in the City Springs District, including what are presently known as The Adley (6075 Roswell Road) and The Morgan (6125 Roswell Road). The City's Code of Ordinances 54-24 (adopted in 2015) regulates tax incentives.
		"Rebrand Roswell Road as the City Center's gateway."		■		Zoning and development regulations have directly improved the look and feel of Roswell Road and will continue to do so; Additional public improvement opportunities may expand gateway features along the corridor so they are not only concentrated at the City Springs campus site. In July 2022, the City funded a city-wide wayfinding plan to provide cohesive signage and enhance placemaking across the City; The Roswell Road Access Management will guide the future look of the corridor, aiding in the creation of a true gateway; City Springs work along Roswell Road paired with Veteran's park will add a true sense of place along Roswell Road.

# PREVIOUS GOAL EVALUATION

This matrix evaluates success and progress on previously adopted goals identified in the 2012 City Center Master Plan.

*Goal: “Create a unique, vibrant, walkable City Center rich in amenities desired by the community, such as commercial, retail, recreational and cultural facilities.”*

MEASURE	COMPLETE	IN PROGRESS/ ONGOING	NOT STARTED	NOTES
“New choices for retail and dining, distinct from traditional options in the study area, are present and successful.”		■		This has been achieved in various nodes of the District; the City seeks to expand upon this.
“New recreation and cultural facilities are present and draw users from around Sandy Springs as well as the immediate City Center area.”		■		The city has added new facilities to the District as described elsewhere in this plan, and continues to seek out and prioritize opportunities for new recreation, cultural spaces, and programming in the District.

*Goal: "Catalyze significant market-driven private investment in walkable, mixed-use redevelopment that introduces substantial new dining, amenity retail, and entertainment options. This will both achieve City Center development goals and strengthen the district's ability to support Sandy Springs' fiscal goals."*

MEASURE	COMPLETE	IN PROGRESS/ ONGOING	NOT STARTED	NOTES
"The City Center has emerged as a walkable center for living, working, shopping and leisure."		■		City Springs is more walkable and a live-work-play lifestyle is possible; the City seeks to improve upon this experience.
"Investments in a walkable core attract investments on other sites over time."		■		Investment in private property has increased in the last 10 years with a direct correlation to increased walkability and amenities.
"The overall level of private investment is in the range of at least \$2 to \$6 for every \$1 of public resources invested."	■			Between 2012 and 2022, staff estimates the combined value of projects occurring in the City Springs District equaled approximately \$2.51 of private investment for every \$1 of public investment.
"City Center emerges as a stronger center of economic development for Sandy Springs."		■		The City Springs campus and surrounding redevelopments have created new retail spaces providing opportunities for businesses to start and relocate to the District. The area continues to develop as a desirable location for both businesses and workers.

*Goal: "Create an appropriate setting for a new civic/ cultural center that functions as a place of community activity and identity."*

MEASURE	COMPLETE	IN PROGRESS/ ONGOING	NOT STARTED	NOTES
"A civic/cultural center, integrating a building with complementary public landscaped areas, is prominently in place. It attracts residents from throughout Sandy Springs to participate in a variety of activities throughout the day and week, with emphasis on cultural and community activities besides day-to-day City business."	■			City Springs opened in 2018 and is home to City Hall, City Green, restaurants, retail, and residences as well as the 1,096 seat Performing Arts Center and Conference Center spaces including the 5,000 SF flexible space Studio Theatre.

*Goal: "Create a comprehensive system of infrastructure to support City Center, including walkable streets, stormwater, traffic flow, transit services, bicycling facilities, parking, utilities and signage."*

MEASURE	COMPLETE	IN PROGRESS/ ONGOING	NOT STARTED	NOTES
"Private investment increases in response to good quality streets, utilities and other key infrastructure."		■		The City continues to make capital improvements which make the City more attractive for private investment.
"City Center includes places where walking is safe and enjoyable - enhancing the value of adjacent properties."		■		While more walkable, the City continues to make pedestrian improvements.
"More and better access choices are present, including new driving route options, inviting bike facilities and convenient transit services."		■		GA Smart project with Geogia Tech and MARTA to pilot transit signal priority; Denmark Drive was added to the street grid.

*Goal: "Introduce a green space network that accommodates a variety of activities; draws activity from City Center development; and provides strong connections to City Center, established neighborhoods and Sandy Springs' open space network."*

MEASURE	ACCOMPLISHED/ COMPLETED	STILL PURSUING/ IN PROGRESS	NOT PRIORITIZED/ NOT STARTED	NOTES
"A signature set of public parks and plazas distinguishes City Center from other portions of the City and from other communities in the region."		■		City Green, Heritage Green, and Marsh Creek Rain Garden Park, have been established in the District, with Veterans Park underway.
"City Center parks and plazas welcome a wide variety of activities that serve people from throughout Sandy Springs as well as the City Center area."	■			The City Green provides a space for programmed and unprogrammed activity; Events such as City Green Live, Concerts by the Springs, and Movies by Moonlight, are held periodically, which attract visitors and Sandy Springs residents.
"City Center parks and plazas are easily accessible from existing nearby neighborhoods, which gain value from their presence."	■			City Springs Master Plan Figure 2.19, page 51 outlines recently complete projects which promote increased connectivity.



APPENDIX

**B.**

# Public Engagement

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## Open House – Summary

### May 10, 2022

The first open house for the City Springs Master Plan was held on May 10, 2022, from 6:00-8:00PM at the Studio Theatre at City Springs. The goal of the event was to educate the attendees on the project and planning process, show results of the planning team’s existing conditions work and gather initial feedback on their vision for the future of the City Springs District. The event was attended by at least 102 people.

### Open House Overview

#### Meeting Format:

The Open House event had several active and passive opportunities for attendees to learn about the project and give input. To inform the participants about the project and planning process, a handout was provided upon arrival, a formal presentation was conducted, and the planning team created several boards describing why the City Springs Master Plan is being updated, existing conditions, and ongoing development. Participants had several opportunities to give the planning team their input including a word cloud activity, image preference surveys, and a comment sheet.



Planning team conducting the 6:30PM formal presentation.

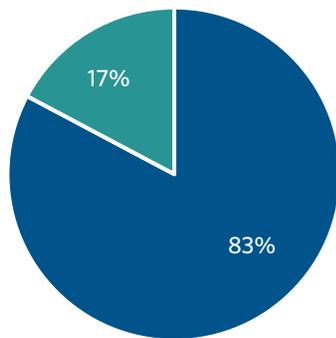
1. **Welcome Activity:** Participants signed in and indicated on a map where they live and how long they have lived in the area.
2. **Formal and Looping Presentations:** The planning team conducted a brief formal presentation from 6:30-6:40PM to orient the audience to the project and provide context for the existing conditions research. A looping presentation that included the same information was on for the duration of the meeting for those who arrived after the 6:30 presentation.
3. **Visioning Activity:** On white boards, participants wrote five words or less to describe their vision for the future of City Springs.
4. **Educational Boards and Visual Preference Activities:** Participants reviewed project background information and provided input by placing dot stickers next to images that illustrate preferred development styles.
5. **Collective Visioning Activity:** Large study area maps were placed on tables and participants used pins and tags to indicate where they preferred to see development, preservation, and new amenities.
6. **Exit Poll:** Participants completed a short poll hosted on Pigeonhole Live about their top concerns, types of amenities they want to see in the study area, and what the future of the study area represents to Sandy Springs.

### Participants

102 people signed into the open house event, and more participated in the event as often one household only signed in using one person's name. Upon entry, attendees were asked to answer two welcome questions: (1) A board asked the question: 'Who's Here Tonight?' and another asked, (2) 'How Long Have You Been Around the Area.' Below are the results of those questions showing that the majority of those who registered live inside Sandy Springs, work outside of Sandy Springs, and the majority of the attendees have been in the area since 2000-2020.

#### Who's Here Tonight

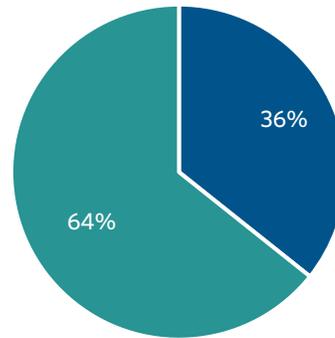
Where do you live?



- I live inside of Sandy Springs
- I live outside of Sandy Springs

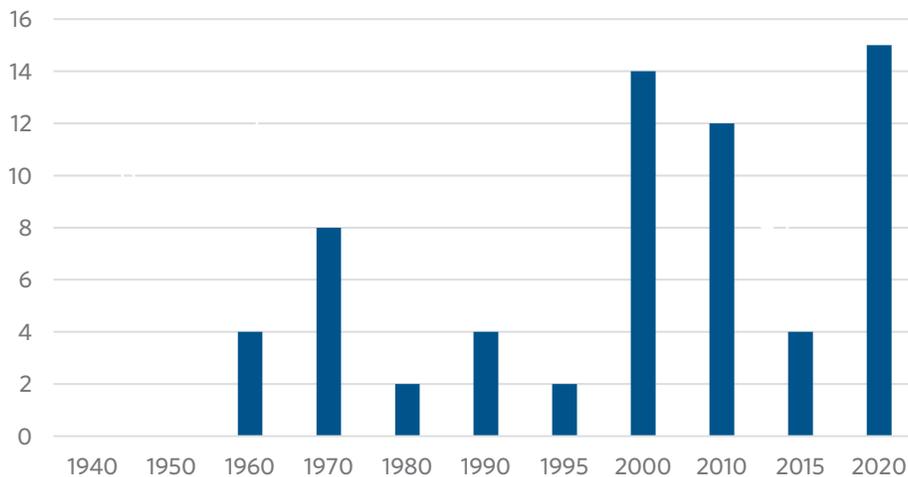
#### Who's Here Tonight

Where do you work?



- I work inside of Sandy Springs
- I work outside of Sandy Springs

#### How Long Have You Been Around the Area?



## Input Overview

### Visioning Activity

Participants were invited to an interactive station where PigeonHole Live was used to create a word cloud. Participants were encouraged to use 5 words or less to describe their vision for the City Springs District. **63 people offered their input** for this activity. The most frequently mentioned word, shown in dark orange, was walkable. Other words mentioned multiple times include walkable, mixed-use, diverse, green, sustainable, local events, and amenities. The word cloud appears exactly as words and phrases were submitted and was not edited or altered in any way.



### Visual Preference Activities

Display boards were provided for different land uses and amenities that showed images of residential, office, retail, and hotels. Participants placed dots next to images that showed their preferred development style and use examples that correspond with their vision for the City Springs District. Key takeaways from this activity include the following:

- The preferred residential images show a desire for human scale residential development that provides a comfortable neighborhood feeling.
- The preferred office images illustrate modern office buildings that are accompanied by greenspace and designed with high fenestration.
- The preferred retail and food & beverage show a desire for a walkable city center with both public and private seating areas and greenspace.
- The preferred amenities images illustrate that trails (bike and pedestrian), small gathering spaces, and public art installations are important to the attendees.



Participants providing input on their preferred development types.

**1. Residential development.** Participants were asked to place dots on any and all images that they think are appropriate in the study area. The most-selected images are outlined in blue.

Instructions given to the public: *Ultimately, additional residential development may need to occur over the next 20 years. Think about the scale, look, and feel of what that might look like by selecting photos of residential developments you think are appropriate for the City Springs District.*



**2. Office development.** Participants were asked to place dots on any and all images that they think are appropriate in the study area. The most-selected images are outlined in blue.

Instructions given to the public: *City Springs is still projected to grow as a place of work for many metro area residents. Select photos of the type of office developments you think are appropriate in the City Springs District!*



**3. Retail and food & beverage development.** Participants were asked to place dots on any and all images that they think are appropriate in the study area. The most-selected images are outlined in blue.

Instructions given to the public: *Looking to the future, shopping, food and beverage, and other retail options could look different as properties redevelop or rehabilitate. Select photos of the types of retail developments you think are appropriate for the City Springs District.*



4. **Amenities:** Participants were asked to place dots on any and all images that they think are appropriate in the study area. The most-selected images are outlined in blue.

Instructions given to the public: *Select photos of the types of amenities you think are appropriate in City Springs District!*



### Collective Visioning Activity

The collective visioning activity provided an opportunity for participants to use pins and tags to pinpoint where they want to see a certain type of development, use, or amenity, or to let the planning team know where they see most traffic congestion, and opportunities to improve on traffic operations. Placing these maps on a table and having attendees participate in this activity at the same time helped spur conversation and increased participation.



Attendees participating in the collective visioning activity.

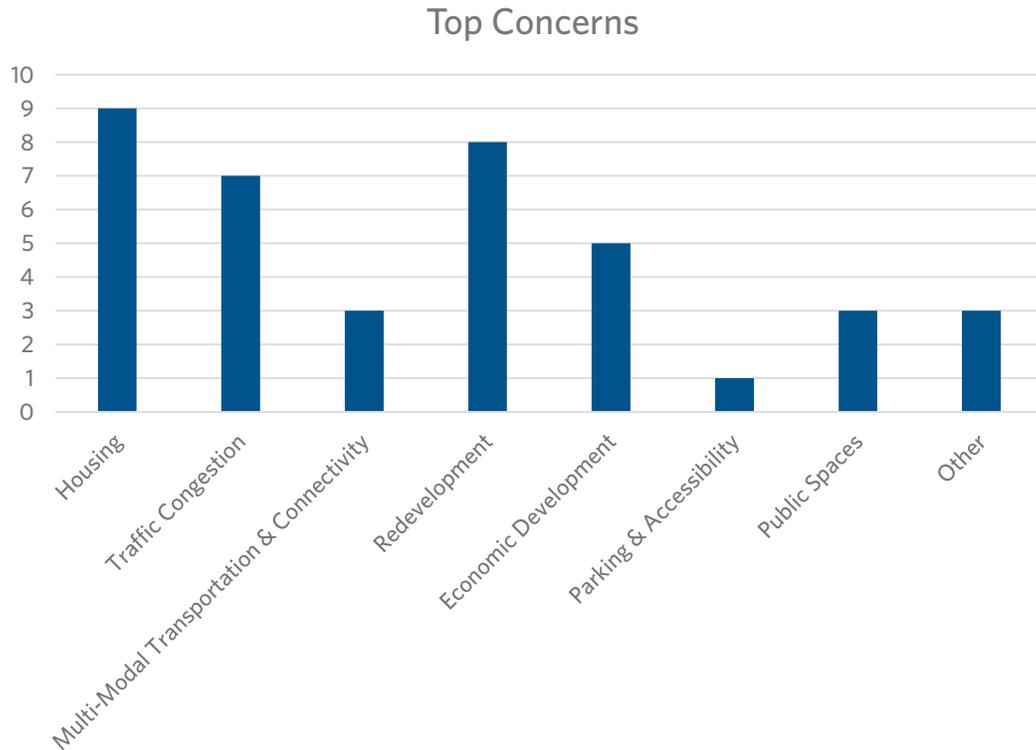


## Exit Poll

An exit poll helped to summarize the sentiments of the participants after they had the opportunity to learn about the project and process. Participants scanned a QR code that showed them a three-question survey. The graphs below summarize the input received from the exit poll.

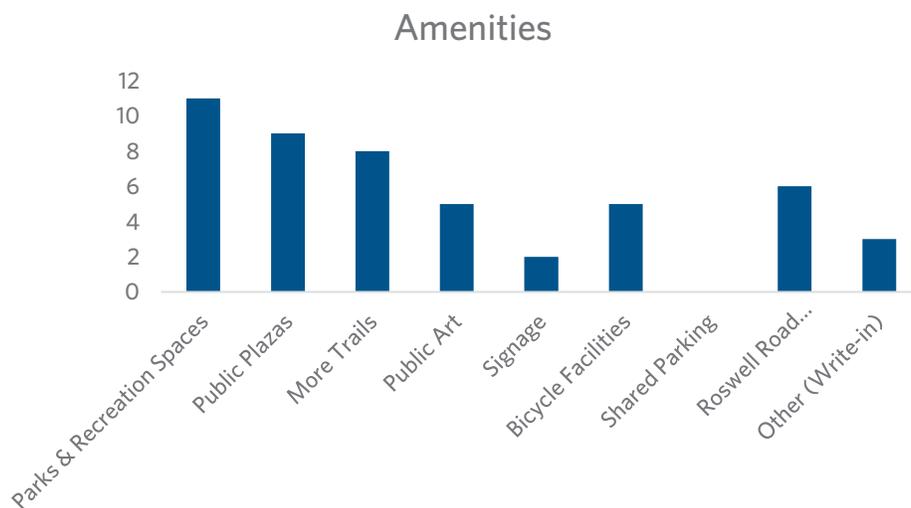
### Question 1: *What are your top 3 concerns for the City Springs area?*

39 responses (participants could choose up to 3 responses)

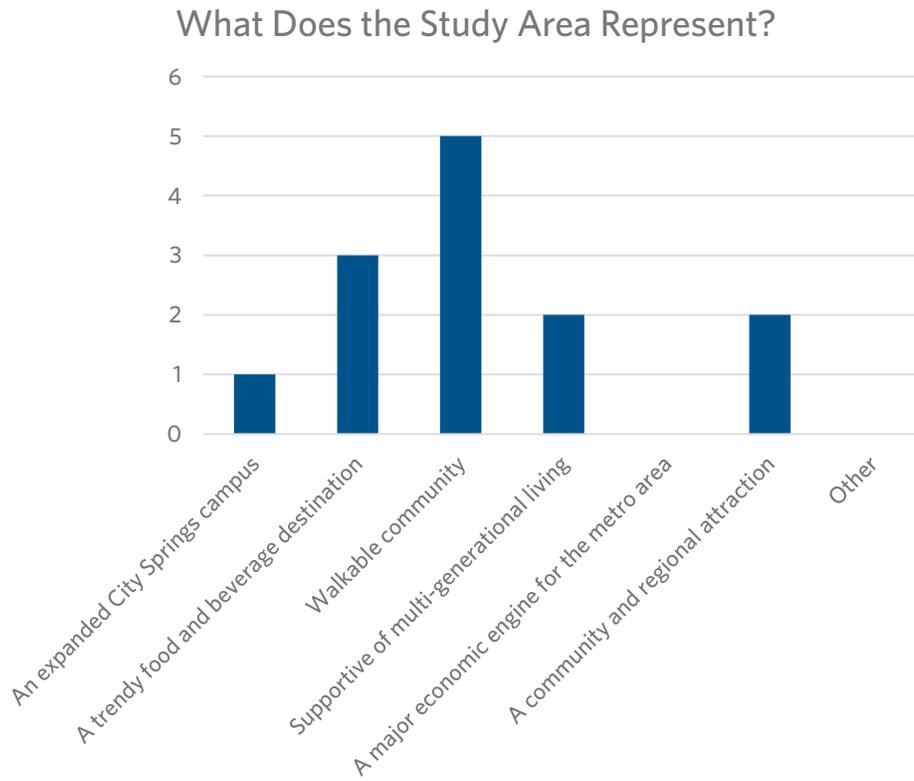


### Question 2: *What types of amenities are you most interested in seeing added in the study area?*

49 responses (participants could choose up to 5 responses)



**Question 3:** *What does the future of the study area represent to Sandy Springs?*  
13 responses (participants could choose 1 response)



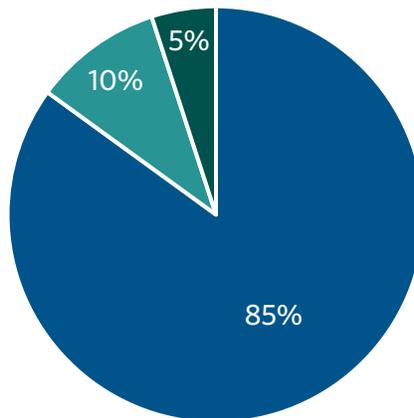


## Online Survey #1 – Summary

Live May 10<sup>th</sup> – June 3<sup>rd</sup>

The online survey mirrored some of the boards and exit poll from the May 10<sup>th</sup> Open House, and questions from the stakeholder roundtables. Participants were directed to review preliminary project information on the project website. The online survey garnered **120 responses** from residents, property owners, and business owners. See the following summary of responses. Note that unless a question specifically states "Select all that apply" the respondents could only choose one option.

1. What is your association with the City of Sandy Springs?  
120 responses

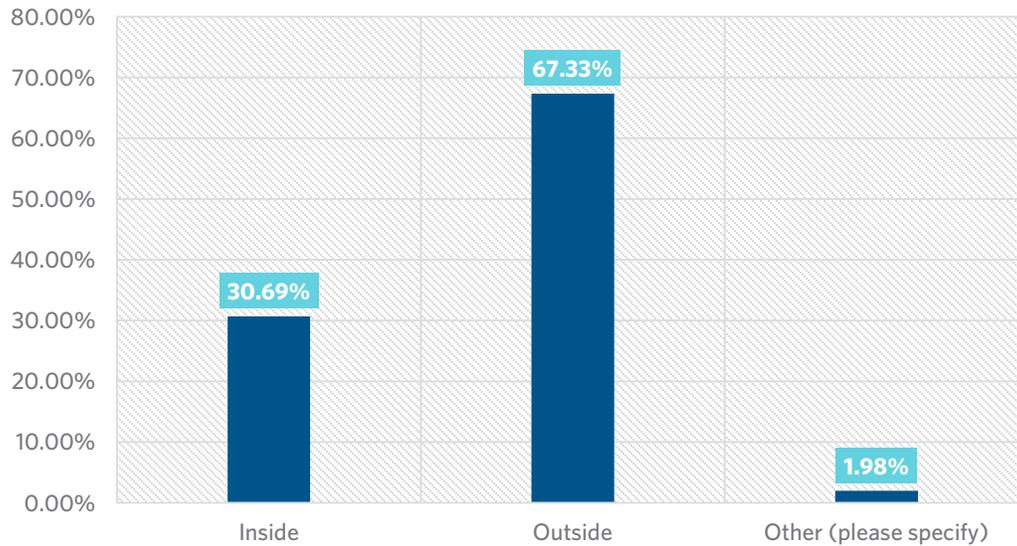


- I am a Sandy Springs resident/property owner.
- I own a business in Sandy Springs.
- Other (please specify)

Most survey respondents were residents of or property owners within the City of Sandy Springs. Other participants indicated that they were either a combination of the two main options (resident and business owner). One person works in Sandy Springs and hopes to live there one day. Residents answered questions 2-7, fourteen business owners answered questions 8-14, and all survey participants answered questions 15-23.

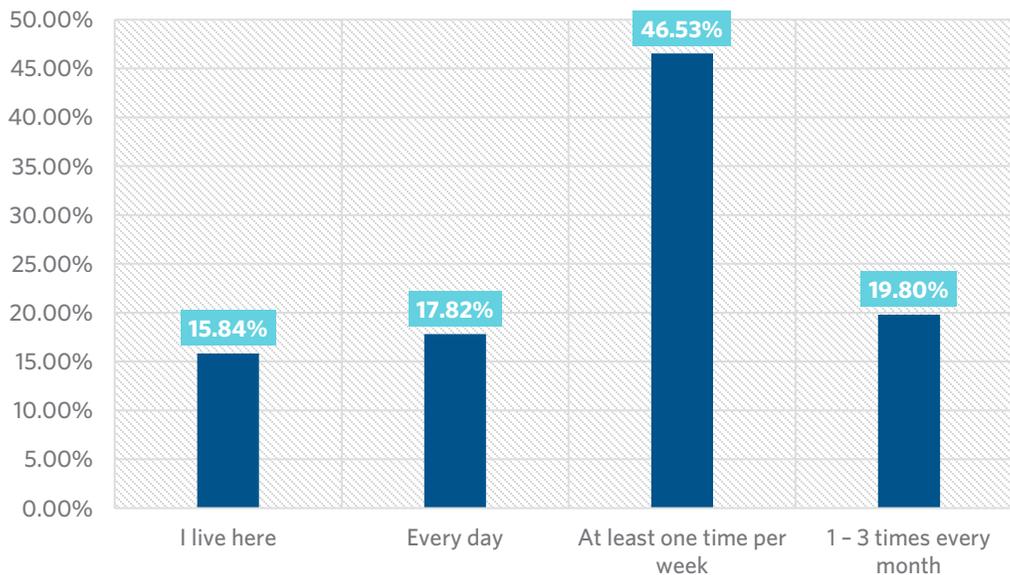
## RESIDENT/PROPERTY OWNER-RELATED RESPONSES

2. Do you live and/or own property inside or outside of the City Springs District?  
101 responses



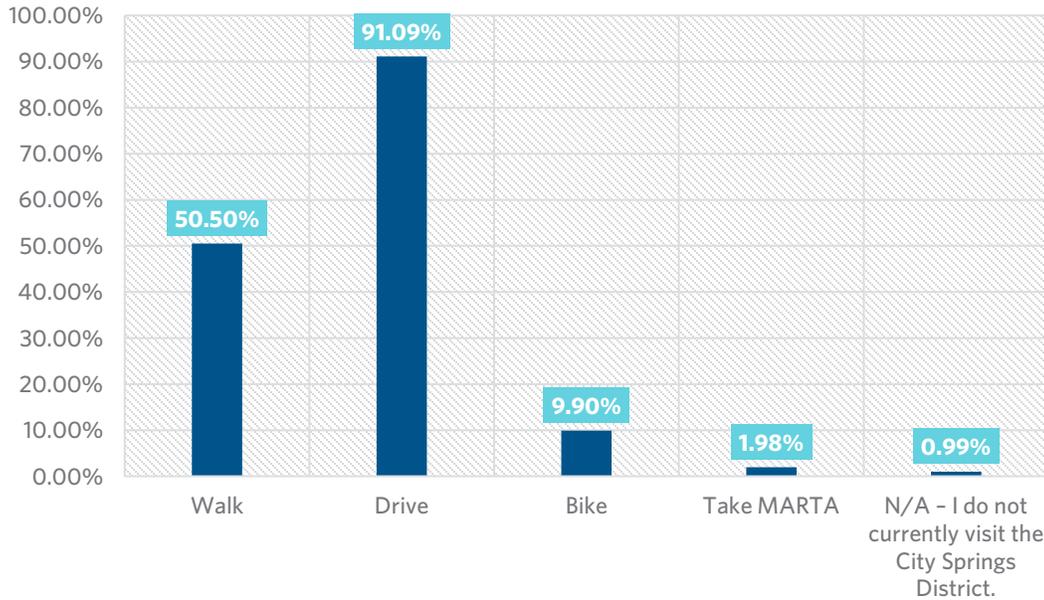
About one-third of survey participants live inside the study area with two respondents indicating that they live just outside of the City Springs District boundaries. Most participants do not live in the study area.

3. How often do you visit the City Springs District?  
101 responses



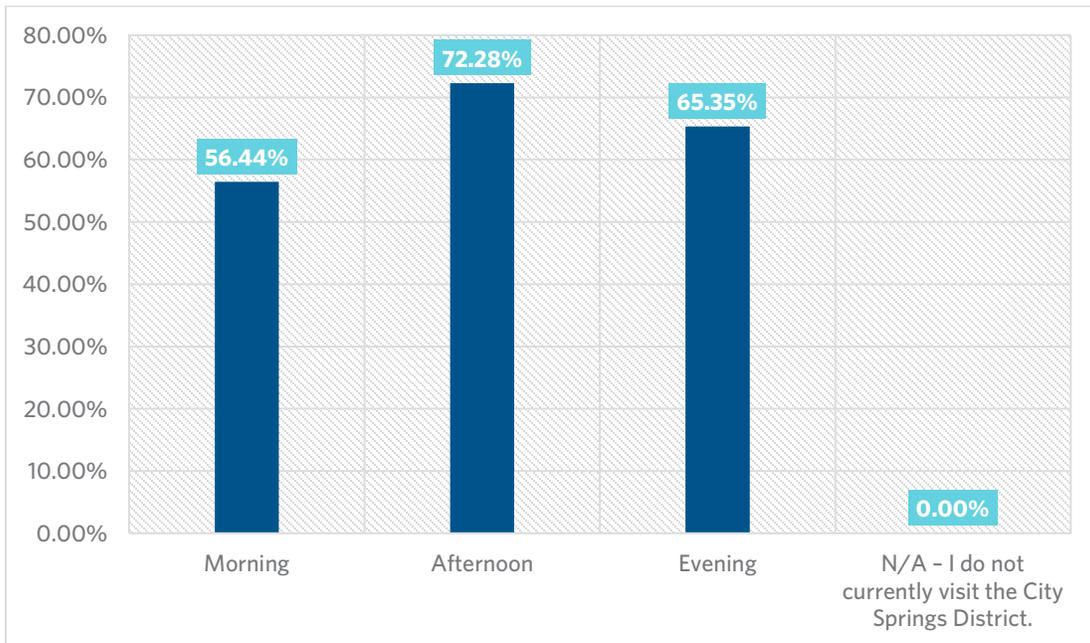
Most respondents claim they have visited the City Springs District often. There were no responses for the participants who visit the district less frequent than monthly.

4. How do you travel to and around the City Springs District? Please choose all that apply.  
101 responses



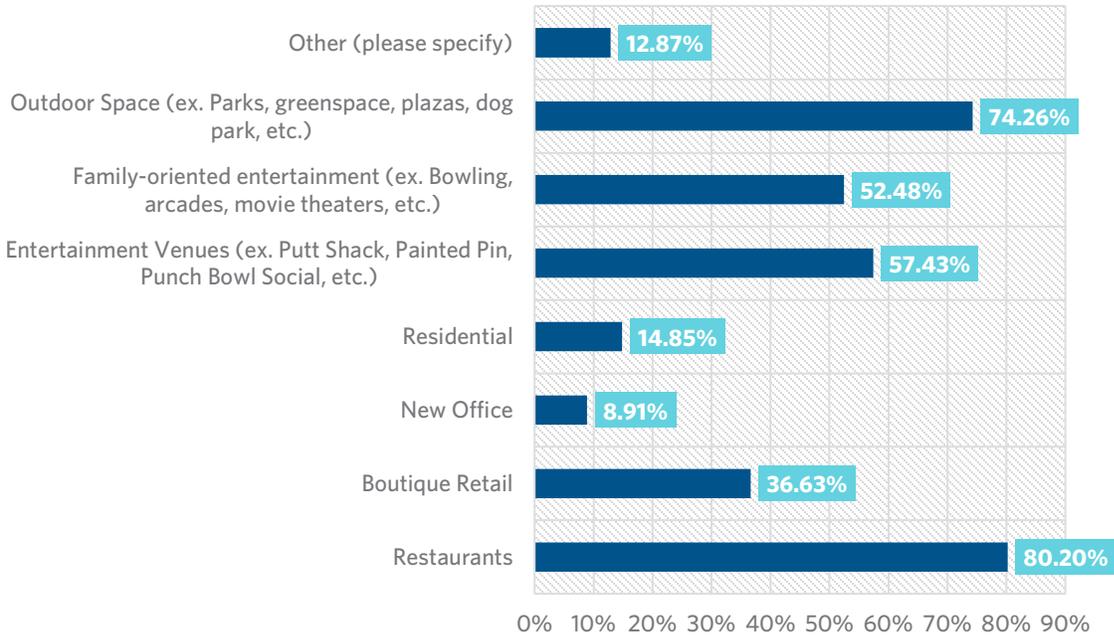
Almost all participants drive as a means of transportation to and around the District. Walking also seems to be a popular mode, followed by biking and transit as the least used options.

5. If you visit the City Springs District, what time of day do you typically visit? Please choose all that apply.  
101 responses



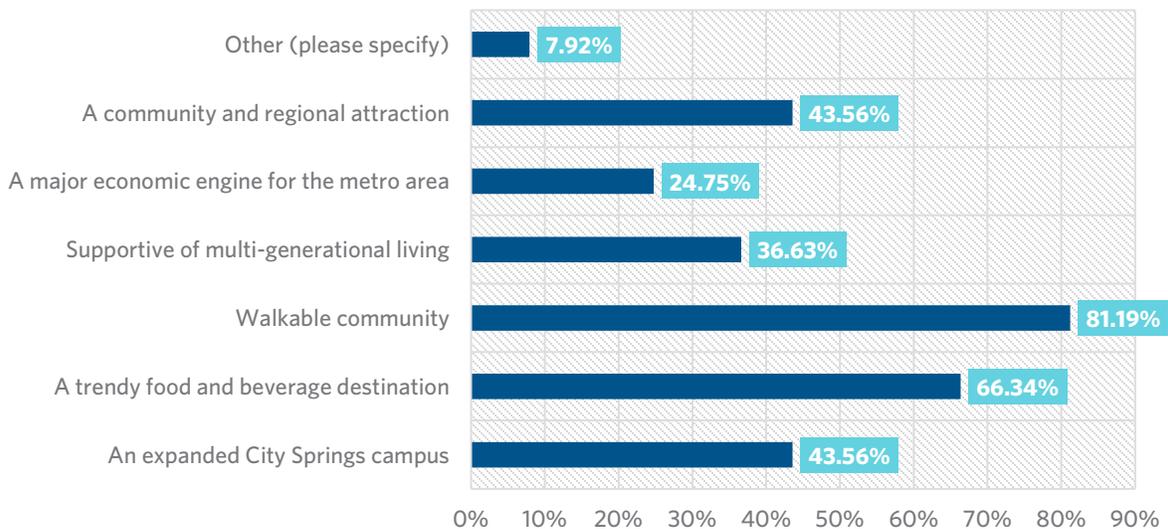
The amount of trips to the City Springs District seems to be evenly distributed with the afternoon being the most popular time to visit.

6. Are there specific businesses or general types of businesses that you'd like to see in the district?  
101 responses



Survey responses indicate restaurants and outdoor space are most desired. Others stated that family-friendly businesses with direct access to the City Green would greatly complement City Springs.

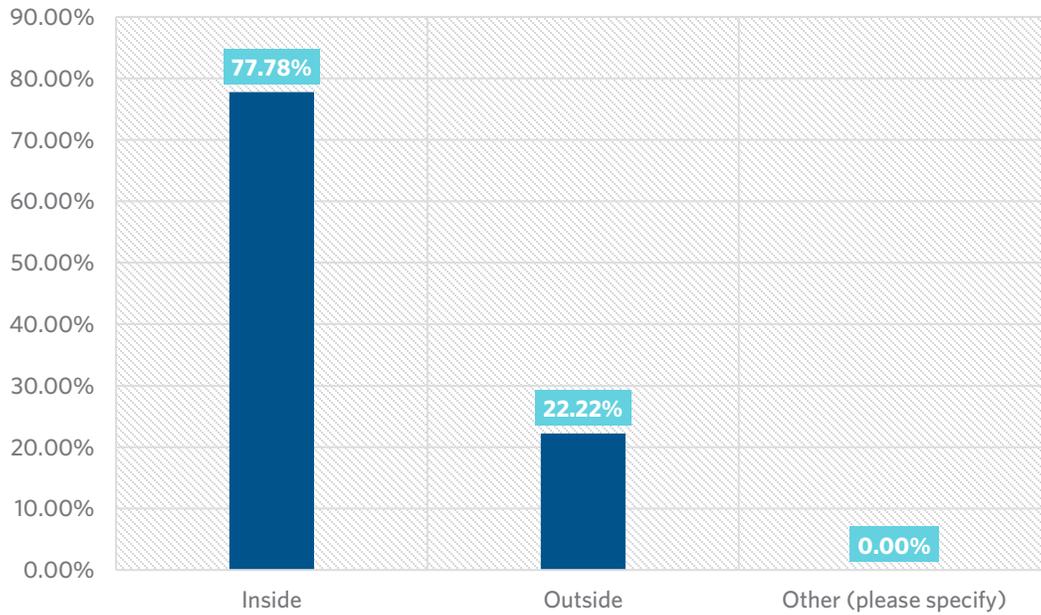
7. What does the future of the study area represent to Sandy Springs? Select all that apply.  
101 responses



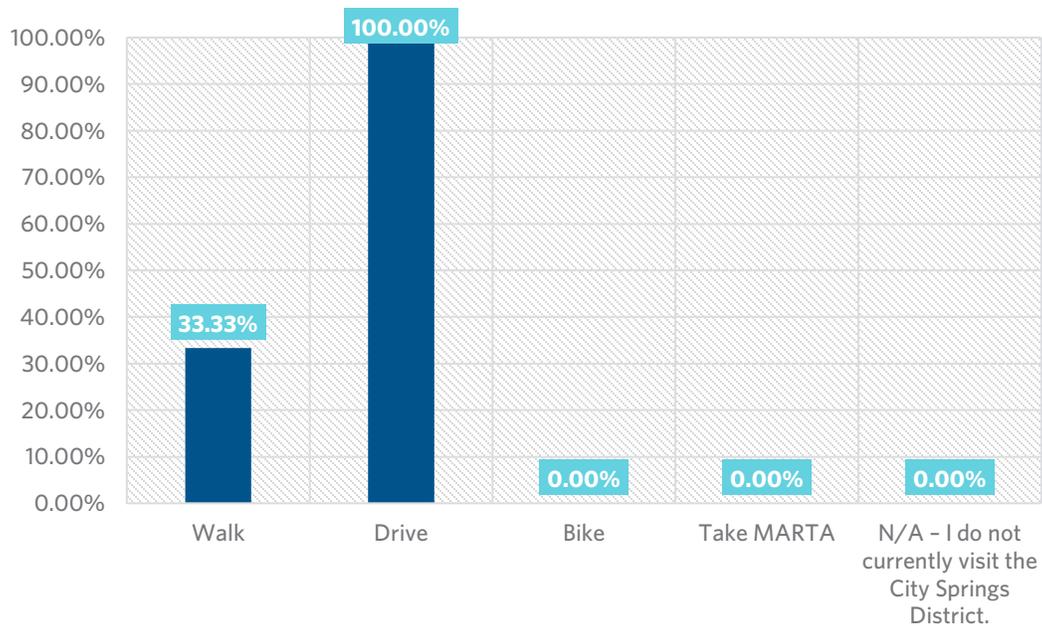
Most indicated that the future of City Springs represents a walkable community and a trendy food & beverage destination.

## BUSINESS OWNER RESPONSES

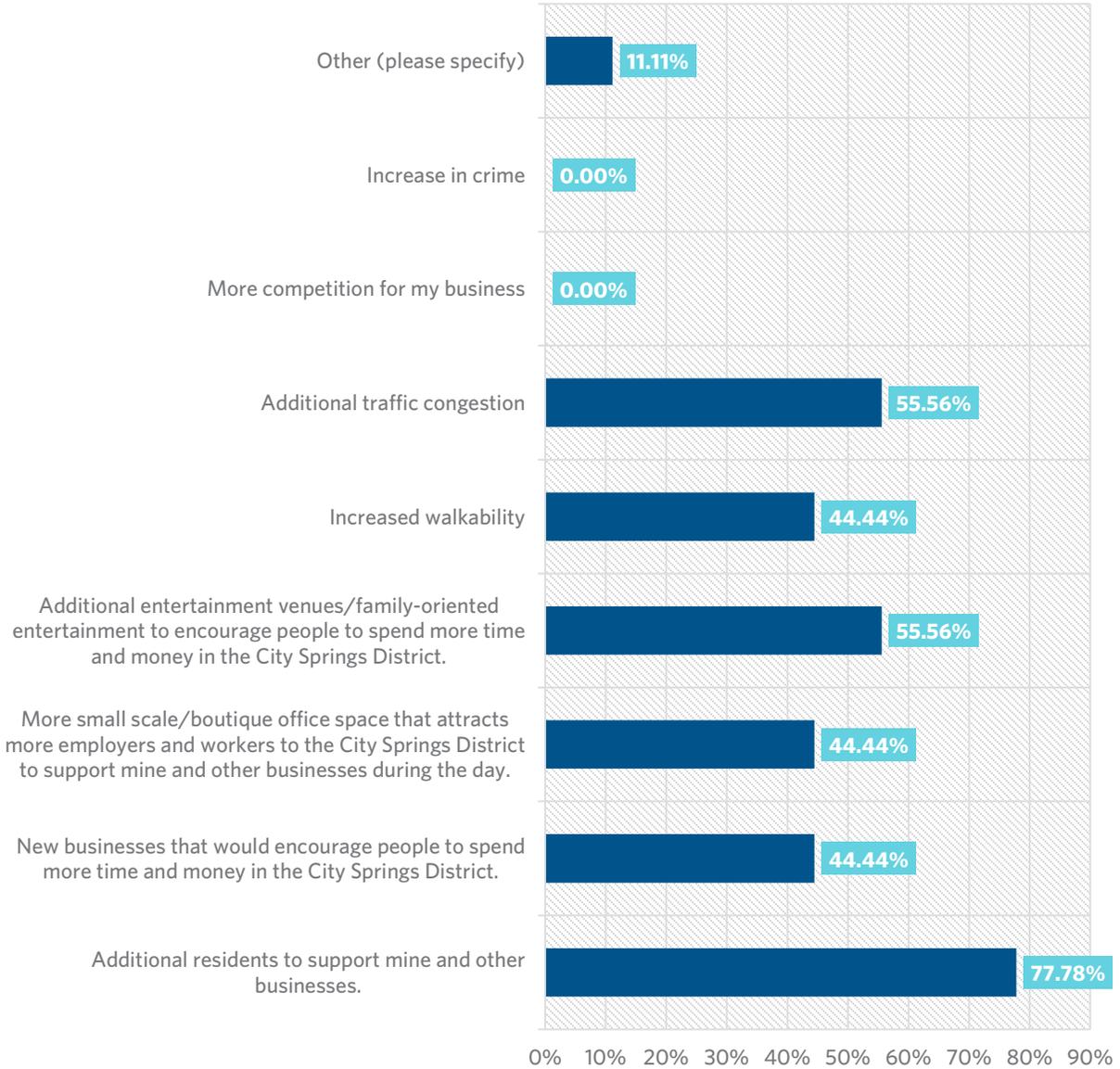
8. Is your business inside or outside of the City Springs District?  
9 responses



9. How do you travel to and around the City Springs District? Please choose all that apply.  
9 responses

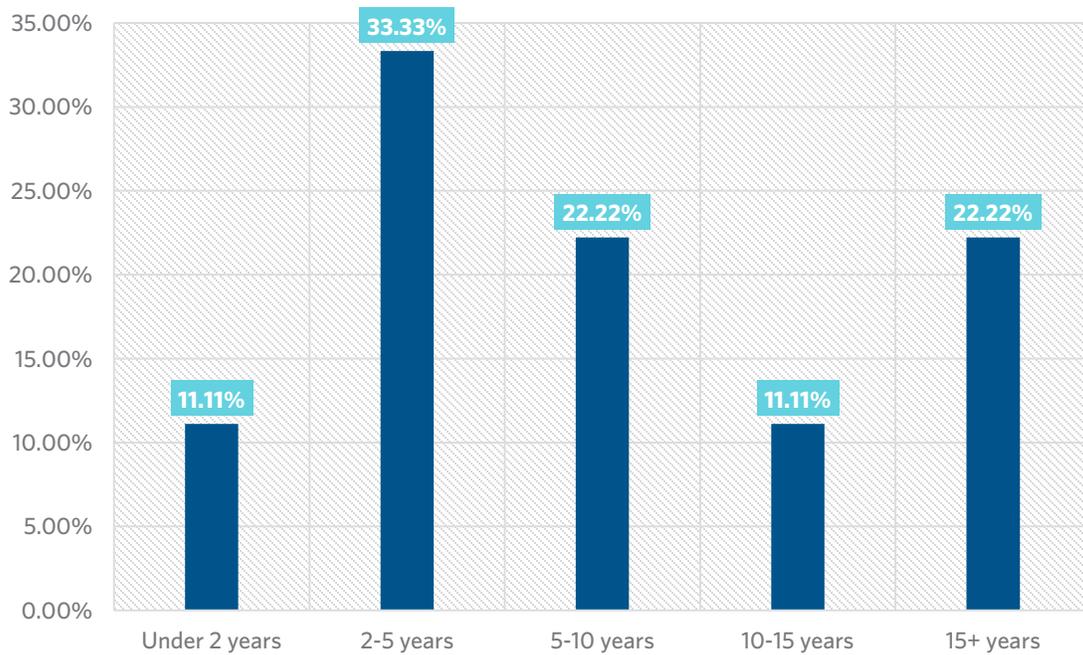


10. What benefits and/or challenges do you think infill or redevelopment in the City Springs District would bring to your business? Please choose all that apply.  
9 responses

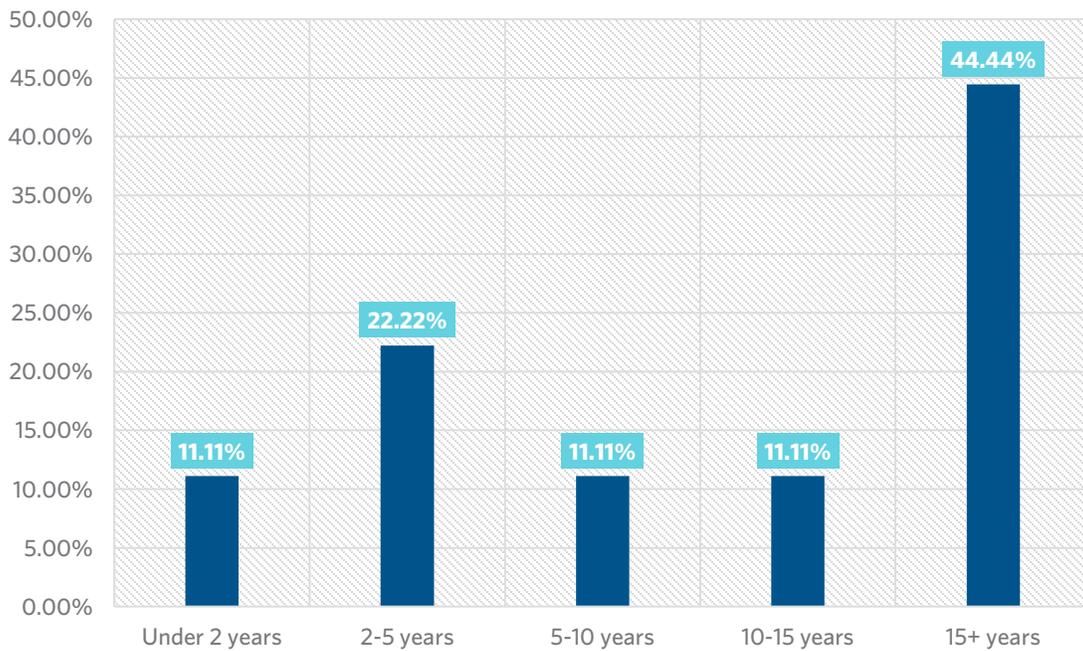


Most business owners that responded to the survey believe that additional residential development will bring them more business. They also believe complementary entertainment can attract more users to the District bringing more exposure to the businesses in the area. Crime and more competition were not of concern to business owners.

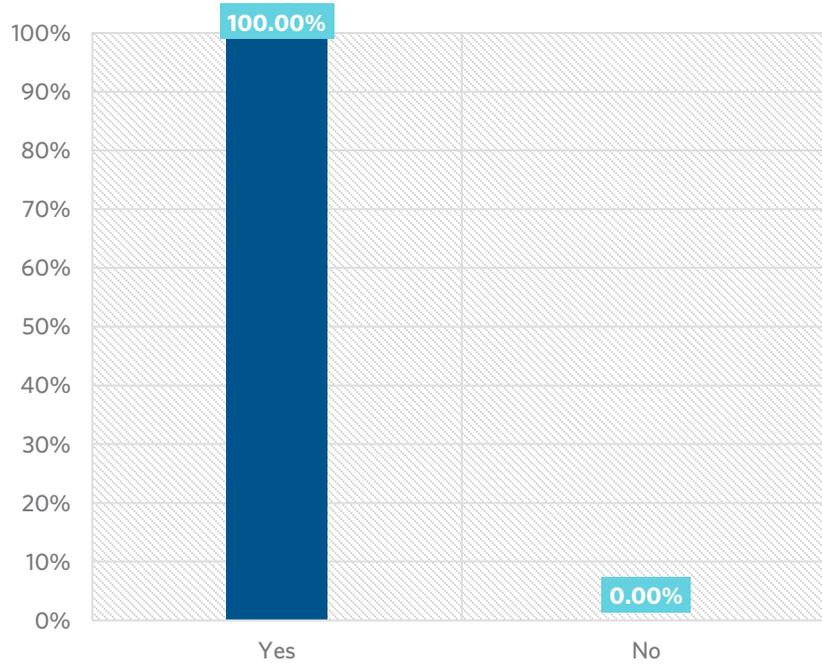
11. How long has your business been in the City Springs District?  
9 responses



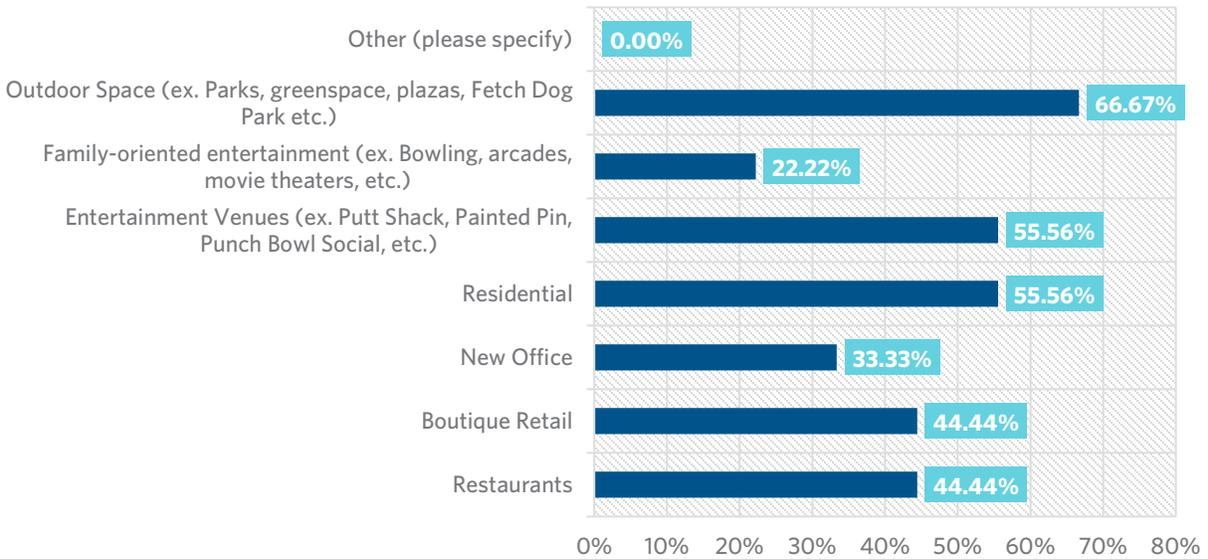
12. How long have you owned the business?  
9 responses



13. Do you visit other businesses, restaurants, and amenities within the City Springs District?  
9 responses



14. Are there specific types of businesses/development you'd like to see that might be mutually beneficial to your current operation?  
9 responses



Most business owners believe that outdoor space, entertainment venues, and new residential development would be mutually beneficial to their businesses.

## QUESTIONS FOR ALL RESPONDENTS

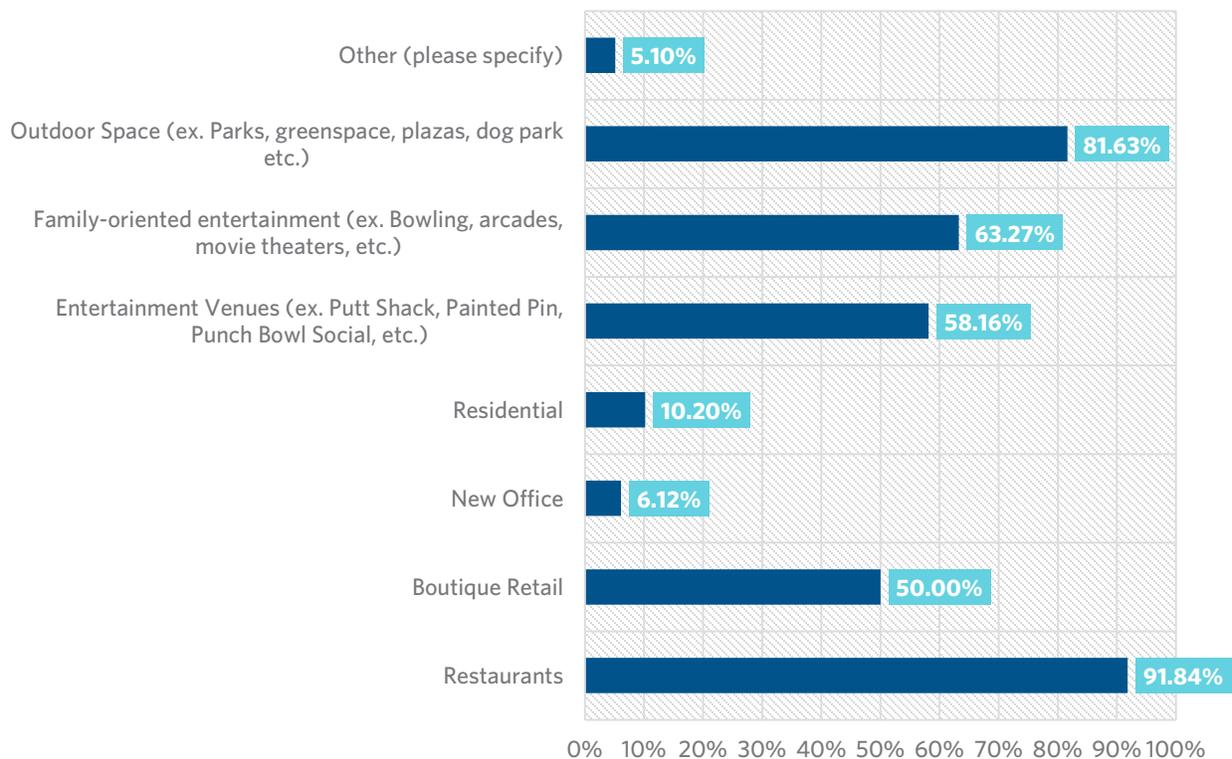
15. Rate the City Springs District’s existing transportation network (transit, bike/ped, vehicular circulation, parking). Please rate from 1 – 5, with one being very poor, and 5 being very good.

Participants rated the transportation network with an average score of **2.5**.

97 responses

16. Are there specific businesses or general types of businesses that you’d like to see in the district?

98 responses (These responses represent residents and business owners)



Participants primarily selected restaurants, outdoor space, and entertainment venues as desired business types in City Springs. “Other” responses also referenced additional entertainment such as breweries, comedy clubs, etc.

17. Ultimately, additional residential development may need to occur over the next 20 years. Think about the scale, look, and feel of what that might look like by selecting photos of residential developments you think are appropriate for the City Springs District. The most-selected images are outlined in blue.

94 responses



18. City Springs is still projected to grow as a place of work for many metro area residents. Select photos of the type of office developments you think are appropriate in the City Springs District! The most-selected images are outlined in blue.

94 responses



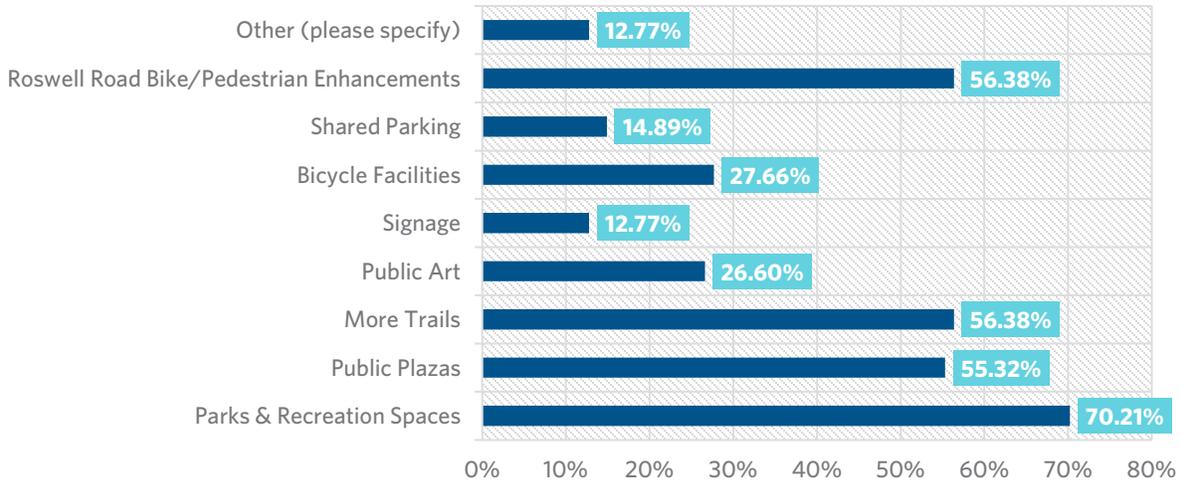
19. Looking to the future, shopping, food and beverage, and other retail options could look different as properties redevelop or rehabilitate. Select photos of the types of retail developments you think are appropriate for the City Springs District. The most-selected images are outlined in blue. 95 responses



20. Select photos of the types of amenities you think are appropriate in City Springs District! The most-selected images are outlined in blue. 93 responses

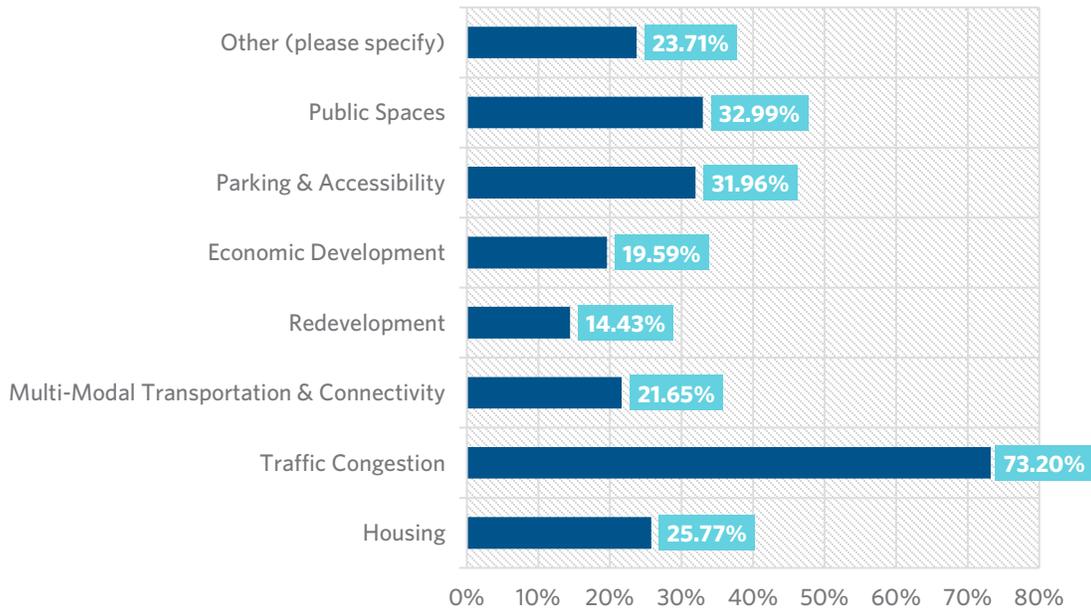


21. What types of amenities are you most interested in seeing added in the study area? Select all that apply.  
94 responses



Most respondents seem interested in additional park space, plazas, trails, and bike/ped improvements along Roswell Road.

22. What are your top concerns for the City Springs area? Select up to 3.  
97 responses



Traffic congestion is the main concern of City Springs stakeholders. Others indicated that existing sidewalks need improvement and that the city's roads are dangerous for bicyclists and pedestrians.

23. Is there anything else you want to share with us as it relates to the City Springs Master Plan Update?

43 responses

Survey participants reiterated the importance of a few key themes identified throughout the survey. The responses appear exactly as submitted and were not edited or altered in any way.

- *More attractions and good design are key to creating a walkable City Springs; Downtown Alpharetta is often cited as a desirable precedent.*
- *Pedestrian safety is a priority to residents who wish to walk more.*
- *The City should continue addressing Roswell Road traffic.*
- *Diverse retail offerings (additional restaurants, shops, etc.) will make the study areas more distinct and attractive to people of different ages.*
- *Balance parking and alternative modes of transportation to serve users now and in the future.*
- *Quality architecture is a priority for future development.*



## Farmers' Market Pop-Up Event – Summary

June 25, 2022

Members of the planning team hosted a pop-up event for the City Springs Master Plan on Saturday, June 25, 2022, from 9 AM – 12 PM at the weekly Sandy Springs Farmers Market held on the City Green. This pop-up presented an opportunity for the planning team to be out in the community and reach Sandy Springs residents who did not attend the in-person Open House on May 10th or participate in the first online engagement opportunity. During the event, the team educated participants on the project and planning process and gathered additional feedback on the draft Vision Statement, Planning Principles, and visual preference survey conducted at the open house.

### Pop-Up Overview

#### Event Format:

This pop-up was an informal event where the planning team set up in a tent at the Sandy Springs Farmers' Market – a weekly event that occurs from April to November. The event gave attendees the opportunity to engage with members of the planning team one-on-one to ask questions and provide input. The planning team provided educational information about the project and allowed participants to give feedback and input on a variety of plan elements. Following is a detailed outline of the pop-up event agenda and content:



*Pop-Up Event, Sandy Springs Farmer's Market*

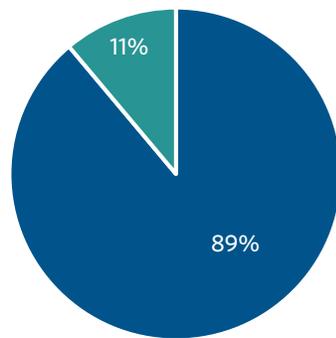
1. **About the Master Plan:** Members of the planning team greeted attendees and explained the City Springs Master Plan process and goals.
2. **Who's Here Today?:** Participants signed in and indicated on a map where they live and how long they have lived in the area. They also indicated whether they work inside or outside the city.
3. **Vision Statement & Planning Principles:** Participants reviewed the draft vision statement and planning principles, then used sticky notes to give feedback on these items if they had any comments or additional ideas.
4. **Image Preference Activity:** Participants used sticker dots to indicate their preference for future residential, retail, office, and hotel building typologies, and amenity development.
5. **Exit Poll:** Participants completed a short poll using sticker dots where they shared their biggest concerns, desired amenities, and what the study area represents to Sandy Springs. The team provided a QR code for the poll for those who did not have time to complete it in person at the event.
6. **Comment Forms:** The planning team provided comment forms to participants who wanted to provide additional feedback.

- Handout:** The planning team provided a flyer to all participants with a QR code to access the exit poll, the project website address, and the date of the next public open house.

### Participants

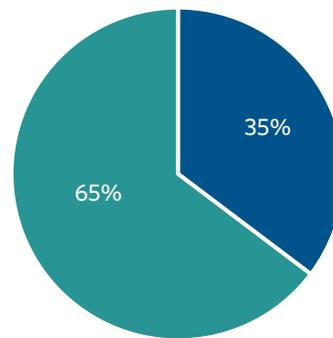
The planning team asked participants to complete two welcome activities: One board asked the question: 'Who's Here Tonight?' and another asked, 'How Long Have You Been Around the Area.' Below are the results of those questions showing that the majority of those who completed the activity live inside Sandy Springs, work outside of Sandy Springs, and most of the attendees have been in the area since 2000-2020.

**Who's Here Tonight?**  
Where do you live?



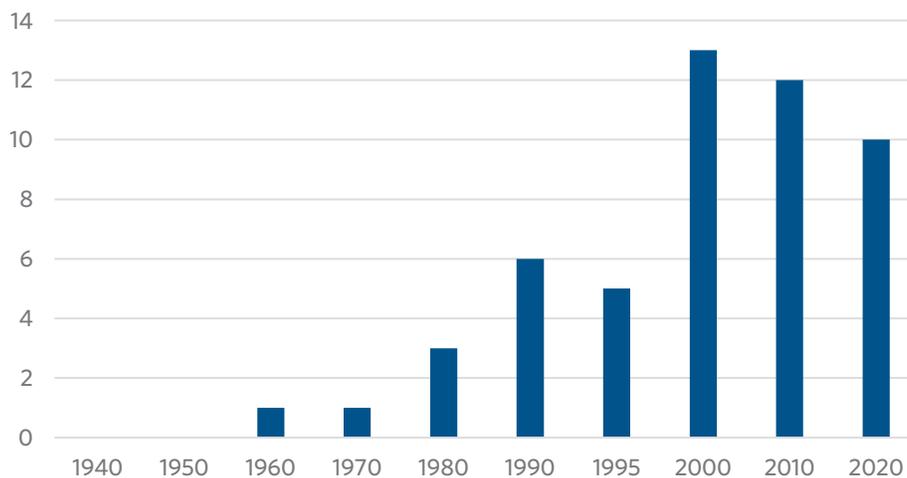
- I live inside of Sandy Springs
- I live outside of Sandy Springs

**Who's Here Tonight?**  
Where do you work?



- I work inside of Sandy Springs
- I work outside of Sandy Springs

**How Long Have You Been In The Area?**



## Input Overview

### Vision Statement & Planning Principles

Participants had the opportunity to review the draft Vision Statement and Planning Principles for the master plan and provide feedback. The planning team developed these items, which will help guide the policies, programs, and projects included in the plan, based on previous input from the community and stakeholders. Following is a list of the comments received – please note that comments are shown exactly as written by pop-up participants:

Vision Statement	
	<i>No Comments.</i>
Planning Principles	
1. Leverage existing and new infrastructure opportunities to promote safe, multi-modal connectivity.	
	<i>Bike Share - lanes, ease of use; Pedestrians should be high priority.</i>
	<i>Must have convenient parking so can use as a learning/eat/play/entertainment center for those too far to walk but live in Sandy Springs.</i>
2. Reinforce a sense of place and community identity by expanding a network of neighborhoods and outdoor spaces to encourage activity, interaction, and gathering.	
	<i>Connect with the Master PATH Trail Plan; provide connections to neighborhoods.</i>
	<i>More sidewalks with subdivisions.</i>
	<i>Use 'Natural Play' opportunities; DO NOT need large play equipment like at Overlook; Animals to climb on stones in brook at HHS, etc.</i>
3. Invigorate the District's built environment by encouraging high quality building and implementing pedestrian scale urban design practices.	
	<i>Yes, pedestrians and trees.</i>
	<i>Why modern? (which may go out of style).</i>
	<i>Modern never goes out of style.</i>
	<i>Maintain the history of the city. Modern isn't always better.</i>
4. Continue to catalyze market-driven private investment and foster a vibrant living, dining, entertainment, and shopping destination.	
	<i>No Comments.</i>

### Visual Preference Activities

Display boards were provided for different land uses and amenities that showed images of residential, office, retail, and hotels. Participants placed dots next to images that showed their preferred development style and use examples that correspond with their vision for the City Springs District. The key takeaways from this activity include the following and largely confirm what the project team has heard in previous engagement efforts:

- The preferred residential images show a desire for human scale residential development that provides a mix of architectural styles and a comfortable neighborhood feeling.
- The preferred office images illustrate modern office buildings that are accompanied by greenspace or other quasi-public spaces and designed with high fenestration.
- The preferred retail and food and beverage typologies show a desire for a walkable city center with both public and private seating areas and greenspace.
- The preferred amenities images illustrate that trail (bike and pedestrian), gathering spaces, and public art installations are important to the participants.



*Participants providing input on their preferred development styles.*



*Participants providing input on their preferred development styles*



1. Ultimately, additional may need to occur over the next 20 years. Think about the scale, look, and feel of what that might look like by selecting photos of residential developments you think are appropriate for the City Springs District. The most-selected images are outlined in blue.



2. City Springs is still projected to grow as a place of work for many metro area residents. Select photos of the type of office developments you think are appropriate in the City Springs District! The most-selected images are outlined in blue.



3. Looking to the future, shopping, food and beverage, and other retail options could look different as properties redevelop or rehabilitate. Select photos of the types of retail developments you think are appropriate for the City Springs District. The most-selected images are outlined in blue.



4. Select photos of the types of amenities you think are appropriate in the City Springs District! The most-selected images are outlined in blue.



## Comment Forms

The planning team received a total of seven comment forms. Following are the comments included on the forms; please note that these comments are provided exactly as they appeared on the forms, other than correction of some spelling or punctuation errors.

<b>Form 1:</b> Name and email address of participant wishing to be added to the project update email distribution list (information withheld to protect privacy).
<b>Form 2:</b> Would like to see more play areas for children and a dog park.
<b>Form 3:</b> Roswell Road just needs some simple improvements that are not even too expensive <ul style="list-style-type: none"><li>• Trees along sidewalk</li><li>• Median (where not impacting traffic)</li><li>• Underground utilities lines</li><li>• Public art</li><li>• "Mask" parking lots better so can't see cars as much - without impacting business</li><li>• More beautification on Roswell Rd.</li></ul>
<b>Form 4:</b> Co-op living for residents
<b>Form 5:</b> <ul style="list-style-type: none"><li>• Finish Veterans' Park</li><li>• Need sidewalks</li><li>• Higher quality retail - dept. store</li></ul>
<b>Form 6:</b> I've been living in lovely Sandy Springs since I was 48 years of age - I'm now 63! I would like to age gracefully in SS and to be able to enjoy the city among all ages of folks - and the nature! I love the access to nearby trails, etc. Please keep in mind the 65+ peeps who want to participate and live in AFFORDABLE housing. Thank you for wanting to know your residents' thoughts and concerns.
<b>Form 7:</b> No apartments, no condos, too many

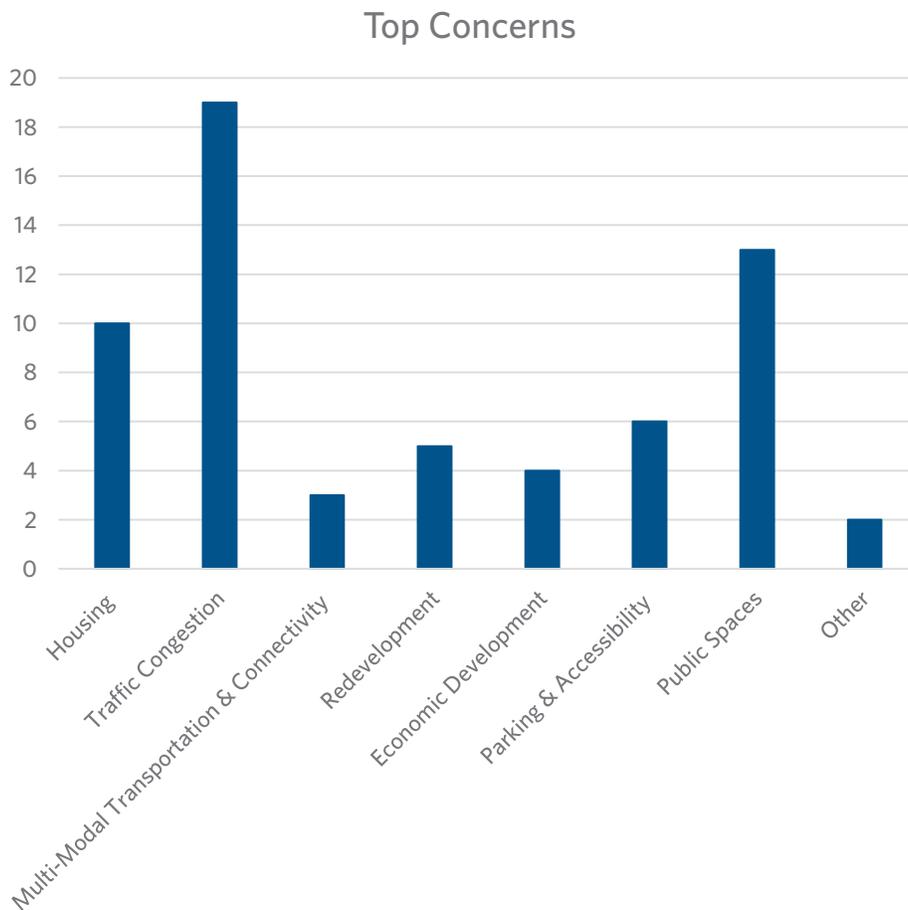
## Exit Poll

An exit poll helps to summarize the sentiments of event participants after they have had the opportunity to learn about the project and planning process. Participants completed the exit poll in-person using sticker dots. Planning team members provided all participants with a flyer that included the QR code to access the exit poll online if they did not have time to complete it in person and the project website address. The graphs below summarize the input received from the exit poll.



Participants completing the Exit Poll.

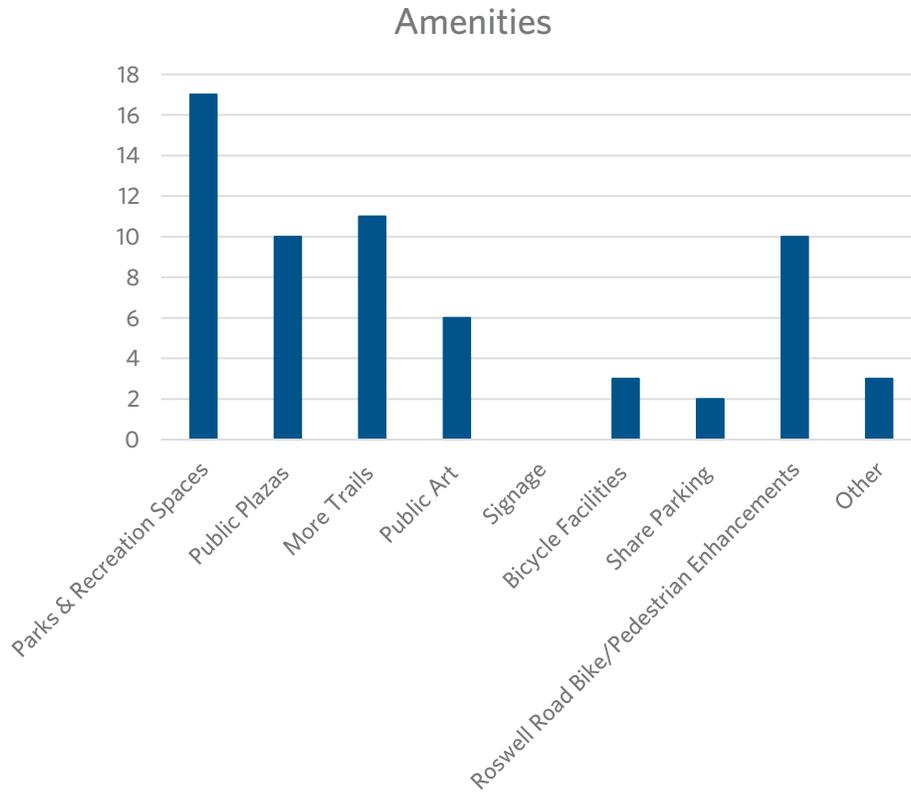
**Question 1:** *What are your top 3 concerns for the City Springs area?*  
62 responses (participants could choose up to 3 responses)



Other (write in) Responses

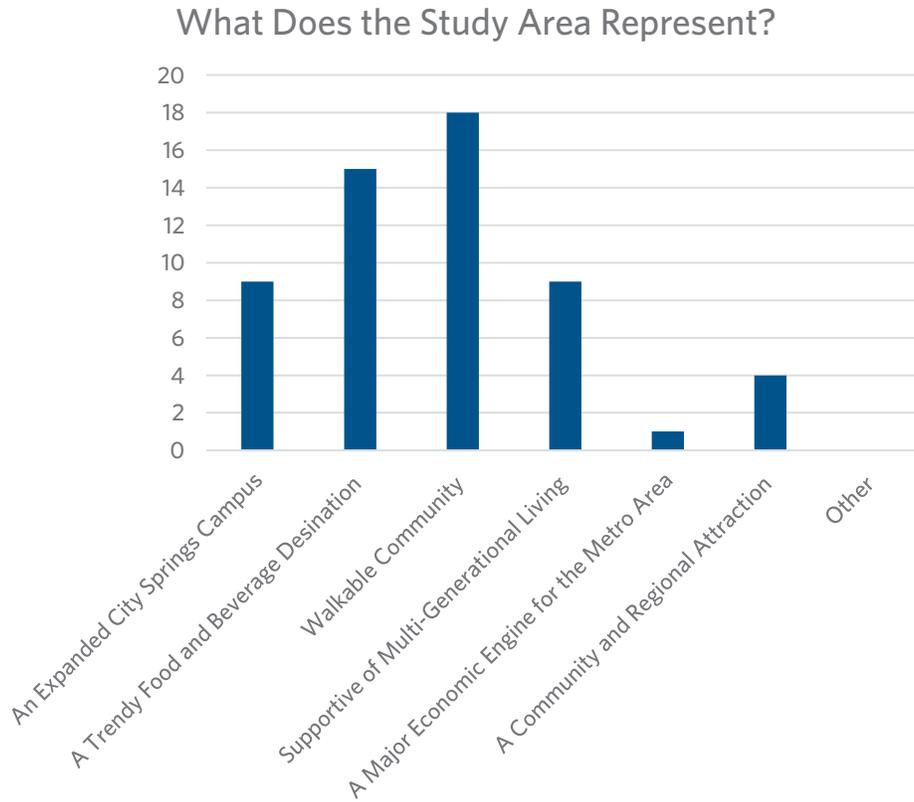
Listen to Constituents

**Question 2:** *What types of amenities are you most interested in seeing added in the study area?*  
 62 responses (participants could choose up to 5 responses)



<b>Other (write in) Responses</b>
Restaurants + locally owned, unique with outside spaces

**Question 3:** *What does the future of the study area represent to Sandy Springs?*  
56 responses (participants could choose 1 responses)





## Open House – Summary

### November 7, 2022

The second open house for the City Springs Master Plan was held on November 7, 2022, from 6:00-8:00PM at the City Springs 3<sup>rd</sup> Floor Conference Center. The goal of the event was to collect feedback on potential recommendations and to determine whether to refine, remove, or add to the action plan and strategy. The event was attended by at least 62 people.

### Open House Overview

#### Meeting Format:

The Open House event had several active and passive opportunities for attendees to learn about the project and give input. The planning team created several boards that informed attendees about the City Springs Master Plan update, including the goals of the plan, the Vision Statement, Planning Principles and potential recommendations.

1. **Welcome Activity:** Participants signed in and indicated on a map where they live and how long they have lived in the area.
2. **Looping Presentation:** A looping presentation that informed attendees about the Master Plan update, the Vision Statement, and Planning Principles was shown throughout the duration of the meeting.
3. **About the Master Plan:** Participants learned about why the city is updating the City Springs Master Plan and what will be included in the plan.
4. **Program & Policy Recommendations:** Participants reviewed draft program and policy recommendations and were asked to use sticker dots to indicate whether or not the city should prioritize the recommendation.
5. **Redevelopment & Investment Recommendations:** Attendees were asked to participate using sticker dots to indicate if they liked or disliked the idea to gauge preferred styles of development and potential changes to city-owned properties.
6. **Opportunity Sites:** Large opportunity site maps were placed on tables and participants used stickers and tags to indicate what type of development they think would be appropriate at the site.
7. **Public Realm Improvements:** Participants reviewed draft public realm improvement recommendations and were asked to use sticker dots to indicate whether or not the city should prioritize the recommendation.

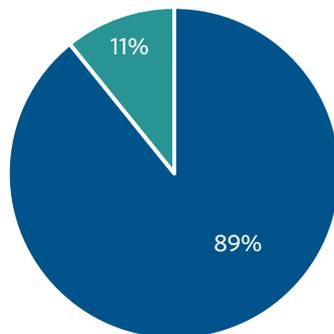


Participants reviewing the public realm improvement recommendations with city staff.

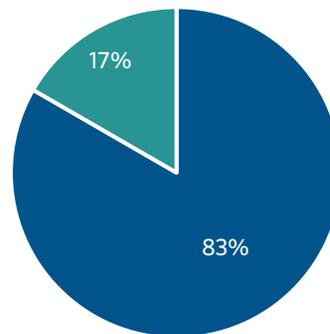
## Participants

Upon entry, attendees were asked to answer two welcome questions: (1) A board asked the question: 'Who's Here Tonight?' and another asked, (2) 'How Long Have You Been Around the Area.' Below are the results of those questions showing that the majority of those who registered live inside Sandy Springs, work outside of Sandy Springs, and the majority of the attendees have been in the area since 2000-2020.

**Who's Here Tonight**  
Where do you live?



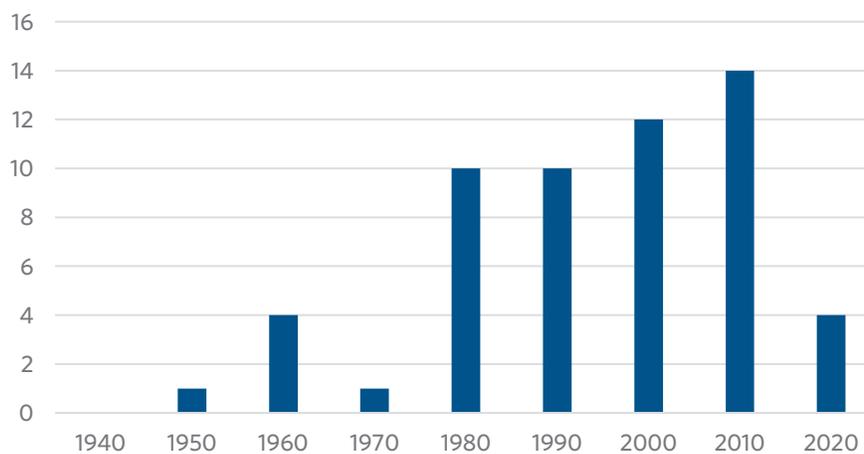
**Who's Here Tonight?**  
Where do you work?



- I live inside of Sandy Springs
- I live outside of Sandy Springs

- I work inside of Sandy Springs
- I work outside of Sandy Springs

**How Long Have You Been Around the Area?**



## Input Overview

### Program & Policy Recommendations

Participants were invited to review each draft program and policy recommendation and share their thoughts on prioritization. A sticker could be used to say, 'This should be prioritized' or 'This should not be prioritized.' Attendees were asked to vote once per recommendation. Below is a summary of the input received.

ID	RECOMMENDATIONS	PRIORITIZE	DO NOT PRIORITIZE
Program & Policy Recommendations (PP)			
PP.1	Continue building out the street grid established in the Sandy Springs Technical Manual (Section 2- Street Framework and Mobility Maps: Typical Sections and Details by Street) as new development or major site changes occur.	11	0
PP.2	Evaluate opportunities for Development Authority involvement in promoting homeownership in City Springs.	9	4
PP.3	Consider new zoning tools to encourage redevelopment and other site enhancements by providing mutually beneficial incentives to property owners within redevelopment and rehabilitation projects.	12	1
PP.4	Consider a property improvement program to provide property owners a means to pursue aesthetic and outdoor amenity enhancements and improve the overall look and experience within the City Springs District. Evaluate opportunities to support such private sector reinvestment through waivers, grants, low-interest loans, and/or tax incentives.	15	0
PP.5	Expand established branding and wayfinding for the City Springs campus to the broader District.	11	1
PP.6	Establish City Springs Design Guidelines for developers and architects to abide by, guiding cohesive design throughout the District.	15	1
PP.7	Expand and implement park improvements and encourage future pedestrian connections to Allen Road Park.	12	0
PP.8	Continue to partner with MARTA for expanded and enhanced transit service.	5	4
PP.9	Continue to partner with MARTA for additional investment in existing and new transit facilities (i.e. additional bus shelters, benches, etc.).	6	5
PP.10	To support the development vision, zoning should appropriately reflect 4 to 6 stories in Tier 1 areas of the City Springs District core.	11	6
PP.11	To support the development vision, zoning should appropriately reflect 2 to 4 stories in Tier 2 areas of the City Springs District. These areas provide a gradual height transition from City Springs District core to surrounding protected neighborhoods.	17	4
PP.12	Construct a new facility to house the Anne Frank in the World Exhibit, Georgia Holocaust Memorial, and other programming at 6110 Blue Stone Road.	1	7
PP.13	Consider additional opportunities for park network expansion by partnering with property owners and developers and pursuing strategic land acquisition where appropriate.	15	0
PP.14	Consider elements of this plan's parking strategy during the development approval process to accommodate district growth and future demand for public parking.	10	0
PP.15	Conduct feasibility analysis for a regional stormwater management strategy.	8	2
PP.16*	Review and consider alternatives to the steel and concrete construction requirement to mitigate impact on private development due to increased construction cost.	N/A	N/A

\*This recommendation was added after the Public Meeting Open House.

## Redevelopment & Investment Recommendations

Participants were invited to review each draft redevelopment & investment recommendation and share their thoughts on prioritization. A sticker could be used to say, 'This should be prioritized' or 'This should not be prioritized.' Attendees were asked to vote once per recommendation. Below is a summary of the input received.

### Redevelopment Ideas

ID	RECOMMENDATIONS	PRIORITIZE	DO NOT PRIORITIZE
Redevelopment Ideas			
	Townhomes fronting pedestrian oriented pathways	14	8
	Mixed-use Office, Services, Food and Beverage	14	10
	A boutique hotel unique to Sandy Springs	16	11
	Destination Restaurants	32	1
	Brewery and Distillery Cluster	19	7
	Artist Studios and Co-working Spaces	22	5
	Mid-rise Condos/Apartments	9	12
	Active Adult Living and Medical/Wellness Cluster	19	6

### Opportunity Sites

Large table maps were provided so participants could provide input on what they want to see on the opportunity sites identified by the project team. Key takeaways include:

#### RI.1: Hilderbrand Drive at Blue Stone Road

- Alternative mobility options are important, especially bike lanes along Mount Vernon Highway.
- Interparcel connectivity is desired.
- Apartments should not be prioritized.
- Townhomes may be appropriate.

#### RI.2: Sandy Springs Circle, Johnson Ferry Road, and Roswell Road block

- Unique, small retail and restaurants should be prioritized.
- Apartments should not be prioritized.
- Condo or townhome over retail may be appropriate.
- More trash cans are needed along Sandy Springs Circle.

#### RI.3: Roswell Road at Mount Vernon Highway

- Retail, restaurants, and office should be prioritized.
- Permitted uses should not include night clubs.
- May be an appropriate location for additional public parking.
- 2-3 story development may be appropriate.

#### RI.4: Sandy Springs Circle between Mount Vernon Highway and Hammond Drive

- Small business should not be pushed out.
- Housing types could vary here between rent and for-sale products.

#### RI.5: Hilderbrand Drive between Roswell Road and Boylston Drive

- Need better connections and safety along and across Roswell Road.
- May be a good location for food & beverage, arts & entertainment, and restaurants.

- Should be redeveloped.
- Apartments should not be prioritized.

**RI.6: Roswell Road and Sandy Springs Place**

- Alternative mobility options are important, especially bike lanes along Roswell Road.
- High end senior condos and mixed use may be appropriate.
- May be a good area for a corporation's headquarters.



Participants reviewing opportunity site maps and providing input.



## Public Realm Improvements Recommendations

Participants were invited to review each draft public realm recommendation and share their thoughts on prioritization. A sticker could be used to say, 'This should be prioritized' or 'This should not be prioritized.' Attendees were asked to vote once per recommendation. Below is a summary of the input received.

ID	RECOMMENDATIONS	PRIORITIZE	DO NOT PRIORITIZE
Public Realm Improvements (PRI)			
PRI.1	Establish an art walk east and west of the Georgia Power substation from Mount Vernon Highway to Hilderbrand Drive. consistent with Sec. 10.4.14 of the City of Sandy Springs Development Code.	21	1
PRI.2	Implement an experiential, mixed media art district/art walk to provide immersive pedestrian experiences for all City Springs users.	14	4
PRI.3	Activate Blue Stone Road as a main street by incorporating green infrastructure in the streetscape to address water quality, attracting development that brings a new sense of vibrancy and pedestrian activity to the street, and accommodates low vehicular speeds.	10	10
PRI.4	Activate Hilderband Drive as a main street by incorporating green infrastructure in the streetscape to address water quality, attracting development that brings a new sense of vibrancy and pedestrian activity to the street, and accommodates low vehicular speeds.	18	10
PRI.5	Extend Blue Stone Road south of Sandy Springs Place to Hammond Drive, continuing the main street concept to the south.	13	9
PRI.6	Extend the multi-use path to connect Hammond Drive to Cliftwood Drive to provide greater connectivity to Allen Road Park.	15	0
PRI.7	Consider connecting N Hampton Drive to Sandy Springs Circle with a multi-use path.	12	0
PRI.8	Update streetscape along Roswell Road to align with the 4-lane section with sidewalks as established in the Sandy Springs Technical Manual Section 2 - Street Framework and Mobility Maps: Typical Sections and Details by Street.	23	0
PRI.9	Update streetscape along Sandy Springs Place to align with the 2-lane section with sidewalks as established in the Sandy Springs Development Technical Manual Section 2 - Street Framework and Mobility Maps: Typical Sections and Details by Street.	13	1
PRI.10	Update streetscape along Carpenter Drive with the 2-lane section with sidewalks as established in the Sandy Springs Technical Manual Section 2 - Street Framework and Mobility Maps: Typical Sections and Details by Street.	6	1
PRI.11	Update streetscape along Cliftwood Drive with the 2-lane section with sidewalks as established in the Sandy Springs Technical Manual Section 2 - Street Framework and Mobility Maps: Typical Sections and Details by Street.	6	0
PRI.12	Update streetscape along Allen Road with the 2-lane section with sidewalks as established in the Sandy Springs Technical Manual Section 2 - Street Framework and Mobility Maps: Typical Sections and Details by Street.	7	0
PRI.13	Update streetscape along Hammond Drive with the 4-lane section with a landscaped median, on-street parking, and sidewalks as established in the Sandy Springs Technical Manual Section 2 - Street Framework and Mobility Maps: Typical Sections and Details by Street.	11	0
PRI.14	Update streetscape along Sandy Springs Circle from Johnson Ferry Road to Roswell Road with the 2-lane section with sidewalks as established in the Sandy Springs Technical Manual Section 2 - Street Framework and Mobility Maps: Typical Sections and Details by Street.	13	0
PRI.15	Update streetscape along Sandy Springs Circle from Hammond Drive to Allen Road with the 2-lane section with sidewalks as established in the Sandy Springs Technical Manual Section 2 - Street Framework and Mobility Maps: Typical Sections and Details by Street.	9	0
PRI.16	Update streetscape along Johnson Ferry Road west of Sandy Springs Circle with the 2-lane section with sidewalks as established in the Sandy Springs Technical Manual Section 2 - Street Framework and Mobility Maps: Typical Sections and Details by Street.	12	0

ID	RECOMMENDATIONS	PRIORITIZE	DO NOT PRIORITIZE
PRI.17	Update streetscape along Mountain Creek Road with the 2-lane section with sidewalks as established in the Sandy Springs Technical Manual Section 2 - Street Framework and Mobility Maps: Typical Sections and Details by Street.	1	0
PRI.19	Construct sidewalks along Lake Forrest Drive from Mount Vernon Highway to Hammond Drive.	15	1
PRI.20	Partner with private developers to create a pedestrian connection around Arlington Cemetery to form safe pedestrian connection along Mount Vernon Highway.	16	0
PRI.22	Prioritize sidewalk connections along Carpenter Drive and Mountain Creek Road with any potential redevelopment.	1	1
PRI.23	Establish the intersection of Johnson Ferry Road and Sandy Springs Circle as a gateway to signal arrival and a sense of place through gateway signage, thematic art, lighting, landscaping, etc.	11	1
PRI.24	Establish the intersection of Mount Vernon Highway and Sandy Springs Circle as a gateway to signal arrival and a sense of place through gateway signage, thematic art, lighting, landscaping, etc.	9	2
PRI.25	Establish the intersection of Hammond Drive and Sandy Springs Circle as a gateway to signal arrival and a sense of place through gateway signage, thematic art, lighting, landscaping, etc.	5	1
PRI.26	Establish the intersection of Cromwell Road and Roswell Rd as a gateway to signal arrival and a sense of place through gateway signage, thematic art, lighting, landscaping, etc.	0	4
PRI.27	Establish the intersection of Mount Vernon Highway/Johnson Ferry Road and Boylston Drive as a gateway to signal arrival and a sense of place through gateway signage, thematic art, lighting, landscaping, etc.	2	1
PRI.28	Establish the intersection of Hammond Drive and Roswell Road as a gateway to signal arrival and a sense of place through gateway signage, thematic art, lighting, landscaping, etc.	7	1
PRI.29	Establish Roswell Road at Allen Road/Carpenter Drive as a gateway to signal arrival and a sense of place through gateway signage, thematic art, lighting, landscaping, etc.	4	2
PRI.30	Enhance pedestrian crossings across the City Springs District to encourage greater pedestrian connectivity and safety where new intersections may form as the street network continues to form over time.	22	0
PRI.31	Consider opportunities to partner with private developers and/or property owners to implement an environmental park that expands City Springs District's park network and serves as a shared stormwater facility for adjacent future development.	19	1
PRI.32	Continue MARTA coordination to thoughtfully integrate the future I-285 Bus Rapid Transit (BRT) Station	6	1
PRI.35*	Complete Boylston Drive multi-use path. (T0058/S2104)	N/A	N/A
PRI.36*	Widen Hammond Drive east of Roswell Road (TS193/S2193). (TSPLOST)	N/A	N/A
PRI.37*	Complete Mount Vernon Highway/Johnson Ferry Road (TS191) Intersection Redesign. (TSPLOST)	N/A	N/A
PRI.38	Partner with private developers to create continued east-west pedestrian connection from Hilderband Drive to the west.	7	0

\*These projects are already underway by the City so were not included for public input.”

# Board photos

Below are images of the boards at the end of the November 7, 2022 Open House. These show what recommendations the public thinks should be prioritized.

## STREETSCAPE ENHANCEMENTS

The City of Sandy Springs is an active and vibrant community. We are committed to creating a more walkable and bikeable environment for all. This plan identifies key streetscape enhancement projects that will improve the pedestrian and bicycle experience throughout the City Springs District. The projects are prioritized based on their potential to improve the pedestrian and bicycle experience, as well as their potential to improve the overall quality of life in the City Springs District.

**What are streetscapes?**  
Streetscapes refer to the composition of street including the level, trees, sidewalks, and landscaping. All the elements make up the streetscape. Streetscape enhancements improve the pedestrian and bicycle experience throughout the City Springs District. The projects are prioritized based on their potential to improve the pedestrian and bicycle experience, as well as their potential to improve the overall quality of life in the City Springs District.

- PRI 8 - Enhance the Roswell Road streetscape to create a more walkable environment.**
- PRI 9 - Enhance the Sandy Springs Place streetscape to create a more walkable environment.**
- PRI 10 - Enhance the Carverton Drive streetscape to create a more walkable environment.**
- PRI 11 - Enhance the Cliffwood Drive streetscape to create a more walkable environment.**
- PRI 12 - Enhance the Allen Road streetscape to create a more walkable environment.**
- PRI 13 - Enhance the Hammond Drive streetscape to create a more walkable environment.**
- PRI 14 - Enhance the Sandy Springs Circle (Johnson Ferry Road to Roswell Road) streetscape to create a more walkable environment.**
- PRI 15 - Enhance the Sandy Springs Circle (Hammond Dr to Allen Rd) streetscape to create a more walkable environment.**
- PRI 16 - Construct sidewalks along Lee Forest Drive from Mount Vernon Hwy to Hammond Drive.**
- PRI 17 - Enhance the Mountain Creek Road streetscape to create a more walkable environment.**
- PRI 18 - Enhance the Johnson Ferry Road streetscape to create a more walkable environment.**
- PRI 19 - Enhance the Mountain Creek Road streetscape to create a more walkable environment.**
- PRI 20 - Prioritize sidewalk connections along Mountain Creek Road with any potential redevelopment.**

**Dark Sky Corridor**  
**PRI 21 - Widen Hammond Drive east of Roswell Road.**  
**PRI 22 - Complete Mt. Vernon Hwy/Johnson Ferry Rd Intersection Redesign.**

## STREETSCAPE ENHANCEMENTS

**PRI 3 - Activate Buestone Road as a main street.**  
**PRI 4 - Activate Hilderbrand Drive as a main street.**

**What are busstops?**  
**PRI 23 - Establish the intersection of Johnson Ferry Road and Sandy Springs Circle as a gateway to the City Springs District.**  
**PRI 24 - Establish the intersection of Hammond Drive and Sandy Springs Circle as a gateway to the City Springs District.**  
**PRI 25 - Establish the intersection of Roswell Road and Johnson Ferry Road as a gateway to the City Springs District.**  
**PRI 26 - Establish the intersection of Mt. Vernon Highway/Johnson Ferry Road and Boylston Drive as a gateway to the City Springs District.**  
**PRI 27 - Establish the intersection of Roswell Road at Allen Road/Carverton Drive as a gateway to the City Springs District.**  
**PRI 28 - Revitalize the intersection of Mt. Vernon Highway and Sandy Springs Circle as a gateway to the City Springs District.**  
**PRI 29 - Establish the intersection of Cranwell Road and Roswell Road as a gateway to the City Springs District.**  
**PRI 30 - Establish the intersection of Hammond Drive and Roswell Road as a gateway to the City Springs District.**

## ADDITIONAL MULTIMODAL ENHANCEMENTS

The City of Sandy Springs is an active and vibrant community. We are committed to creating a more walkable and bikeable environment for all. This plan identifies key multimodal enhancement projects that will improve the pedestrian and bicycle experience throughout the City Springs District. The projects are prioritized based on their potential to improve the pedestrian and bicycle experience, as well as their potential to improve the overall quality of life in the City Springs District.

- PRI 20 - Partner with private developers to create pedestrian connection around Arlington Community to form a pedestrian connection along Mount Vernon Highway.**
- PRI 21 - Partner with private developers to create continued east-west pedestrian connection from Hammond Drive to the west.**
- PRI 22 - Enhance pedestrian crossings across the City Springs District to encourage greater pedestrian connectivity and safety where new intersections may arise as the street network continues to form over time.**
- PRI 23 - Enhance the multi-use path to connect Hammond Drive to Cliffwood Drive to provide greater connectivity to Allen Road Park.**
- PRI 24 - Consider connecting N Hampton Drive to Sandy Springs Circle with a multi-use path.**
- PRI 25 - Complete Boylston Drive multi-use path.**
- PRI 26 - Continue MARTA coordination to thoughtfully integrate the future N-285 Bus Rapid Transit (BRT) Station.**
- PRI 27 - Continue to partner with MARTA for additional transit service and investment in the City Springs District. (i.e. additional bus shelters, benches, etc.)**

## REINFORCING SENSE OF PLACE

The City of Sandy Springs has a rich history and a vibrant community. We are committed to creating a more walkable and bikeable environment for all. This plan identifies key sense of place enhancement projects that will improve the pedestrian and bicycle experience throughout the City Springs District. The projects are prioritized based on their potential to improve the pedestrian and bicycle experience, as well as their potential to improve the overall quality of life in the City Springs District.

- PRI 1 - Establish an Arroyo Park east and west of the Georgia Power substation from Mount Vernon Highway to Johnson Ferry Road.**
- PRI 2 - Implement neighborhood, mixed-use art district art walk to provide immersive pedestrian experience for all City Springs users.**
- PRI 3 - Consider opportunities to partner with private developers/property owners to implement an environmental park that expands City Springs park network and serves as a shared amenity/facility for adjacent future developments.**
- PRI 4 - Establish a parkway along Johnson Ferry Road from Hammond Drive to Roswell Road.**
- PRI 5 - Establish a parkway along Hammond Drive from Johnson Ferry Road to Roswell Road.**
- PRI 6 - Establish a parkway along Roswell Road from Johnson Ferry Road to Hammond Drive.**
- PRI 7 - Establish a parkway along Johnson Ferry Road from Roswell Road to Hammond Drive.**
- PRI 8 - Establish a parkway along Hammond Drive from Roswell Road to Johnson Ferry Road.**
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- PRI 32 - Establish a parkway along Hammond Drive from Roswell Road to Johnson Ferry Road.**
- PRI 33 - Establish a parkway along Roswell Road from Johnson Ferry Road to Hammond Drive.**
- PRI 34 - Establish a parkway along Johnson Ferry Road from Hammond Drive to Roswell Road.**
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- PRI 99 - Establish a parkway along Roswell Road from Johnson Ferry Road to Hammond Drive.**
- PRI 100 - Establish a parkway along Johnson Ferry Road from Hammond Drive to Roswell Road.**



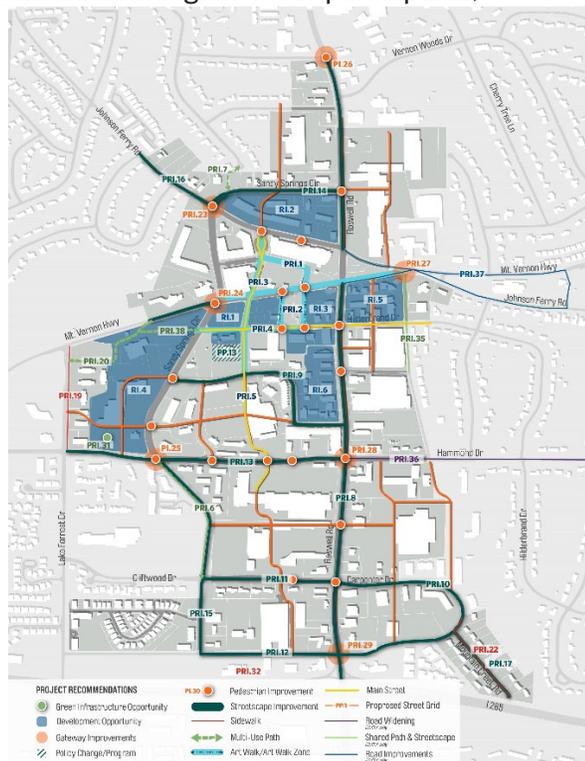
## CITY SPRINGS MASTER PLAN

### Online Survey #2 – Summary Live November 7th–18th

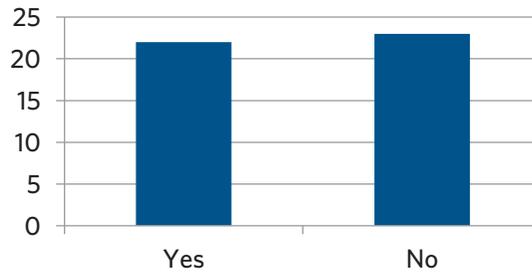
Three online surveys were created – one for each group of recommendations. The online surveys mirrored some of the boards from the November 7<sup>th</sup> Open House. Participants at the meeting could give their input through this survey, or in person. They were encouraged to pick one method or the other and most did it in person. The online survey was open after the meeting to capture any input from those who did not attend. The online surveys garnered **210 responses** combined between the three surveys from residents, property owners, and business owners. See the following summary of responses. Note that unless a question specifically states "Select all that apply" the respondents could only choose one option.

#### PUBLIC REALM IMPROVEMENTS RESPONSES

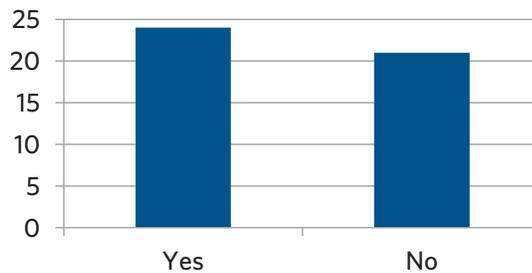
1. This survey allows you to share your thoughts on how each transportation, mobility, and streetscape recommendation within the City Springs Master Plan should be prioritized. Below, you will see a map of all the master plan recommendations. Please refer back to this map as needed or keep it open in another tab for reference by clicking [here](#).  
17 Responses (this was an acknowledgement for participants)



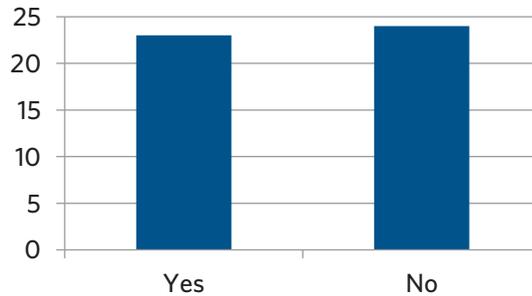
2. PRI.3 - Activate Bluestone Road as a main street. Should the City prioritize this?  
45 Responses



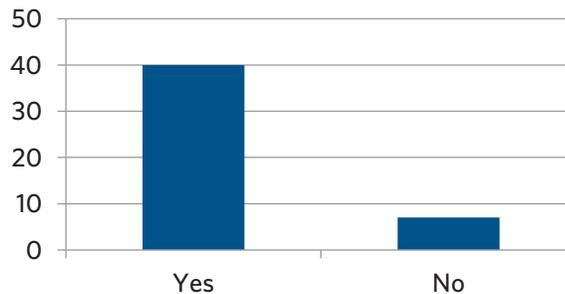
3. PRI.4 - Activate Hilderbrand Drive as a main street. Should the City prioritize this?  
45 Responses



4. PRI.5 - Extend Bluestone Road south of Sandy Springs Place to Hammond Drive, continuing the main street concept to the south. Should the City prioritize this?  
47 Responses

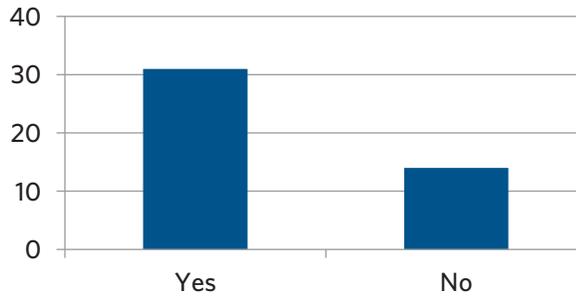


5. PRI.8 - Enhance the Roswell Road streetscape to create a more walkable environment. Should the City prioritize this?  
47 Responses



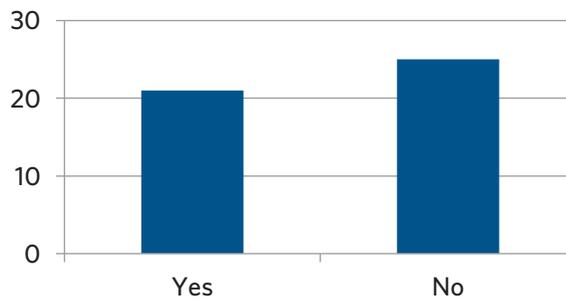
6. PRI.9 - Enhance the Sandy Springs Place streetscape to create a more walkable environment. Should the City prioritize this?

45 Responses



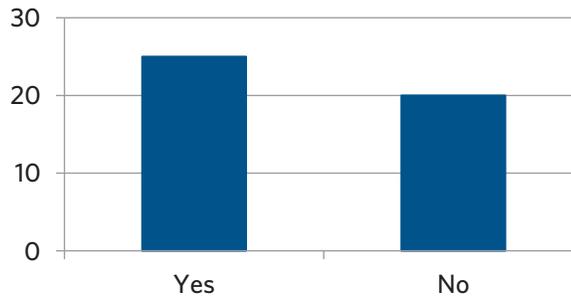
7. PRI.10 - Enhance the Carpenter Drive streetscape to create a more walkable environment. Should the City prioritize this?

46 Responses



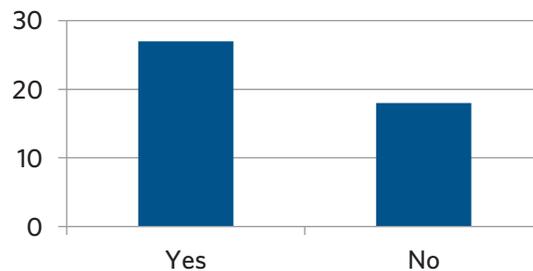
8. PRI.11 - Enhance the Cliftwood Drive streetscape to create a more walkable environment. Should the City prioritize this?

45 Responses



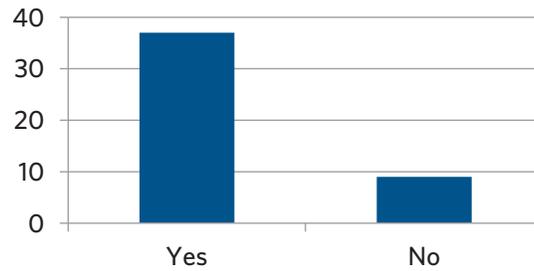
9. PRI.12 - Enhance the Allen Road streetscape to create a more walkable environment. Should the City prioritize this?

45 Responses



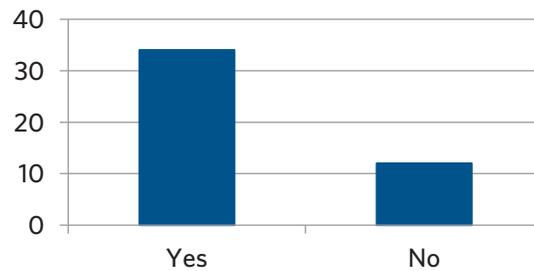
10. PRI.13 - Enhance the Hammond Drive streetscape to create a more walkable environment. Should the City prioritize this?

46 Responses



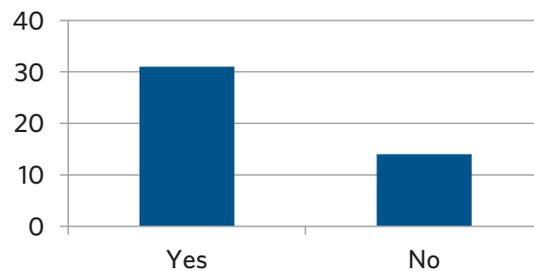
11. PRI.14 - Enhance the Sandy Springs Circle (Johnson Ferry Road to Roswell Road) streetscape to create a more walkable environment. Should the City prioritize this?

46 Responses



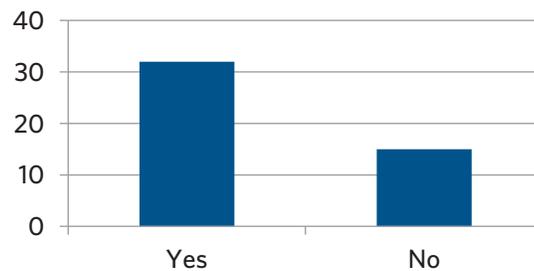
12. PRI.15 - Enhance the Sandy Springs Circle (Hammond Drive to Allen Road) streetscape to create a more walkable environment. Should the City prioritize this?

45 Responses



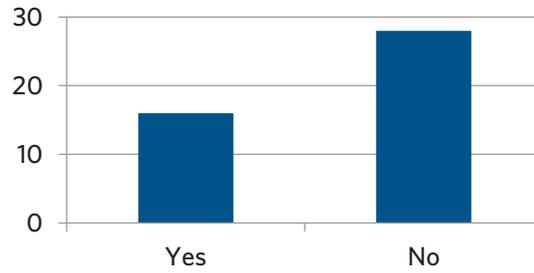
13. PRI.16 - Enhance the Johnson Ferry Road streetscape to create a more walkable environment. Should the City prioritize this?

47 Responses

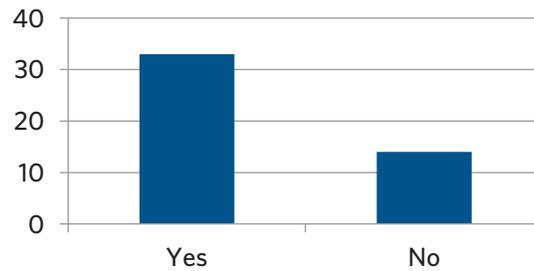


14. PRI.17 - Enhance the Mountain Creek Road streetscape to create a more walkable environment. Should the City prioritize this?

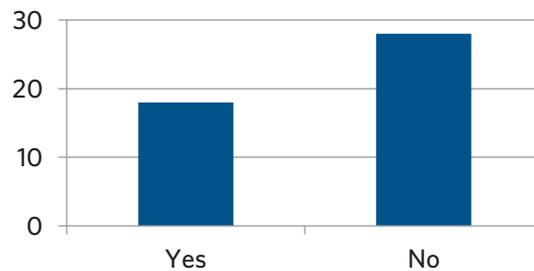
44 Responses



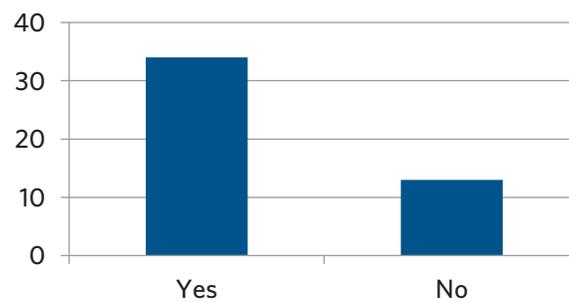
15. PRI.19 - Construct sidewalks along Lake Forrest Drive from Mount Vernon Highway to Hammond Drive. Should the City prioritize this?  
47 Responses



16. PRI.22 - Prioritize sidewalk connections along Mountain Creek Road with any potential redevelopment. Should the City prioritize this?  
46 Responses

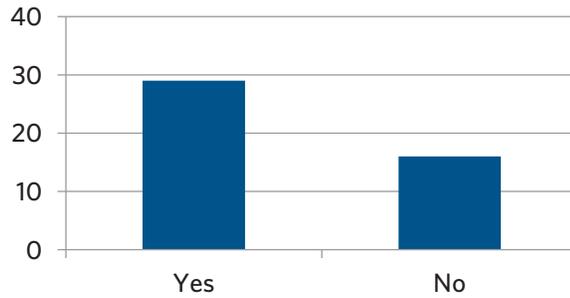


17. PRI.20 - Partner with private developers to create pedestrian connection around Arlington Cemetery to form safe pedestrian connection along Mount Vernon Highway. Should the City prioritize this?  
47 Responses



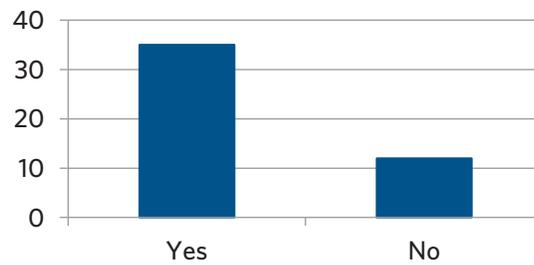
18. PRI.38 - Partner with private developers to create continued east-west pedestrian connection from Hilderband Drive to the west. Should the City prioritize this?

45 Responses



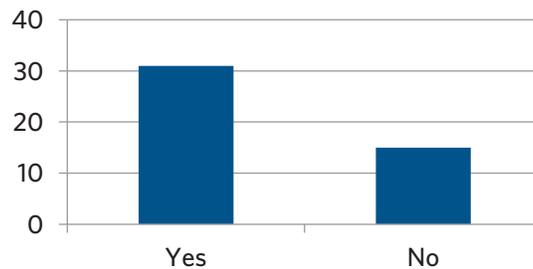
19. PRI.30 - Enhance pedestrian crossings across the City Springs District to encourage greater pedestrian connectivity and safety where new intersections may form as the street network continues to form over time. Should the City prioritize this?

47 Responses



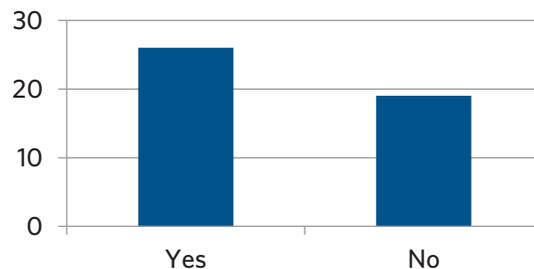
20. PRI.6 - Extend the multi-use path to connect Hammond Drive to Cliftwood Drive to provide greater connectivity to Allen Road Park. Should the City prioritize this?

46 Responses



21. PRI.7 - Consider connecting North Hampton Drive to Sandy Springs Circle with a multi-use path. Should the City prioritize this?

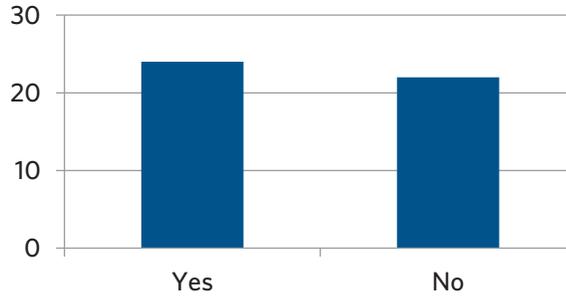
45 Responses



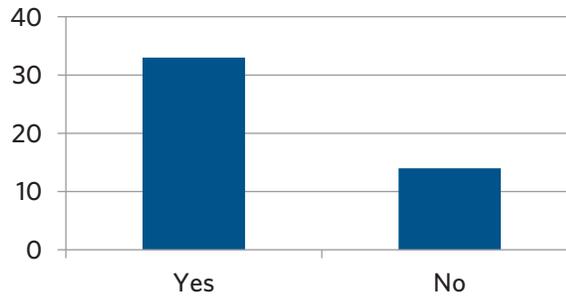
22. PRI.32 - Continue MARTA coordination to thoughtfully integrate the future I-285 Bus Rapid Transit (BRT) Station. MARTA is planning Bus Rapid Transit service along the Top End I-285

Express Lanes which will provide additional transit options for regional trip for users in the City Springs District. The location of the station is to be determined. Should the City prioritize this?

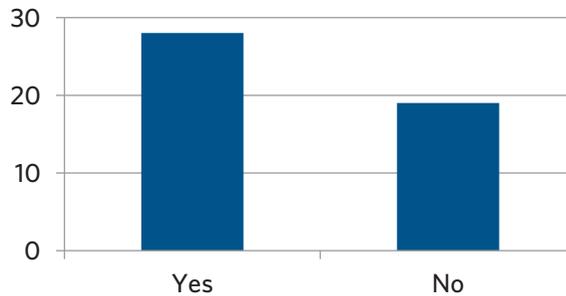
46 Responses



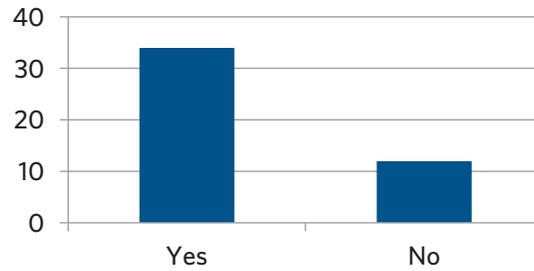
23. PRI.1 - Establish an Artwalk east and west of the Georgia Power substation from Mount Vernon Highway to Hilderbrand Drive. Two shared use paths have already been constructed on either side of the Georgia Power Substation that create an opportunity for a more interesting walk between Mt. Vernon Hwy and Hilderbrand Drive in the near term. Refer to the recommendations map for the route of the proposed artwalk. Should the City prioritize this? 47 Responses



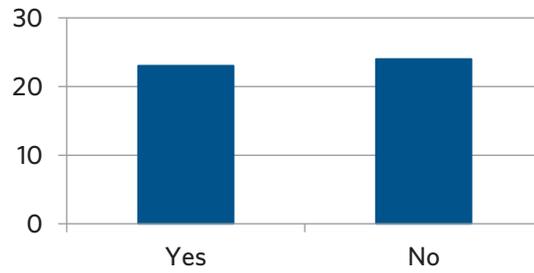
24. PRI.2 - Implement experiential, mixed media art district/art walk to provide immersive pedestrian experience for all City Springs users. Sandy Springs' commitment to the arts has been evident through its programs, the construction of the Performing Arts Center, and public art installations on the City Springs Campus. This idea proposes expanded incorporation of art within the District for all to enjoy and to reinforce a sense of place in the long term. Refer to the recommendations map for the route of the proposed artwalk. Should the City prioritize this? 47 Responses



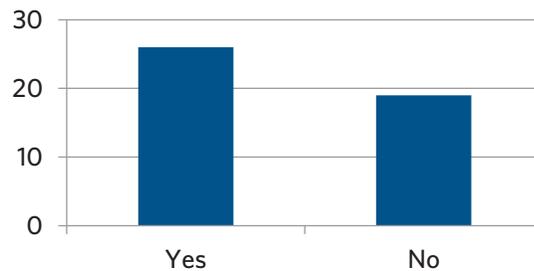
25. PRI.31 - Consider opportunities to partner with private developers/property owners to implement an environmental park that expands City Springs' park network and serves as a shared stormwater facility for adjacent future development. The successful implementation of Marsh Creek Rain Garden Park begs the question: where else can an environmentally-friendly retreat be incorporated within the study area? A similar facility would serve the study area well as new development comes online, both for stormwater management and to increase quality of life through accessible green space. Should the City prioritize this?  
46 Responses



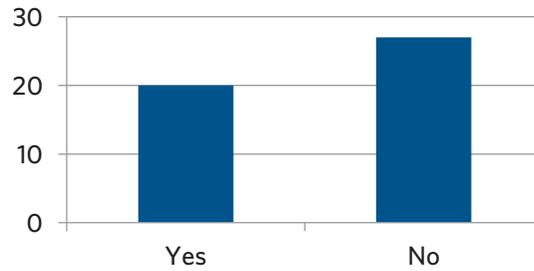
26. PRI.23 - Establish the intersection of Johnson Ferry Road and Sandy Springs Circle as a gateway to the City Springs District. Should the City prioritize this?  
47 Responses



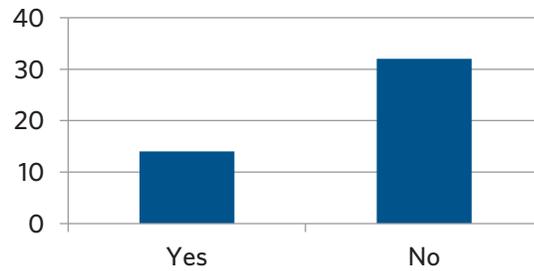
27. PRI.24 - Establish the intersection of Mount Vernon Highway and Sandy Springs Circle as a gateway to the City Springs District. Should the City prioritize this?  
45 Responses



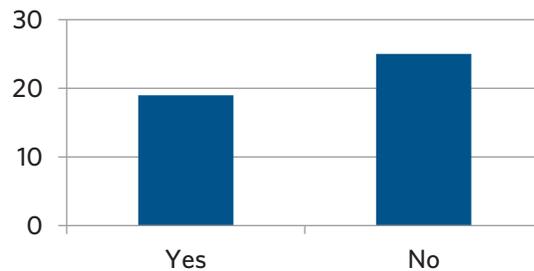
28. PRI.25 - Establish the intersection of Hammond Drive and Sandy Springs Circle as a gateway to the City Springs District. Should the City prioritize this?  
47 Responses



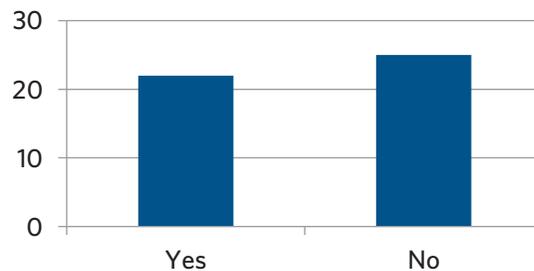
29. PRI.26 - Establish the intersection of Cromwell Road and Roswell Road as a gateway to the City Springs District. Should the City prioritize this?  
46 Responses



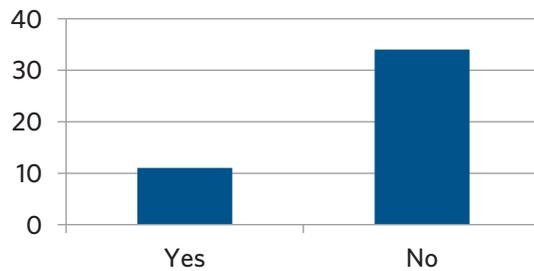
30. PRI.27 - Establish the intersection of Mt Vernon Highway/Johnson Ferry Road and Boylston Drive as a gateway to the City Springs District. Should the City prioritize this?  
44 Responses



31. PRI.28 - Establish the intersection of Hammond Drive and Roswell Road as a gateway to the City Springs District. Should the City prioritize this?  
47 Responses



32. PRI.29 - Establish the intersection of Roswell Road at Allen Road/Carpenter Drive as a gateway to the City Springs District. Should the City prioritize this?  
45 Responses



33. Below is a list of projects that are currently underway. If you have comments on these projects, please write them in the comment box. PRI.35 - Complete Boylston Drive multi-use path. The City of Sandy Springs partnered with developers to install a shared use path along Boylston Drive between Denmark Drive and Hammond Drive. The City intends to complete this connection to Mt. Vernon Hwy. PI.36 - Widen Hammond Drive east of Roswell Road. This improvement has been identified to address higher traffic volumes and to mitigate traffic congestion. This is funded by the 2016 and 2021 TSPLOST (Transportation Special Purpose Local Option Sales Tax). PI.37 - Complete Mt. Vernon Hwy/Johnson Ferry Rd Intersection Redesign. This improvement was selected to improve vehicular and pedestrian mobility and to reduce congestion in the City Springs District. This is funded by the 2016 TSPLOST (Transportation Special Purpose Local Option Sales Tax).  
8 Responses

<i>Complete the Bolyston Drive multi-use path. That should be the first priority.</i>
<i>PI.37 - Yes, please complete this project. It will make a nice gateway in the City Springs campus and Veterans Park. This will tie in the east side of Roswell Road and complete the downtown loop: City Hall, Library, Firestation, shops, restaurants, and living. PRI.35 and 35: Yes.</i>
<i>Can these be completed faster?</i>
<i>This is a major intersection that is difficult to traverse. Adding pedestrians and bicycles will only make it more difficult. With the changes you made to sandy springs circle cars now have to traverse at roswell road to make the transition from Johnson Ferry to Mt Vernon. I recommend pave over veteran park and create a diverging diamond for traffic to move from Mt Vernon and Johnson Ferry. also remove the traffic lights for city springs to reduce the grid lock they create. Close Blue Stone road so there is no turning traffic there. Widen the intersection at Sandy Springs Circle and Mt Vernon and also at Johnson Ferry so cars can traverse through this area efficiently and with minimal impact to the city springs complex. Dig a new entrance to City hall underground parking from Blue Stone area. and do a pedestrian bridge over Mt Vernon from Blue Stone side to City Hall side.</i>
<i>YES! a pedestrian bridge or underpass to go over or under Roswell road.</i>
<i>This is the critical intersection for placemaking at the core of the city. This needs to be the #1 traffic priority.</i>
<i>Hammond Drive widening: I am BEGGING you to please make Harleston Rd a culdesac, closing off entry from Harleston onto Hammond Drive. First, the cut through traffic of cars cutting through from Johnson</i>

<p><i>Ferry to Hammond with cars FLYING down the hill poses a huge risk to our children, as the speed bump is installed mere feet from the Hammond drive intersection and doesn't help with speeding. Second, the turn from Harleston onto Hammond has low visibility and is exceedingly dangerous, and will increase with the widening project as cars can move freely. Third, turning from Hammond onto Harleston creates congestion without a left turn lane. Lastly, the InTown Suites next to our street -- which should not be zoned so closed to single family residential to begin with -- continues to be a nuisance; police cars are there regularly. Closing off the street would help create a buffer from the extended stay facility. PLEASE, please seriously consider closing off Harleston to be a cut de sac to protect the integrity of our neighborhood and property values.</i></p>
<p><i>I don't feel the PI.36 or PI37 are overly necessary. Do we need to make Hammond a super highway rather than the neighborhood street it is now? This would just encourage more and more cut through traffic from cobb county residents going towards 400.</i></p>

34. Is there any other input you would like to share with the project team?

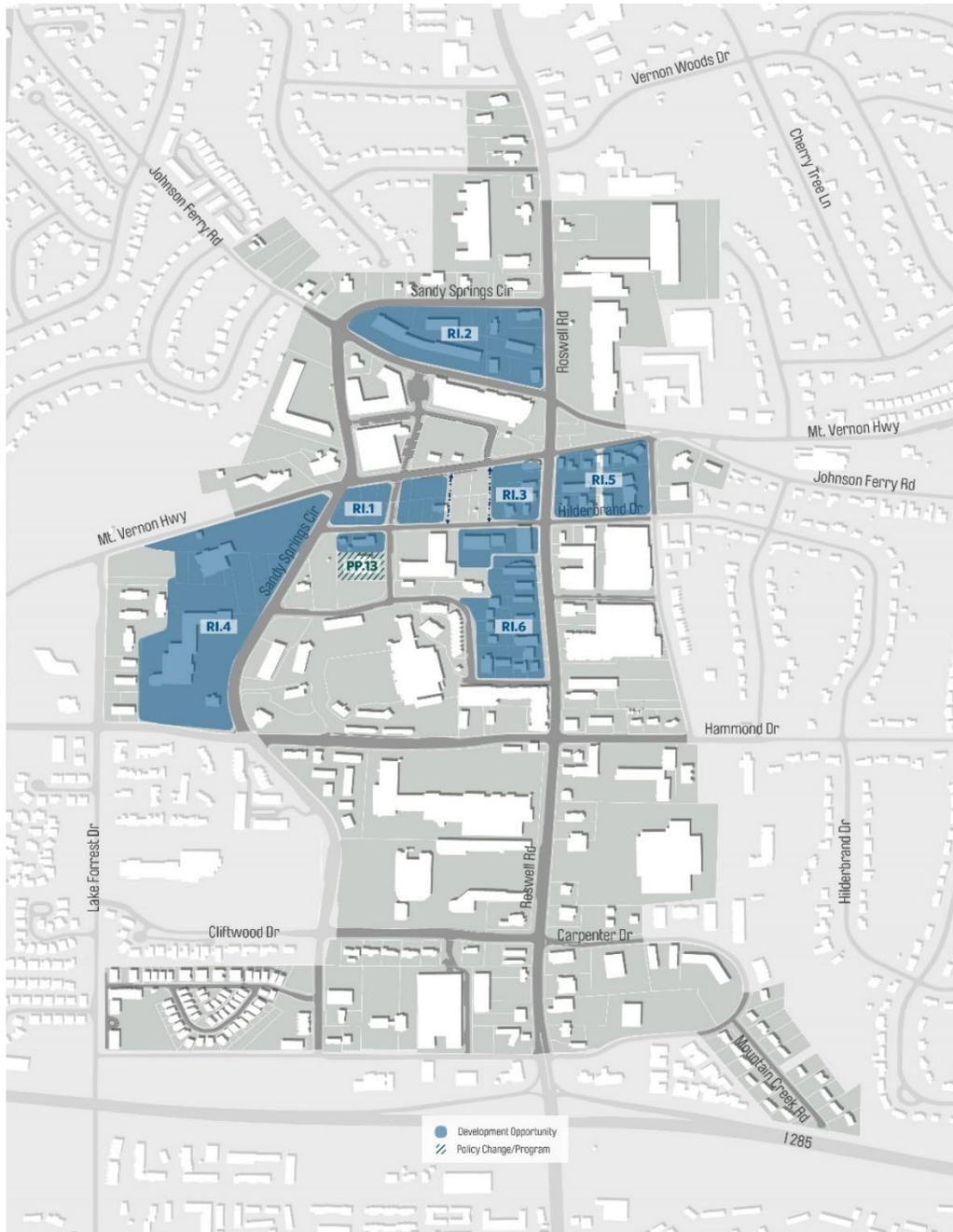
21 Responses

1	<i>Generally speaking my view is that we should complete the basics first. Build side-walks and pedestrians connections everywhere. Delay/hold off on things like public art, which are more of a nice-to-have.</i>
2	<i>How many gateways do we need? A lot fewer than are proposed here!</i>
3	<i>Do you understand how absolutely ridiculous it is to expect citizens to be able to understand your survey? I have experience with urban planning and people will not be able to understand this survey. Your input will be meaningless. But I suppose, you are just going through the motions anyway.</i>
4	<i>There seems to be a very unrealistic idea about traffic and parking</i>
5	<i>Generally speaking my view is that we should complete the basics first. Build side-walks and pedestrians connections everywhere. Delay/hold off on things like public art, which are more of a nice-to-have.</i>
6	<i>How many gateways do we need? A lot fewer than are proposed here!</i>
7	<i>Do nothing to increase traffic times on Roswell Rd</i>
8	<i>Someone (city or developer) needs to start the painstaking process of contacting families and moving the graves that are south of mount vernon.</i>
9	<i>protect or grow our canopy</i>
10	<i>Define gateway.</i>
11	<i>Need to 'clean up' and beautify Roswell Road as top priority otherwise all the other projects will go to waste. It's embarrassing to take out of towners on a ride up/down Roswell Road. There is no appeal to the 'center of SSprings' like in Roswell and Decatur for example.</i>
12	<i>Do nothing to increase traffic times on Roswell Rd</i>
13	<i>All these proposals cut off east west traffic and access for taxpayers to hospitals, urgent cares, grocery, hardware and pharmacy stores. Widen one of the east west roads to become a major transportation artery for cars -- no pedestrians or bikes. Then you can think about closing roads like blue stone to be pedestrian walkways to venues that imitate ponce city market. Do not spend money where sidewalks already exist. do not add sidewalks in office park areas. Wait for redevelopment to townhouses and then require developers to add sidewalks. You are adding density with no road expansion. Instead you are shrinking roads. This type of project is inappropriate in this location. Move it to morgan falls or the panhandle.</i>
14	<i>I do not know what "establish the ___ intersection as a gateway" to the city. What does that entail?</i>

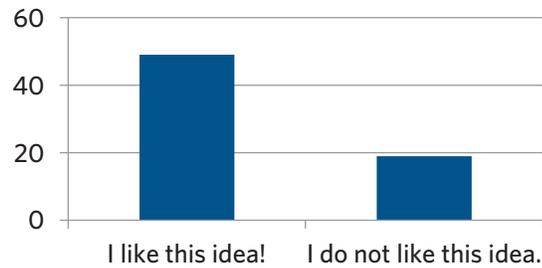
15	<i>The opportunities listed above are extensive and expensive. It will take many years and a lot of city funds to make a difference in such a large area. Instead, focus on creating a great "vibe" on Bluestone, Hilderbrand and Sandy Springs place, with ground floor shops and restaurants, below office and residential. This can be in some new buildings, but largely in reimagined existing buildings. This can be inexpensive and fast. It takes creativity instead of massive dollars. Once this district takes off the larger area will come along because businesses want to be near the action.</i>
16	<i>Instead of trying to prevent side street use, we need to encourage more routes to relieve the strain on Roswell, Hammond, Mt Vernon and JF. This needs to be a priority before you can add more housing. Don't be short sighted.</i>
17	<i>Hilderbrand at Harleston and Johnson Ferry is a huge cut through block, and the property there should be redeveloped entirely to remove the old rotting single family homes and Hammond Glen apartments, which are poorly maintained. Prioritizing making Hilderbrand a Main Street will create even more traffic. Also, the gas station and blighted bank property near the Veterans Park site is super sketchy and scary... I don't even feel safe there in daylight hours. Should be redeveloped.</i>
18	<i>add trash cans along all sidewalks and at most corners.</i>
19	<i>Please prioritize at least sidewalks everywhere, going from random sidewalks to streets walking or biking is dangerous. Particularly Sandy Springs circle</i>
20	<i>I love the crosswalk ideas across Roswell Rd as we need more improvements. I especially like the cross walk at Chaseland Rd by the Waffle House and the connection to North Hampton to Sandy Springs circle to encourage walkability to neighboring homes.</i>
21	<i>IN JANUARY OF THIS YEAR DOWNTOWN ALPHARETTA SOUGHT TO LOWER THE SPEED LIMITS BY 10 -15 MPH ON 160 ROADWAYS, MANY OF THESE WITHIN THEIR DOWNTOWN DISTRICT. SEE THIS ARTICLE. <a href="https://www.ajc.com/neighborhoods/north-fulton/alpharetta-looks-to-slow-speeding-traffic/3VUII6EAVRBURBAS35RJA2AHZU/">https://www.ajc.com/neighborhoods/north-fulton/alpharetta-looks-to-slow-speeding-traffic/3VUII6EAVRBURBAS35RJA2AHZU/</a> IS THIS SOMETHING OUR TRANSPORTATION FOLKS ARE LOOKING AT? WITHOUT REASONABLE SPEEDS AND/OR OTHER TRAFFIC CALMING MEASURES THAT FOSTER SAFETY YOU WON'T HAVE SAFETY NOR WILL PEDESTRIAN AND BICYCLIST ACTIVITY INCREASE. START SLOWING DOWN THE TRAFFIC BEFORE IT GETS TO THE DESIGNATED GATEWAY POINTS YOU WANT TO CREATE. MAKE IT 25 mph FROM BONNIE LANE/ WRIGHT RD SIGNAL EAST TO SS CIRCLE. SIMILARLY LOWER THE SPEEDS AT OTHER GATEWAY POINTS. WHERE ARE THE DEDICATED CROSSWALKS? DOES EVERY LOCATION REQUIRE A STUDY TO INSURE THERE IS A WARRANT FOR CROSSWALKS? CAN THIS BE AN IF YOU BUILD IT THEY WILL COME APPROACH? WE NEED THEM (WITH THE LIGHTS THAT MAKE CARS STOP) IN FRONT OF CITY HALL ON JOHNSON FERRY, AT HERITAGE (AT SS PLACE AND SS CIRCLE), AT THE MARSH CREEK RAIN GARDEN AT FERRY DR. A SAFETY ISLAND AT ROSWELL RD AND MT VERNON IS A MUST. THE FUTURE PLAN ONCE MT VERNON AND JOHNSON FERRY EAST OF ROSWELL RD GETS REDONE IS TO ELIMINATE LEFT TURNING MOVEMENTS ONTO MT VERNON FROM SOUTHBOUND ROSWELL RD PUT A SAFETY ISLAND HERE INSTEAD OF USING ALL THAT SPACE TO STACK MORE CARS TURNING LEFT ONTO JOHNSON FERRY FROM NORTHBOUND ROSWELL RD. LETS STOP CATERING TO CARS FIRST AND START CATERING TO THE PEOPLE FIRST. AUGMENTATION OF BICYCLE AND PEDESTRIAN SAFETY AT VARIOUS CONFLICT POINTS MEANS CREATING THAT SAFETY AT EVERY INTERSECTION. EVERY INTERSECTION WILL PRESENT AS A CONFLICT POINT.</i>

## REDEVELOPMENT & INVESTMENT RESPONSES

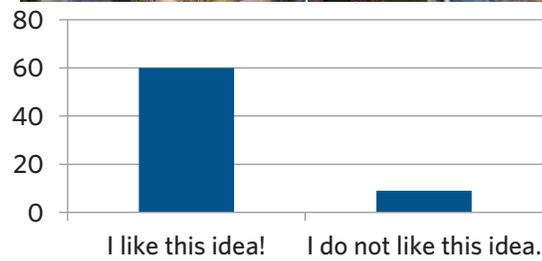
1. Redevelopment can take on many forms and, in the context of the future of City Springs, should provide a wide array of development formats to make the District unique and inviting. The following ideas support each of the Planning Principles of this planning process by promoting new housing options to support future growth, expanding on art and culture in Sandy Springs, targeting prospective residents of diverse backgrounds, and enhancing overall quality of life. Explore the ideas in the questions below and let us know what you think! Please refer back to this map as needed or keep it open in another tab for reference by clicking [here](#). 27 Responses (this was an acknowledgement for participants)



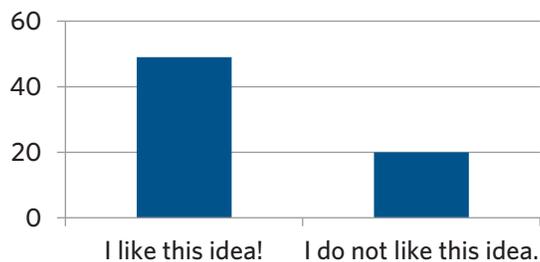
2. Townhomes fronting pedestrian-oriented pathways (2-4 stories)  
68 Responses



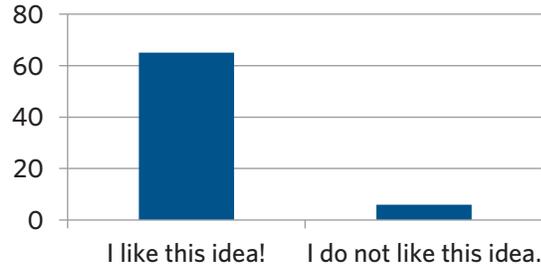
3. Mixed-Use Office, Services, Food & Beverage (3-6 stories)  
69 Responses



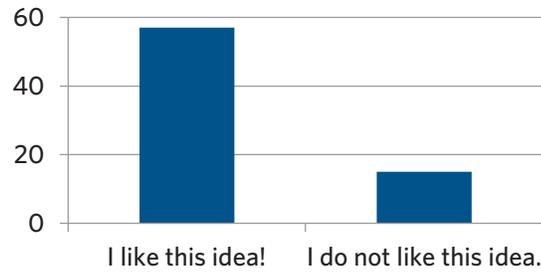
4. A boutique hotel unique to Sandy Springs (3-6 stories)  
69 Responses



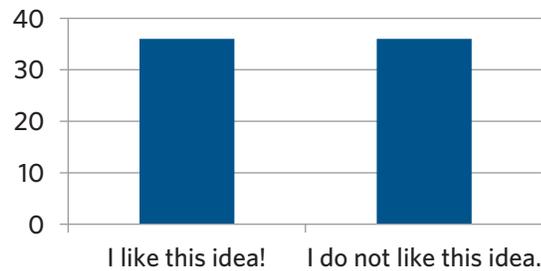
5. Destination restaurants (single story or part of 4-6 story mixed-use building)  
71 Responses



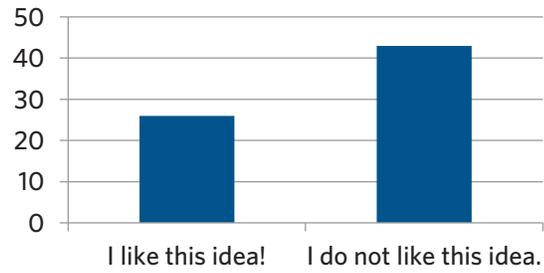
6. Brewery & Distillery Cluster (single story or part of 4-6 story mixed-use building)  
72 Responses



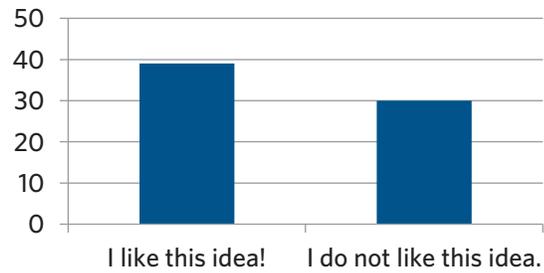
7. Artist Studios and Co-working Spaces (4-6 stories)  
72 Responses



8. Mid-rise Condos/Apartments (4-6 stories)  
69 Responses



9. Active Adult Living & Medical/Wellness Cluster (4-6 stories)  
69 Responses

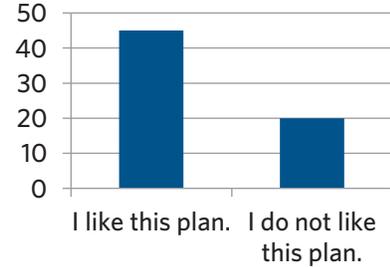


10. Indicate your general feelings about this plan for the city-owned properties using below and write any additional thoughts you wish to share.

**65 Responses**

The City of Sandy Springs conducted a Highest and Best Use Study for the City-owned parcels at Bluestone Road and Wilderbrand Drive. The proposed plan seeks to achieve the following:

- PROMOTE COMMUNITY INTERACTION**
  - Include street-level "socialized" retail & dining
  - Provide public spaces for outdoor gathering
- EXPAND GREEN SPACE**
  - Link City Green & Heritage Green via Blue Stone Corridor
  - Plant walk & runner's market trees
- INVITE SPONTANEOUS FUN**
  - Make space for informal outdoor art
- NURTURE UNIQUE LOCAL IDENTITY**
  - Improve pedestrian linkages to the Heritage Center
- MAKE IT WALKABLE**
  - Pedestrian-focused site-work Play Development
  - Mitigate vehicle traffic

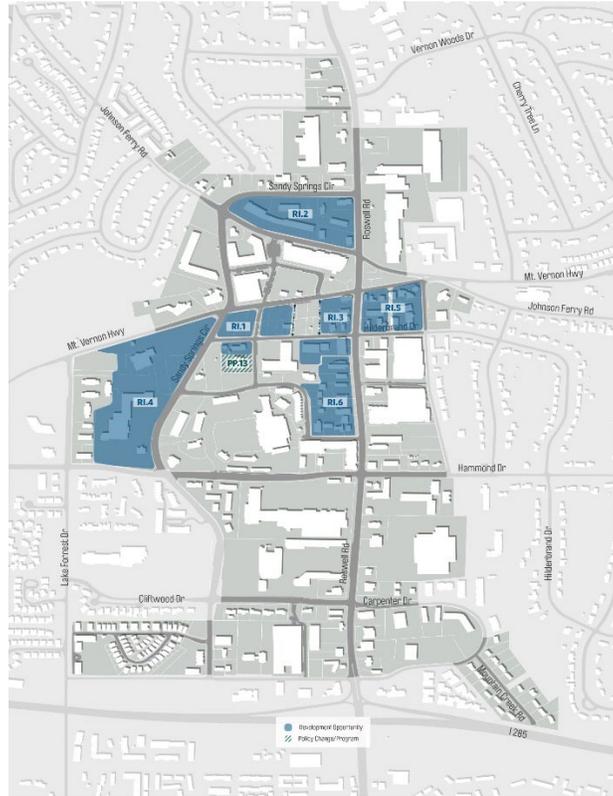


11. This conceptual diagram reflects a community-driven vision of how areas around the City Springs District could be shaped over time by expanding the character and scale established by this planning process. Share your thoughts on this conceptual plan in the comment box below.



1	<i>Too dense, too uniform. No character.</i>
2	<i>who can afford it</i>
3	<i>I do not think that we need more apartments/townhomes along these spaces. It is so congested with traffic as it is, and is dangerous to walk. At some of these, would love to see boutique restaurants and shops, or fun "activity" based retail. Also, green space and safe uses for gathering spaces.</i>
4	<i>Don't underestimate the value of pocket parks.</i>
5	<i>I like this plan, though would push to include rooftop greenspace. A restaurant with a greenspace component on top level or rooftop garden as an amenity for residents are fantastic ideas that should be promoted.</i>
6	<i>I need more explanation to analyze this conceptual plan.</i>
7	<i>The concept plan is fine if it allows for wide sidewalks along all roads. Grid layout is positive.</i>
8	<i>I would like to see more restaurants and boutique type retail. But unfortunately many of the mixed use retail spaces end up as nail salons, waxing parlors and fitness studios.</i>
9	<i>Thumbs up</i>
10	<i>This is going to cause gridlock and congestion on the three roads that carry your taxpayers from homes to businesses to work. You need to include a new road system. And removing traffic lanes and adding bikes on Mt Vernon is not a solution.</i>
11	<i>All buildings should be low height. This is not Atlanta and why we love it. Hours of operation should be limited at late night.</i>
12	<i>seems like it's too much of an expanse. If you look at other successful city centers (Roswell, Canton, Woodstock, Alpharetta) - they are more compact and the "night life scene" is centered in the middle of the town. Here, looks like everything is scattered about. Those towns do a great job of incorporating living and playing in their communities.</i>
13	<i>Too big, stretches too far to 280. The expanded scope loses the focus on creating a core area that is attractive, artsy, walkable, and a destination. Do this first as stage one, then see about expansion. Stage one is the key.</i>
14	<i>This is a lot of development along Roswell road. Roswell road traffic is already severely congested. Before more businesses that will attract people from all over, there needs to be some plan to expand Roswell road and adjacent roads to support the traffic.</i>
15	<i>I like having another road between sandy springs circle and Roswell rd</i>
16	<i>The area south of city springs needs to be a vibrant downtown, similar to Alpharetta. Restaurants. Food halls. Bars etc. make it a destination that people want to live near. We don't need office space.</i>
17	<i>anything that increases green space and keeps buildings lower than 2 stories is best.</i>
18	<i>The grid design is a great idea and increases connectivity of City Springs as a true epicenter type location in the city. I like the buildings fronting the main thoroughfares and help in pedestrian interaction with the street.</i>
19	<i>I like the overall design. Major roads appear to be tree lined. Core roads appear to be continuous and in rough blocks. The key criterion I'd like to see in the city core is walkability. This can be achieved by ensuring sidewalks, engineered traffic calming (see how well the Dutch do it), and creating inviting streetscapes with storefronts.</i>
20	<i>Unclear</i>
21	<i>Please add more architectural interest and charm into the plans. Not making everything look the same height and style. See downtown Alpharetta</i>

12. What would you like to see at Opportunity Site RI.1? Think about building height, placemaking, amenities, and more!



1	<i>2 story building, restaurant and shops. Keep the open-air quality of Sandy Springs</i>
2	<i>lower heights, placemaking signs, no shopping centers</i>
3	<i>who can afford it</i>
4	<i>Whatever it is, should be inviting. Brewery, experiential retail, artist studios, coworking, coffee shop, restaurants with patio, interactive art.</i>
5	<i>I'm assuming ri.1 includes the parking lots on the other side of the street. I think that this could be a really good ground floor retail, underground garage, and higher level residences or offices. The corner is certainly in a hole so it could use more space to keep it dynamic. 6 stories.</i>
6	<i>If you put a building there no higher than one story.</i>
7	<i>Retail/ Restaurant</i>
8	<i>no more than three stories high.....</i>
9	<i>green space. This area is congested and adding any business is dangerous. There is no space for a business. Definitely not more than 1 story and no driveway to Mt Vernon or Sandy Springs Circle. Remove the duplicate traffic light it causes grid lock and is unnecessary. Right turn traffic only in this whole area. no traffic lights stopping traffic. reduce number of pedestrian cross walks.</i>
10	<i>greenspace/park</i>
11	<i>NO apartments</i>
12	<i>Quaint coffee shop or distillery/beer place. Or, maybe combine that with a bike shop. Something about 2 stories high that could be walked to by the existing underground deck.</i>
13	<i>mixed use space including office &amp; retail...possible brewery. No more than 2-3 floors.</i>
14	<i>Artist live-work spaces plus street level shops, live music venues, cafes, etc. It should build on the arts focus of City Springs. It also might be a hotel site, with the same street attractions. Consider higher in exchange for street level amenities.</i>

15	<i>Would really like to see some sort of pet friendly dog park</i>
16	<i>Low and mid rise. Focused on dining on bars. Downtown Alpharetta feel.</i>
17	<i>Art Museum single story with greenspace</i>
18	<i>First floor retail and restaurants that can have outdoor dining and/or rooftop dining on taller buildings to take advantage of the views of Atlanta.</i>
19	<i>A brewery or an area with ample outdoor space to gather and meet with neighbors, etc. I think the example in the picture showed a building design with a huge covered patio type area would be great to have a spot like that with live music and off Roswell Rd to enjoy.</i>
20	<i>Toy and gift store</i>
21	<i>Might be a good spot for boutique hotel</i>
22	<i>Parking maybe hotel</i>

13. What would you like to see at Opportunity Site RI.2? Think about building height, placemaking, amenities, and more!

1	<i>I don't necessarily feel like the current structure and shops should be changed at this location. The parking is very easy to quickly enter and exit.</i>
2	<i>A more attractive and usable area for restaurants, retail. This may be the best area for more condos or taller building</i>
3	<i>building heights can be higher here with more density type uses</i>
4	<i>who can afford it</i>
5	<i>Townhomes. Unsure if retail/commercial/office is a fit here since it's on the backside of city hall. Maybe townhomes on bottom two stories and condos above. For sale block opportunity.</i>
6	<i>I really enjoy the character of the shops and think they provide good and necessary services, though agree there could be significant upward densification. This would be a large enough parcel to include inner atrium/garden/pool and would be good to include office use. 6 stories.</i>
7	<i>I love the location of Daniels barbecue restaurant there</i>
8	<i>Retail/Restaurant</i>
9	<i>Mixed- use Office/Medical office, condos for sale or apartments, retail/restaurant on 1st floor. Underground Parking.</i>
10	<i>1 story retail / restaurants. This has limited parking. Another more than 1 story cannot be supported. Citizens have cars. Unless you make city hall parking totally free and create new entrances that are not on the main corridors of Mt Vernon and Johnson Ferry this will continue to be grid lock and unattractive to your tax payer base.</i>
11	<i>mixed use retail and apartments</i>
12	<i>This is the block to develop the brewery and restaurants and fun places to gather. We love our quiet neighborhood and that block has minimal residents for noise that will come with something like that.</i>
13	<i>I like the 1-story building as it is.</i>
14	<i>restaurants..building height 2 floors</i>
15	<i>Artist live-work spaces plus street level shops, live music venues, cafes, etc. So basically building on what is already there, just moving it away from strip mall look, and adding the artist live-work above. It should build on the arts focus of City Springs. Redevelop the scattering of parcels along Roswell Road into a hotel site, with the same street attractions as above. Consider a higher hotel building in exchange for street level amenities.</i>
16	<i>If more public parking is needed, put a structure here, away from street frontage. Also townhomes/condos here</i>
17	<i>Secondary focus. Let's not mess with these existing tenants</i>

18	<i>Restaurants and shopping - organic and walkable, 2 stories with courtyards and outdoor space</i>
19	<i>Mixed use environment with more height but not so much lot coverage that doesn't allow for a plaza and outdoor spaces for people to gather, eat and activate a greenspace.</i>
20	<i>R2 would be nice to see townhomes with a mixture of condos with retail underneath.</i>
21	<i>Women's clothing boutique</i>
22	<i>Restaurants, boutiques - downtown Alpharetta look and offerings</i>
23	<i>Mixed use development 6 stories, townhouses retail and personal service type uses</i>

14. What would you like to see at Opportunity Site RI.3? Think about building height, placemaking, amenities, and more!

1	<i>I do not want to see high-rises and local, small businesses driven out. I do not want to feel like I am driving down some high-rise, cement corridor down Roswell Road</i>
2	<i>since along Roswell Rd and at City Center needs a good destination use</i>
3	<i>who can afford it</i>
4	<i>Updated facades, more patios and outdoor amenities.</i>
5	<i>I don't know that you can modify the GA Power station much. Doesn't this limit development here?</i>
6	<i>More breweries! Cocktails bars!</i>
7	<i>Retail/Restaurant</i>
8	<i>This is a brand new bank building and you gave it extra driveways. If you change anything remove all curb cuts and only access from behind. Do not go over 1 story. the 4-6 story buildings are suffocating and unattractive.</i>
9	<i>mixed use, building height same as Blue Stone lofts</i>
10	<i>We will need some noise and late-night shenanigans to be looked at for what goes here.</i>
11	<i>hotel up to 6 floors with ample parking</i>
12	<i>Artist live-work spaces plus street level shops, live music venues, cafes, etc. So basically moving it away from strip mall look, and adding the artist live-work above. It should build on the arts focus of City Springs. Redevelop the scattering of parcels along Roswell Road into a hotel site, with the same street attractions as above. Consider a higher hotel building in exchange for street level amenities.</i>
13	<i>Low and mid rise. Focused on dining on bars. Downtown Alpharetta feel.</i>
14	<i>Boutique hotel no more than 4 stories</i>
15	<i>A green space to play off of the access path next to the substation. Allow for any new buildings that front Roswell Rd to have access out their back doors to this space. Encourage that kind of engagement that can allow people to be away from the noise and traffic of Roswell Rd.</i>
16	<i>This should be multi story apartments with retail on the bottom to increase street engagement with Roswell Rd.</i>
17	<i>Family friendly restaurant with play area outside for kids and small stage for live music</i>
18	<i>Dog park</i>
19	<i>Multi unit bldg with rooftop restaurant</i>

15. What would you like to see at Opportunity Site RI.4? Think about building height, placemaking, amenities, and more!

1	<i>I do not want this area built up, it would be nice regardless of its development to maintain the open nature that would actually serve the community. A dog park would be great.</i>
2	<i>lower heights and an amenity use</i>
3	<i>who caN AFFORD IT</i>
4	<i>Townhomes, pocket park, walking path, interactive art.</i>

5	<i>Having some class B retail space is incredibly useful and allows for a larger, more diverse, and healthier community. I would not change this center except to encourage a much greener parking lot.</i>
6	<i>Housing or office with retail/restaurant on the ground floor and/or street edges</i>
7	<i>Townhomes for sale</i>
8	<i>1 story restaurants with outdoor patios behind the buildings, ace hardware, small shops, away from the street noise and high rise congestion of Roswell Road and City Springs.</i>
9	<i>Mixed use like Chattahoochee works</i>
10	<i>townhouses. no apartments</i>
11	<i>This area seems better suited for apartments, condos, etc. Townhouses - no: these can be built at many other places in the city. The new housing units should retain an arts focus to relate to City Springs.</i>
12	<i>Low and mid rise. Focused on dining on bars. Downtown Alpharetta feel. The biggest parcel to do this. Some residential can be integrated here.</i>
13	<i>Improve traffic pattern to relieve the traffic on SS circle and Mt Vernon by increasing through streets. Create other routes. Do a mix of townhomes and condos.</i>
14	<i>This is one of the best sites in the district based on topography. Views of downtown from taller buildings would be a huge attraction for a for sale condo product in a mixed use building or center with retail on the ground floor. A greenspace located behind the buildings to stay off of Sandy Springs circle and/or rooftop dining opportunities to take advantage of the views. The church property will hopefully be a good mix of residential types and possibly some retail or civic space once they figure out who will be engaged through the current RFP process.</i>
15	<i>This would be a good opportunity for a mixed use development with office, retail and ownership/rental properties.</i>
16	<i>Office</i>
17	<i>Restaurants, boutiques - downtown Alpharetta look and offerings</i>
18	<i>All these areas should have 4 to 6 stories</i>

16. What would you like to see at Opportunity Site RI.5? Think about building height, placemaking, amenities, and more!

1	<i>I don't want this redeveloped but if it is, again I don't want to see small business forced out.</i>
2	<i>same as R1.2 response</i>
3	<i>WHO CAN AFFORD IT</i>
4	<i>Mix of office, artist maker space and/or coworking, brewery. No parking on this site or underground parking only (but not accessible from Roswell)</i>
5	<i>2 - 4 story office and retail.</i>
6	<i>Mixed- use Office/Medical office, condos for sale or apartments, retail/restaurant on 1st floor. Underground Parking.</i>
7	<i>This is a high traffic area. The park will not be accessible due to traffic so do not try to connect the two. The park was an excuse to get rid of the old businesses not because a park was needed. This area needs to be razed and the roads network fixed.</i>
8	<i>Mixed use- restaurants, office.</i>
9	<i>This is the best block to develop the brewery and restaurants and fun places to gather. We love our quiet neighborhood and that unsightly block has minimal residents for the noise that will come with something like that.</i>
10	<i>Artist live-work spaces plus street level shops, live music venues, cafes, etc. So basically moving it away from strip mall look, and adding the artist live-work above. It should build on the arts focus of City Springs. Redevelop the scattering of parcels along Roswell Road into a hotel site, with the same street attractions as above. Consider a higher hotel building in exchange for street level amenities.</i>

11	<i>2-3 story townhomes - transitional space to single family housing to the East</i>
12	<i>Low and mid rise. Focused on dining on bars. Downtown Alpharetta feel.</i>
13	<i>Possible hotel or condo site.</i>
14	<i>This is a good place for height and a mix of uses. People visiting the Veterans park should be able to walk to restaurants and retail. Some coworking, office or artist spaces could be good to have in the mix.</i>
15	<i>Boutique hotel for out of towners to stay in the city and enjoy.</i>
16	<i>Karaoke bar</i>
17	<i>Better option for townhomes in this area</i>

17. What would you like to see at Opportunity Site RI.6? Think about building height, placemaking, amenities, and more!

1	<i>I would like to see this left alone. I can not believe the City would actually include this in their plan and not have spoken to any of the actual owners of the properties. Disgraceful</i>
2	<i>same as R1.2 response</i>
3	<i>who can afford it</i>
4	<i>Updated facades, more patios and outdoor amenities.</i>
5	<i>The geography here is challenging. Would love to see some sort of infrastructure to help unify and connect</i>
6	<i>Housing or office above retail/restaurant</i>
7	<i>Mixed- use Office/Medical office, condos for sale or apartments, retail/restaurant on 1st floor. Underground Parking.</i>
8	<i>Remove all curb cuts. Have a charming row of 1 story businesses with a rear road connecting them.</i>
9	<i>townhomes like the ones that are across the street. 3 story. No retail.</i>
10	<i>NO more apartments!!!</i>
11	<i>This currently messy area should be the gateway to City Springs, announcing the importance of place. I see the highest use as a street level contemporary art museum with luxury condos above to attract arts donors, patrons, and investors. Maybe with city rent subsidies for successful artists themselves: singers, painters, writers, etc.</i>
12	<i>Mixed use - with breaks to provide green space and sight lines beyond Roswell Rd</i>
13	<i>Low and mid rise. Focused on dining on bars. Downtown Alpharetta feel. Like .4 can have residential here</i>
14	<i>Restaurant and retail.</i>
15	<i>The topo could work beautifully to have a greenspace at the heart behind the buildings on Roswell Rd and Hilderbrand since they would be close to the road. Again, shielding restaurant patrons and the users of the greenspace from the traffic and noise of Roswell Rd. Great place for that brewery or distillery to create a cool environment people can walk to.</i>
16	<i>Restaurants and bars here would be cool to make an entertainment type district where it would draw people from surrounding cities to go on the weekends.</i>
17	<i>Upscale date night restaurant</i>
18	<i>Mixed use on Roswell road</i>

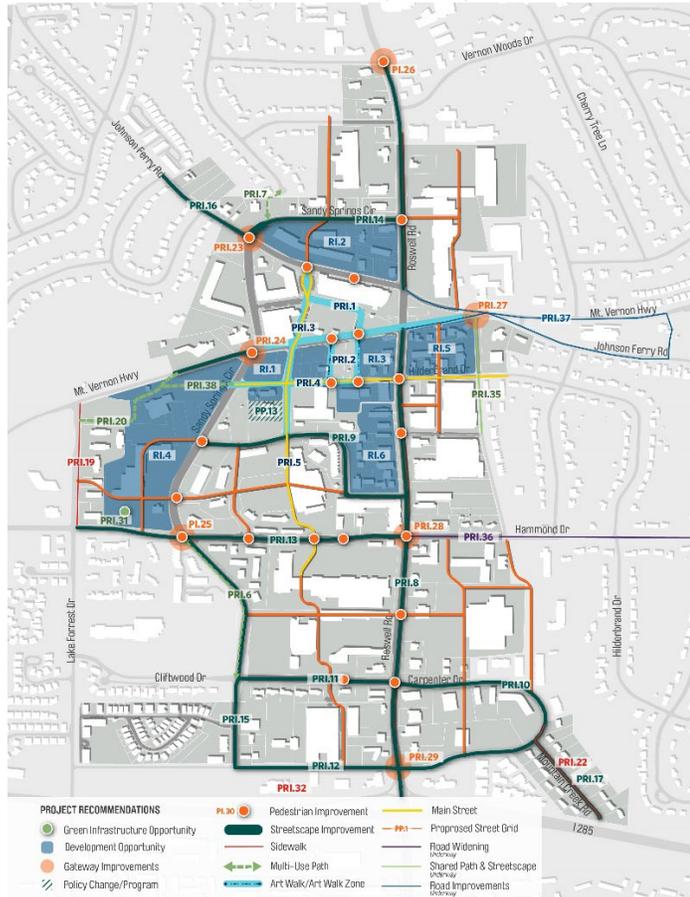
18. Is there any other input you would like to share with the project team?

1	<i>I feel strongly that the architecture of new structures built needs to have a timeless appeal that seems to have some continuity. Some of the new apartments built in the last few year have an style that ages very poorly (The Margo). I think Sandy Springs should invest in making buildings that we will not want to demolish in 30-40 years, but will rather look beautiful for decades to come.</i>
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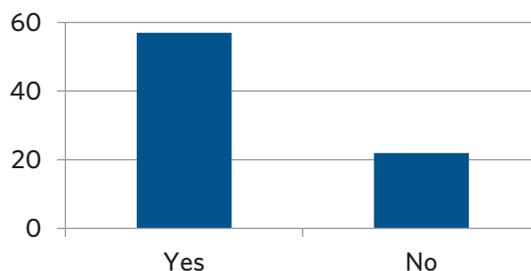
2	<i>The Holocaust Museum is NOT right for this area. Destroying small business is NOT what is right for Sandy Springs. I don't want to see a centrally-planned high-rise monstrosity community. Many parts of Sandy Springs do need redevelopment and freshening up, but this in it's entirety is not the right path forward for Sandy Springs.</i>
3	<i>Art and murals should be everywhere.</i>
4	<i>protect our tree canopy</i>
5	<i>Roswell Rd is very ugly ... too many poles.. old shopping centers, etc. Need to have our Main Street attractive. Until then Sandy Springs won't be appealing. Currently it looks very old and run down.</i>
6	<i>Make sure the city is walkable with destinations that appeal to all ages.</i>
7	<i>This is a chance to put enough retail/restaurant footage in the same place to be a true destination and gathering place for the community.</i>
8	<i>Figure out the roads and eminent domain the land to move the roads out so we can bypass this whole area. Move Mt Vernon to run between the church and the cemetery, through the new firestation, through the aldi shopping center (behind R.2) and out to Roswell Road. All this development is going to cause gridlock. You have already made this area undesirable for existing residents because there are stop lights and traffic calming devices every 50 feet. You are driving us out and making this an apartment community instead of stately homes.</i>
9	<i>The green space behind Heritage will have to be loved and looked after. It is a disaster and not very inviting for what we can do these days.</i>
10	<i>I just ask to please avoid the apartments. We have enough of them.</i>
11	<i>Keep the focus on the arts ecosystem that can be created around City Springs - from emerging artists in their bare bones live-work studios where creation happens, to very successful artists and their patrons in a luxury setting. And everything in between. Think about a vision of a monthly arts event open to all of metro Atlanta that is centered in this area to help imagine what is needed. This arts focus in the core will differentiate the city from others.</i>
12	<i>A good plan for the city. The issue will be existing shopping center owners that have no desire to jump on board with any of the city's plans. So many of the older shopping centers are cash-flowing and have no debt. Why burden the property owners with the expectation of good for the community at the expense of the property owners?</i>
13	<i>Need to redo the Roswell Abernathy Shopping Mall Center</i>
14	<i>Many of us who live in Blue Stone Lofts would like to see this area not be so populated with apartments and transient renters. we know from condo community living that when folks own, they are more vested in their communities and property. We have even passed amendments to lower our own rental capacity. Please please consider less rental and more owner owned and occupied development.</i>
15	<i>No more large offices. Mix residential with restaurants, bars and retail. Mix in some small office space as well potentially.</i>
16	<i>There needs to be a road behind Lowes from Hammond down to Carpenter. Or a real street that subdivides the massive lot between lowes and retail fronting Roswell. There is too much congestion on Roswell. Local traffic trying to access the Lowes and adjacent stores could use this route.</i>

## POLICY & PROGRAMS RESPONSES

1. This survey allows you to share your thoughts on how each policy and programming recommendation within the City Springs Master Plan should be prioritized. Below, you will see a map of all the master plan recommendations. Please refer back to this map as needed or keep it open it in another tab for reference by clicking here.  
47 Responses (this was an acknowledgement for participants)

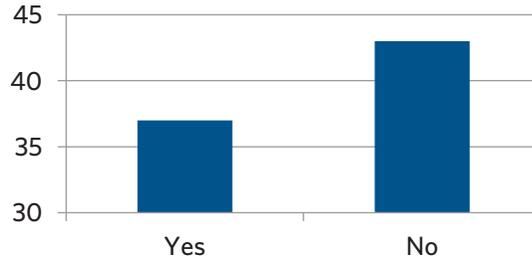


2. PP.1 - Continue building out the street grid established by the Sandy Springs Technical Manual. The previously planned street network on the map will continue to be implemented as new development is implemented. Should the City prioritize this?  
79 Responses



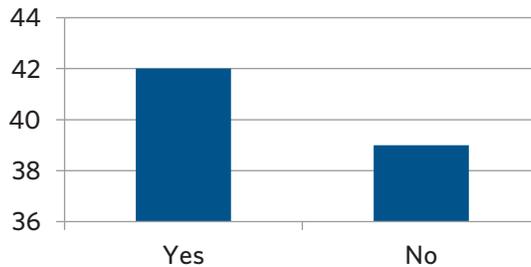
- PP.2 - Evaluate opportunities for Development Authority involvement in promoting homeownership in City Springs. The Sandy Springs Development Authority provides catalytic funding for desirable economic development projects by providing access to capital and other financial incentives. It can enable opportunities that provide home ownership in City Springs which may be through a guarantee that townhomes or condos are kept for sale to diversify the residential mix in the District. Should the City prioritize this?

80 Responses



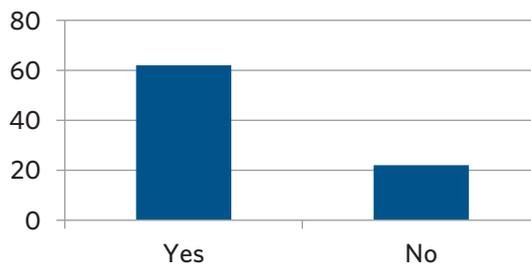
- PP.3 - Consider new zoning tools to encourage redevelopment and other site enhancements by providing mutually beneficial incentives to property owners within redevelopment and rehabilitation projects. This might include an urban placemaking program that would promote and incentivize privately owned public spaces through an incentive program which would allow for greater building height. It may also include a graduated height program that encourages land assembly through bonus height incentives. Should the City prioritize this?

81 Responses



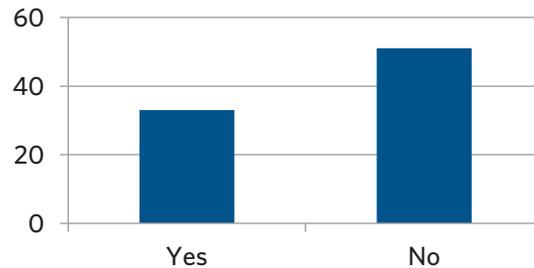
- PP.4 - Consider a property improvement program to provide property owners a means to pursue aesthetic and outdoor amenity enhancements and improve the overall look and experience within the Study Area. Evaluate opportunities to support such private sector reinvestment through waivers, grants, low-interest loans, and/or tax incentives. This improvement program provides means to commercial and mixed-use property owners and tenants to renovate, restore, or redesign the facades on their buildings, construct outdoor patios, landscaping, and tree canopies, among other functional and aesthetic property improvements. Should the City prioritize this?

84 Responses



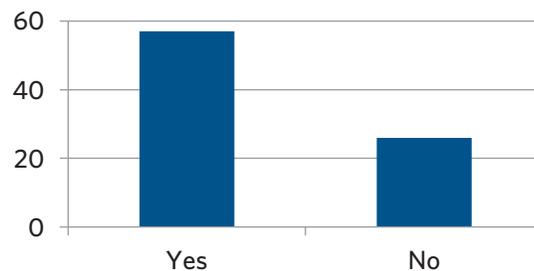
6. PP.5 - Expand established branding and wayfinding for the City Springs Campus to the broader district. Wayfinding signage currently found in the City Springs campus would ultimately be found across the study area along pedestrian pathways and vehicle right-of-way to point to landmarks and public facilities to extend the identity of City Springs beyond the campus grounds. Should the City prioritize this?

84 Responses



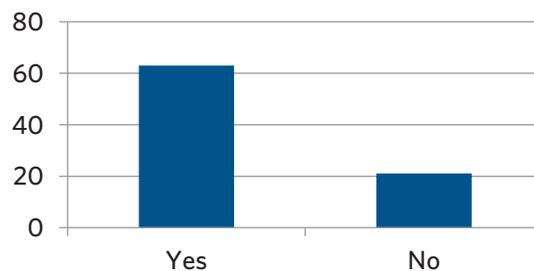
7. PP.6 -Establish City Springs Design Guidelines for developers and architects to abide by, guiding cohesive design throughout the District. To ensure intentional, quality design, the City will create Design Guidelines to supplement the City's Development Code in regulating design, materials, landscape elements, and aesthetics to maintain a degree of continuity and consistency among developments in the City Springs District. Should the City prioritize this?

83 Responses



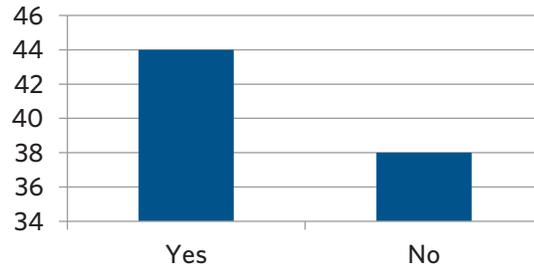
8. PP.7 -Expand and implement park improvements and encourage future pedestrian connections to Allen Park. Allen Park, just outside of the study area, plays an important role to those who live and work nearby. The City will expand the park into adjacent City-owned parcels and work to make improvements to the park to continue leveraging it as an asset to the District. Should the City prioritize this?

84 Responses



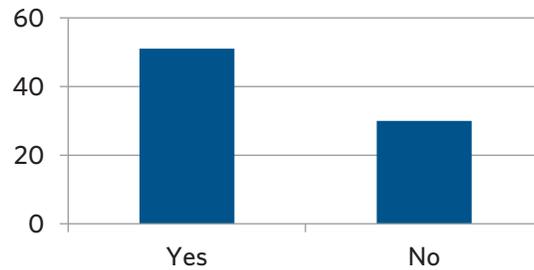
9. PP.8 - Continue to partner with MARTA for additional investment in transit facilities (i.e. additional bus shelters, benches, etc.). MARTA currently provides transit access within a walkable distance across the District and has plans to provide bus rapid transit (BRT) service along I-285. This policy will enact continued coordination for the addition of bus shelters, benches, and other bus stop amenities. Should the City prioritize this?

82 Responses



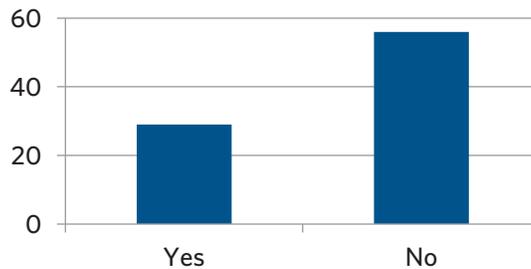
10. PP.9 - Continue to partner with MARTA for expanded transit service. MARTA currently provides transit access within a walkable distance across the District and has plans to provide bus rapid transit (BRT) service along I-285. This policy will encourage continued coordination to address future transit needs. Should the City prioritize this?

81 Responses

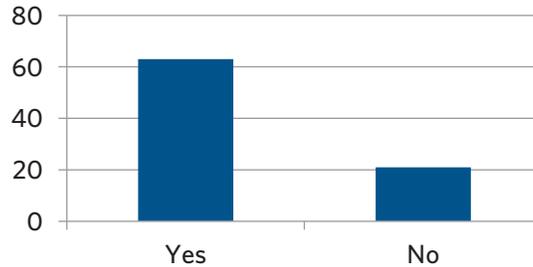


11. PP.12 - Construct a new facility to house the Anne Frank in the World Exhibit, Georgia Holocaust Memorial, and other programming at 6110 Blue Stone Road. City Council approved a facility to house the Sandy Springs Police Department and Visit Sandy Springs, as well as the Anne Frank in the World Exhibit, the Georgia Holocaust Memorial and associated programming and office space. This facility will be a prominent structure along Blue Stone and context-sensitive design will be incorporated to reinforce the City Springs vision. Should the City prioritize this?

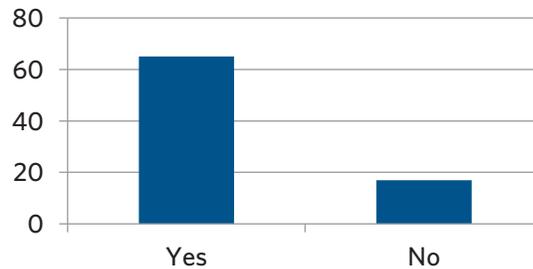
85 Responses



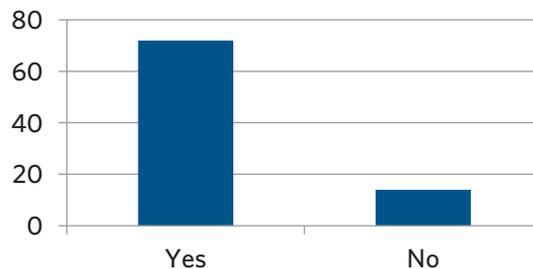
12. PP.13 - Consider additional opportunities for park network expansion by partnering with property owners and developers. While the City actively incentivizes developers to provide privately-owned public open space, the City will work to identify potential park spaces to meet future needs in order to provide access to all users. Should the City prioritize this?  
84 Responses



13. PP.14 - Consider elements of this plan's parking strategy during the development approval process to accommodate district growth and future demand for public parking. As the District grows, transit access and pedestrian connectivity is planned to become a more prominent method of navigating City Springs, however parking will still be a vital aspect in new developments. The Master Plan's parking strategy will devise additional policies that remove parking as a barrier to redevelopment while ensuring that the City's broader transportation initiatives are not compromised by an overabundance or mismanagement of parking. Should the City prioritize this?  
82 Responses

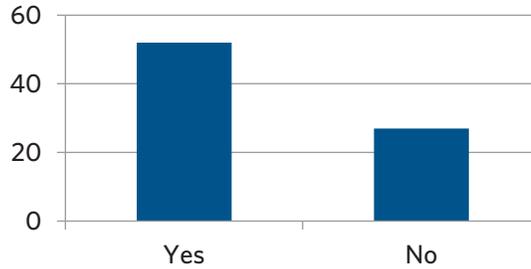


14. PP.15 - Conduct feasibility analysis for a regional stormwater management strategy. Redevelopment of properties will present an opportunity to handle stormwater management in a more sustainable, regional manner, as opposed to the current parcel-by-parcel method currently used. A regional system will also create opportunities for complementary park spaces. Should the City prioritize this?  
86 Responses



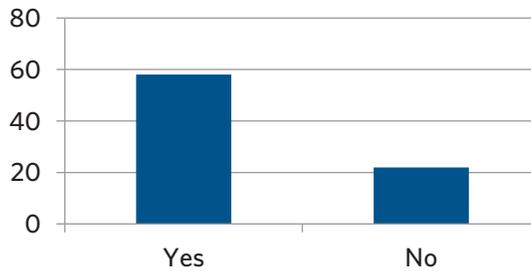
15. Building Height Policy. Use this map for questions 15 & 16. PP.10 - To support the development vision, zoning should appropriately reflect 4-6 stories in Tier 1 areas of the City Springs District core. Should the City prioritize this?

79 Responses



16. PP.11 - To support the development vision, zoning should appropriately reflect 2 - 4 stories in Tier 2 areas of the City Springs District. These areas provide a gradual height transition from City Springs District core to surrounding protected neighborhoods. (use the map shown above question 15). Should the City prioritize this?

80 Responses



17. Is there any other input you would like to share with the project team?

1	<i>Ensure that every single street in this planning area has sidewalks on every side of the road. That is a key factor in having a safe, central gathering space.</i>
2	<i>"Wayfinding signage"- are you serious? Put things in plain English!!!</i>
3	<i>No more apartment developments. This is ruining the city I love</i>
4	<i>We need a fantastic dog park (like Brook Run, although I know it would be smaller). Mixed retail and restaurant (like historic Roswell). No more banks or apartments!</i>
5	<i>Pedestrian walking bridges at various points over Roswell rd between 285 and Abernathy. This would go a long way to uniting both side of Roswell rd and get pedestrians out of the flow of traffic.</i>
6	<i>the plan is too aggressive and does not represent the wishes and desires of the greater Sandy Springs citizenship. None of this seems to support current residents and instead an outside vision that has nothing to do with what actually makes Sandy Springs unique and special. This plan is the opposite of why people choose to live here and not Buckhead.</i>
7	<i>We are too crowded now!</i>
8	<i>Implement affordable housing and DEI</i>
9	<i>NO MORE APARTMENTS!!!</i>
10	<i>More density please. But developers do not need public subsidies, unless they provide meaningful returns to the city (in the form of dramatically lower rents for decades). Don't be the suckers you continually show yourselves to be. (And, if you're not suckers, then you're just corrupt.)</i>

11	<i>Most important is continuing support of outdoor spaces and park connectivity and finish the street lights on Johnson ferry to the river and around the city</i>
12	<i>no more apartments</i>
13	<i>It is absolutely appalling the the city is planning to invest in the new cultural center at 6110 Bluestone Road while the Williams-Payne House and former Heritage Sandy Springs Collection falls into disrepair. The collection chronicles over 250 years of Sandy Springs History and was shoved into a basement. The city should be prioritizing preserving IT'S OWN HISTORY before investing in other cultural tourism projects.</i>
14	<i>City needs to find a way to make parking free for visitors in all parts of downtown</i>
15	<i>I think the area should be enlarged, and that transit and densification should be promoted as well as tree canopy's (specifically through rooftop green spaces on some of these tall buildings. but also to help incentivize the smaller properties to retain or grow tree coverage. )</i>
16	<i>Although we've loved Sandy Springs, the spending &amp; taxes have become too much.</i>
17	<i>Less traffic lights, increase flow of traffic, less bottlenecks. Lower taxes.</i>
18	<i>identify more streets specific sandy springs place an heritage park , bluestone is a prominent st regarding ss ctr</i>
19	<i>Support adaptive reuse of existing properties, many of which can be expediently ly repurposed to contribute to an enticing retail/restaurant walking district.</i>
20	<i>Sandy Springs does not need additional housing/ rental properties and commercial development!!!!</i>
21	<i>2-4 stories in Tier 1 areas also</i>
22	<i>limit tier 1 to 2-4 stories. Keep sandy springs accessible for those of us already here. This overdevelopment and removal of traffic lanes is making it unattractive for your existing taxpayers. I know drive to Cobb county for shopping and restaurants. It is more pleasant to get around. Return sandy springs circle to 4 lanes. Avoid traffic lights within 100 yards of one another through connected businesses. Especially around city hall. It is a nightmare to traverse sandy springs circle, Roswell road and Mount Vernon. Be careful with the offset crosswalks. They are installed on Cortez road in Bradenton Florida and there are soooo many lights that you cannot focus on the pedestrians. It is less safe know with the cross walks and lights than it was before implementing these new "improvements"</i>
23	<i>Parking is currently an issue for residents in this area and needs to be considered before bringing more residents and visitors to this area.</i>
24	<i>These policies should be more narrowly focused on creating an attractive, walkable, store lined city core for Sandy Springs. A destination area for shopping, eating, culture. As I read these they sound too broad, too much, and not really giving me placemaking. Id rather see policies that create this core than ones that seem too unfocused and liable to create traffic problems in an already too-much- car-congestion area.</i>
25	<i>Please create incentives for more active uses around City Springs. While the City Center is beautiful, so much of it is dead space. Can we plan for a freestanding brewery or rooftop restaurant on one of the corners of the parks? We need more creative planning on activating spaces (Alpharetta did a beautiful job at this).</i>
26	<i>We need more spaces like foodhalls and hangouts for young adults.</i>
27	<i>Widening Hammond with sidewalks</i>
28	<i>I wouldlike to see parks with excessive equipment in them.</i>
29	<i>Lack of parking everywhere. Especially Morgan Falls overlook Park. Plan for more then you think you need</i>
30	<i>Incentives for private property owners and landlords - especially some of the blighted property in Glenridge Hammond - would be much appreciated. The Hammond Glen apartments are an eyesore and embarrassment to the area.</i>
31	<i>growth needs to be organic and not forced. offer incentives to small business ie resturants to bring in new business....not just large companies</i>

32	<i>IS THERE A WAY TO INCENTIVIZE PROPERTIES LIKE CITY WALK TO NOT WAIT UNTIL REDEVELOPMENT BEFORE THEY PARTNER TO CREATE THE STREET GRID? PROPERTY ASSEMBLAGES AND MAJOR REDEVELOPMENT COULD TAKE DECADES IF AT ALL. This is the Kroger Shopping Center where one would not likely expect that store building to ever get torn down since it is an anchor grocery building and a full scale property overhaul may never come. The Plan shows the continuation of Blue stone Rd as the Main Street through there. Let's find a way to get it done.</i>
33	<i>Quit building apartments</i>
34	<i>I really think the grid build out and additional pedestrian crossings and safety measure would really help give the district a true sense of place and walkability.</i>

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APPENDIX

**C.**

# Parking Strategy Supplement

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## Technical Memorandum: Parking Strategy

### Introduction and Goals

The consultant team reviewed a 2014 district-wide parking study and, in an effort to provide new information on parking demand at mixed-use developments, conducted detailed parking inventory and occupancy counts of the City Springs campus. As opposed to relying on dated parking ratios from suburban-style residential and commercial development, the City Springs survey results were used to assess the City's off-street parking requirements for new development. The parking demand ratios derived from that work were then used to estimate peak parking demand that would be generated by new opportunity site development scenarios and evaluate how that demand would be satisfied through some combination of surface, structured, and curbside space capacity. Those ratios took into consideration potential influences associated with best management practices related to parking access and revenue control systems, smart parking technology, and parking and transportation demand management (PDM and TDM) strategies. Additionally, relevant City staff and representatives of REEF Parking, the City's current parking contract management firm, were interviewed to get a sense of the parking role the City would play in supporting future development initiatives. With a sense of the relationship between future development opportunities, parking demand at the city-owned opportunity sites, and an understanding of the role the City would likely play in supporting shared parking management strategies, the following policy guidelines are offered for consideration.

Note that the focus of this task is oriented towards **creating policies that remove parking as a barrier to redevelopment while ensuring that the City's broader transportation initiatives are not compromised by an overabundance of parking, poor management, or both.**

### Parking Role and Responsibility

Prior to the development of the parking strategy it was important to determine the level of responsibility that the City would have with regards to parking development, ownership, and operation. In the case of the City Springs campus, which in addition to the commercial and residential components includes City Hall, the Performing Arts Center, and the Conference Center, the City took a lead role in parking development and operations as it contributed to the construction of the parking garage and is responsible for day-to-day parking management through the City's third-party contract manager. This management responsibility includes City Springs' parking structure, curbside spaces, and a valet parking program. The City does not have similar parking assets or responsibilities elsewhere.

City staff do not believe that the City Springs campus situation where the City helped fund and is fully responsible for managing off-street parking will be the formula to be used on the opportunity development sites as the presence of City Hall and Performing Arts Center made the City Springs campus a unique situation. Therefore, the theme that runs throughout this appendix is the **development of policy language that encourages and/or requires private sector parking providers and operators to manage new parking facilities in an open, transparent, and shared manner.** Given that background, the following policy guidelines address:

- **Rightsizing future parking facilities** to ensure that neither an underabundance nor overabundance of parking spaces are created.
- **Private development's role in managing and operating off-street parking facilities in a shared manner** where any surplus parking that is created is accessible to those existing and nearby land uses that may be under parked.
- Potential for a parking management program that **supports carshare, bikeshare, transit ridership subsidies, and other transportation demand management (TDM) initiatives.**
- The creation of **flexible and adaptable management strategies that are capital-light and technology-heavy.**

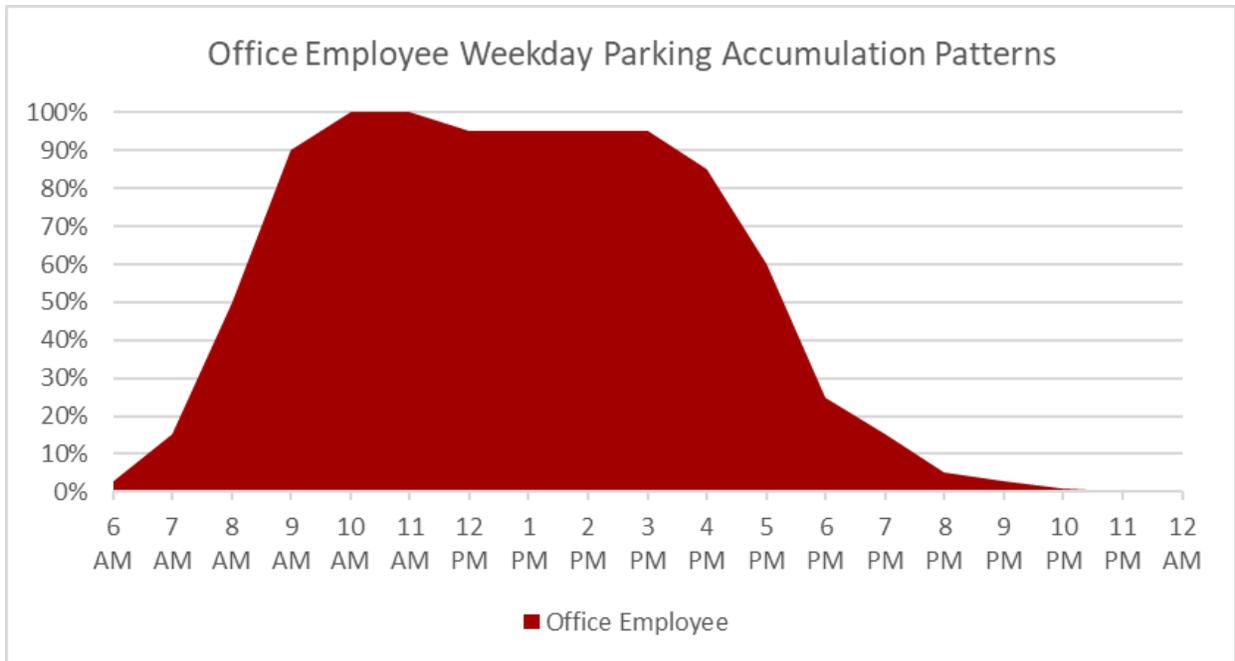
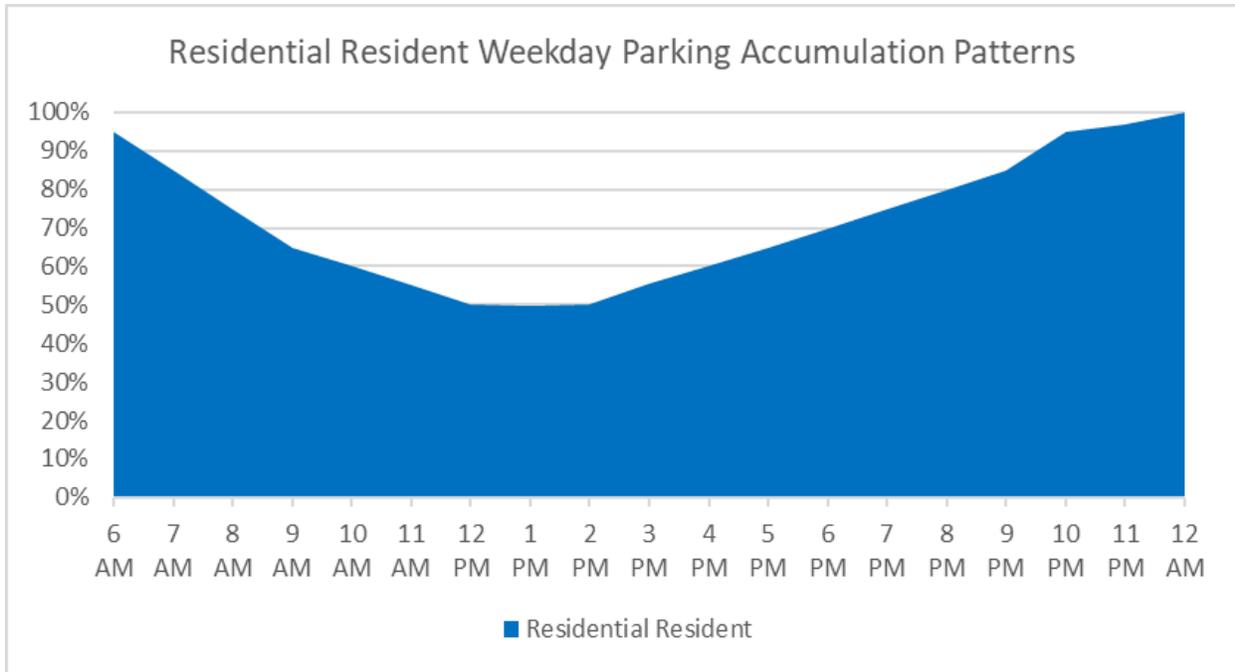
As the development and management of off-street parking facilities is quite different from the management of curbside parking spaces, the document that follows includes separate discussions of curbside vs. off-street management policy. However, before that can be accomplished, a brief overview of current parking codes and ordinances is warranted.

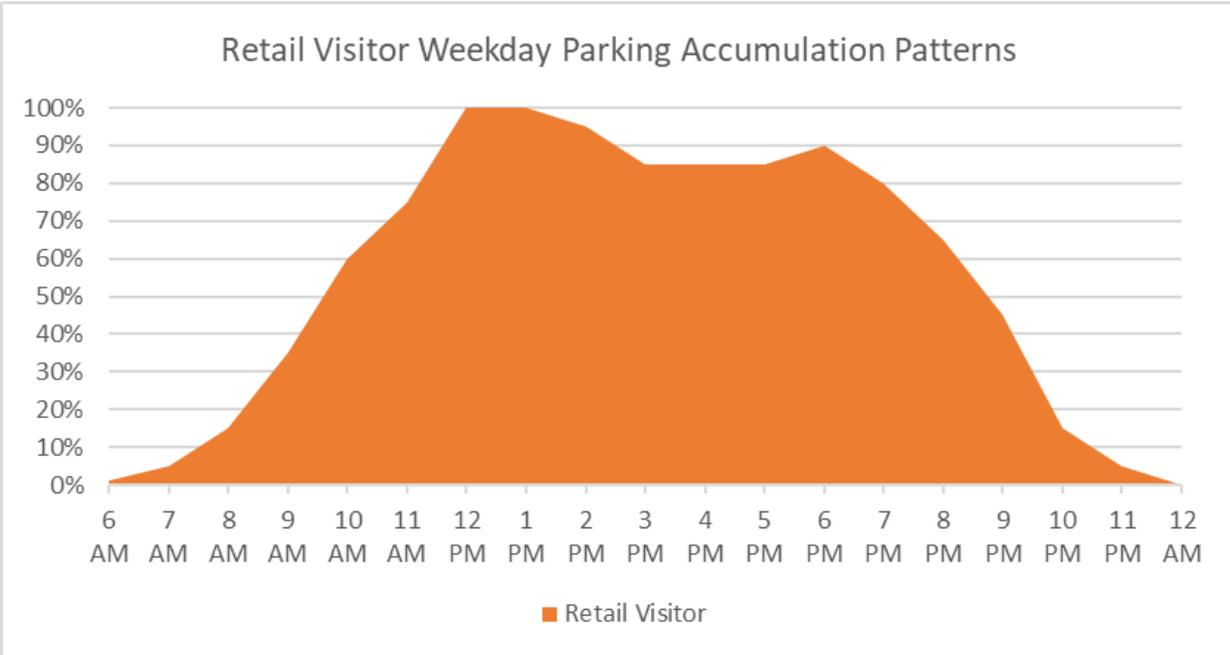
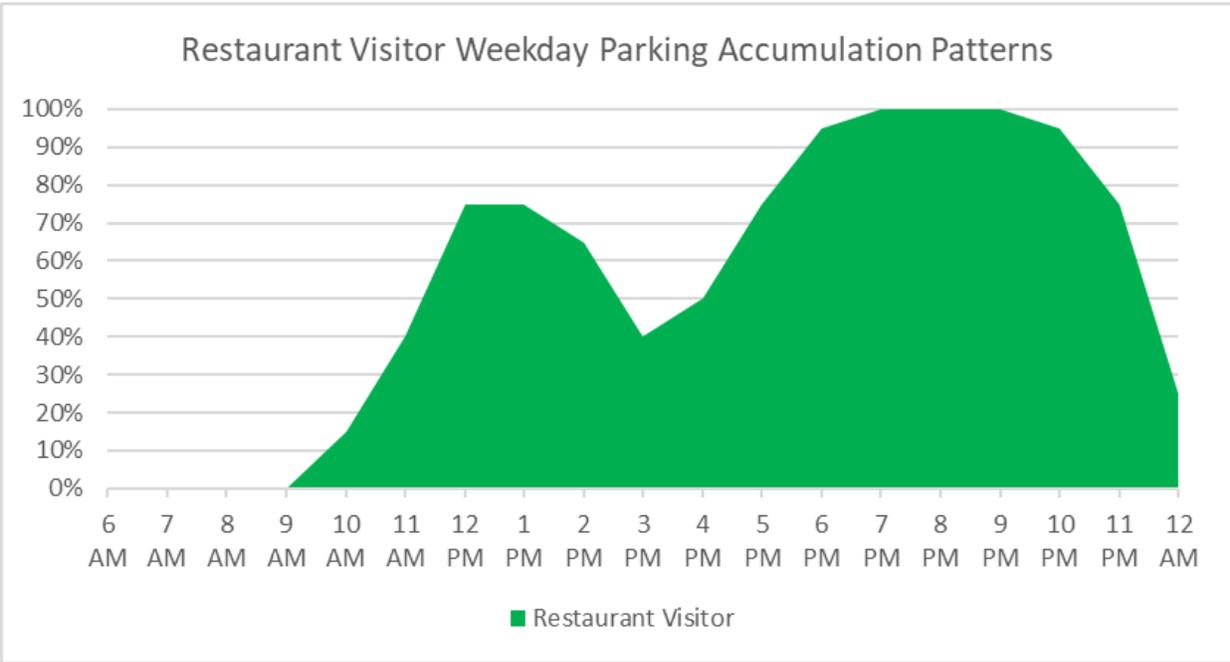
### Existing Off-Street Parking Codes/Ordinances Review and Recommendations

As this effort is concentrating on curbside and off-street parking management strategies, the codes and ordinances that address parking stall design standards, landscaping, lighting, and off-street parking requirements for new development and other design considerations were excluded from this examination. Even when these design standards are excluded from discussion, there are nearly a dozen applicable codes that relate to parking signage, wayfinding, hours of operation, meter rates, and fines for parking violations. Chapters and sections of the code that were examined are listed below:

- Division 6.3 - Residential Parking
  - Section 8.1.2 - Parking Required
  - Section 8.1.3 - Perimeter Center - City Springs District
  - Section 8.1.4 - Parking Reductions
  - Section 8.1.5 - Vehicle Parking Options
  - Section 8.1.6 - Unbundling Parking in Perimeter Center
  - Section 22.50 - Violations
  - Section 58-121 - Illegal Parking at City Springs
  - Section 58-122 - Enforcement
  - Section 58-124 - Free Parking
  - Section 59-96 - Signs
- 
- Division 6.3 - Residential Parking, Article 6 - Rules for All Districts: this section addresses parking location and design standards for single-unit residential land uses. While this evaluation does not include a discussion of design, *Division 6.3* was included for what it did not reference: a residential parking permit program. There is currently no program where residents who live in residential zoned areas adjacent to commercial and/or commuting locations (bus/transit stop) may obtain a permit that restricts access to the curbside space to residents during periods when office workers, restaurant employees, commercial visitors, and commuters are tempted to park on residential streets.
  
  - Section 8.1.2 - Parking Required: As noted in the list above, the majority of parking management-related codes and ordinances are located within a single division under *Article 8 - Site Development*. The first section, *Section 8.1.2 - Parking Required* states that before a building permit is issued for a project that includes the required parking, the parking lot layout and area must be found by the Director to comply with this Development Code. The code includes a calculation of required spaces for a variety of land use types (two per dwelling unit for single-unit residential, one per 300 sq.ft. for office, one per 150 sq.ft. for restaurant, etc.).
  
  - Section 8.1.3 - Perimeter Center/City Springs District Codes: This section offers alternatives to the requirements outlined in Section 8.1.2 for the two subject areas. In these districts there are no minimum parking requirements/ratios, only maximum requirements/ratios, which acknowledge a number of factors that will reduce parking demand in a mixed-use environment. However, these parking demand ratios do not take into consideration the potential for shared use where a parking space vacated by a resident who departs for work in the morning, for example, could be used by an employee to an office building without fear of conflict. For example, the 1.1 spaces per multi-family bedroom required by the city code are not reduced during the weekday daytime period when a significant percentage of residents have left for work. Hourly parking accumulation patterns for different land use activities have been researched and published by the Urban Land Institute and National Parking Association and these adjustments could be added to the city's code and, with appropriate management on behalf of the developer and their property managers, would reduce the potential for over-building parking capacity.

Figure 1: Urban Land Institute/National Parking Association Select Land Use Parking Accumulation Pattern





- Section 8.1.4 - Parking Reductions:** With regards to other adjustments and reductions, *Section 8.1.4 - Parking Reductions* does include a number of factors where the space requirement for new development may be reduced. They include affordable housing reductions, senior living reductions, a private car sharing program, proximity to transit, and a parking utilization study. The case study of parking supply and demand at the City Springs campus generated parking demand ratios that are generally in line with the City's off-street parking maximums, so no changes are warranted.
- Section 8.1.5 Vehicle Parking Options:** This section defines how a new development's parking requirements may be met in terms of location (on-street and off), and/or through valet parking, tandem, and remote parking. It is under *Section 8.1.5* that shared parking credits/reductions can be applied. The code identifies the Urban Land Institute (ULI) and National Parking Association (NPA) as a resource to justify shared use reductions following review and approval by the Director of Planning and Zoning. Remote parking reductions are notable as they define the acceptable distance from the

principal use as 800 feet and the terms upon which a remote site lease agreement must be structured. While that might be a reasonable measure of acceptable walking distances, some municipal codes define 1,200 feet as that distance. This is an important distinction as the municipality and/or developer who builds a large, centrally located parking structure for a project and who realizes surplus parking capacity could offer that surplus to adjacent property developers as a way of satisfying that developer's parking requirements. Extending the service distance area for shared parking would extend that benefit to a greater number of potential partners.

As Sandy Springs' codes include parking maximums, it may be prudent to consider codes and ordinances that permit a developer to exceed the maximum parking space requirement. Developers may be pressured by lending institutions and leasing agents to provide more parking capacity than required. If permitted, the developer should make a one-time payment for each space provided above the maximum limit. In effect, it would represent the opposite of a fee-in-lieu of parking. While an in-lieu fee is paid when parking requirements are not met, this fee would be generated when the developer wishes to exceed space requirements. But like an in-lieu fee, the revenue from this program would be used to support mobility on demand, "last-mile" services, and a range of other transportation demand management strategies.

- *Section 8.1.6 - Unbundling Parking in Perimeter Center:* This section introduces Unbundling Parking in Perimeter Center which requires that the cost of leasing/renting a parking space be separated from the cost/rent for multi-unit residences. "Vehicle parking spaces must be leased or sold separately from the rental or purchase fees, such that potential renters or buyers have the option of renting or buying a residential unit or commercial space at a price lower than if the vehicle parking was included". With the cost of a monthly residential parking permit being segregated from the rent or condo fee, the City and developer are providing an opportunity for future residents of Sandy Springs, and in this case Perimeter Center, to carefully consider the choice to drive, park, and own a car. In combination with private car sharing services, proximity to transit, and bike/scooter facilities, this strategy encourages future residents to consider bike, walking, public transit services, and transportation network companies as viable alternatives to owning a vehicle and paying monthly parking fees. It is recommended that the City modify this existing ordinance to include the City Springs campus and future mixed-use developments like those examined as opportunity sites. However, for this recommendation to be successful, the City will need to track the benefit of this process by first requiring the developer to prepare a parking management plan (discussed later in this document) and the City's zoning enforcement staff would need to conduct periodic site visits to confirm compliance.

It is important that capital and annual administrative costs for any new parking policies and/or for any changes to existing policies be quantified as those policies that have political and financial support can succeed while those that do not have sufficient funding and support will not.

### Existing On-Street Parking Code Review and Recommendations

While the aforementioned code language primarily addresses off-street parking, there are a handful that relate to the management and enforcement of curbside parking restrictions as well. They include parking violations (Section 22.50), illegal parking at City Springs (Section 58-121), free parking (Section 58-124), and enforcement (Section 58-122).

- *Section 22.50 - Violations:* Enforcement of this section "shall be through a civil action in municipal court by the issuance of a ticket which shall be either left with the vehicle or delivered to the person in possession thereof. For purposes of such civil action, it shall be presumed that the registered owner of said vehicle is in control or possession thereof". The key phrase in this code is "or delivered to the person in possession" of the vehicle. **This language would permit the issuance of digital parking citations that would be part of a license plate recognition (LPR) parking enforcement program** where a vehicle mounted with the LPR cameras and related hardware and software could identify the vehicle in violation and issue that citation directly to the registered vehicle owner by mail. This is similar to the LPR-based speed cameras that are becoming more common.
- *Section 58-121 - Illegal parking at City Springs:* This section covers the definition of illegal parking, including time-imposed parking restrictions and the treatment of food truck vending. Section 58-122 covers enforcement and the issuance of citations for vehicles parked in restricted areas and "shall be

the responsibility of the parking management service, code enforcement officials of the City operating under the community development department and/or the police chief or his designee". Parking management service means the private vendor retained by the City and authorized to issue parking citations for illegally parked vehicles. In effect, **the City has expanded its parking capabilities not by creating a new municipal department and hiring additional municipal staff but by contracting out those services to a third party.** Given the limited size of the City of Sandy Springs' parking system (City Springs campus), and the desire to have the private sector responsible for the development and operation of publicly accessible off-street parking facilities, this is the prudent approach.

- *Section 58-124 - Free Public Parking:* states that free parking shall be available to the general public at all designated parking spaces within the defined City Springs area for up to two hours maximum on a first-come, first-served basis. Requiring parking rate schedules to be codified by its elected officials limits management flexibility. The code does permit flexibility during events at City Springs.

While some modest "tweaking" may be warranted, the **City's existing codes do introduce the basic elements of off-street parking best management practices** in that some flexibility is permitted in how the off-street requirements are satisfied.

## Parking Strategy Recommendations

### Parking Management Plan

As noted in our review of current parking operations and conditions, there are several existing elements that are appropriate and represent current parking industry best planning and management practices, such as:

- the City's off-street parking requirements for new development
- reductions to those requirements associated with affordable housing and proximity to transit stops,
- unbundling of residential parking pricing from rents

However, the City lacks code language or ordinances that require the developer to prove how they would achieve these goals through shared parking management. A Parking Management Plan (PMP) is a codified site plan condition submission that some municipalities use to require developers and property managers to meet these goals.

A potential PMP implementation method would be to require a PMP submission for review with the final site plan submission for approval by the City's Community Development Department. Design submission requirements of the PMP include but are not limited to parking stall and drive aisle dimensions, parking space allocation (employees, residents, visitors, car/vanpool, etc.), bicycle access points and bicycle parking locations, and the location and type of access/control gates and pay stations. Management details include identifying parking staffing levels during peak and off-peak periods, hours of parking operation, parking rates, and a description of how the different long-term (employees and residents) and short-term (shoppers, diners, and residential visitors) parkers are managed from the moment they enter the lot/garage to the moment they depart. If valet parking is anticipated, the PMP needs to include a description of how and where staging and vehicle retrieval will occur. Given the need to ensure that vehicles waiting to enter the parking facility do not back out onto the public right-of-way, the PMP also requires a queuing analysis which includes the peak volume of vehicles and the processing capacity of the entry lanes and parking control equipment.

The City could also extend the PMP boundary into the public right of way to form a more comprehensive Curbside Management Plan showing curb activity and other streetscape elements. This may address all required elements contained in the project's site plan conditions, which typically includes but is not necessarily limited to on-street parking meters, taxi stands, curbside handicap parking, para-transit passenger pick-up and drop-off areas, loading zones, car sharing spaces, bus stops, and bicycle parking.

The PMP reinforces the transportation demand management strategies that are required of the developer and property management as they reference both employer-provided benefits and building-provided amenities. Employer-provided benefits can include a monthly subsidy for public transit and/or car and vanpool programs while building-provided amenities include preferred car/vanpool parking locations, bicycle parking facilities, and shower and locker facilities. These and potentially other parking and transportation demand management strategies that would be employed by the developer and property manager but monitored periodically by the City will provide the City and regional transportation planners greater insight into, for example, which last-mile mobility option is most effective, how and where mobility on demand is working (or not), how fare payment

portals are used, where real-time transit information is posted, how the property manager's responsibility as transit data manager can be codified, and which department within the City would the PMP process be managed.

<b>Instructions:</b> Attach MAC checklist to the PMP. Draft PMPs may be rejected or delayed if MAC Checklist is not completed.				
<b>Site Plan/Use Permit Number:</b>				
<b>Project Name:</b>				
<b>Address:</b>				
<b>A.</b>	<b>Parking Management Plan</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
1	Cover page with signature line			
2	Table of contents			
3	Project specific information			
4	General project description/project overview			
5	Approved site plan or use permit parking condition and any other conditions referencing the PMP			
6	All architectural floor plans on which vehicle parking and/or parking access are located, annotated per the Guidelines			
	a. Garage level plans, with any and all revisions from the approved garage plan bubbled and labeled			
	b. Curbside and ground floor plan			
	c. PMP sign plan (interior and exterior) and table of signs			
	d. Details of access control gates/array, pay stations and any other access and revenue control (PARC) equipment or automated parking control equipment			
7	Curbside Management Plan			
8	Garage Management and Enforcement Plan			
9	Description of how all users will be directed to parking spaces, payment equipment, and garage entrances and exits			

Figure 2. Arlington County, VA Parking Management Plan minimum acceptable criteria checklist

With regards to public parking improvements in the public right-of-way, the municipality will be required to purchase, fabricate, install, and maintain all of the signs, shelters, and equipment as required and approved by the PMP. However, the developer is required to pay for the equipment and material following the municipality's menu of costs for signs, meters, etc. The PMP funds are retained by the municipality in escrow as the development moves beyond the site plan approval process and through construction. Once construction is complete and the Certificate of Occupancy released, the municipality then installs the signs, shelters, and equipment following a previously approved installation schedule. Note that this code and practice only applies to public streets as curbside parking regulations and enforcement on private property being outside of the municipality's area of responsibility.

An illustrative example of a PMP is offered on the following page.

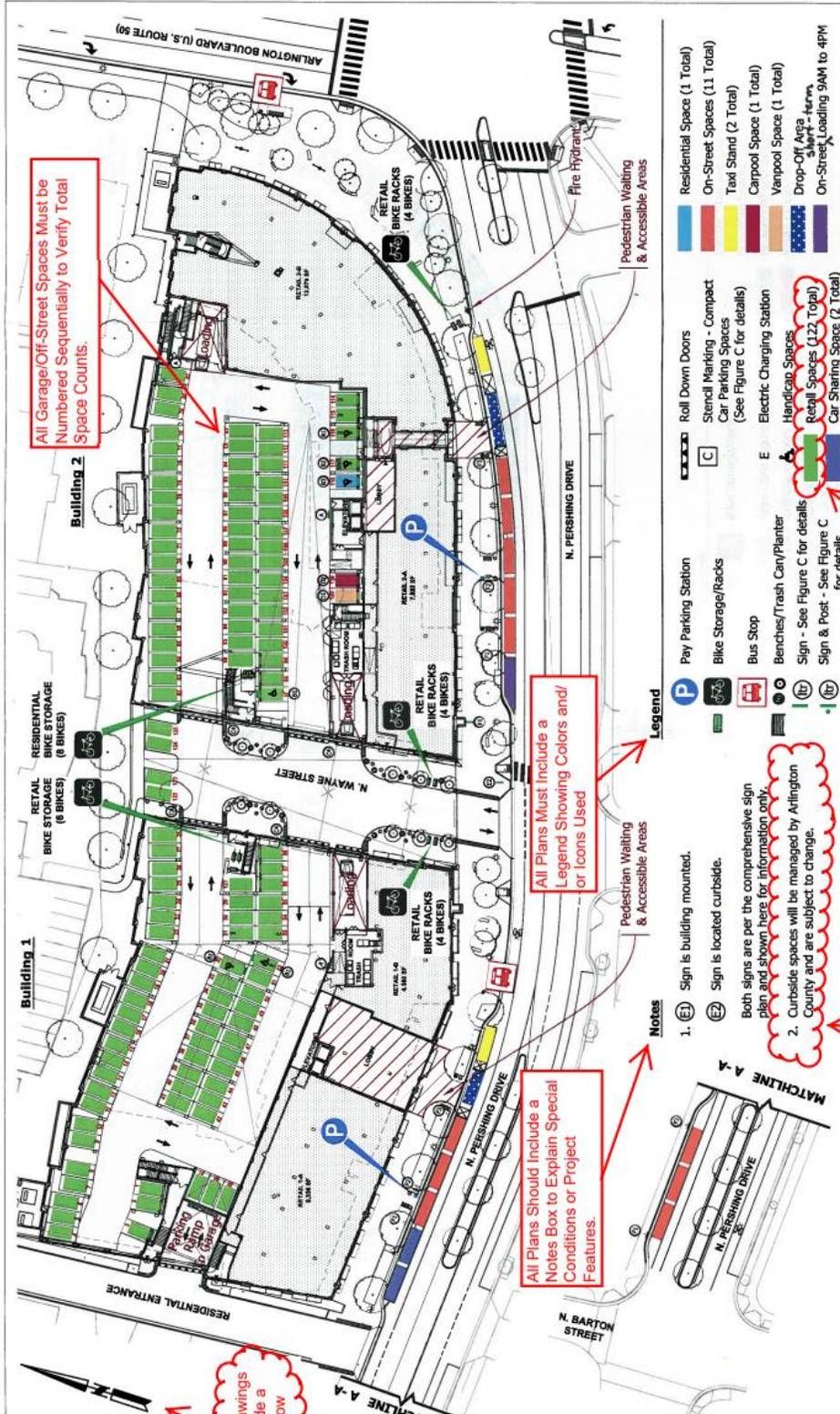


Figure 3. Illustrative Example of a Parking Management Plan

Ground Level Parking Plan

NOTE: ACG Prefers the Term "Short Term Parking" Instead of "Retail Parking".

Parking Management Plan

This Statement Must Be Listed on All Curbside Plans.

## Shared Parking Strategy

As described earlier in this memo, under *Review of Off-Street Parking Codes/Ordinances*, the City's code already supports shared parking agreements and provides reduced parking requirements for private development that takes advantage of shared parking schemes. The City also takes advantage of shared parking today for overflow parking from City Springs campus events. Specifically, they currently use the parking at Sandy Springs United Methodist Church.

The City should continue to work with other district property owners to identify other potential overflow parking locations to utilize to accommodate future demand that may arise as the result of multiple overlapping events. If current overflow parking locations become targets for redevelopment, the City should work with the developer to secure long-term shared parking agreements once development is complete. Additional overflow sites will also be required to accommodate demand in the mid-term while construction on these sites is underway. Other sites where the City should explore potential for shared parking may include:

- City Center Crossing (6337 Roswell Road)
- Centre Court (6010 Sandy Springs Circle)

The City should create a last-mile connectivity strategy to support users connecting from the overflow parking to City Springs campus. This may include an expansion of their existing shuttle program, supplemented by other options such as enhanced wayfinding and free bikeshare.

In order to create a consensus around these issues, the City should undertake an events parking study to determine how demand will change with added events, work with property owners of underutilized lots, and create a last-mile connectivity strategy. This study should include case studies of City Springs' peers, such as Avalon (Alpharetta), Halcyon (Peachtree Corners), and Downtown Woodstock.

## Mitigating Impact to Neighborhood Parking

As the City adds density, it may become desirable to prevent this demand from spilling over into adjacent neighborhoods. The streets most likely to benefit from this type of program would be the residentially zoned areas around City Springs and any other higher-density developments that impose a fee for parking. Experience suggests that parkers who are required to pay for monthly or hourly parking will invariably search for free parking alternatives. Curbside space in residential neighborhoods around City Springs, for example, may already be experiencing demand from some of these cost-conscious parkers. Residents who live within walking distance of these types of large parking demand generators may request that the City discourage this type of activity through the creation and enforcement of new parking policies. There are two main options for addressing this concern:

- **NO PARKING zones:** The City can enact NO PARKING zones in sensitive neighborhoods to prevent people from using the neighborhood streets to access nearby commercial destinations. The NO PARKING restrictions can be applied during specific time periods, for example 8:00 am – 8:00 pm, or during all hours. This policy is most applicable where residents have ample parking for their own vehicle storage (and that of their guests) on their private driveways and garages, which is generally the case in the neighborhoods adjacent to City Springs district. However, this type of policy can become burdensome on residents who do not have access to enough off-street parking for residents and their guests (in driveways or garages). This type of policy is easier to enforce than Residential Parking Permit Programs (see below) and puts a larger burden on commercial properties to accommodate more parking.
- **Residential Parking Permit Program (RPPP):** RPPPs have well-documented benefits as well as challenges. Residents are required to purchase, display, and manage residential and temporary visitor parking passes, residents are empowered to alert municipal staff of potential parking violators, municipal staff are required to respond to these requests through reactive enforcement patrols, and/or staff has to consistently and systematically patrol these areas as part of a pro-active and dedicated enforcement effort. A resident who is tired of seeing his neighbor's second, third, or fourth vehicle parked on the street in front of their house might be tempted to use the RPPP program to harass that neighbor. Additionally, the creation of one residential parking zone might create another simply by the fact that one zone would force the commuter or restaurant employee to move their vehicle into an adjacent residential street.

## Flexible Curbside Parking Restrictions, Codes, and Ordinances

A review of the City's code did not yield substantial insight regarding the creation, management, and enforcement of other compelling uses of curbside space along the public right-of-way such as loading zones, shared mobility zones, parklets, and bike corals to name a few. **The demand for curbside parking is constantly evolving as the land uses and the transportation network that serves them evolves.** An underperforming retail shop becomes a popular restaurant/bar and as parking demands change so does the type of curbside parking restriction placed in front of that new business. The trend in the industry, therefore, is moving toward multiple-use/shared-use on-street spaces. For example, a single curbside space might be limited to loading and unloading from 7AM to 9AM, two-hour durations from 9AM to 11AM and 1PM to 5PM, and food vending from 11AM to 1PM. One of the many challenges associated with multiple and shared use parking management is the stress it places on the regulatory signage and enforcement. As required by law, regulatory signage needs to post all parking restrictions following the Manual for Uniform Traffic Control Devices which is produced by the Federal Department of Transportation. **As illustrated in the photo, that could lead to a difficult to interpret and difficult to enforce scenario.**

Unfortunately, there is no fixed formula that can be referenced that calculates how many loading zones and/or shared use zones need to be created. Therefore, as opposed to codifying the location and management of these zones, **the City's Community Development and Public Works Departments along with the city's third-party parking management provider need to be given the flexibility to respond to changing conditions without requiring City Council approval.** For example, changing a four-hour posted parking duration on one street/block to two-hours to encourage greater turnover to support adjacent businesses need not require City Council review and approval.

The City of Sandy Springs could modify existing code language that requires Council approval to have that authority through and with the city manager. The decision to create, relocate, and/or expand a shared use zone, therefore, would be left to the staff that may be working with a particular business owner, property manager, or developer to create these spaces as the need arises.



## Funding the Recommendations

The cost to Sandy Springs to introduce these elements may be significant. Employing an LPR-mounted vehicle for parking enforcement and RPPP management may require acquisition of a vehicle, the LPR equipment, and one or potentially two new employees so that a resident and non-resident's vehicle could be identified simply based on the registered vehicle information. Expanding the curbside program will require additional parking staff to enforce the new parking areas, collect meter revenue, and respond to business owner and parking consumer complaints. As a result, if the City desires to move in this direction, **the City needs to prepare for the budgetary requirements that are associated with these new and expanding responsibilities.** While seemingly unrelated to parking management policy, the need for a consistent and dedicated stream of revenue is paramount to the success of the public parking program and **it is recommended that the City create a parking enterprise fund within the existing General Services department which houses the parking management function.** An enterprise fund is an accounting construct that requires that all annual operating expenses are met from the parking revenue that the program generates. Without a dedicated source of funding and separation from the competition that each municipal department experiences during the annual budget setting process, the City's public parking program would soon fail to meet its management obligations.

## Next Steps

The City of Sandy Springs has in place a considerable number of on- and off-street parking best management practices embedded in their code including off-street parking reductions and unbundling of parking pricing from rents but there are important pieces to this puzzle that need to be inserted, and new parking management strategies to consider adoption for. Principal among them is:

- PP.14.1** Undertake an Event Parking study to support growth of events at the City Springs campus
- a. Work with property owners within and near the district to identify additional options for event-overflow parking in the near- and mid-term before redevelopment establishes a more permanent shared parking ecosystem.
  - b. Study options for shuttling and other first- and last-mile connections for any overflow parking that's further than walking distance
- PP.14.2** Consider the following supplements to the code to regulate parking for private development:
- a. Modify *Section 8.1.6 - Unbundling Parking in Perimeter Center* to include the City Springs campus and future mixed-use developments like those examined as opportunity sites in the City Springs Master Plan
  - b. Extend the service distance area allowed for shared parking in *Section 8.1.5 - Vehicle Parking Operations* from 800 ft to 1,200 ft to extend that benefit to a greater number of potential partners
  - c. Incorporate codes and ordinances that permit a developer to exceed the maximum parking space requirement, in exchange for a parking impact fee or an agreement that the surplus parking will be available for public use
  - d. Work with the City legal team to determine whether the current code (*Section 22.50*) would permit the issuance of digital parking citations that would be part of a license plate recognition (LPR) parking enforcement program
  - e. Site plan condition submission through parking management plans, detailing how developers and property managers plan to meet parking requirements
  - f. Including payments from the developer to fund curbside parking management signs and equipment
  - g. Monitor and mitigate impact to residential neighborhoods (through NO PARKING zones and/or Residential parking Permit Programs)
  - h. Codifying management flexibility to uncoupling changes to curbside restrictions from formal City Council debate

## Technical Memorandum: City Springs Campus Case Study

The consultant team conducted a parking inventory, utilization, and land use demand study on the City Springs mixed-use campus with the intention of analyzing high density development patterns and parking demand which will differ from traditional suburban development. This campus has residential, retail, restaurant, office (City Hall), a conference center, and a performing arts center. It is supported by a combination of publicly shared and restricted off-street parking and metered curbside parking.

The City Springs campus is the city's first fee-based and proactive parking management strategy, as the city manages the publicly accessible off-street facilities and the multi-space metered curbside program. By utilizing a third party parking management provider, the city maximizes the benefit of the publicly accessible spaces through shared space management, parking pricing, wayfinding, and access control. One of the off-street parking structures at the City Springs campus is reserved for and restricted to residents and is not part of the shared public parking program.

The other key points from the study of the City Springs campus are as follows:

- Unified management under one entity (city with a parking operator) can achieve shared parking operations and reductions in the number of off-street parking space provided.
- The land use-based maximum parking demand ratios published in the city code (Section 8.1.3.) are generally appropriate for future mixed-use development parking requirements (exception being restaurant where the existing 8.0 spaces per 1,000 sq.ft. appears quite low)
- There are significant deviations in parking demand by time of day between the various land use activities, which suggests that additional adjustments and reductions to off-street parking requirement are possible.

Figure 1 - Boundary and Block Coding of City Springs Campus Parking Study



- Multi-family developers, leasing agents, and residents are likely to require parking that is reserved and segregated from the other parking user groups. This is in conflict with the goal to provide shared parking for all potential parking user groups.

### Right Sizing Off-Street Parking Requirements

Developing accurate and effective off-street parking requirements for new development is a key component of this 2022 study as it was in the 2014 study. City Springs as a new mixed-use development varied land uses and staggered activity is likely to be reflective of the type of development to be encouraged throughout the larger City Springs District (other than the performing arts component, which will likely remain unique). As such, the inventory of parking spaces developed for City Springs and hourly weekday and weekend day parking occupancy counts were conducted in May 2022 in an effort to understand how these parking supply and demand “demographics” might continue. Figure 2 and Figure 3 illustrate the results of the hourly occupancy counts on a typical weekday and a Saturday, respectively with the City Springs boundary. Of the 1,006 spaces that were included in the field surveys, 750 spaces were occupied during the weekday peak hour of 1 PM while 774 spaces were occupied during the Saturday peak period of 8PM. The weekday peak hour is likely driven by the large office building (City Hall) while the Saturday peak is likely driven by the City Springs residents and their guests and an event at the Performing Arts venue. It is understood that a smaller daytime event at the Performing Arts Center was ongoing during the weekday survey.

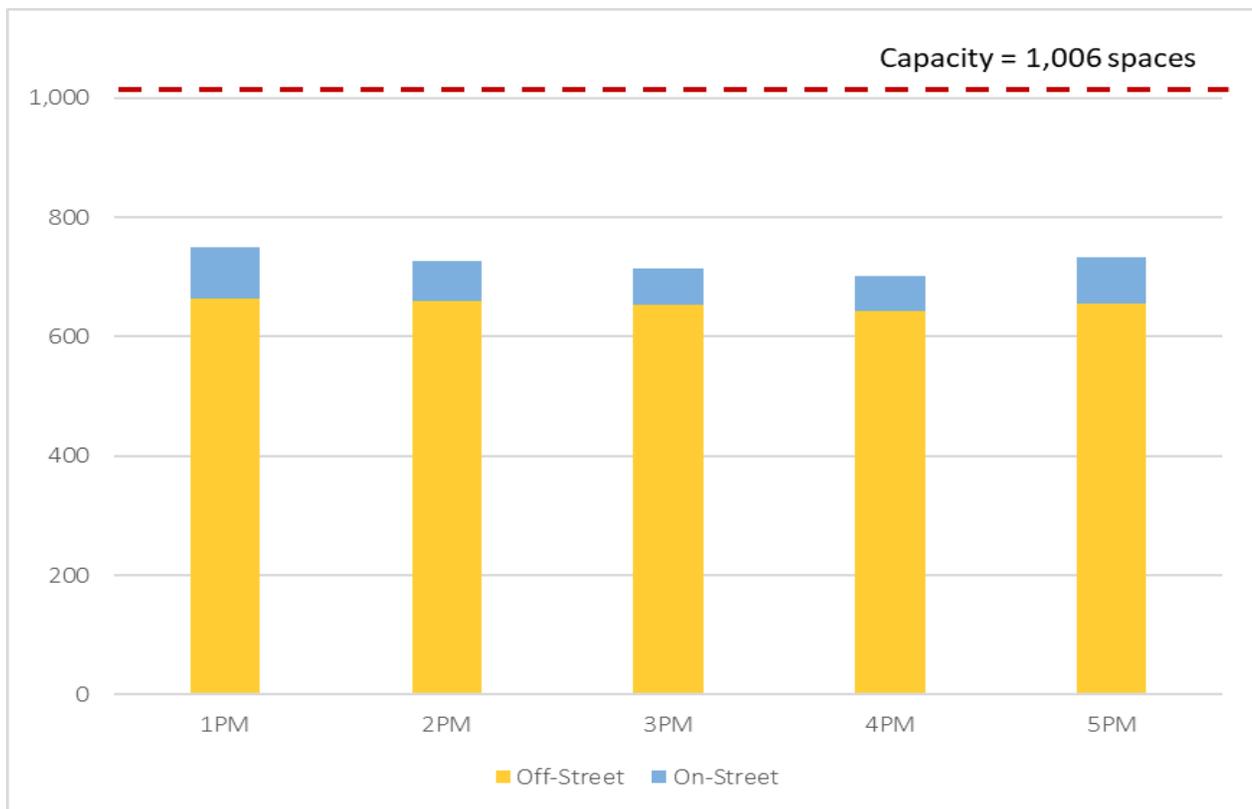


Figure 2. Hourly parking occupancy on a typical weekday

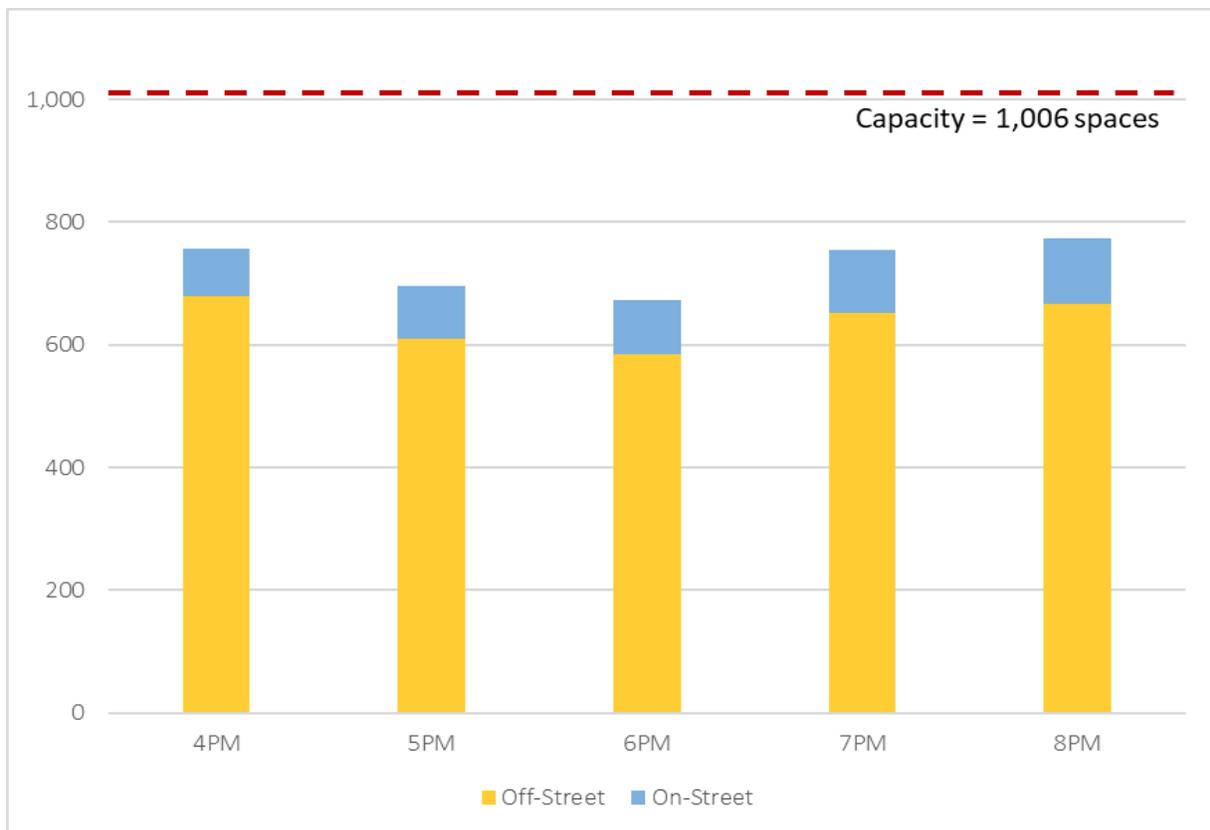


Figure 3. Hourly parking occupancy on a typical Saturday

It must be noted that the survey team could not access the residential/reserved garages and the modeling of residential parking demand will be based on industry standards. It is, however, important to note that parking for residents is reserved. This suggests that market forces, leasing agents, and the would-be tenants themselves are not willing to share residential parking spaces with non-residents even when the residents are at work, on vacation, or otherwise absent from the property. Therefore, when developing parking management strategies that maximize space/staff efficiency it is unlikely that shared parking can be applied to multi-family residential development.

Shared parking relates to the ability for two or more different land use activities to share a finite supply of parking spaces without conflict. The classic and most straightforward example is for a mixed-use development with office and residential activities. Office activity typically exhibits a 9AM to 5PM curve on weekdays and nearly zero demand on a weekend day while residential activity typically exhibits a 5PM to 9AM curve on weekdays and weekends. Therefore, some of the parking spaces developed for the residential component could satisfy the office parking demand while the residents are away. Figure 4 through Figure 7 illustrate weekday hourly parking accumulation patterns for a variety of different land use types as researched by the Urban Land Institute (ULI) and National Parking Association (NPA). However, as noted in the case of City Springs today, residential parking is restricted, reserved for residents, and is not available to satisfy other user groups' parking needs.

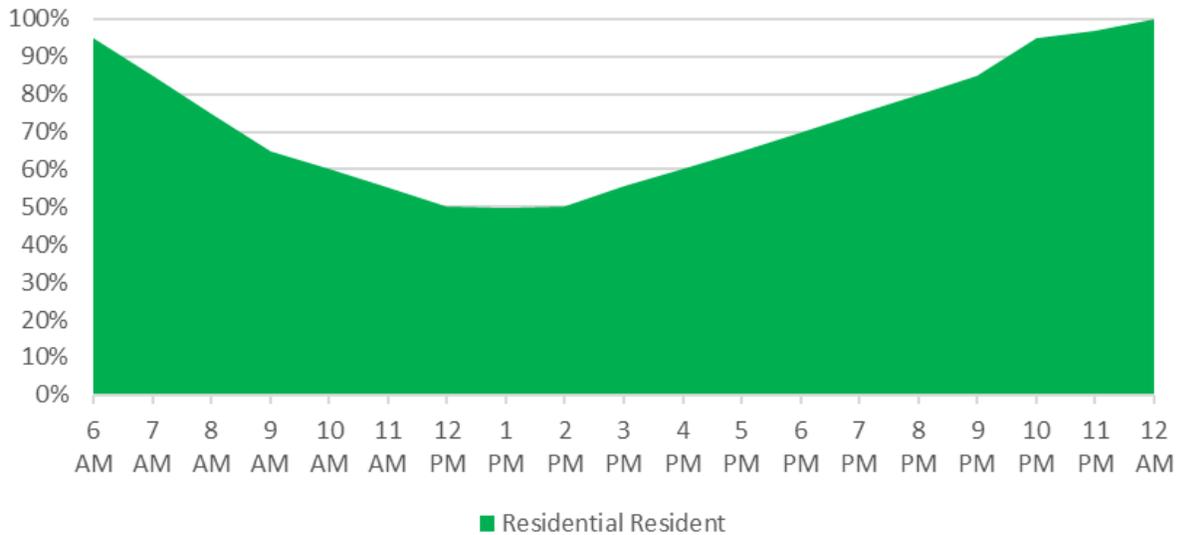


Figure 4. Residential Resident Weekday Parking Accumulation Patterns

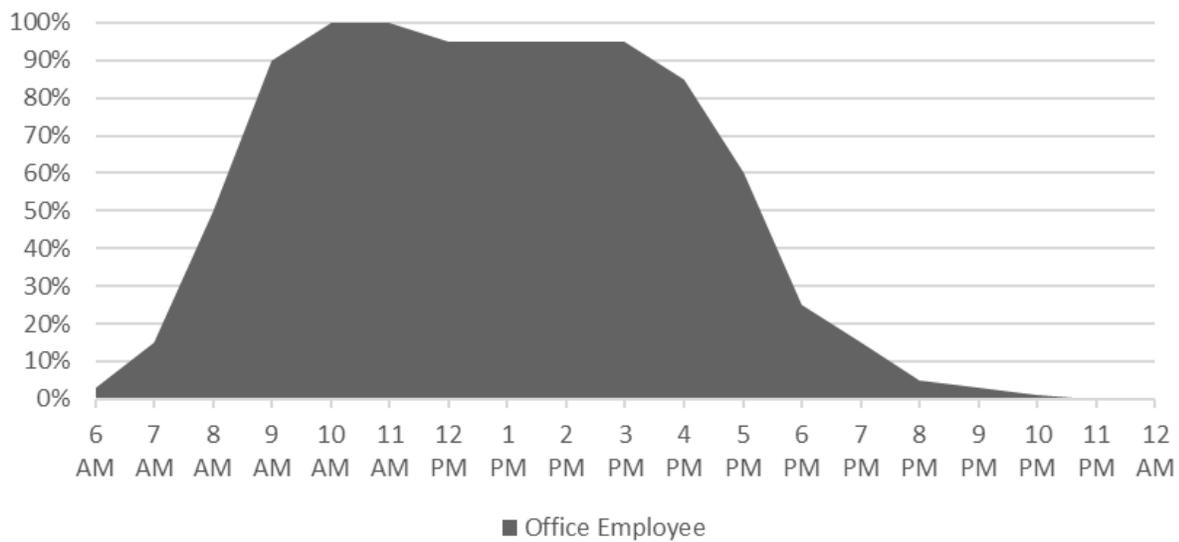


Figure 5. Office Employee Weekday Parking Accumulation Patterns

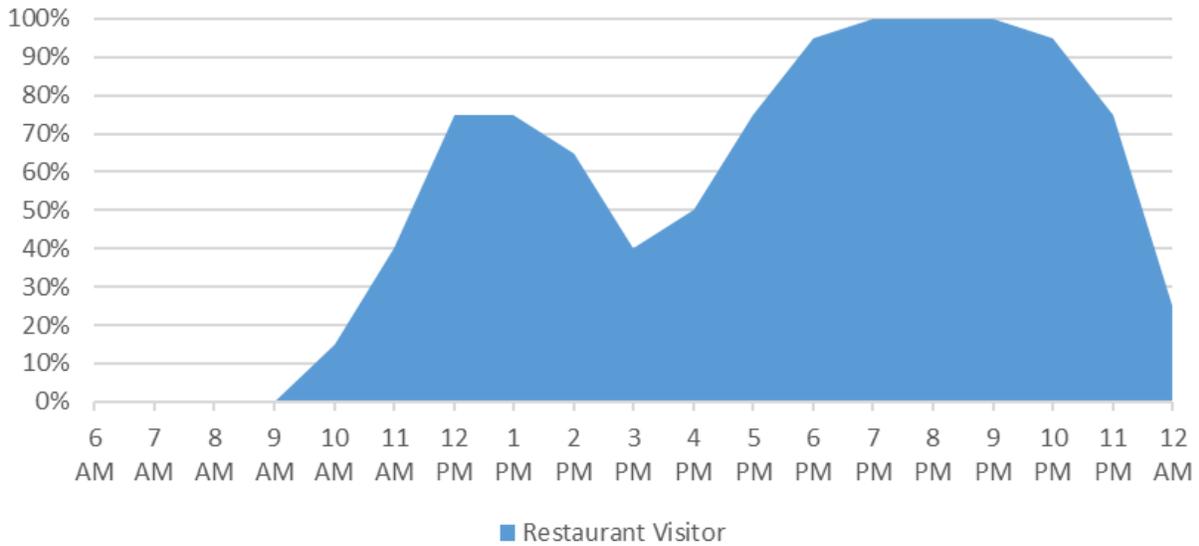


Figure 6. Restaurant Visitor Weekday Parking Accumulation Patterns

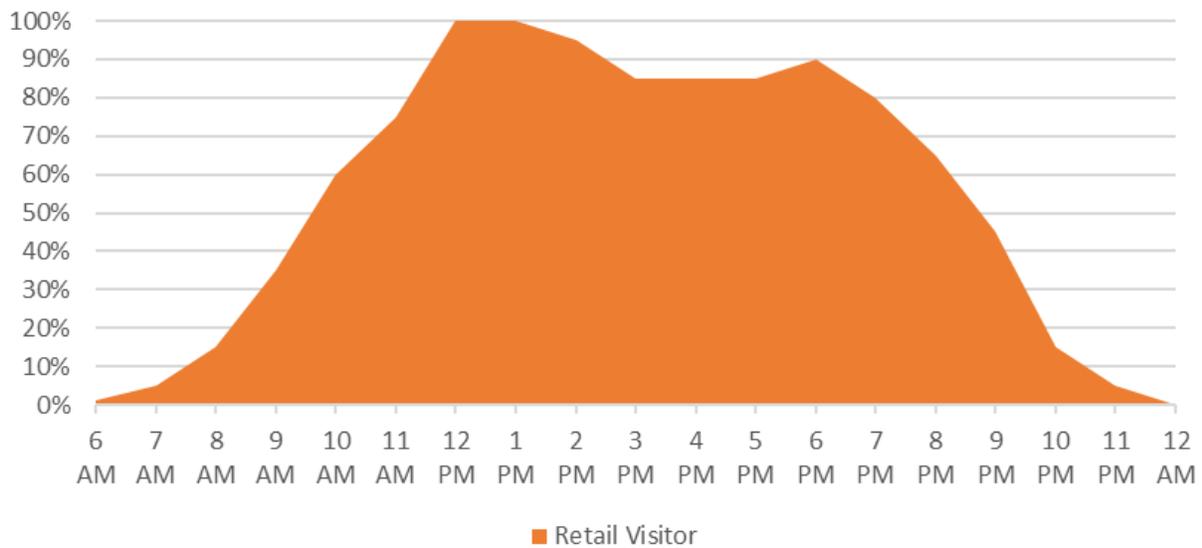


Figure 7. Retail Visitor Weekday Parking Accumulation Patterns

By combining the results of the field surveys of parking utilization with City Springs' development program, ratios that relate to the hourly parking demand by office, retail, and restaurant square feet and Performing Arts Center for a weekday and weekend were created. Figure 8 below illustrates those ratios and patterns by time of day. For example, it is estimated that the peak weekday demand for restaurant parking activity peaks between 7PM and 9PM when the restaurant generates 10.7 parking spaces per 1,000 square feet. However, during the afternoon when the office and retail uses are peaking, the restaurant demand figure decreases to 8.0 spaces per 1,000. Presumably, this reflects the fact that many lunchtime restaurant patrons are office employees and their parking needs were quantified/satisfied under the office designation.

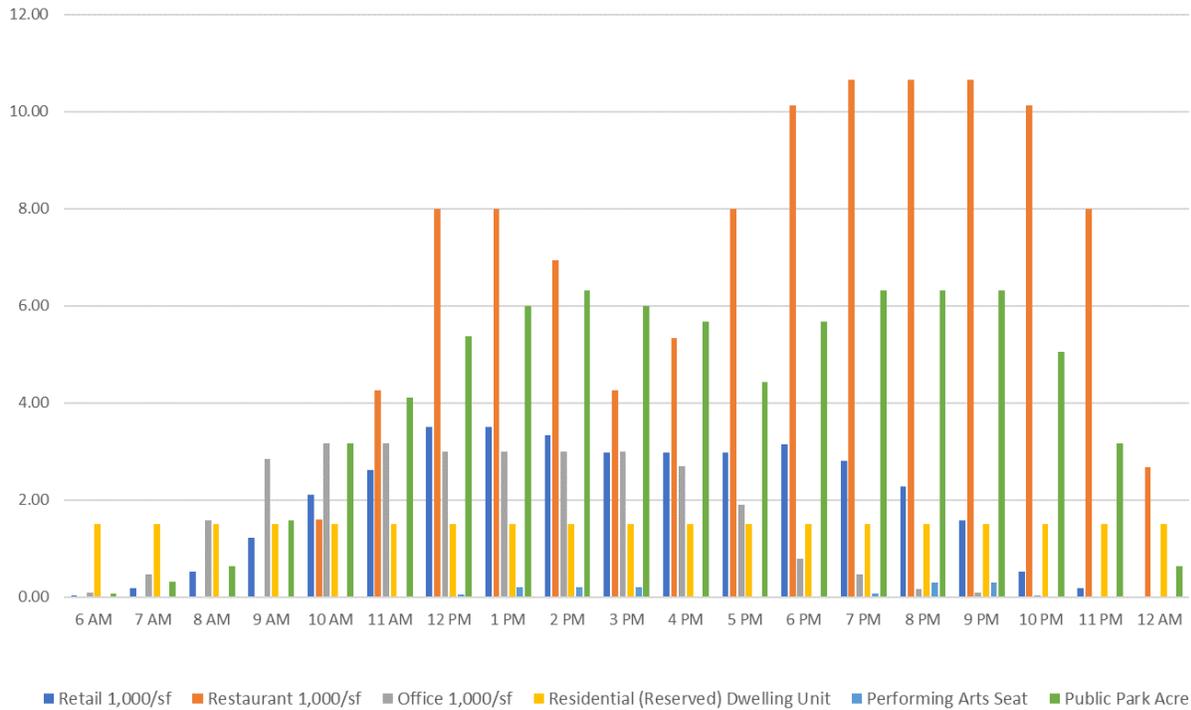


Figure 8. Recommended Weekday Hourly Parking Demand Ratios

Table 1 compares the parking demand ratios based on the 2022 utilization surveys, those based on the 2014 study, and those ratios found in Sandy Springs codes and ordinances. Code required parking includes one specific for the City Springs District (see Section 8.1.3) which applies maximum as opposed to minimum parking requirements. This and other sections of the Parking Division within the code are discussed in greater detail later in this report. It would appear that the 2022-based utilization surveys result in demand ratios that are generally in line with the city’s maximum parking requirements. However, the 2022 office ratios are based on City Hall which likely has greater levels of public activity when compared to typical non-governmental office buildings.

Table 1. Parking Demand Ratio Comparison

Land Use Type	Code Required Parking		2014 Parking Study Observations (1PM)	2022 Survey-based Demand Ratios
	Sec. 8.1.2. <sup>(1)</sup> Min Required	Sec. 8.1.3. <sup>(1)</sup> Max Required		
<b>Office (City Hall)</b>	3.3 1,000/Sq.ft.	2.0 1,000/Sq.ft.	na 1,000/Sq.ft.	3.2 1,000/Sq.ft.
<b>Residential <sup>(2)(3)</sup></b>				
Multi-family				
0-1 Bedrooms	1.0 Bedroom	1.1 Bedroom	0.5 Unit	0.85 Unit
2 Bedrooms	1.5 Bedroom	2.2 Bedroom	1.0 Unit	0.9 Unit
3+ Bedrooms	1.7 Bedroom	3.3 Bedroom	1.5 Unit	1.65 Unit
Townhomes	2.0 Bedroom	2.4 Bedroom	0.9 Unit	2.5 Unit
<b>Restaurant</b>	6.7 1,000/Sq.ft.	8.0 1,000/Sq.ft.	7.0 1,000/Sq.ft.	15.0 1,000/Sq.ft.
<b>Retail</b>	3.3 1,000/Sq.ft.	4.0 1,000/Sq.ft.	1.4 1,000/Sq.ft.	3.5 1,000/Sq.ft.
<b>Health &amp; Fitness</b>	3.3 1,000/Sq.ft.	4.0 1,000/Sq.ft.	na 1,000/Sq.ft.	3.5 1,000/Sq.ft.
<b>Performing Arts Venue <sup>(3)</sup></b>	2.0 1,000/Sq.ft.	na 1,000/Sq.ft.	na seat	0.44 seat
<b>Public Park</b>	na	na	3.7 Acre	12.0 Acre

(1) City of Sandy Springs Code of Ordinances - Div. 8.1 Parking

(2) Code Required includes 0.2 spaces per unit for guests

(3) Based on ULI/NPA Shared Use 3rd Edition

(4) Live Theater not included in code. Figure here represents "Place of Assembly"

na = Not applicable and/or available in city's codes

Based on the observations and takeaways of this case study, the 2022 parking demand ratios are appropriate to determine both the number of spaces required for new development and the parking reduction and shared parking demand management policies recommended in the *Technical Memorandum: Parking Strategy*.



APPENDIX

**D.**

# Stormwater Analysis

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## Technical Memorandum: Stormwater Management Synopsis

### Overview

Shared Stormwater Management is being considered by the City of Sandy Springs to encourage development in strategic areas of the City Springs District. Pond and Company has summarized potential locations for stormwater management areas using a basin map. The map indicates hydrologically feasible points that would be effective for shared stormwater Best Management Practices (BMPs). For concentrated, point source stormwater outfalls, Sandy Springs Development Code follows the recommendations by the Atlanta Regional Commission's (ARC) Georgia Stormwater Management Manual (GSMM). The main permitting requirements of which include Runoff Reduction (Water Quality) and Peak Flow Attenuation (Detention).

### Detention

For shared stormwater facilities, the BMPs selected could potentially account for one or both requirements. Typically, in high-density developments, providing an area for detention can drastically reduce the amount of developable area on a site or add significant long term cost of construction and maintenance with the use of underground chambers. Therefore, it would be recommended that the shared stormwater areas incorporate a detention facility that can be designed and sized using runoff values for a fully built basin. This can be a traditional dry basin (GSMM standard 4.5), a wet pond (GSMM standard 4.25), or constructed wetlands (GSMM standard 4.26).

### Water Quality

Runoff Reduction (Water Quality) requirements can be met in areas with soils that are conducive for groundwater infiltration. If soils do not provide adequate infiltration rates, Water Quality is met with extended detention of the 1.2" storm event. Dependent upon the individual site conditions, additional Water Quality BMPs can be located upstream of the shared detention facilities. However, individual Water Quality BMPs are typically required to have a maximum drainage area of 5 acres. This can be achieved in larger basins by having multiple BMPs in parallel with upstream sub-basins strategically drained. Examples of shared Water Quality BMPs include bioretention (GSMM standard 4.2), enhanced swales (GSMM standard 4.8), and infiltration trenches (GSMM standard 4.12). Alternatively, since Water Quality BMPs typically do not require a large land area, it may be feasible for developers to include these on individual sites.

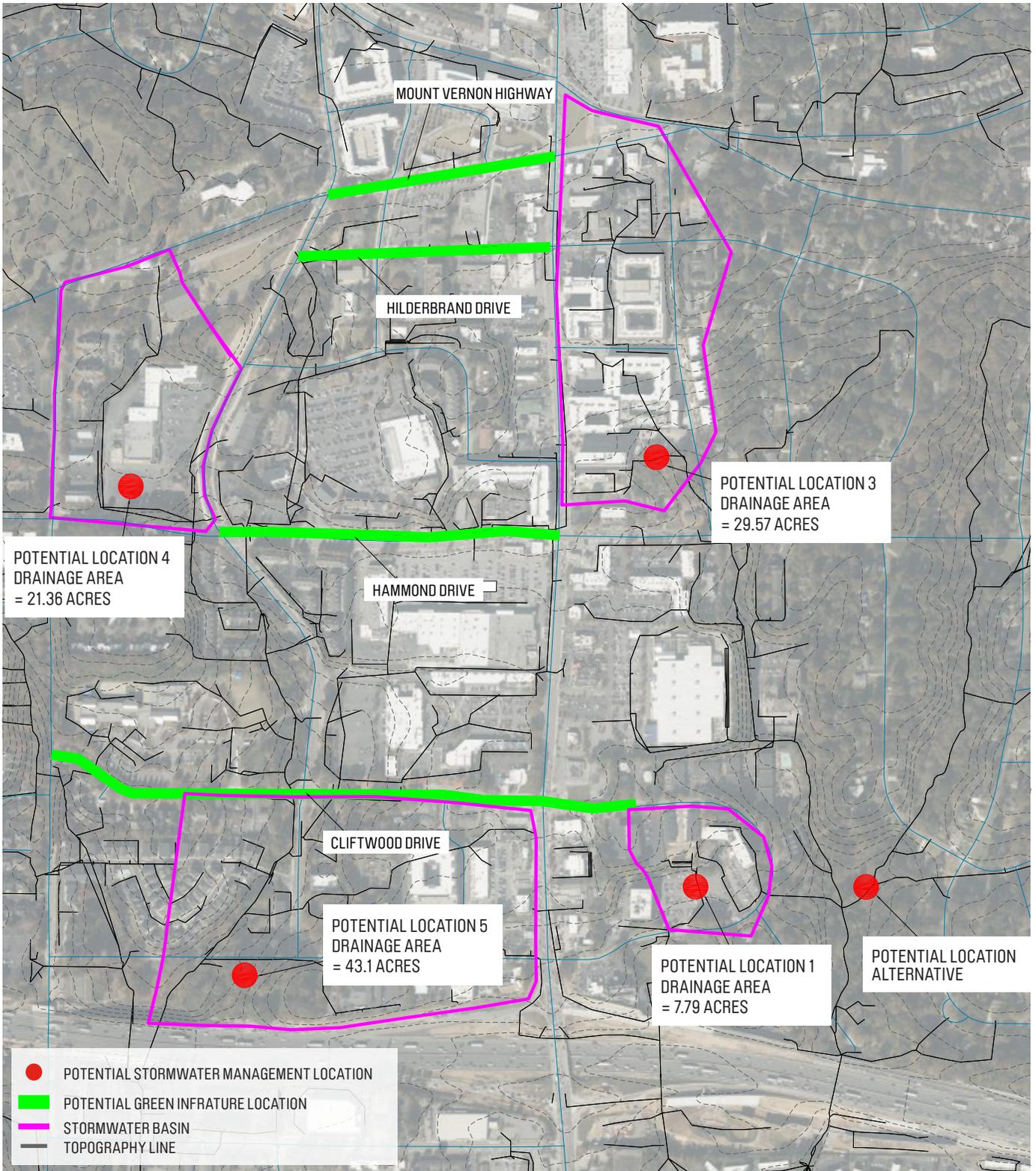
### Green Streets

The City of Sandy Springs is also considering the development of "Green Streets" which would be located on minor interior streets in the City Springs District to provide added stormwater benefits for adjacent developments. The objective of these is to reduce impervious surfaces, provide water quality improvements, and encourage pedestrian and bicycle transit. Typical infrastructure used in urban Green Streets in Sandy Springs would be focused on green infrastructure, such as stormwater planters and tree boxes (GSMM standard 4.24). Green Streets are envisioned as part of the proposed Bluestone Road and Hildebrand Drive improvements (see *PRI.3* and *PRI.4* in *Chapter 4. Implementation Guide*). This infrastructure provides localized enhancements and, if implemented in multiple locations, could provide significant benefits to an entire community and ecosystem.

## Drainage Map Rationale

The GIS data, containing contour lines, was applied to CAD software in order to create a mappable visual layout of the area. Then a draft of the water basins was created around the proposed potential locations for additional stormwater management park. This was analyzed using the elevations from the contour lines along with the data of existing stormwater equipment. After the water basins were created, their areas were calculated using the properties tool in CAD. From those calculations, it is presumed that potential location 5 (from the sheet) will be the best candidate site having a 43.1-acre drainage area. The second-best is potential location 3 with 29.57-acres. The third-best candidate is potential location 4 with 21.36 acres. And finally potential location 1 with 7.79 acres. These findings should inform the Districtwide Stormwater Management Strategy (see project PP.15 in *Chapter 4. Implementation Guide*).

## Drainage Map



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APPENDIX

**E.**

# Market Analysis

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# City Springs Master Plan Update

## Real Estate Market Analysis & Positioning

Prepared for

City of Sandy Springs

DECEMBER 2022



MARKET- DRIVEN  
DEVELOPMENT STRATEGIES™

# Preface

This report was commissioned by the City of Sandy Springs, as a subcontract to Pond & Company in March 2022. The Market Analysis and Positioning Strategy is a component of the City Springs Master Plan Update and should be read in conjunction with the Master Plan Update document.

The purpose of this report is to provide a comprehensive market analysis for City Springs, the “study area”, in Sandy Springs, Georgia.

The first objective of the analysis was to assess the feasibility for retail, office, residential, and hotel development in City Springs over a ten-year time horizon. The assessment considered a range of potential for each asset class and prioritized the amount of each based on an objective assessment of study area characteristics, local competition, market trends, and other important factors. Based on this assessment, recommendation of the most optimal uses was provided, along with the optimal positioning and target markets of each use, which are provided in the Report Recommendations deliverable.

The second key objective was to determine the optimal positioning of City Springs relative to the competitive nature of other nodes and city centers in the northern Metropolitan Atlanta area.

The figures presented in the report are based on an evaluation of the current general level of the economy in the local market, and neither consider, nor make provisions for the effect of any sharp rise or decline in local or general economic conditions.

MXD Development Strategists, Ltd. do not warrant that any estimates contained within the study will be achieved, but that they have been prepared conscientiously on the basis of information obtained during the course of this market analysis. Any tenant references made in this report are for illustrative purposes only.

Reference material used for this report, including previous city plans, was derived from the project team, as well as from the public and private sectors and government publications. This information was supplemented by our experience in the planning and development of real estate projects throughout North America and internationally.

# How to Read This Document

The purpose of the Real Estate Market Analysis and Positioning Document is to establish a baseline understanding of planning and development opportunities in the City Springs District. This is based on a thorough examination of the regional and local real estate market, economic indicators, demographic profiles, competitive nodes, best practices, and stakeholder consultation. The recommendations in this document were used by the consulting team to create a realistic and implementable City Springs Master Plan Update that responds accordingly to market forces.

The major components of this Real Estate Market Analysis and Positioning Document are as follows:

1. **Economic & Demographic Analysis** – A review of the Metro Atlanta and Sandy Springs economies including major economic sectors, top employers, major economic initiatives, and location quotient. A demographic profile of Sandy Springs is also compared to the region.
2. **Retail, Office, Residential and Hotel Market Analyses** - A thorough real estate market study and assessment of residential, retail, employment and hotel opportunities for City Springs to ensure recommended land uses are complementary and feasible to be constructed by the local development community. Real estate data was sourced from CoStar, the leading provider of real estate development information. CoStar was also the source of the geographically-defined submarkets, which form the basis of the analytical methods used by MXD in its quantitative analysis.

CoStar was also the source for submarket boundaries used in the retail, office, residential, and hotel market analysis. It is important to note that the submarket boundaries differ between asset classes.

It is typical in the real estate industry for office, retail, hotel, and residential's submarkets geographic boundaries to differ from one another due to how each real estate asset is perceived in the market and where clusters of each real estate asset are spatially allocated in a region. Submarkets typically include multiple cities within their boundaries. This differentiation does not impact the outcomes of the market analysis. A 10-year program of development potential is a major output for the Real Estate Market Analysis. Due to the fluctuating nature of the real estate industry, the development potential displays conservative, moderate and aggressive scenarios for each asset class. This table can be found at the beginning of Chapter 6.

3. **Recommendations & Positioning** – This document culminates with a Recommendations and Positioning section that includes “3 Big Ideas” for the City Springs District and recommendations and positioning for each asset class. An overall market positioning was established using all findings established in this detailed process to differentiate the City Springs District from other nearby competing mixed-use nodes.

While the Recommendations and Positioning found in Chapter 6 influence recommendations in the overall Master Plan Update document, stakeholder and community consultation also plays a major factor and has been taken into consideration. Discussions with real estate brokers, local developers, city staff, and residents were important to crafting the final positioning. This document should ultimately be viewed as a one part of a roadmap to determining how the City Springs District could be developed over the next decade to generate success and pride for the city.

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# 1

## Economic & Demographic Analysis

# Economic & Demographic Analysis

## Metropolitan Atlanta Economy

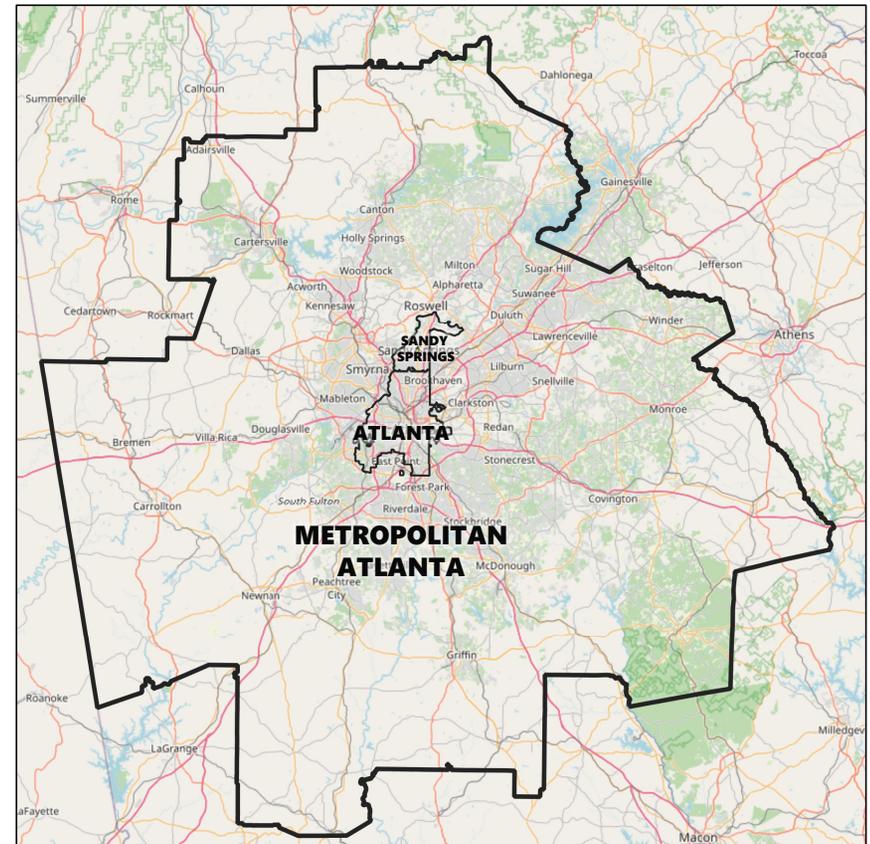
The City Springs District is located in the Metropolitan Atlanta Region (as defined by the U.S. Census Bureau), referred to henceforth as "Metro Atlanta" and "the region", where appropriate. The development of City Springs will be significantly shaped by the state of the Metro Atlanta economy. Specifically, population growth and employment growth generated at a metro scale will be the key demand driver for City Springs. Exploring the market realities of the broader metro region informs the recommendations and positioning opportunities for City Springs.

Metro Atlanta continues to show signs of a robust economic recovery from the effects of the coronavirus pandemic. Total employment in the region was roughly 2% above the pre-pandemic peak as of February 2022. Many economic sectors took a hit in the early months of the pandemic, but employment in the professional & business services and financial activities sectors have rebounded quickly and are now well above their respective pre-pandemic peaks.

A handful of large corporations are in the process of adding thousands of high-paying office jobs. For example, Microsoft, Google, FanDuel, Visa, Cisco, Micron, and Norfolk Southern are opening major offices in Midtown, and in early 2022, Walmart announced it is opening a major tech hub in the City of Atlanta.

In other sizable recent moves, FinTech firm Deluxe Corporation announced 700 new jobs and an Innovation Center in Sandy Springs; TK Elevator opened its North American headquarters at The Battery in Cumberland/Galleria where Papa Johns relocated its headquarters to as well; Mailchimp is expanding its local presence on the Eastside, Carvana is opening a major office in Dunwoody, and Airbnb and Nike are each establishing East Coast hubs in West Midtown. These expansions follow numerous Fortune 500 firms setting up technology-related operations regionally, including BlackRock, Facebook, Anthem, and Honeywell.

Figure: Sandy Springs in Metropolitan Atlanta



Source: U.S. Census Bureau

# Economic & Demographic Analysis

Metro Atlanta boasts lower living and business costs than many other large East and West Coast metros, and this competitive advantage should continue to boost population and job growth to the region. Metro Atlanta has drawn some of the strongest in-migration in the country over the past few decades, and many employers cite lower business costs coupled with the access to high-quality labor has made the move highly profitable.

While not unique to the region, traffic congestion could be a limiting factor for Metro Atlanta's mid- to long-term growth prospects. While MARTA rail is an effective and widely-used mode of transit, it is limited in its scope, lessening its potential impact. However, the future expansion of MARTA is on the horizon, and pedestrian infrastructure improvements throughout the region could help provide residents with alternative modes of transportation.

Urban and core-suburban submarkets in Metro Atlanta benefit from the region's fast-growing base of highly educated workers, particularly those working in the region's booming technology sector. The region produces more than 40,000 college graduates per year, ranking it in the top 10 metropolitan areas nationwide. Metro Atlanta also attracts many well-educated workers migrating to the area for employment, most notably from the Northeast.

Many younger households that would have previously sought a home inside the perimeter are now considering more affordable alternatives in desirable communities located along or outside the perimeter. As a result, Sandy Springs has become more sought after as a place to call home due to its strong demographics, good schools, proximity to jobs, and easy accessibility. These are considered highly desirable traits for future population growth.

Education and health services employment is less concentrated in the region than the national average, but that sector has seen substantial job growth over the past few years. Multiple healthcare systems are constructing new facilities, and the sector is poised to grow in order to adequately service the region's expanding population. Piedmont Hospital opened phase one of the \$450 million Piedmont Heart Institute tower in Buckhead early in order to treat coronavirus patients, Emory University Hospital Midtown is underway on its \$500 million Winship Cancer Institute tower, and Children's Healthcare of Atlanta is building a \$1.5 billion hospital and campus expansion in Brookhaven that will open in 2025.

The greater region is also emerging as a major electric vehicle manufacturing hub, which will boost spin-off industrial activity and job growth in the coming years. SK Innovation's new facility in Commerce will employ thousands at full build-out and could eventually serve as one of the largest hubs of electric vehicle battery manufacturing in the world. And on the eastern fringe of the metro region along I-20, Rivian announced it will build a new \$5 billion electric vehicle manufacturing plant, which is slated to ultimately employ 7,500 workers.

The presence of the well-connected Hartsfield-Jackson Atlanta International Airport helps attract potential residents and companies, including Mercedes-Benz and State Farm, which have relocated major operations to Sandy Springs and Dunwoody, respectively.

Metro Atlanta's status as a transportation and logistics hub also helped attract Norfolk Southern, which moved its corporate headquarters to Midtown in 2021. The firm is adding roughly 850 new jobs with an average salary over \$100,000. The airport, along with competitive tax incentives, has also helped the region's growing film and entertainment industry, which is responsible for \$3 billion in annual direct spending in the state.

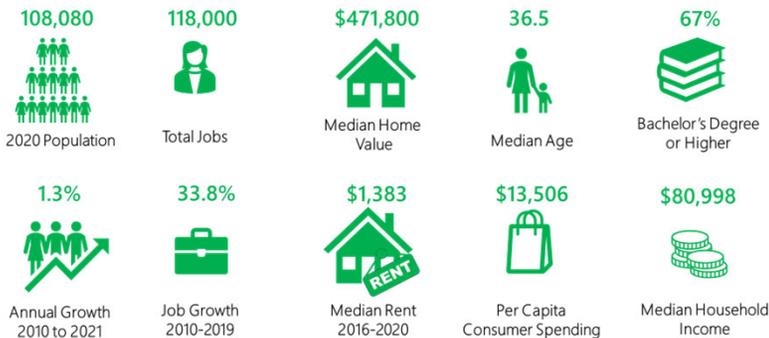
# Economic & Demographic Analysis

## Sandy Springs Profile

Sandy Springs is a suburban community of approximately 108,000 residents located in the region's affluent northern suburbs. The city incorporated in 2005 and is now the seventh largest city in the state. City Springs is in a strategic location in the region. Direct connectivity to I-285, GA 400, and three MARTA stations makes the study area a compelling place to live, work, and play. Sandy Springs has experienced increased demand due to its high quality of life.

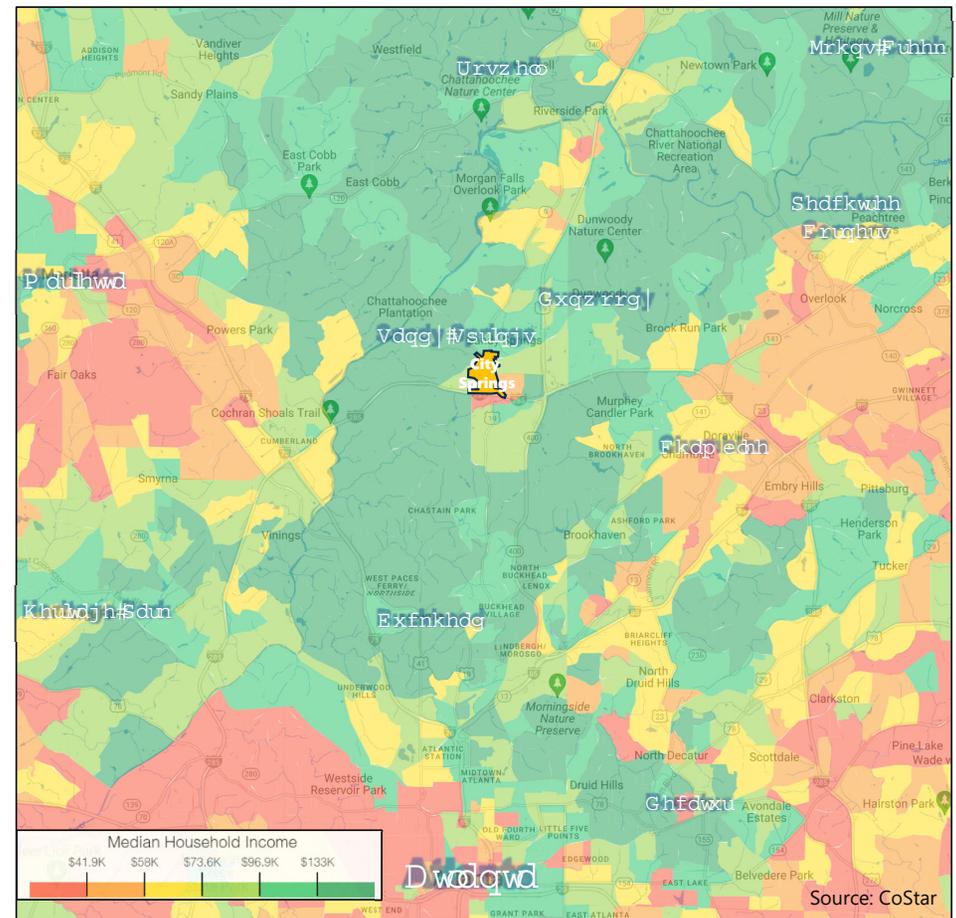
The city is characterized by median household income levels of \$80,998, well above the Atlanta MSA median of \$71,193 (American Community Survey 2020 5-year estimates). Home values are commensurately higher as well (\$471,800 in Sandy Springs versus \$259,000 in metro Atlanta), as reported in the Housing Needs Assessment. Education levels are significantly higher than the Metro Atlanta average: 67% of adults aged 25 or over have a bachelor's degree or higher level of education, compared to 39.5% of the entire region. Population growth, coupled with the appealing demographic profile, suggests the potential for the development of additional commercial and residential uses.

Figure: Sandy Springs Demographic Highlights



Source: U.S. Census, ACS 2020 5-Year Estimates

Figure: Median Household Income



# Economic & Demographic Analysis

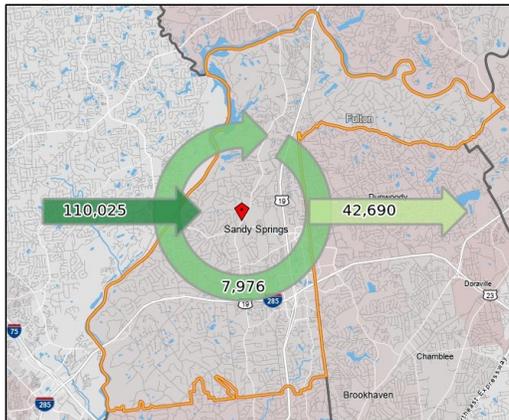
## Sandy Springs Employment

Sandy Springs is a major employment hub within Metro Atlanta. Prior to Covid-19, over 110,000 people traveled into the city for work daily and 7,976 were both working and living in the city for a total of 118,001 jobs. While the rise of teleworking has modified how many workers flow into the city each day, the number of jobs based in Sandy Springs has not decreased. The large daytime population provides an important source of business for retail and restaurants in the city as well as supportable demand for new housing development.

As shown by the OntheMap illustrations below (using the most recent dataset of 2019), employment is concentrated along the highway network with large clusters in the Perimeter Center and Medical Center cluster areas. While the City Springs area does have some clustering of employment, these jobs are largely Retail, Food & Beverage (F&B), and Services. A key challenge to diversifying the range of activities in City Springs will be to attract professional employment to the area away from its traditional location at intersections of the metropolitan highway network.

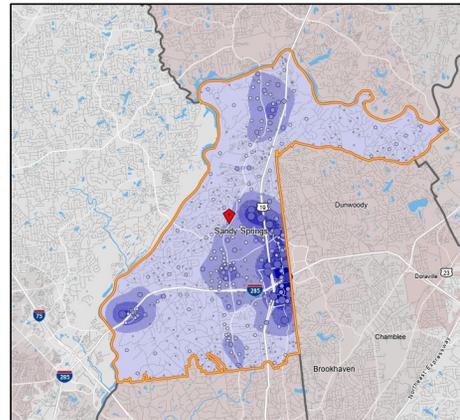


Figure: Daily Inflow/Outflow of Workers



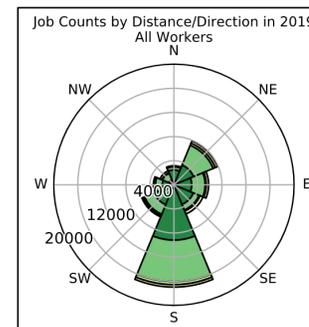
Source: OntheMap, 2019

Figure: Employment Density



Source: OntheMap, 2019

Figure: Sandy Springs Resident Workplace Destinations



Outbound Worker Destinations		
Cities, CDPs, Etc.	Count	
Atlanta City, GA	12,816	25.3%
Alpharetta City, GA	3,146	6.2%
Dunwoody City, GA	2,124	4.2%
Roswell City, GA	1,642	3.2%
Brookhaven City, GA	1,161	2.3%
Marietta City, GA	971	1.9%

Source: OntheMap, 2019



# Economic & Demographic Analysis

## Sandy Springs Employment Inflow/Outflow

A study of the workforce living in Sandy Springs compared to the jobs located in the city provides insight on the local economy and potential economic opportunities.

Overall, Sandy Springs is an employment center with significantly more jobs than resident workers. While 50,666 workers live in Sandy Springs, there are 118,001 jobs in the municipality. As a result, there is a net inflow of over 67,000 workers each day according to data from the U.S. Census Bureau, Center for Economic Studies.

There are only two major employment sectors that experience a net outflow of workers from Sandy Springs to other jurisdictions: Transportation & Warehousing, and Public Administration. Outflow is minimal in comparison to the size of these industries in Sandy Springs.

There are 5,252 Sandy Springs residents working in the Health Care sector, yet over 18,800 such jobs in the city. Similarly, Finance and Insurance experiences a net inflow of over 10,000 workers a day, and Professional, Scientific & Technical Services over 9,000 workers.

Administration & Support also demonstrates a net inflow of workers to jobs in Sandy Springs. However, such “back office” type employment is not associated with higher wages, and it is unlikely that many of these workers could afford to live in Sandy Springs.

**A key opportunity for City Springs is to target these high-wage professionals seeking a shorter commute (even walking, biking or e-biking) to their place of employment in Sandy Springs. This can be accomplished through the provision of amenities appealing to younger professionals as well as a variety of appropriate housing options.**

Table: Sandy Springs Employment Inflow/Outflow

Employment Sector	Workers Living in Sandy Springs	Jobs in Sandy Springs	Daily Inflow or Outflow of Workers to Sandy Springs
Agriculture, Forestry, Fishing & Hunting	20	13	-7
Mining, Quarrying, and Oil & Gas Extraction	17	113	96
Utilities	103	63	-40
Construction	1,425	2,703	1,278
Manufacturing	1,542	2,445	903
Wholesale Trade	2,628	6,847	4,219
Retail Trade	4,593	7,101	2,508
Transportation & Warehousing	1,380	521	-859
Information	3,086	6,495	3,409
Finance & Insurance	3,989	14,554	10,565
Real Estate	1,368	3,916	2,548
Professional, Scientific & Technical Services	7,681	16,844	9,163
Management of Companies & Enterprises	2,386	7,779	5,393
Administration & Support	4,746	15,396	10,650
Educational Services	2,960	4,221	1,261
Health Care & Social Assistance	5,252	18,842	13,590
Arts, Entertainment & Recreation	828	1,162	334
Accommodation & Food Services	4,282	6,129	1,847
Other Services	1,390	2,179	789
Public Administration	990	678	-312
<b>TOTAL</b>	<b>50,666</b>	<b>118,001</b>	<b>67,335</b>

Source: OntheMap, 2019



# Economic & Demographic Analysis

## Sandy Springs Top 10 Employers

Within Sandy Springs, the largest employers in 2022 are almost all within the Software and the Professional, Scientific, & Technical Services categories. These companies are located outside of the City Springs District study area and are concentrated in the Central Perimeter business district, with the exception of the Intercontinental Exchange located in the Powers Ferry area.

United Parcel Service's (UPS) global headquarters is one of the largest employers in the city as of 2022 with over 2,000 employees and 1.8% of total employment.

The Mercedes-Benz USA headquarters opened in 2018 and currently employs nearly 1,000 workers. Mercedes Benz moved their national headquarters from Montvale, New Jersey, to Sandy Springs.



City of Sandy Springs 2022 Top 10 Employers		
Employer	Industry	# of Employees
Cox Enterprises	Software/Professional, Scientific, Technical Services	3,211
United Parcel Service	Software/Professional, Scientific, Technical Services	2,081
Onetrust	Logistics & Transport	2,043
IBM Corporation	Software/Professional, Scientific, Technical Services	1,935
Intercontinental Exchange	Software/Professional, Scientific, Technical Services	994
VMware	Software/Professional, Scientific, Technical Services	960
Inspire Brands	Software/Professional, Scientific, Technical Services	931
WestRock	Manufacturing	847
Elavon	Software/Professional, Scientific, Technical Services	819
Mercedes-Benz USA	Automotive	908

Source: Sandy Springs Economic Development, 2022



# Economic & Demographic Analysis

## Sandy Springs Location Quotient Analysis

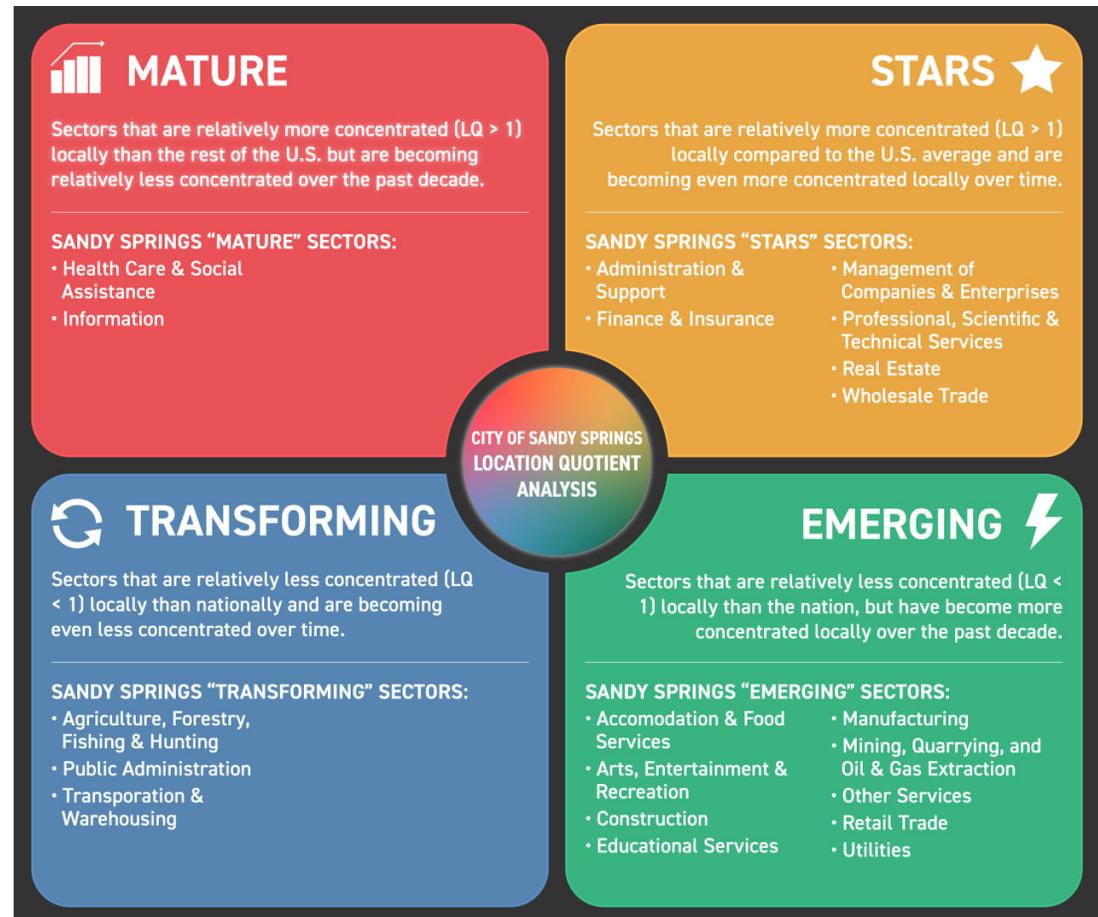
A location quotient analysis quantifies the degree of concentration between different employment sectors in the City of Sandy Springs relative to the U.S. employment sectors. U.S. Census data between 2014 and 2019 (the latest data available) was used to identify employment concentration and growth.

Star sectors are those with a higher concentration of employment in the city relative to the U.S. average and are quickly growing. Sandy Springs' Star sectors share a concentration of office-intensive industries including Management of Companies & Enterprises, Administration & Support, Finance & Insurance, and Professional, Scientific & Technical Services. These sectors continue to add new employment and so are driving demand for commercial real estate development in Sandy Springs. This presents potential opportunities for the City Springs District.

Similarly, the Emerging sectors of Accommodation & Food Services, Arts, Entertainment & Recreation as well as Retail Trade suggest longer term demand for additional retail and entertainment activity in the city. This supportive evidence was considered in the retail analysis described further in the report.

Mature sectors are those that are more concentrated than the U.S. average; however, they are becoming less concentrated over time by experiencing less growth than the U.S. average. Health Care & Social Assistance lost significant employment between 2014 and 2019, although it is still the largest employment sector in the city as of 2019 U.S. Census data. Overall, the Mature and Transforming sectors are ones which are not introducing additional employment to the local area and so are not currently driving demand for commercial development.

Table: City of Sandy Springs LQ Diagram



# 2

## Retail Market Analysis

# Retail Market Analysis

## Metro Atlanta Retail Overview

The Metro Atlanta retail market stands strong as indicators in absorption, vacancy, leasing activity and rent growth have positively improved since the beginning of the pandemic. **Construction activity, while muted, is generally supportive of new retail development in the City Springs area.**

### Absorption

Annual net absorption in 2021 reached over 4.3 million SF, which is a strong recovery from 2020 when the pandemic and its economic outfall generated a net negative absorption of -256,728 SF. Despite retail's strong resurgence, it is important to note the steady decline in net absorption since 2014 when nearly 6 million SF were absorbed.

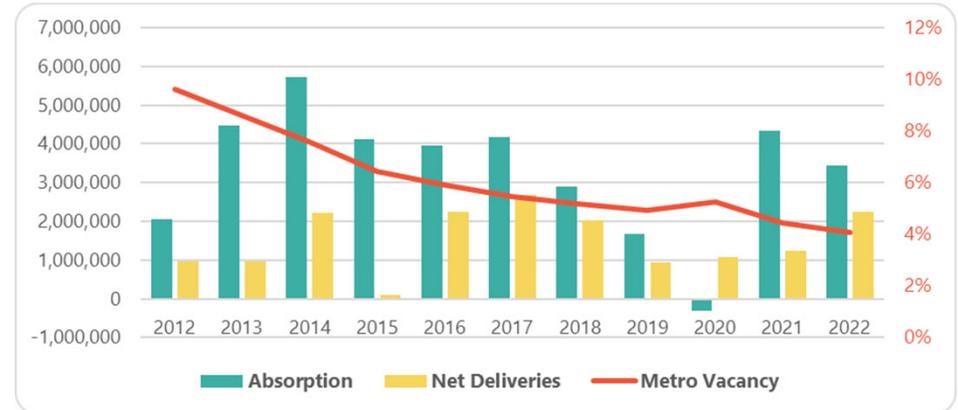
Demand for new retail is expected to be concentrated in the region's northernmost suburbs (for example, Alpharetta) that feature higher incomes and spending patterns. Additionally, neighborhoods inside the Perimeter such as Midtown, West Midtown and the Eastside will profit from densification and gentrification with influxes of high-income demographics.

### Vacancy

The Metro Atlanta vacancy rate has decreased steadily over the past decade. **Vacancy reached a ten-year low of 4.5% by the end of 2021. Historically, retail vacancy rates below 5-6% were sufficient to trigger substantial amounts of new construction. However, deliveries have remained at low levels indicating uncertainty of the long-term prospects of many forms of retail. This trend, which is characteristic of most major markets nationwide, may temper demand forecasts for City Springs.**

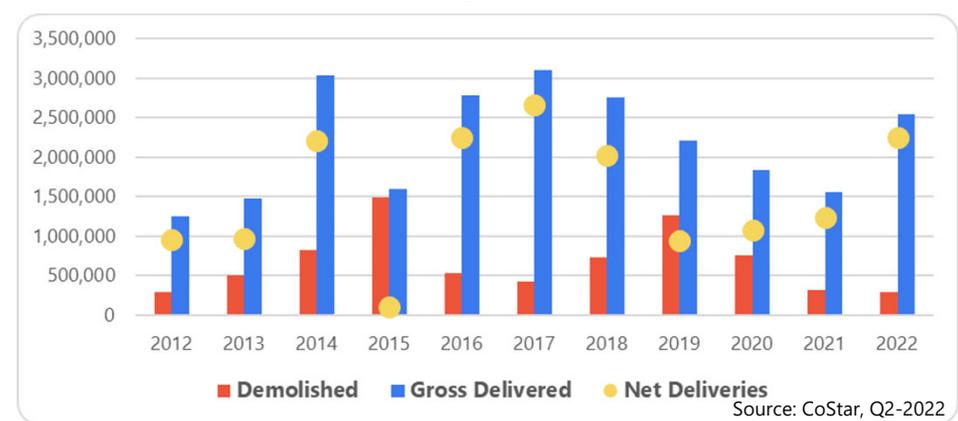
Retail vacancy rates have been further reduced by demolitions of obsolete retail properties over the past decade. Many of these demolitions have been made to make way for new multi-unit developments in desirable locations.

Figure: Metro Atlanta – Retail Absorption, Net Deliveries & Vacancy



Source: CoStar, Q2-2022

Figure: Metro Atlanta Demolitions & Deliveries



Source: CoStar, Q2-2022

# Retail Market Analysis

Vacancy rates are highest for Malls (over 10%) and lowest for Power Centers (i.e., retail centers comprised solely of large format “big box” stores), General Retail (i.e., streetfront retail shops) and smaller strip centers, which typically focus on local services and convenience. Malls have seen a steady uptrend in vacancy since 2017, and the future of enclosed retail space in Metro Atlanta does not appear bright due to national shifts in shopping patterns towards unenclosed mixed-use environments such as what is envisioned for City Springs.

## Leasing Activity

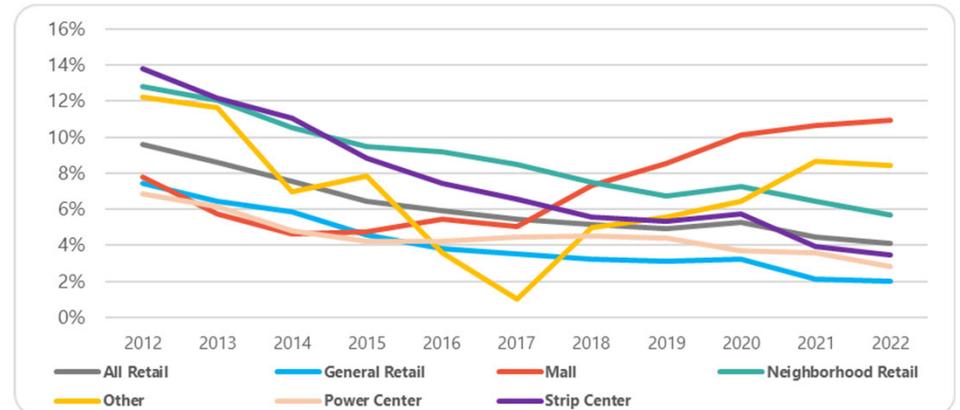
Metro Atlanta's strong economic recovery should continue to help boost retail demand over the near term, but leasing activity remains below pre-pandemic averages for the market. As with the rest of the country, Metro Atlanta has seen numerous big-box store closures as well as firms moving out of spaces after declaring bankruptcy. For example, JCPenney and Macy's have each closed multiple locations throughout the region over the past few years, vacating hundreds of thousands of square feet in the process.

Population growth in the region has roughly doubled the U.S. average over the past decade. This growth has helped drive demand for retail space throughout Metro Atlanta. The region's northernmost suburbs tend to grow the fastest and have high incomes, so those areas will continue to garner an outsized share of leasing activity. Neighborhoods inside the Perimeter should continue to benefit from urbanization and gentrification, slowing retail growth in communities along the Perimeter including City Springs.

## Rent

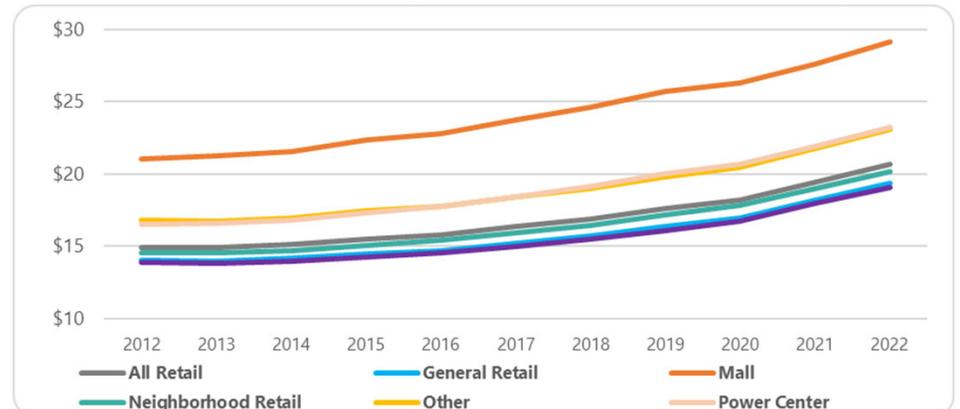
Retail rents have been climbing steadily for the past five years, primarily due to minimal new supply being developed. Average market rent rose to \$19.34 in Q4 2021, up from \$17.92 in Q2 2020, an annual increase of 7.9%. **Of note, strong demographic trends, and limited supply in the Sandy Springs area generated the fastest rental increase in the region before the pandemic. Since then, however, exurban and south Metro Atlanta submarkets have been the strongest performers due to little supply and consistent vacancy rates.**

Figure: Metro Atlanta Retail Vacancy by Format



Source: CoStar, Q2-2022

Figure: Metro Atlanta Retail Rental Rates by Format



Source: CoStar, Q2-2022



# Retail Market Analysis

## Construction Activity

Retail development in Metro Atlanta has remained limited for years compared to the region's historical norms. The market has about 1.9 million SF or 0.5% of its existing inventory under construction, which is roughly in line with the national average of 0.4%.

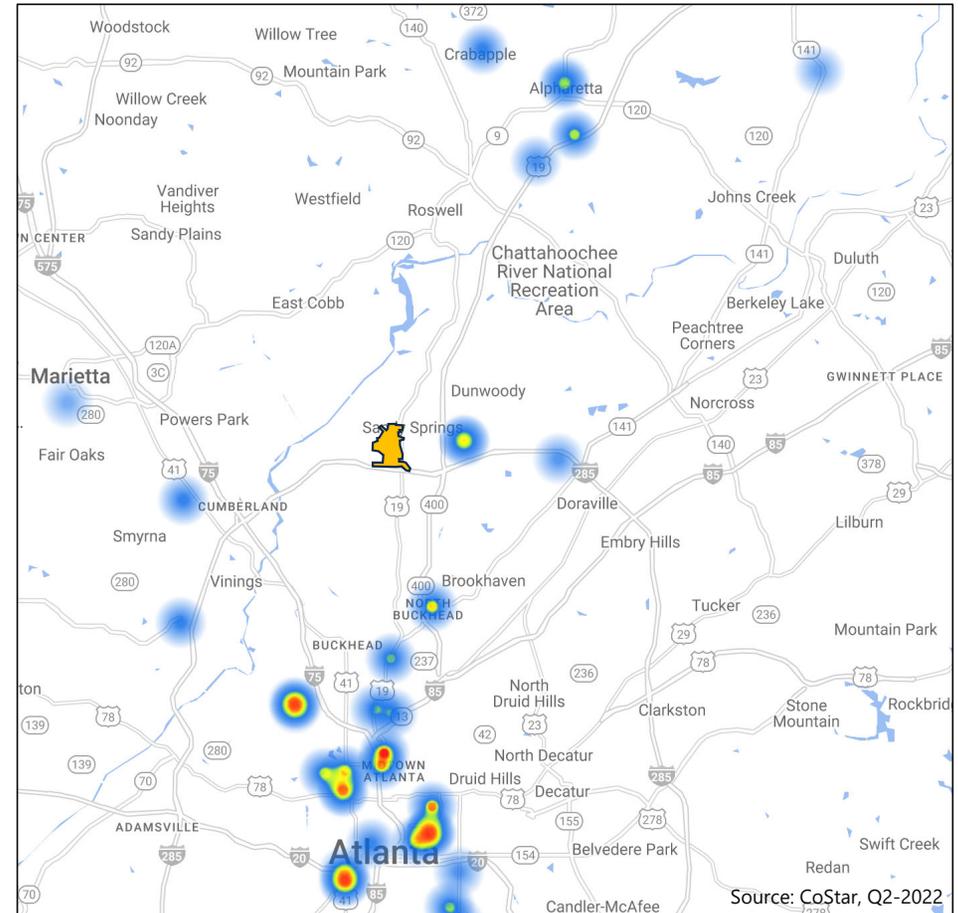
**The region has added a net of approximately 18 million SF of retail inventory since 2010. In comparison, developers built more than 90 million SF of retail stock from 2000 to 2010.** This trend has occurred at a similar ratio nationwide, as the retail sector has experienced the continued encroachment of online shopping, and increased construction costs. As a result, retail developers have largely focused on smaller neighborhood-oriented retail that services local areas.

Most of the retail built in Metro Atlanta over the past few years has targeted affluent households and areas with strong demographic growth, particularly fast-growing, exurban submarkets such as Alpharetta. Denser, more affluent locales such as Buckhead/Lenox and Midtown/Brookwood have maintained notable but relatively modest construction pipelines. The Atlanta Central Business District (CBD) submarket, which includes some gentrifying East Atlanta neighborhoods, has delivered a significant amount of retail in recent years.

Developers continue to target older, well-located retail centers for redevelopment plays, and many of these projects include multi-unit components. For example, the Southern Post, a redevelopment of the 47,000 SF Roswell Plaza in downtown Roswell includes 40,000 SF of retail, 95,000 SF of loft space, 128 apartments and 10 townhomes. **The scale and composition of this development (including multi-use housing) provides an indication as to the type of development that could succeed in the City Springs District.**

Other major potential redevelopment plays include those for North Point Mall in Alpharetta, Gwinnett Place in Duluth, and North DeKalb Mall in Decatur.

Figure: Retail Currently Under Construction, Q2-2022



Source: CoStar, Q2-2022

# Retail Market Analysis

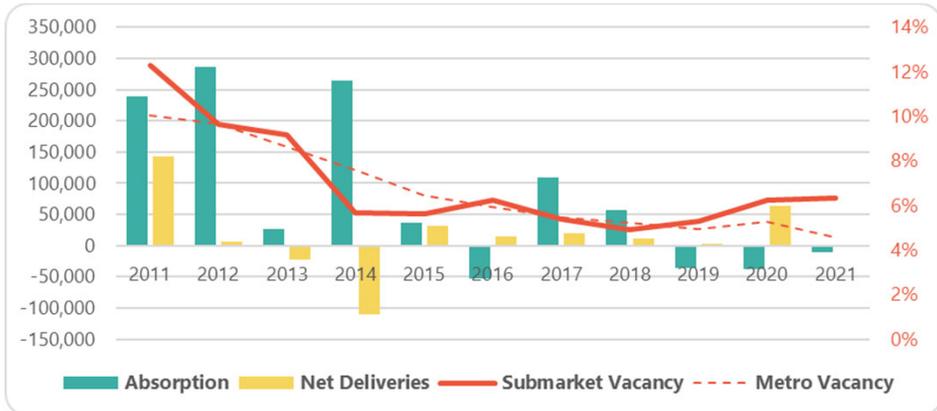
## Sandy Springs/North Central Retail Submarket

Sandy Springs/North Central is a distinct retail submarket within Metro Atlanta, as identified by CoStar. The submarket contains some of the region's most affluent suburbs, with many households earning over \$100,000/year. The submarket also sits in a central location in the region and is easily accessible by GA 400, I-285, and MARTA's Red Line. As such, the area has added thousands of office jobs over the past few years, as firms like Deluxe Corporation, Mercedes-Benz USA, Cox Enterprises, and State Farm have invested heavily in new headquarter locations.

### Absorption & Deliveries

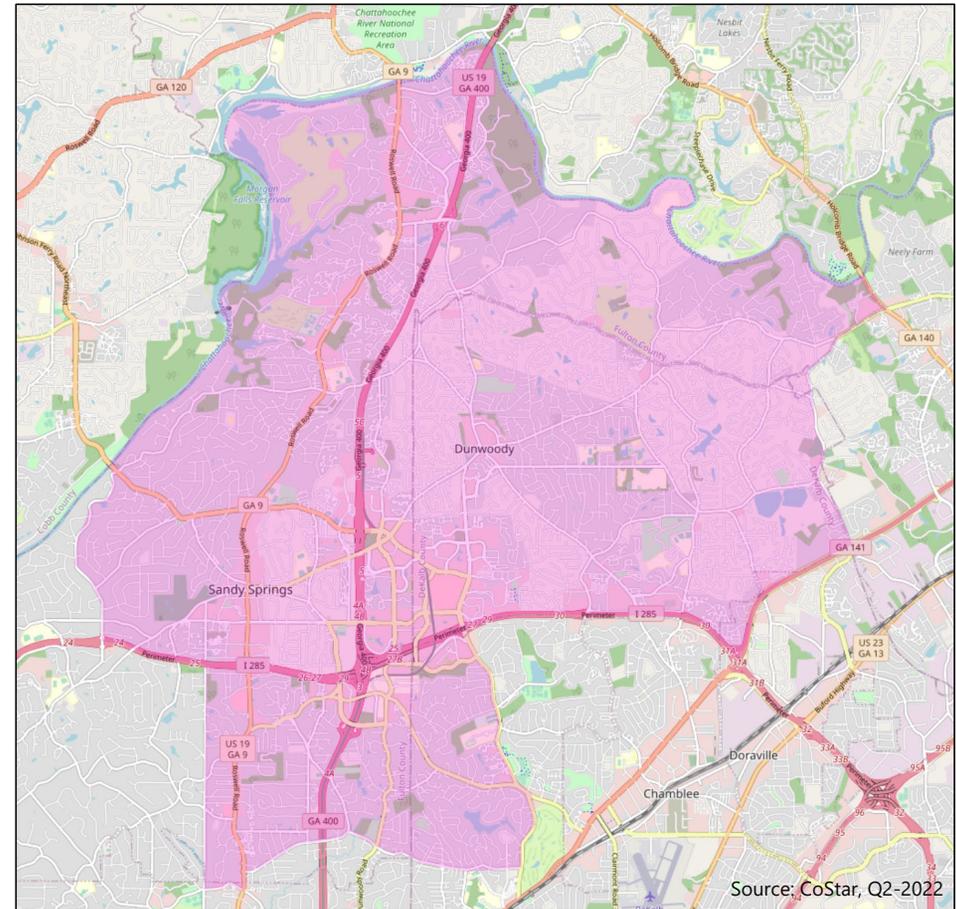
As with the wider Metro Atlanta area, the absorption of retail space in Sandy Springs/North Central was trending downwards even prior to the pandemic. Despite limited demand, vacancy rates were held low through minimal delivery of new space and the demolition of a significant obsolete retail space.

Figure: Sandy Springs/North Central - Retail Absorption, Net Deliveries & Vacancy



Source: CoStar, Q2-2022

Figure: Sandy Springs/North Central Retail Submarket



Source: CoStar, Q2-2022



# Retail Market Analysis

Very little new retail supply has been delivered in Sandy Springs/North Central over the past few years. However, the first phase of GID Investment's High Street project was approved by the City of Dunwoody in early 2021. The first phase of the development is slated to add 150,000 SF of retail to the local market. The project is entitled for up to 400,000 SF at build-out. Additional retail has been completed in City Springs as part of several mixed-use redevelopments.

Demolitions are common in the submarket, and developers continue to target aging retail centers for potential mixed-use projects. For example, nearly 150,000 SF of retail was demolished to create the City Springs multi-use campus that includes a park, restaurants, retail, residential units, Performing Arts Center, and City Hall.

A number of older shopping centers along Roswell Road are being considered by developers for potential development projects, such as Jamestown's proposed redevelopment of Parkside Shops. However, most of these plans are preliminary.

## Vacancy

Even though net absorption has slowed in recent years, the submarket's vacancy rate has generally held steady and currently sits at a healthy 4.9%, down from 9.7% in 2012. This rate should remain low as there is little in terms of speculative supply in the near-term pipeline. The submarket has had to contend with a few large move-outs over the past several quarters.

## Leasing Activity

Most leasing activity involves smaller service-oriented or restaurant space. Nearly all leases signed since 2018 have been smaller than 10,000 SF.

Recent retail tenant move-ins skew strongly towards services in the City Springs study area, with F&B tenants moving into the south side and northern side of the district. Leasing activity generally skews towards smaller independent retailers in City Springs while national chains are drawn to the Perimeter Center area. This trend suggests that City Springs should focus initially on the types of tenants which already demonstrate an interest in the area: smaller, independent retailers and F&B.

Figure: Sandy Springs/North Central – Demolitions & Deliveries

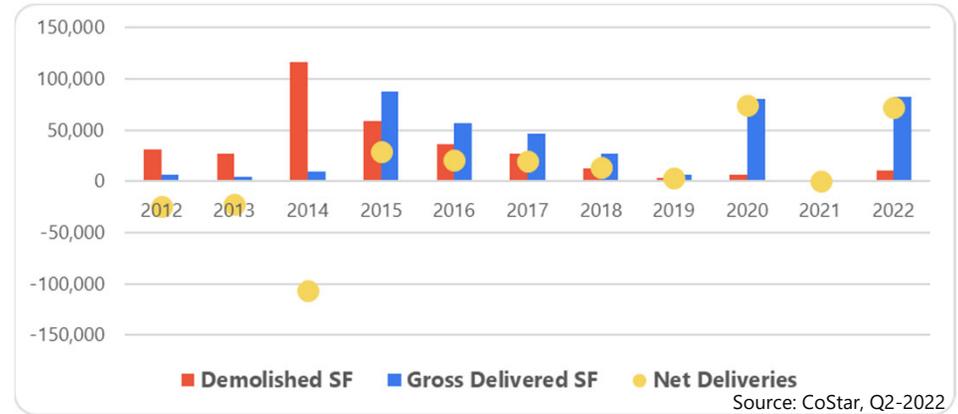
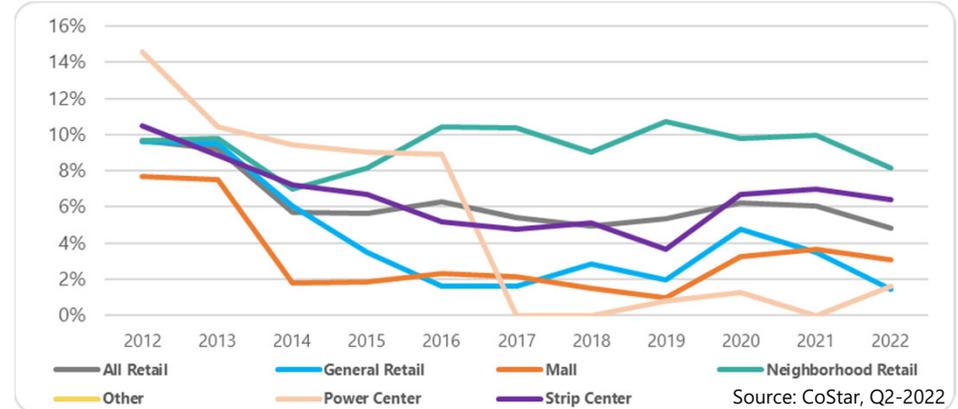


Figure: Sandy Springs/North Central – Vacancy Rate by Retail Format



# Retail Market Analysis

## Rent

Retail asking rents in Sandy Springs/North Central average \$27/SF which is well above the regional average and lower only than upscale in-town submarkets such as Buckhead/Lenox and Midtown/Brookwood. Smaller space near Perimeter Center can exceed \$40/SF, though rents in City Springs are typically around the submarket average. Low vacancy rates coupled with minimal recent construction pipeline has created buoyancy for rents in Sandy Springs/North Central in recent years.

## Cap Rate

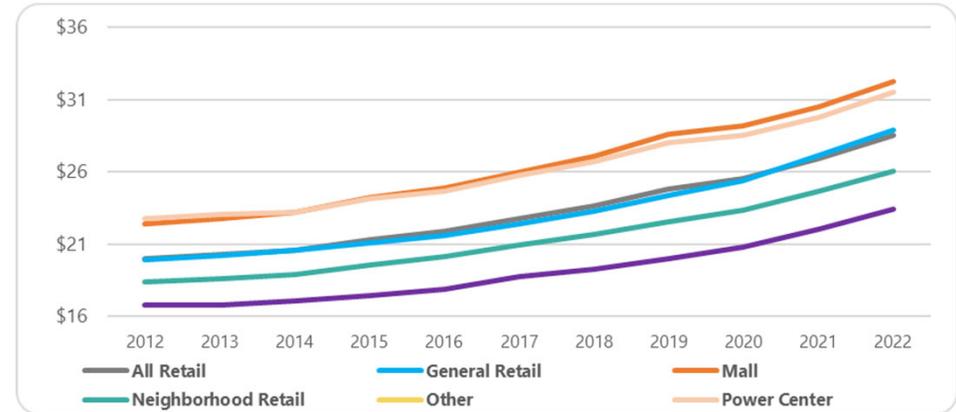
Cap rates are a means of estimating a development value based on current rental revenue. The lower the cap rate, the higher the project valuation. Retail cap rates in Sandy Springs/North Central are at healthy lows of 6.4% to 7.2% depending on the retail format. General Retail, which is primarily streetfront retail such as found at grade in mixed-use buildings, boasts the lowest cap rates which bodes well for the continued growth of the City Springs District.

## Under Construction/Proposed New Retail

About 40% of the submarket's retail inventory is located within half a mile of Roswell Road, and another 40% is within a 1-mile radius of Perimeter Mall. Additional retail development is constrained by land availability in Sandy Springs/North Central.

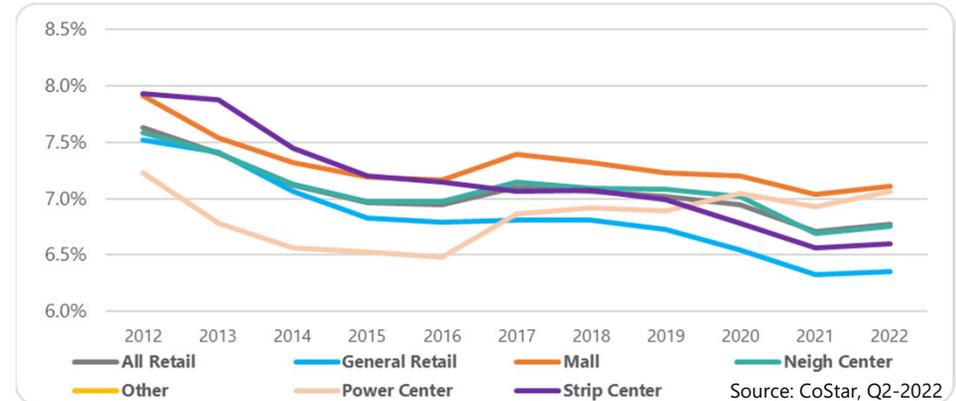
Developers have focused on mixed-use projects over the past decade, and the High Street project could add up to 400,000 SF retail along with 600 luxury apartments over the next few years based on their entitlement. Developers are likely to continue to target older shopping centers for redevelopment opportunities in the coming years.

Figure: Sandy Springs/North Central – Retail Rental Rate Trends



Source: CoStar, Q2-2022

Figure: Sandy Springs/North Central – Cap Rate by Retail Format



Source: CoStar, Q2-2022

# Retail Market Analysis

The major retail developments (over 50,000 SF) in the north Metro Atlanta region, currently either proposed or under construction, were surveyed and detailed below. While not all will provide any competitive impact on City Springs, they do provide a sense of the scale and format of other development in the general area.

High Street is the largest retail site currently under construction in the submarket. Located in the City of Dunwoody, the project will introduce 150,000 SF of retail to Sandy Springs/North Central. Phase I, is currently under construction delivering 2023 on Perimeter Center Pkwy. Phase 1 will offer an upscale retail street together with other uses in a mixed-use master planned site.

Of note, two Neighborhood Centers near City Springs include MarketPlace Terrell Mill (127,000 SF) located west of City Springs at 1360 Powers Ferry Rd SE in Marietta that is delivering in 2023 and Belle Isle Square (53,085 SF) proposed south of City Springs at 4969 Roswell Rd.

Table: Major Retail Proposals & Under Construction

Retail Node	Address	Size SF	Retail Format	Status
High Street Atlanta Phase 1	Perimeter Center Pkwy NE, Dunwoody	150,000	Mixed-Use	Under Construction (Delivery 2023)
Life Time Athletic Buckhead	3462 Peachtree Rd NE, Buckhead	90,000	Health Club	Under Construction (Delivery Late 2022)
Lotus Grove	5597 Buford Hwy NE, Doraville	73,000	Mixed-Use	Under Construction (Delivery 2022)
MarketPlace Terrell Mill	1360 Powers Ferry Rd SE, Marietta	127,000	Neighborhood Center	Under Construction (Delivery 2023)
Belle Isle Square	4969 Roswell Rd, Sandy Springs	53,085	Neighborhood Center	Proposed
Large Format Development	11 Ravinia Dr, Dunwoody	110,000	Large Format	Proposed
Manna Pro Feed Mill Redevelopment	5466 New Peachtree Rd, Chamblee	54,677	Food Hall/Mixed-Use	Proposed

Source: CoStar, Q2-2022; \*Proposals Over 50,000 SF

# Retail Market Analysis

11 Ravinia Dr/Pkwy, Dunwoody



Source: Bagby, D. reporternewpapers.net

High Street Atlanta Phase I – Perimeter Center Pkwy, Dunwoody



Source: HighStreetAtlanta.com

# Retail Market Analysis

MarketPlace Terrell Mill – 1360 Powers Ferry Rd, Marietta



Source: marketplaceterrellmill.com

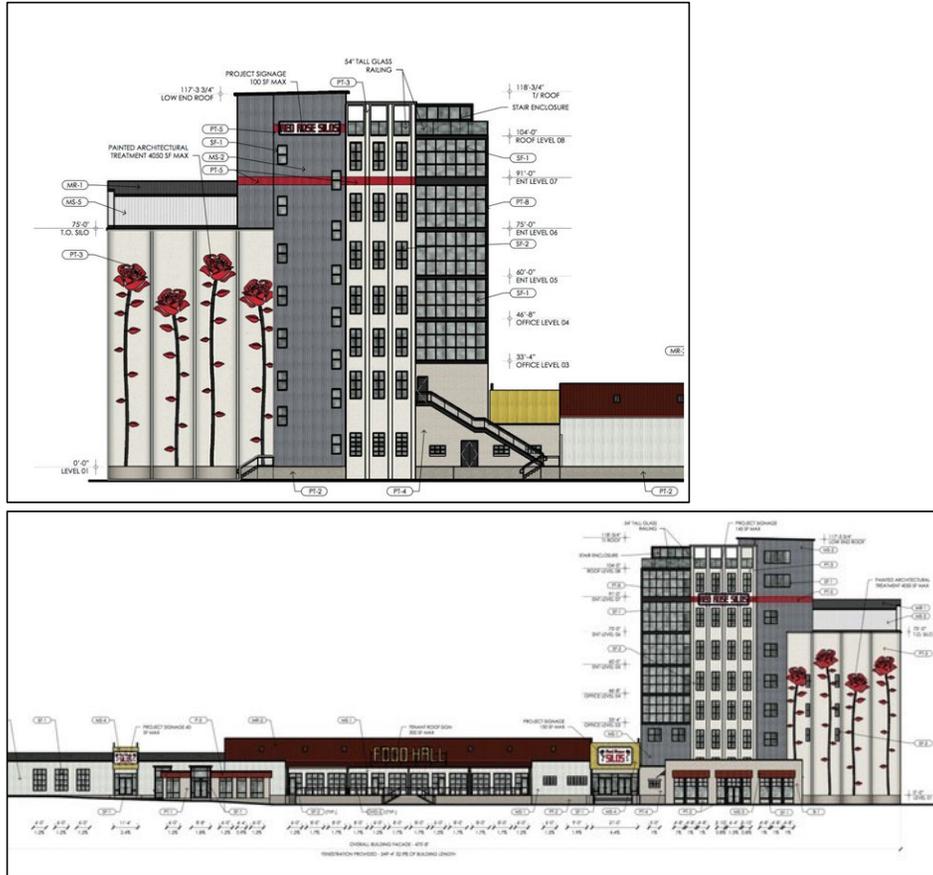
Lifetime Athletic Buckhead – 3462 Peach Tree Rd, Buckhead



Source: Lifetime

# Retail Market Analysis

Manna Pro Feed Mill Redevelopment– 5466 New Peachtree Rd, Chamblee



Source: Atlanta Business Chronicle

Lotus Grove – 5597 Buford Highway, Doraville



Source: Atlanta Business Chronicle

# Retail Market Analysis

## Submarket Residual Demand

Having established overall market conditions in Metro Atlanta and specifically the Sandy Springs/North Central retail submarket, a Residual Demand analysis was performed to estimate the demand for additional retail space in the entire submarket over the next 10 years to inform what can be supported in the City Springs District. Residual Demand analysis is based on supply and demand patterns, rental rates, new construction, cap rates and other key metrics.

The objective of the Residual Demand analysis is to provide a maximum limit on retail absorption at City Springs over the next decade, and to provide a realistic timeline for absorption. By understanding the likely demand for new retail space for the entire submarket, it is possible to then identify the amount of this total that City Springs could reasonably expect to attract based on key factors such as competition, location, and site-specific characteristics.

From the Residual Demand analysis detailed below, it is notable that total retail inventory has barely increased in the local submarket over the past decade. Vacancy has dropped from 9.7% to 4.9% so the amount of occupied floorspace has increased by 603,000 SF since 2012. Absorption in Sandy Springs/North Central averages a moderate 58,993 SF per year.

With vacancy at a healthy 4.9%, the total Residual Demand (i.e. the amount of new retail space the submarket could introduce and still be at a healthy vacancy rate) is currently just over 192,000 SF. Current construction of 157,400 SF is in balance with this residual demand, and as such vacancy rates are expected to remain relatively stable over the next several years.

Over the next decade, High Street and other projects under construction will be absorbed, and an additional 433,000 SF of new retail space will be needed in the submarket over and above what is currently under construction. Some of this total will be taken up by projects in the proposed/planning stages, and part of this residual demand will be captured by City Springs, an estimate of which is made in the remainder of this section.

Table: Sandy Springs/North Central Residual Demand Analysis

Residual Demand	Historic Supply (2012)				Current Supply (2022)				Residual Demand				
	Inventory (SF)	Vacancy Rate	Vacant SF	Occupied SF	Inventory (SF)	Vacancy Rate	Vacant SF	Occupied SF	Current Residual Demand SF	10-Year Avg. Annual Net Absorption (SF/Yr)	2023 Residual Demand SF	2032 Residual Demand SF	
<b>Sandy Spring/N Ctrl</b>	<b>10,377,782</b>	<b>9.7%</b>	<b>1,011,139</b>	<b>9,366,643</b>	<b>10,465,305</b>	<b>4.9%</b>	<b>508,731</b>	<b>9,956,574</b>	<b>192,444</b>	<b>157,400</b>	<b>58,993</b>	<b>94,038</b>	<b>432,531</b>
General Retail	2,334,963	9.8%	228,093	2,106,870	2,227,715	2.1%	46,675	2,181,040	102,582	150,000	7,417	-40,001	-75,830
Mall	2,532,144	7.7%	194,764	2,337,380	2,531,614	3.5%	89,817	2,441,797	79,801		10,442	90,243	104,417
Neighborhood Center	4,178,276	9.8%	411,161	3,767,115	4,336,739	8.1%	349,962	3,986,777	-59,400		21,966	-37,434	219,662
Other													
Power Center	931,993	14.5%	135,078	796,915	931,797	0.3%	3,149	928,648	59,281		13,173	72,455	131,733
Strip Center	400,406	10.5%	42,043	358,363	437,440	4.4%	19,128	418,312	10,180	7,400	5,995	8,775	52,549

Source: CoStar, Q2-2022, Analysis by MXD

# Retail Market Analysis

## Competitive Analysis

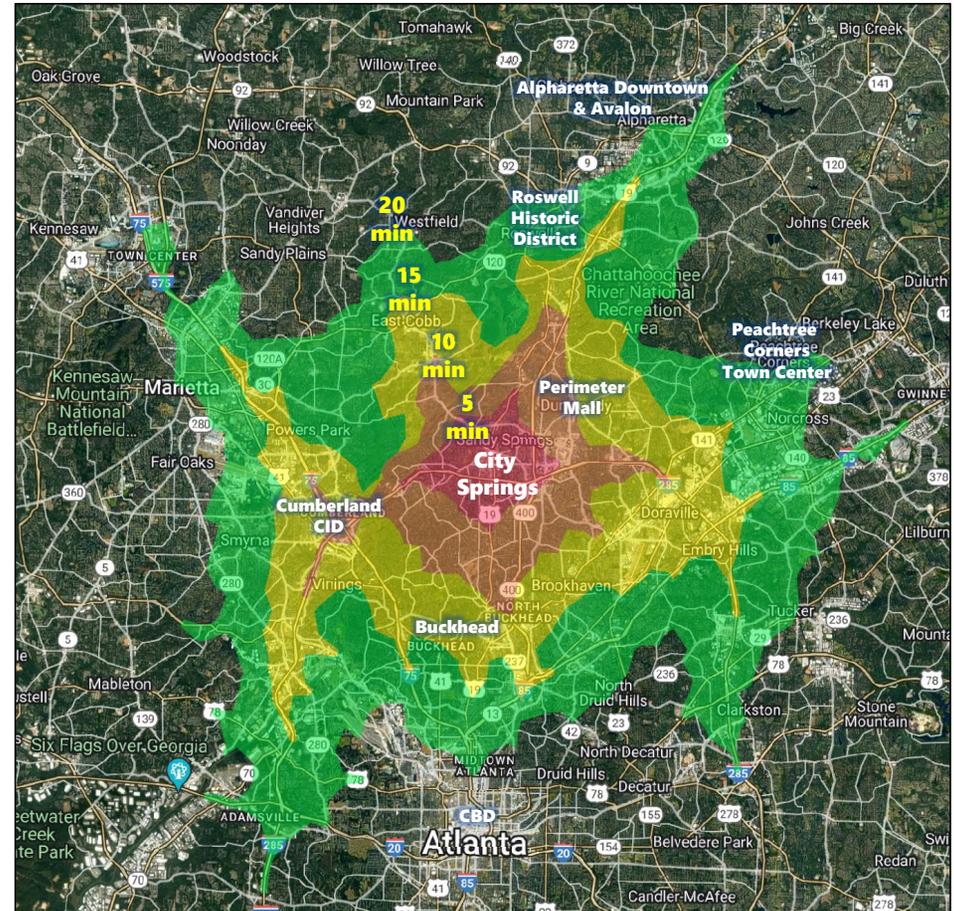
There are a number of competitive nodes in the north Metro Atlanta region which City Springs will contend with. Of particular significance are other planning areas which share aspirational similarities with City Springs to attract new development including retail, restaurants, and entertainment in a variety of urban forms and densities, primarily through infill and redevelopment. These nodes will all be competing for many of the same customers, as well as the same types of shopping, dining and entertainment tenants and thus will have a direct impact on the amount of retail space that could be supported at City Springs.

For suburban retail, nearly all patronage is generated from within a 20-minute drive time zone, with most patrons drawn from a 10-minute drive. **A key challenge for City Springs is that it is located within a 5-to-10-minute drive of Perimeter Center, an established regional retail node with several redevelopment projects planned or under construction. High Street is already under construction and represents a substantial portion of supportable new retail space in the submarket over the next decade.**

A 10-minute drive to the southwest, the Cumberland Community Improvement District (CID) is an established shopping and entertainment node of 3.2 million square feet. The area is also undergoing planning for its next evolution. This puts pressure on patronage that City Springs could aspire to attract from this direction.

**A classic conundrum in the retail sector is to be located within the trade areas of two or more major established competitive nodes.** Typically, the most strategic response to this situation is to focus on creating a successful **compact neighborhood-oriented retail node with multiple amenities**, most notably green space for the public, typically lined with restaurants and entertainment. Success at a local level can be leveraged to attract a broader range of tenants as well as entertainment anchors over the longer term. This is the recommended initial strategy for City Springs to pursue.

Figure: Drive Time Zones and Competitive Planning Areas



Source: Open Route Service



# Retail Market Analysis

Table: Competitive Nodes Performance Summary

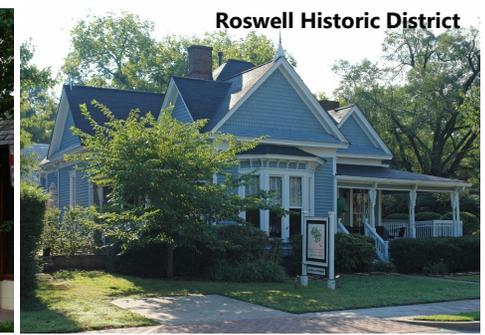
Retail Node	Formats	Inventory SF	Anchors	Average Lease Rate/SF	Vacancy Rate	12-Month Net Absorption SF	Cap Rate	Notes
Perimeter Mall	Enclosed Mall Power Center Mall Street Front Retail	3.4M SF	Macy's, Nordstrom, Dillard's, Target, Walmart, Best Buy, Bed Bath & Beyond	\$30.65	3.3%	63.8K	6.9%	Shifting to mixed-use district. Large office market. MARTA access. Strategic location at I-285/GA 400.
Roswell Historic District	Streetfront Retail Alleyways	637K	Canton Street Farmers Market Bayou'Q	\$21.72	5.4%	9.9K	6.3%	Event venue area. Numerous festivals. East-West Alley F&B cluster. Ped-friendly.
Cumberland CID	Enclosed Mall Power Center	3.2M	Coca Cola Roxy, Mizuno Experience Center Costco, Macy's	\$28.38	9.7%	-30.4K	7.0%	Strategic I-285/I-75 location. The Battery mixed-use development. Entertainment and hotels cluster.
Buckhead	Enclosed Mall Power Center Streetfront Retail	6.3M	Macy's, Nordstrom, Bloomingdale, World Market	\$37.93	2.0%	48.6K	6.5%	Increasingly ped-friendly focus.
Peachtree Corners Town Center	Power Center Mall Streetfront Retail	1.5M	The Belk, Old Navy, Barnes & Noble, HomeGoods, CMX Bistro Movie Theater	\$24.01	2.4%	16.8K	6.4%	Revitalizing Innovation Hub. Ped-friendly retail development.
Alpharetta – Downtown & Avalon	Mixed-Use Streetfront Retail	1.2M	Regal Avalon Cinema, Whole Foods Market, Crate & Barrel, Publix	\$34.01	3.0%	7.5K	6.4%	Mixed-use development is dominant format.

# Retail Market Analysis

**Dunwoody Perimeter Mall**



**Roswell Historic District**



**Cumberland CID**



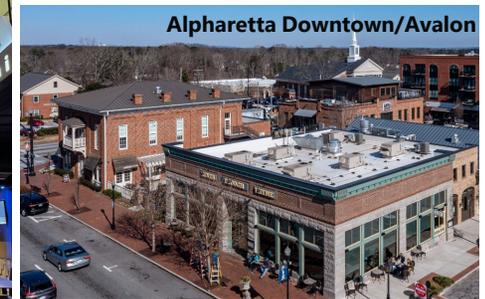
**Buckhead**



**Peachtree Corners Town Center**



**Alpharetta Downtown/Avalon**



# Retail Market Analysis

## Demand Analysis

Having reviewed retail market conditions across Metro Atlanta and the Sandy Springs/North Central submarket, as well as profiled existing and future competition, the focus of this section now turns to retail demand. A demographic analysis was undertaken for areas within one to three miles from the center of the City Springs area (defined in this study as the intersection of Roswell Road and Hammond Drive NE). Key highlights include:

### Population

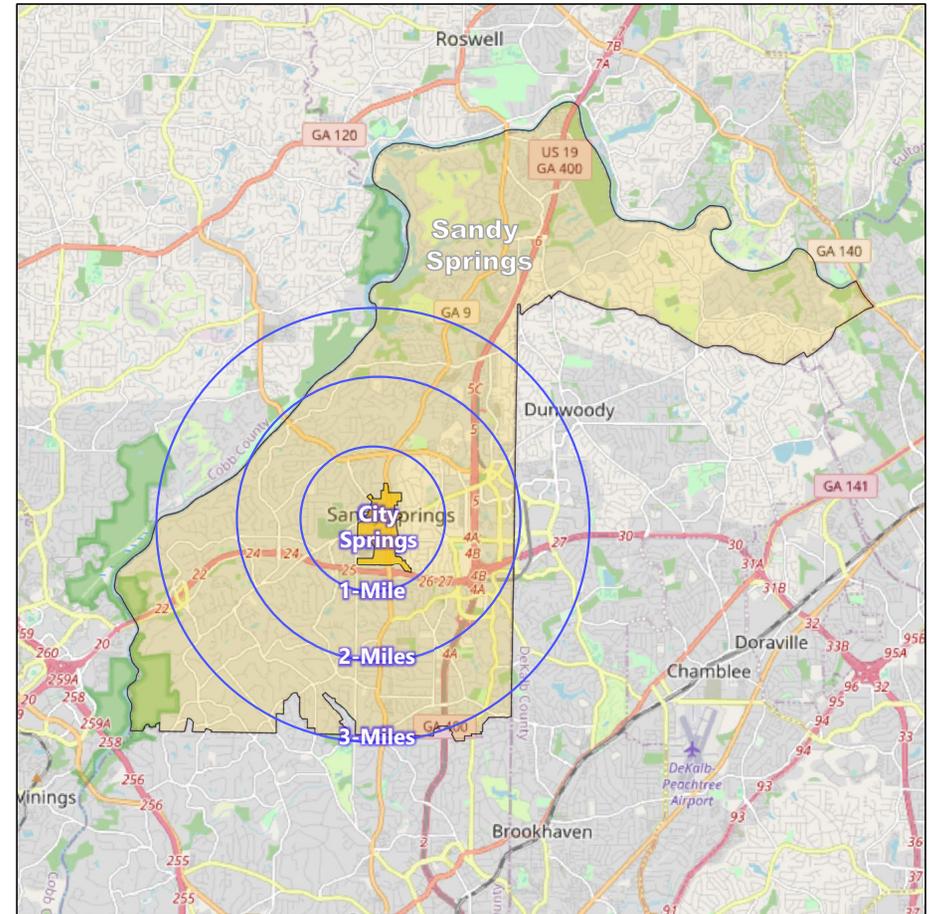
Currently **94,730 people live within 3-miles of City Springs**, and this number is anticipated to grow by 1.5% a year to 109,797 people by 2032, a pace that is close to the national population growth rate (source: Esri Business Data). This growth projection does not include additional multi-unit housing that may result from the City Springs planning effort.

The 15,067 new residents can each support approximately 45 SF of additional shopping, dining and entertainment uses based on the current income profile of the area. Thus, additional population growth within a 3-mile radius will generate support for approximately 678,000 SF of new retail space over the next decade. However, it is important to note that a significant portion of this retail expenditure will occur outside the 3-mile radius both within the submarket but also to major shopping destinations in the north Metro Atlanta area.

An estimated 20% of this new retail spending will be made in City Springs given typical retail consumer shopping patterns, as well as the quantity and quality of retail competition in the north metro. In addition, up to 10% of patronage is anticipated as inflow from outside of the 3-mile radius.

**Based simply on population growth and retail competition, over the next decade approximately 135,000 SF of additional retail space is estimated to be supportable at City Springs. Several other techniques will be applied to “triangulate” this preliminary estimate.**

Figure: Radius Analysis



# Retail Market Analysis

## Household Income

Household incomes are high, averaging \$132,686 within a 2-mile radius of City Springs (Source: Esri Business Data, 2022), well above the average household income of \$99,541 in Metro Atlanta and \$97,026 for the entire U.S. Additional analysis of income distribution reveals that there is a much higher concentration of households earning more than \$200,000 than found nationally, with a lesser but still significant cluster of households earning \$125,000 to \$199,999.

Conversely there are significantly fewer lower-income households that earn under \$50,000 a year than found nationally. The market for value-oriented fare (i.e. Walmart) is limited, while mid-market retail (i.e. The Gap) will have an average appeal in the local market.

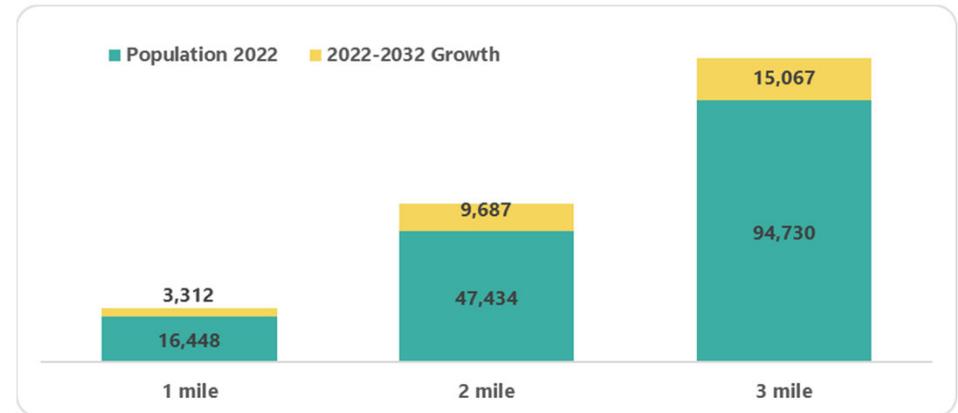
**When juxtaposing the high-income local demographics to the currently available shopping, dining and entertainment options in City Springs, there appears to be an opportunity for increased upscale options in the local area.**

## Educational Profile

When looking at adults 25 years or older living within the 3-mile radius of City Springs, there is a pronounced highly educated profile (Source: Esri Business Data, 2022). Specifically, 36% have a Bachelor's Degree and an additional 25% an Advanced Degree compared to 24% and 15% respectively across Metro Atlanta.

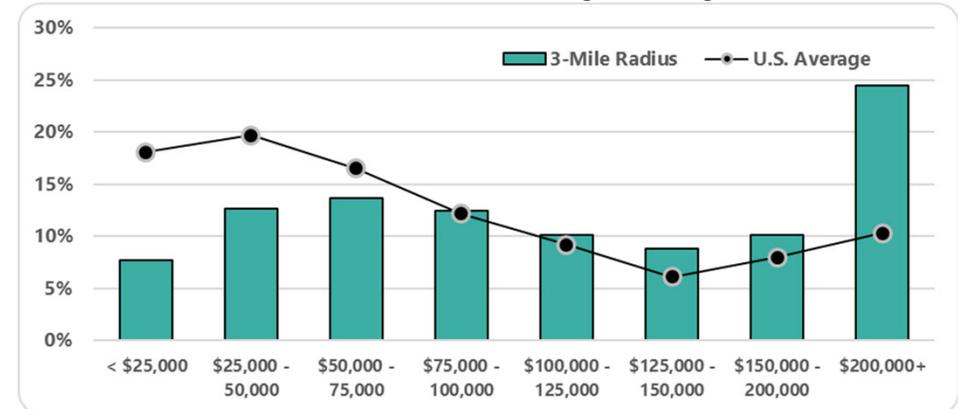
It is a retail industry standard that level of education affects a person's spending profile; two individuals of similar age, gender and income will likely exhibit profound differences if they have highly different educational backgrounds. A person with higher levels of educational attainment typically spends greater amounts on full-service restaurants, services, books, electronics and travel.

Figure: Population, 2021-2026



Source: Esri Business Data, 2022

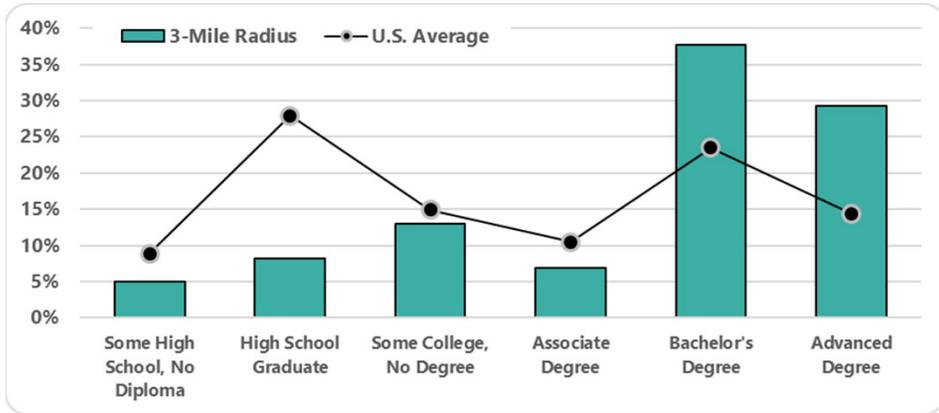
Figure: Average Household Income



Source: Esri Business Data, 2022

# Retail Market Analysis

Figure: Educational Attainment, Residents Aged 25+



Source: Esri Business Data, 2022

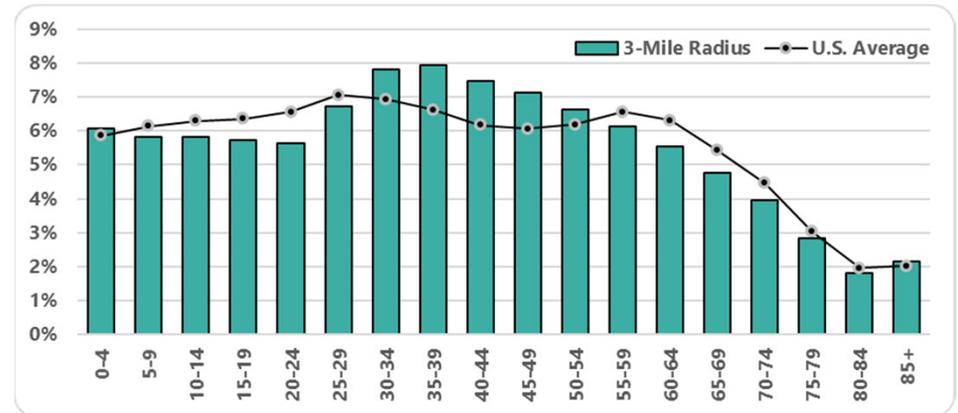
## Age Profile

There is a clear concentration of younger adults aged 25 to 39 in the City Springs vicinity: **23,000 25-39 year-olds live within three miles of the study area**, which is 23% more concentrated than the U.S. average). Conversely, there are relatively fewer children, early 20s adults, and people aged 60 years+ than found nationally.

## Household Profile

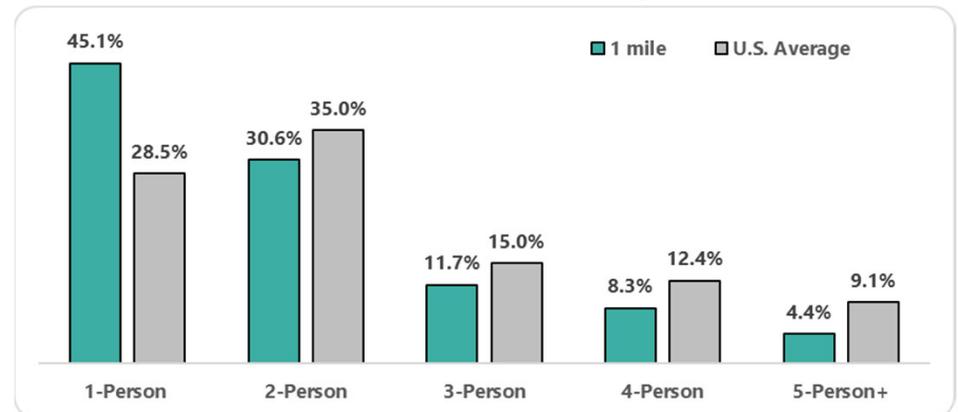
The City Springs area is characterized by smaller households. Households are smaller than average in the 3-mile radius but particularly smaller within City Springs. **Specifically, over 40% of households within one mile of the center of City Springs are singles, well above the national average of 28.5%.** This "on-site" population spends \$4,332 per capita on "Food Away from Home" annually (i.e. restaurants, cafes, etc.) compared to the national average of \$3,526. Similarly, they spend \$459 on "Entertainment Fees & Admissions" compared to \$380 nationally, and \$763 on "Alcohol" vs. \$579.

Figure: Age Cohort Profile



Source: Esri Business Data, 2022

Figure: Household Size Profile



Source: Esri Business Data, 2022

# Retail Market Analysis

## Location Analysis

Retail success is famously attributed to “location, location, location”. City Springs’ locational qualities are assessed to determine basic feasibility of additional retail in the area, as well as to calibrate the retail model used in this study. Visibility and accessibility are considered the most important location qualities along with the population and income characteristics described previously. Additional location factors to consider include local employment, complementary development and physical site factors such as topography.

## Visibility

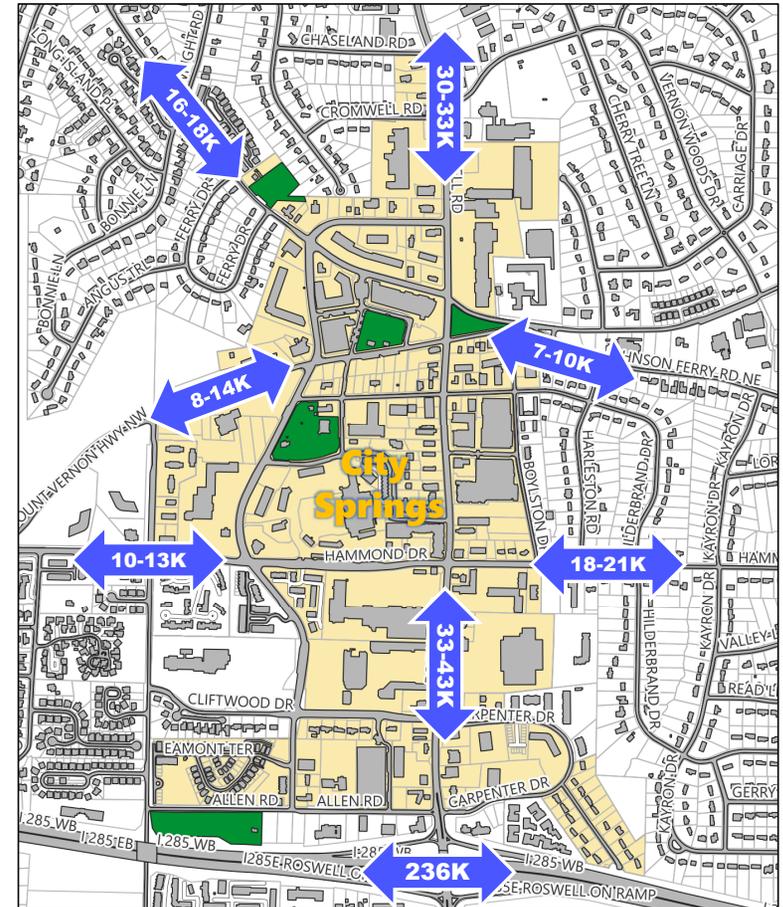
The City Springs’ southern border runs along I-285 on which 236,000 vehicles pass per day. However, as referenced in the ECA, despite lengthy frontage, visibility from this major thoroughfare is limited, due to the highway traffic passing at below grade, the perpendicular direction of City Springs from I-285 and the lack of high visibility retail buildings with a line of sight from the highway (see imagery on following page).

The 30,000 to 43,000 vehicles which pass through the heart of City Springs along Roswell Road are sufficient to support community scale retail, which is defined as under 300,000 SF by the Urban Land Institute. Many retail tenants look for a minimum of 30,000 vehicles per day in their site selection process. However, for traffic along Roswell Road, the retail experience is largely fragmented with no clear gateway to indicate you are entering the City Springs District, although the City has plans to address this through its wayfinding plan. Furthermore, many anchor tenants that draw patronage to the District are located in traditional suburban settings with large setbacks.

## Accessibility

Access from the regional market is considered very good at City Springs, with 760,000 people living within a 20-minute drive of the study area, and over 6,600 living within a 20-minute walk of the existing City Springs campus. While retailers located along GA 400 @ I-285 benefit from superior accessibility from two major thoroughfares, City Springs still benefits from better accessibility than most retail development sites found nationally. Local accessibility benefits from Roswell Road, Mount Vernon Highway and Johnson Ferry Road, facilitating convenient access from many of the high-income subdivisions located within a 20-minute drive to City Springs.

Figure: Vehicles Per Day



Source: CoStar, Q2-2022



# Retail Market Analysis

Limited visibility into City Springs or to any anchor retailers.



**View: I-285 Eastbound at Roswell Rd**

Limited visibility into City Springs or to any anchor retailers.



**View: I-285 Westbound at Roswell Rd**

Lack of gateway entrance experience to the south side of City Springs.



**View: Northbound Roswell Rd @ Allen Rd NE**

Lack of gateway entrance. Fragmented land use and large setbacks.



**View: Southbound Roswell Rd @ Sandy Springs Circle**

Anchor functions located away from core retail area in traditional suburban setting.



**View: The Springs Cinema & Taphouse**

Key anchor tenants in obsolete formats.



**View: Whole Foods**

# Retail Market Analysis

Transit access is not considered supportive of retail development at the City Springs District. Although MARTA has three train stations in Sandy Springs, the stations are more than a 20-minute walk from City Springs and are not considered as supportive infrastructure for the study area. Retail tenants discount the spending potential of bus riders due to associated retail spending potential and the reduced carrying capacity of an individual arriving without a car. Although most of the suburban retail patronage arrives by private automobile, younger generations are increasingly eschewing travel by car for transit, and retail tenants are taking notice.

## Local Employment

Local employees provide an important source of patronage to retail tenants in suburban employment nodes such as Sandy Springs, particularly for Food & Beverage (“F&B”) operations, that may otherwise have limited weekday lunchtime demand. Employees are time-constrained during the weekday, and few are willing to drive more than five minutes on a regular basis in order to shop or dine on their lunch break. After work employee patronage can be important for many restaurant concepts, but convenience shopping at grocers, drug stores or services is typically done closer to a commuter’s home than to their workplace. Office workers are the largest spenders while workers in trades typically have low daytime spending, even if they earn large salaries. Lower wage service workers such as retail employees tend to have very low daytime spending profiles as well. For this reason, only office workers within a five-minute drive are included as potential demand segments in this analysis.

There are currently 10,123 office employees working within a five-minute drive of the City Springs District. The Urban Land Institute reports that the average daily spend for suburban office workers is \$23.12 (2018 study, inflated to 2022 dollars), primarily on lunchtime food & beverage, but also including morning coffee/snack, as well as various sundries purchased during the lunch hour (source: International Council of Shopping Centers). In total, the local employment base represents an additional \$45 million annual spend at City Springs over and above local residents.

Forecasting growth in office employment over the next decade, the local office submarket (detailed in the next section) is expected to grow by just over 700,000 SF. Based on an industry standard of 200 SF of office space per worker (which may change due to Covid-19), this suggests 3,500 additional office employees in the office submarket by 2032 with an incremental increase in retail spending of \$15.4 million (\$2022). Unlike residential expenditure, this spending will occur almost exclusively in the local area, resulting in support for an additional 44,000 SF of retail, primarily F&B tenants in the entire submarket. This figure is over and above incremental demand driven by population growth. City Springs is positioned to capture a minor share of this incremental new demand.

## Complementary Development

City Springs has a number of complementary developments that can drive patronage to local shops and restaurants. Most notably, the new Performing Arts Center draws thousands of visitors annually into City Springs. Similarly, City Green, Act3 Performing Arts Theater and The Springs Cinema & Taphouse are all major anchors from which additional retail development can be leveraged.

## Site Characteristics

The City Springs study area is large and contains a variety of existing land uses. The development area has significant topography which lends character to the area but also acts to reduce visibility and accessibility within City Springs. Roswell Road, the major north-south artery bisecting the study area has a significant change in elevation which typically acts to reduce walkability.

A key challenge is the sheer size of the study area. City Hall and the Performing Arts Center are a natural anchor to a retail district. However, the greatest traffic volume is along I-285 at the southern end of City Springs. It will be essential to locate the relatively limited demand for additional retail in the City Springs study area in strategic locations accessible to local and regional traffic.

# Retail Market Analysis

## Demand Forecasting

Demand for new retail development in City Springs was estimated by analyzing the absorption history of the wider Sandy Springs/Central Perimeter submarket as well as City Springs specifically, the projected residual demand for retail in the entire submarket described previously, pipeline trends, as well as the locational attributes of City Springs detailed previously.

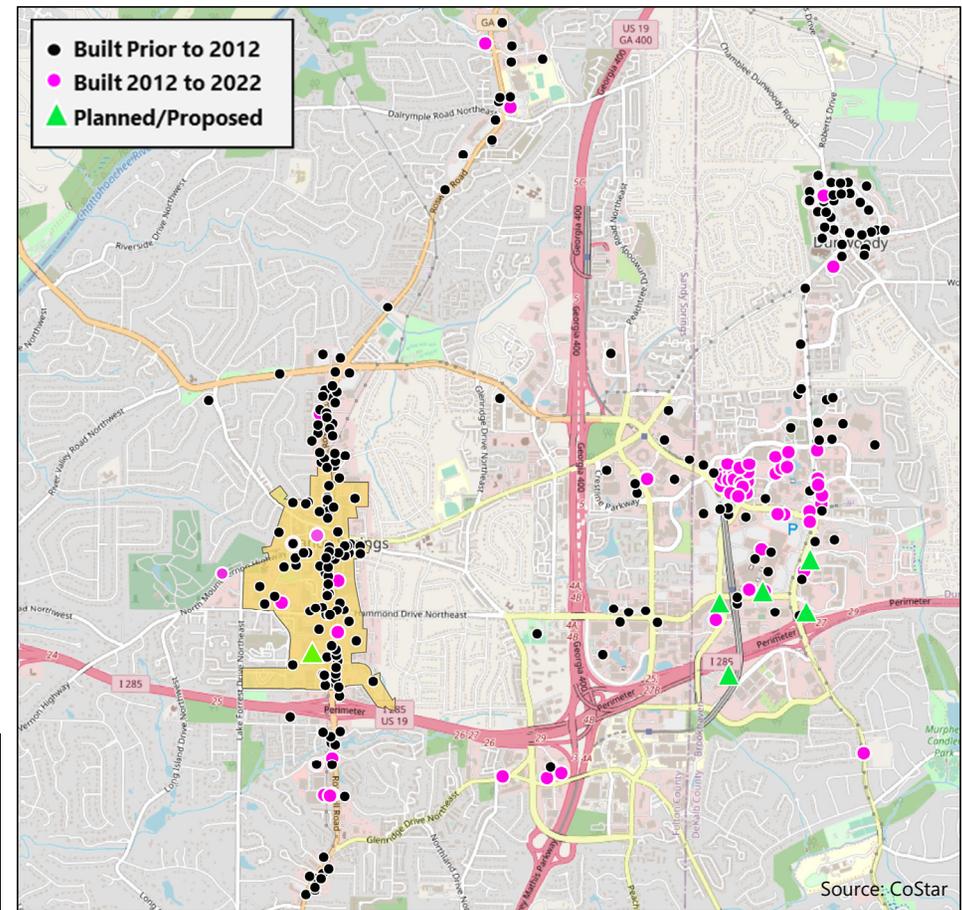
City Springs contains 22% of all new retail floorspace developed in the Sandy Springs/North Central submarket over the past decade. City Springs also houses 19.3% of all retail space currently in planning or under construction.

Combining historic and pipeline data indicates that City Springs could capture 19% of the 433,000 SF of new shopping, dining and entertainment space anticipated to be developed in the submarket over the next decade. This equates to 84,000 SF. However, considering City Springs' locational strengths and overall development vision, this market share could reach up to 30% or 130,000 SF. The previous analysis based on incremental population and employment increases indicated demand for an additional 135,000 SF (population-driven) and 44,000 SF (employment-driven) for a total of 179,000 SF. The average of these two separate analyses suggests **the total support for new retail (shopping, dining, services and entertainment) over the next decade is 155,000 SF.**

Table:  
Market Share Estimate for City Springs and the Sandy Springs/North Central Submarket

Area	2012 Inventory	2022 Inventory	2012-2022 Inventory Growth (SF)	% of 2012-2022 Inventory Growth	Planned/Under Construction (SF)	% of Planned/Under Construction	Est. Future Market Share	10-Year Projected Demand
City Springs	1,587,876	1,654,592	66,716	22.1%	64,000	16.6%	19.3%	83,632
Rest of Submarket	8,187,396	8,422,455	235,059	77.9%	322,400	83.4%	80.7%	348,899
<b>TOTAL</b>	<b>9,775,272</b>	<b>10,077,047</b>	<b>301,775</b>	<b>100.0%</b>	<b>386,400</b>	<b>100.0%</b>	<b>100.0%</b>	<b>432,531</b>

Figure: Retail Development by Year Built



Source: CoStar

# Retail Market Analysis

## Summary & Implications

- Shopping, services, dining and entertainment (“retail”) in Metro Atlanta is performing at a healthy level, with low vacancy and increasing rents, spurred on by rapid growth in employment and population.
- Only 18 million SF of new retail space has been added to the metro since 2010. By comparison, 90 million SF was added from 2000 to 2010. The impact of online commerce has reduced the demand for new space and concentrated it into food & beverage, services and convenience retail (i.e. grocery, drug store, liquor, etc.) typically in smaller formats than built in the past.
- New construction has concentrated in the region’s core business districts and gentrifying neighborhoods as well as its most distant exurbs. Sandy Springs occupies a “middle area” that is currently experiencing the least amount of retail developer interest. However, the Sandy Springs/North Central retail submarket saw the most rapid increases in rental rates prior to the pandemic. Benefiting from excellent demographics and accessibility, the area supports a 40% rental premium over the region’s average, suggesting strong tenant interest but inadequate supply. As such, developer interest should shift to Sandy Springs over the next few years to meet this latent demand.
- Over the past decade, absorption has slowed to an average of just 64,000 SF/year, and healthy vacancy rates have been maintained as much through demolition of obsolete retail properties as from new demand. Leasing has been almost entirely restricted to smaller service-oriented or restaurant space of less than 10,000 SF. This group of tenants is likely to form most new additions to City Springs’ retail inventory.
- The amount of new retail development in the Sandy Springs vicinity is limited compared to previous decades. Projects under construction are largely amenity-laden mixed-use developments in infill areas or redevelopments. In other words, they compete directly with the project vision for City Springs.
- A Residual Demand analysis indicates that the entire Sandy Springs/North Central submarket will require an additional 433,000 SF of new shopping, dining and entertainment (“retail”) space over the next decade over-and-above what is currently under construction.
- City Springs will be in direct competition with two major north metro retail nodes (Perimeter Center and the Cumberland Community Improvement District) for the identified 433,000 SF of space, and both have plans to expand and evolve their offering in a format that directly competes with City Springs.
- A demographic analysis of the residents living within a one to three-mile radius of City Springs provided important insights to optimal retail positioning. The area is characterized by young professional singles and couples earning high incomes.
- **Between 84,000 SF to 179,000 SF of new retail space is estimated to be warranted in City Springs over the next decade based on historic absorption, pipeline trends and the district’s locational attributes.**
- From this analysis, it is recommended the next phase of development in City Springs focus on a compact initial phase of development that appeals to young professionals. Specifically, focusing on the central green space with neighborhood-oriented shopping, upscale conveniences, new-to-market restaurants (including many independents), after-work gathering/entertainment/recreation concepts, and a limited amount of boutique shopping.
- Future phases of development can be more destination-oriented once this initial phase has met success. There are over 760,000 people living within 20-minutes of City Springs, many of whom are affluent, and appealing to this target market should be kept in mind as a longer-term objective for City Springs.

# 3

## Office Market Analysis

# Office Market Analysis

## Metro Atlanta Office Overview

Metro Atlanta's office market is currently in a downturn, challenged by a large amount of speculative construction vacancy (office buildings under development that have yet to secure tenants), sublet leasing vacancy, large move-outs of businesses reassessing work models, and weak rent growth. The office market has shown signs of stabilizing in recent months, but the region still faces uncertainty as the effects of the coronavirus pandemic on the office sector persist.

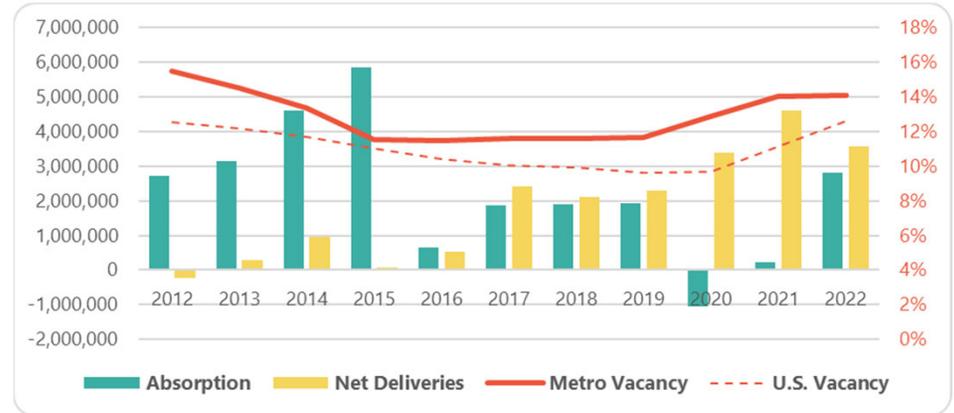
### Absorption & Deliveries

Office absorption had slowed in Metro Atlanta even prior to the pandemic. From 2017 to 2019 absorption averaged two million SF per year, or roughly half the average of 2012-2016. Absorption trended into negative territory in 2020 but has since rebounded, driven largely by the tech sector.

Deliveries have increased steadily in recent years, causing vacancy rates to remain at a relatively high level of 14%. The market's high vacancy is further exacerbated by the lack of demolition in the Metro Atlanta market. Unlike the retail sector, which has seen many obsolete properties being removed from the market to make way for multi-unit and mixed-use development, the office inventory has experienced minimal demolition over the past decade.

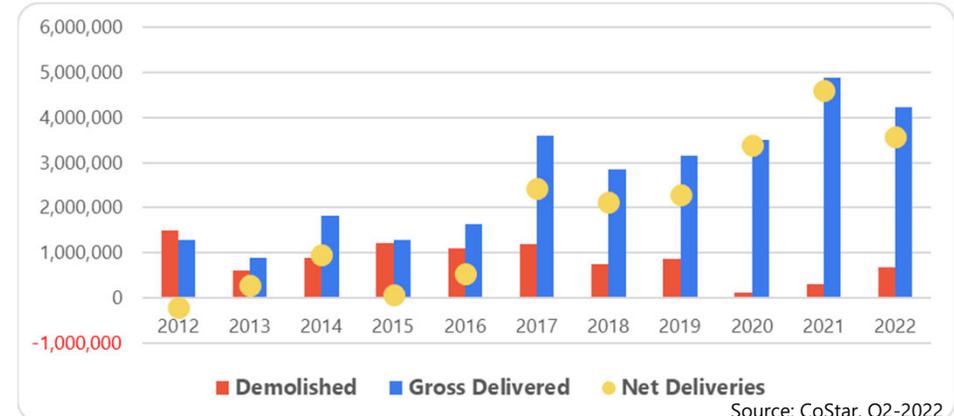
The potential of firms looking to reduce their physical office footprints and/or shifting toward a more permanent remote or flex work structure could continue to weigh on office demand in the near term. A pronounced and sustained demand recovery is contingent on firms maintaining or increasing their physical office footprints rather than shedding space, and uncertainty will likely weigh on the sector until leasing activity returns to pre-pandemic levels for an extended period.

Figure: Metro Atlanta Office Absorption, Net Deliveries & Vacancy



Source: CoStar, Q2-2022

Figure: Metro Atlanta Office Demolitions & Deliveries



Source: CoStar, Q2-2022



# Office Market Analysis

## Rent

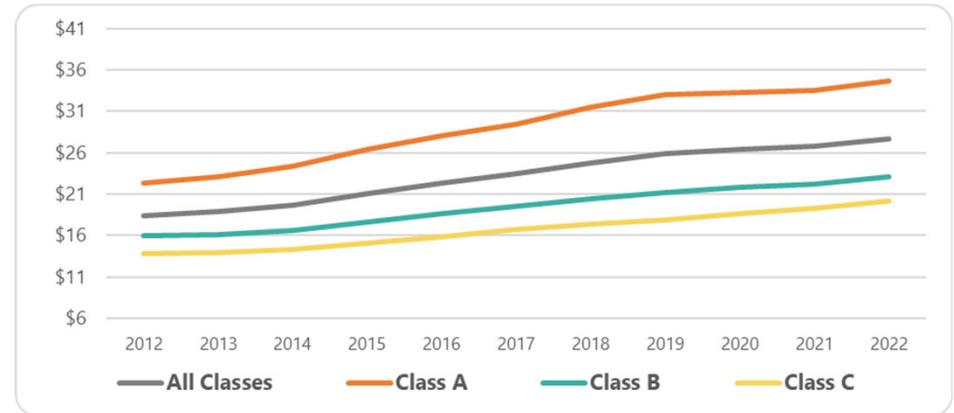
Rent growth across all of Metro Atlanta has slowed considerably since the onset of the pandemic, as most office landlords froze asking rents in response to the crisis. Rent growth will likely remain minimal due to the metro's elevated vacancy rate, prevalent sublet space and steady influx of speculative supply.

Rents in Metro Atlanta averaged \$27.72/SF in Q2-2022 for all properties and \$34.66/SF for Class A space. Rent for Class C space averaged just \$20.11/SF but budget space is currently experiencing the fastest-growing rental rates at 3.8% year-over-year.

The difference between Class A office rents in Midtown and Buckhead and those in premier suburban submarkets such as Central Perimeter do provide a competitive advantage for those suburban locales. Specifically, the gap between Class A rents in Midtown and Central Perimeter was about \$5/SF in 2008, but has since risen to \$11/SF.

Buckhead's relative success, as measured by high rental rates can be attributed to its appeal to companies seeking high-quality space with access to transit and plentiful local amenities. The area continues to add significant residential density, and the community is working on several projects focused on improving walkability and adding greenspace, such as the Path 400 Greenway and the proposed Park Over 400. Additionally, Buckhead's location gives tenants access to the highly educated labor force in the northern suburbs as well as in the in-town neighborhoods, allowing many of those workers to commute to the submarket relatively easily via highway or MARTA. In fact, according to CoStar, over 40% of Buckhead's workforce lives within 10 miles of the submarket, compared to under 30% in Central Perimeter.

Figure: Metro Atlanta Office Rental Rate by Class



Source: CoStar, Q2-2022

# Office Market Analysis

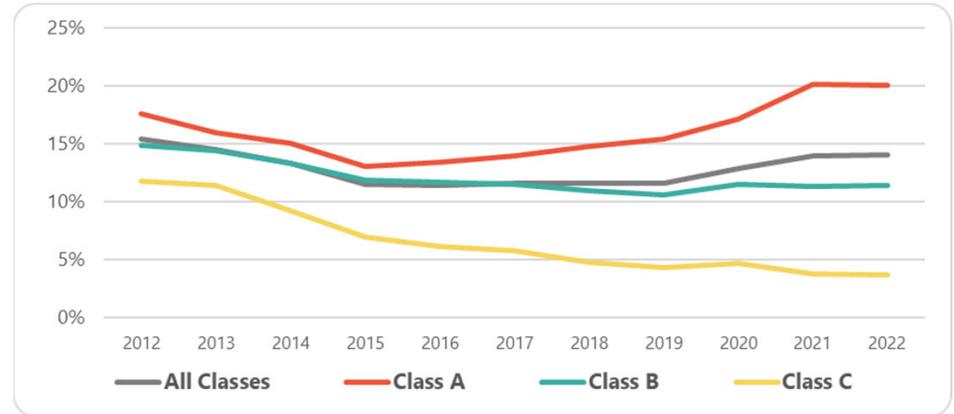
## Vacancy

Metro Atlanta's overall vacancy rate reached 14% in Q2-2022 with Class A reaching 18%-20%. This is significantly higher than the historical average. As many companies continue to reduce physical office footprints, the amount of vacant office space will continue to increase.

The region's active supply pipeline is also putting upward pressure on vacancy rates and will continue to over the next several years, as about 60% of the roughly 5.2 million SF under construction is currently unleased.

The amount of sublet availability in Metro Atlanta remains a concern for the market and could serve as a headwind for the metro's office recovery for years. The region now has more sublet space on the market than at any point since the Great Recession, and the amount of sublet space remains persistently high, with some sizable availabilities popping up in recent quarters.

Figure: Metro Atlanta Office Vacancy Rate Growth by Class



Source: CoStar, Q2-2022

# Office Market Analysis

## Construction Activity

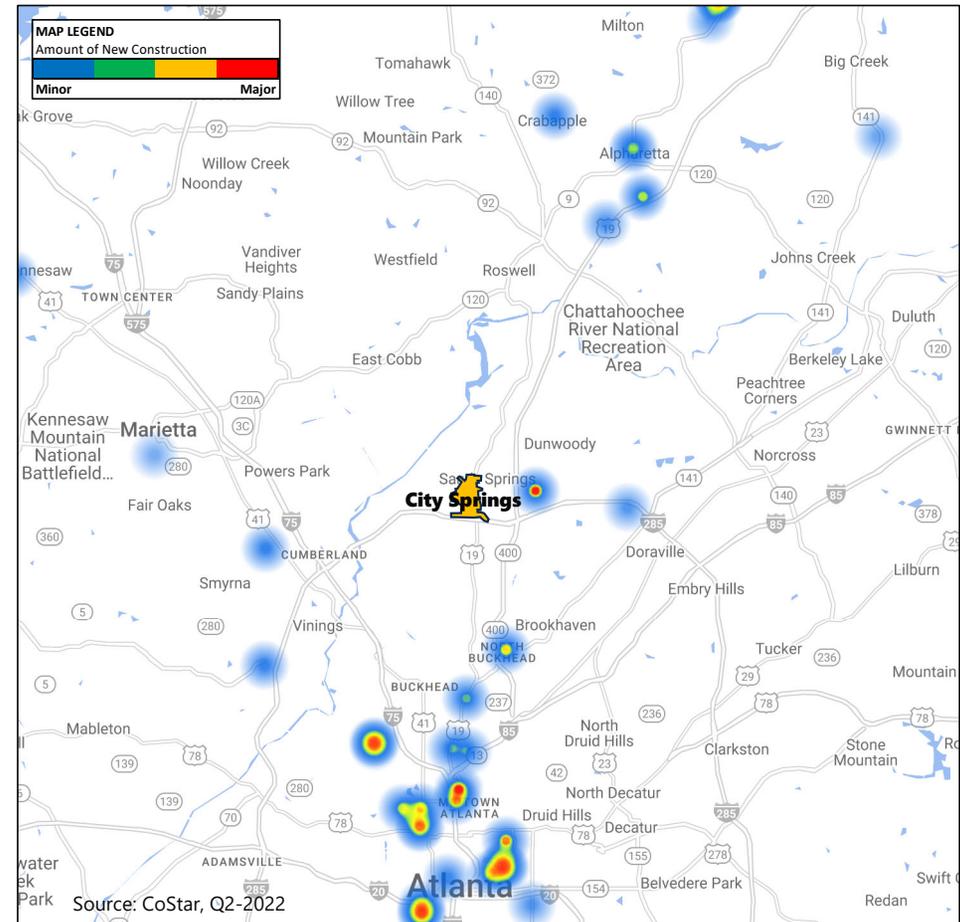
Metro Atlanta's office construction pipeline has slowed over the past year, as the roughly 5.2 million SF under construction is down from the nearly 8 million SF that was underway at the start of 2021 as new projects did not keep pace with deliveries. While construction activity has slowed, about 60% of the current pipeline has yet to be leased, which will ensure vacancy rates remain high over the next several years.

The pandemic and its long-term impact on the office sector has yet to deter Metro Atlanta area developers from breaking ground on speculative office projects. Examples include Echo Street West (300,000 SF), Westside Paper (224,000 SF), and the Offices at Northlake Mall (530,000 SF) which all started construction with major speculative components after the pandemic hit. In Midtown, there is even more speculative supply in the late planning stages, as firms like Cousins Properties, Selig Enterprises, and Portman Holdings are planning several major speculative projects.

A large portion of the region's recently delivered or under construction pipeline is concentrated in the City of Atlanta's in-town submarkets, including Midtown, Downtown, Northside Drive/Georgia Tech, and Buckhead. Midtown projects like 1105 West Peachtree (679,000 SF) and Atlantic Yards North and South (523,000 SF) started construction with major speculative components, but those developments have generally been quick to lease.

New office construction was slow to return to Metro Atlanta coming out of the Great Recession, but developers responded to the region's consistently low vacancies, strong rent growth, and impressive leasing velocity by breaking ground on several major projects in the second half of the last decade. Projects such as the 2017-built Three Alliance and the 2019-built 725 Ponce were quick to lease at top-of-the-market rents, but the region's recently delivered and under construction developments are facing a significantly more challenging leasing environment due to the ongoing effects of the coronavirus pandemic.

Figure: Office Currently Under Construction



# Office Market Analysis

## Submarket Office Overview

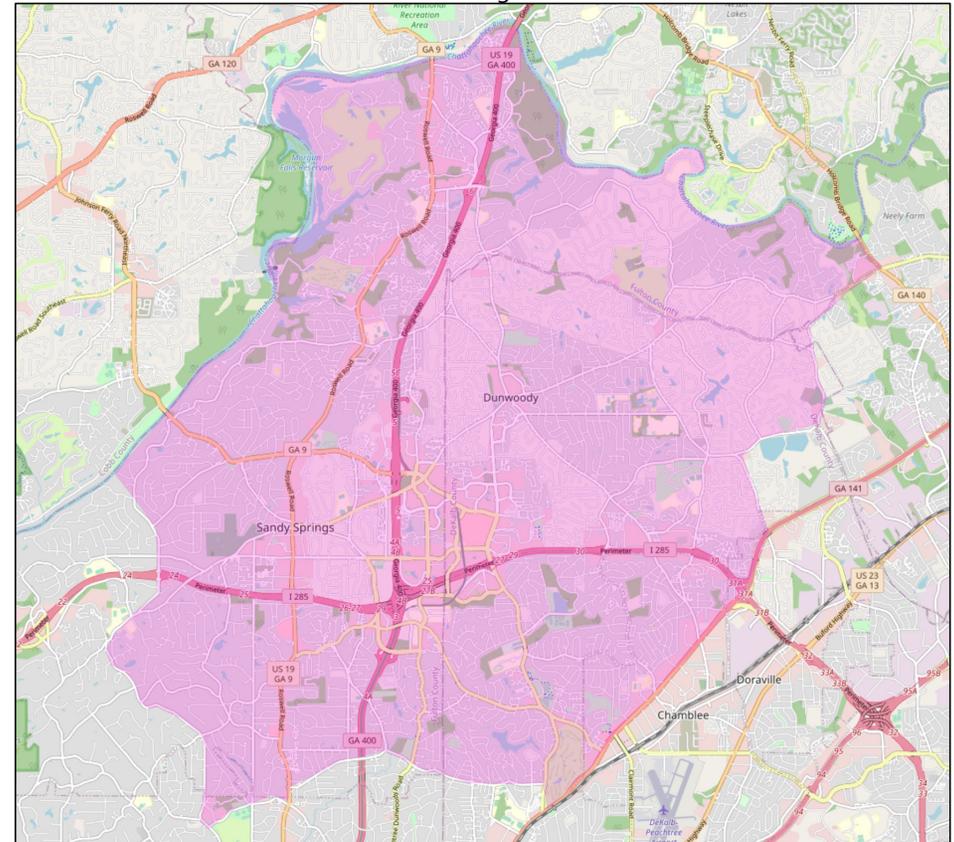
Central Perimeter has attracted several large-scale corporate tenants in recent years, but the submarket's vacancy rate is still well above its pre-pandemic average. Furthermore, the submarket is contending with a sharp rise in sublet availability. An elevated vacancy rate has had a limiting effect on rental increases, and the current year-over-year rent growth of 1.3% is well below the submarket's pre-pandemic annual average of 5.8% (2013 to 2019).

Despite these recent challenges, Central Perimeter has numerous positive qualities. The submarket benefits from its transit accessibility, concentration of Class A office space, and location near some of the region's most highly educated suburbs. These advantages have helped attract a handful of major office users over the past few years, including State Farm, Mercedes-Benz USA; and sizable locations for Cox Enterprises, Insight Global, and Deluxe Corporation.

Figure: Office Class Composition by Submarket (see map on following page)



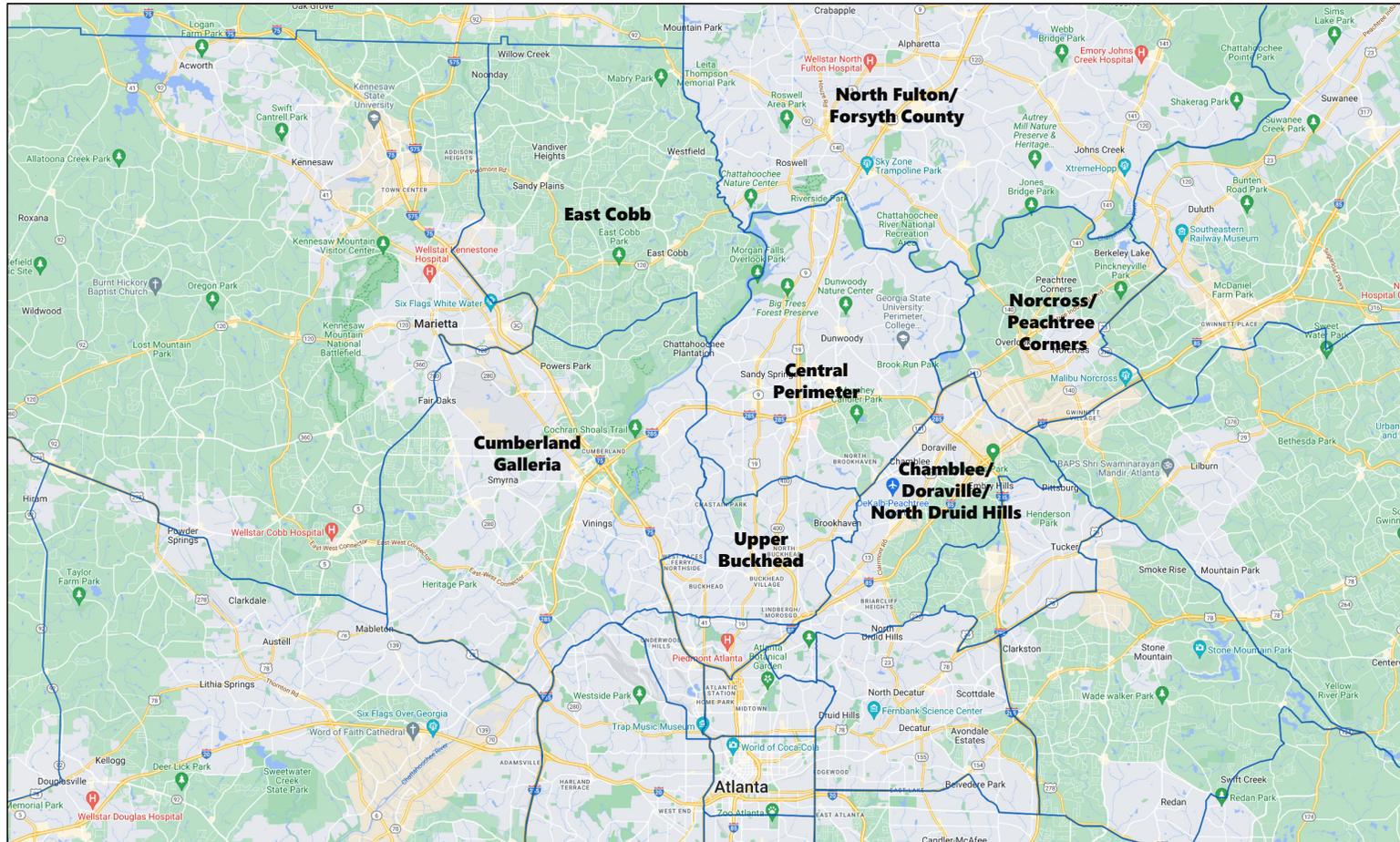
Figure: Central Perimeter Office Submarket



Source: CoStar, Q2-2022

# Office Market Analysis

Figure: North Metro Atlanta Office Submarkets



# Office Market Analysis

## Absorption & Deliveries

Absorption was slowing in Central Perimeter even prior to the pandemic, yet despite reduced demand, delivery of new space trended upwards during the previous decade. This pattern somewhat reflects what is happening across Metro Atlanta, but also points to the growing premium tenants are placing on in-town locations such as Midtown as well as outer suburbs such as Alpharetta over established office nodes developed primarily in the 1980s and 1990s such as Central Perimeter. Given this dynamic, office nodes within Central Perimeter, such as City Springs, must consider the drivers of in-town and exurban success: increased walkability, enhanced amenities and multi-unit residential development.

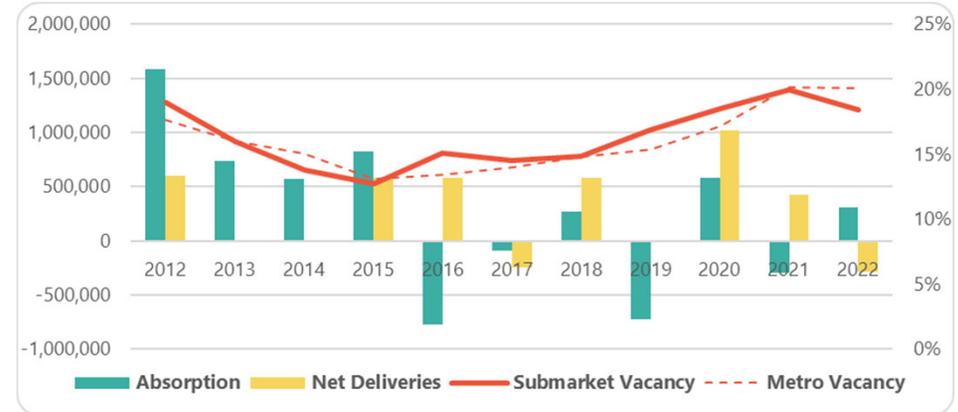
## Vacancy

Central Perimeter's vacancy rate has decreased over the past year, but at 18.4% it is still above where it was right before the pandemic hit (16.9% in 2019), and well above its historical average (15.4% from 2012 to 2019). The submarket is also challenged by a large surplus of sublet space: fully 2.9% of Central Perimeter's inventory is currently advertised as sublet availability, which is above the Metro Atlanta average of 1.8%.

As with Metro Atlanta, the Central Perimeter submarket's fundamentals may continue to face headwinds in the coming years as the office sector grapples with the lingering effects of the coronavirus pandemic. Large leases in high-end properties have traditionally been the key driver for Central Perimeter's office sector. Over the past two years, large tenants signing sizeable leases have helped the submarket backfill large blocks of vacant space.

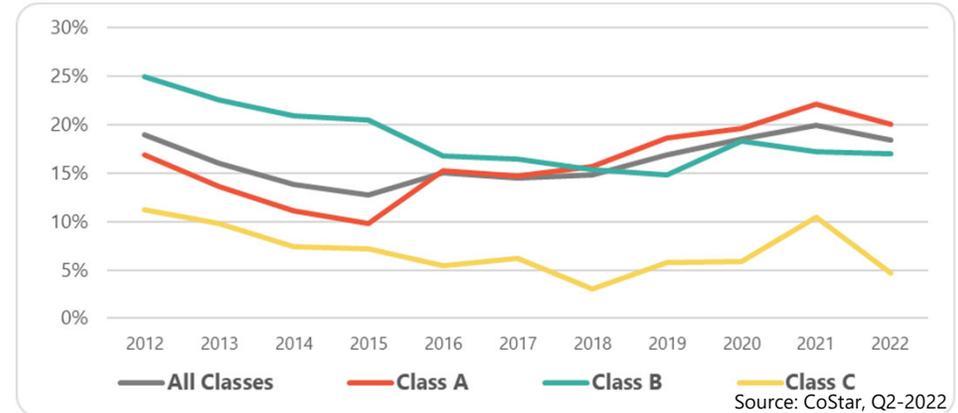
Central Perimeter was largely built during the boom years of the 1980s, when this area of Metro Atlanta emerged as a major suburban employment and residential node. While much of that space is still of high quality, vacancies in properties built before 1990 trend an additional 3% above the submarket average, and tenants have been slowly migrating to newer office developments over the years.

Figure: Central Perimeter Office Absorption, Net Deliveries & Vacancy



Source: CoStar, Q2-2022

Figure: Central Perimeter Office Vacancy Rate by Class



Source: CoStar, Q2-2022

# Office Market Analysis

## Rent

Rent growth in Central Perimeter has remained relatively flat since the onset of the pandemic. Year-over-year growth of 1.3% is well below the submarket's pre-pandemic annual average. The increase in sublet availabilities and high level of vacancy will likely continue to make it difficult for owners to significantly raise rents over the next several years.

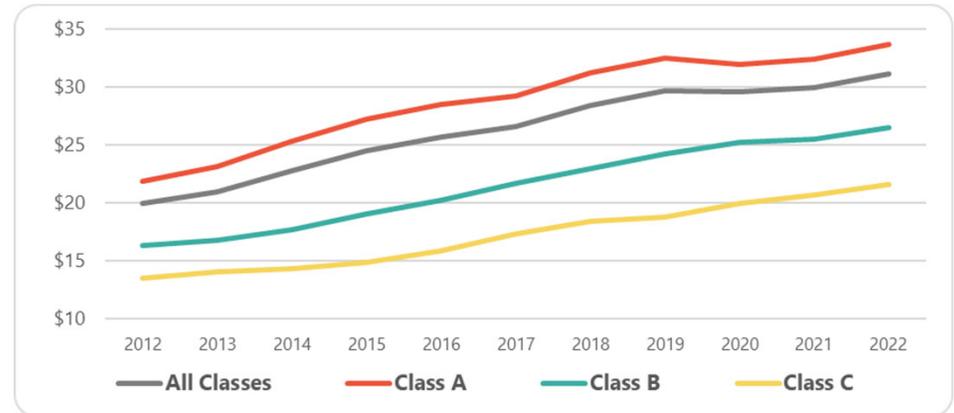
Recent weakness comes after years of strong rent growth performance. Rents in Central Perimeter are more than 35% above their pre-Great Recession peak, outperforming the Metro Atlanta average over the past decade. Central Perimeter performed better than other northern suburban submarkets like North Fulton/Forsyth County and Cumberland/Galleria, where rents are about 25% above their respective prior peaks.

While Class A rents in Central Perimeter are some of the highest in the region and are the highest among suburban submarkets, they come at a roughly 30% discount to those in Midtown and are 20% below rents in Buckhead. This rental disparity gives Central Perimeter assets a competitive advantage in attracting firms that are looking for high-end, well-located, transit-accessible space but don't want to pay top-of-the-market rents. While City Springs does not have direct access to MARTA rail, it will provide an increasingly compelling and more affordable alternative to the core Central Perimeter office cluster as well as Buckhead and Midtown.

## Cap Rates

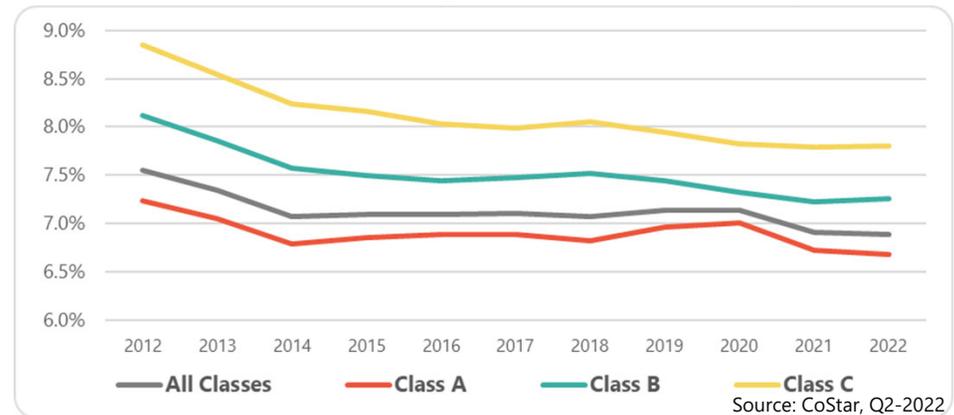
Cap rates for office developments in Central Perimeter average 6.9%, which compares favorably to the Metro average of 7.2%. These rates have compressed slightly since 2014, but they may have bottomed out as there has already been a slight uptick in Class B cap rates, and long-term uncertainty in the office sector has shifted some investor interest to other forms of development.

Figure: Central Perimeter Office Rental Rate Trends



Source: CoStar, Q2-2022

Figure: Central Perimeter Office Cap Rate Trends



Source: CoStar, Q2-2022

# Office Market Analysis

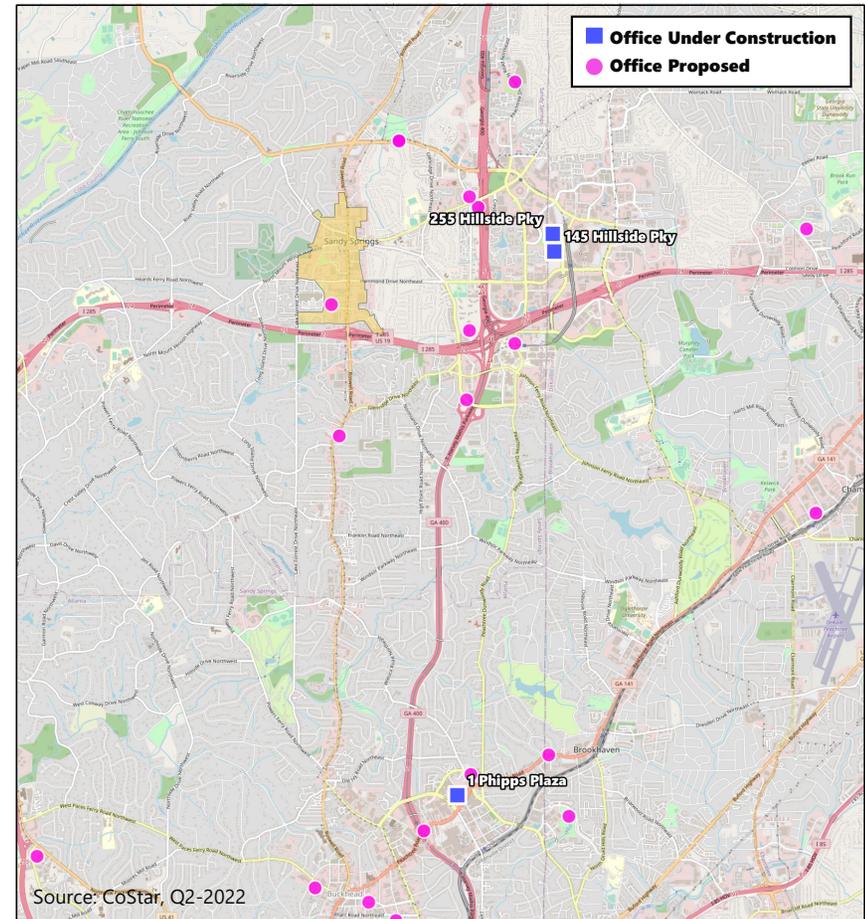
## Under Construction/Proposed New Office

Most of the new office assets built in Central Perimeter over the past several years were build-to-suit projects located near mass transit. Cox Enterprises' facility is within a 10-minute walk of two MARTA stations located in Sandy Springs, while State Farm's campus is adjacent to the Dunwoody MARTA Station.

The pandemic may disrupt plans for new developments in the submarket in the near term, as owners, lenders, and developers continue to adjust to the changing office environment both locally and nationally. Speculative office supply in Central Perimeter is rare when compared to the recent and current pipelines in Midtown and Buckhead. Even suburban competitors such as Cumberland/Galleria and North Fulton/Forsyth submarkets have delivered slightly more speculative office over the past decade than Central Perimeter.

A few large-scale projects are in the works in Central Perimeter, but developers are rethinking the scale and timing of the office portions of these deals because of the pandemic's impact on the office sector. Most notably, GID Development Group is working on its mixed-use High Street project, which could eventually add an additional 139,000 SF of office across the street from the State Farm campus. The first phase will include roughly 150,000 SF of retail, public green space, 600 apartments, and just 40,000 SF of office. After years of setbacks, the Dunwoody Development Authority approved a \$19 million tax break for the first phase of the project in early 2021, and the development started construction in late 2021.

Figure: Proposed and Under Construction Office Properties (10,000 SF+)



# Office Market Analysis

## Office in City Springs

Currently there is approximately 670,000 SF of office inventory in City Springs, or just 1.8% of the entire Central Perimeter submarket. Office inventory is comprised of primarily low-rise buildings, generally of one or two stories, with a small number of mid-rise buildings. Nearly 94% of this total was built prior to 2000, and fully 70% was built prior to 1975.

Of total inventory, 62% is Class B and 38% is Class C. By comparison, for the entire Central Perimeter inventory, 69% is Class A, 24% is Class B and 6% is Class C. The average office property in City Springs District is just 11,964 SF.

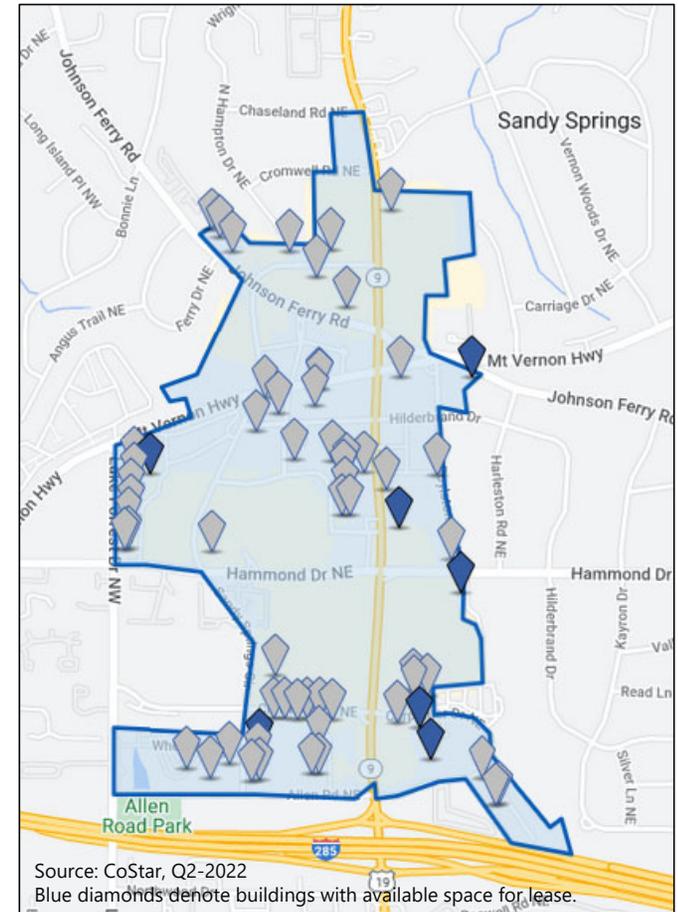
Currently 5920 Roswell Road is the only office development proposed for City Springs, although a construction start date has not been specified yet. The developer, Jamestown, L.P., is proposing to develop 63,500 SF of loft office space as part of a mixed-use development.

Average lease rates in City Springs (\$22.65 per SF) are well below both the Central Perimeter submarket average (\$30.10) and Metro Atlanta average (\$26.88). Much of this difference is driven by the lack of modern office inventory, as other buildings of a similar vintage closer to the I-285/GA 400 command only marginally higher rents.

Current tenants in City Springs skew heavily towards locally-oriented services, with realtors, lawyers and financial/insurance firms catering to individuals and households taking up 33% of space. Such tenants typically seek proximity to their customer base, and so are more akin to retail tenants than other types of office tenants. As such their growth is highly correlated with population growth in the local area.

Technology tenants, which have been the driving force of office absorption in Metro Atlanta over the past two years, constitute just 7% of leased area in City Springs. As will be demonstrated in the remainder of this section, demand for office space in City Springs is forecast to be limited over the next decade. Were the City intent on significantly expand its office base beyond the locally-oriented office tenants outlined above, it will need to tap into the burgeoning Metro Atlanta tech industry, as no other sector is in fast growth mode. Attracting tech companies (as well as non-tech office tenants) requires the provision of high-amenity, walkable mixed-use environments (including housing) that appeal to tech company workers. The success of Buckhead's office sector is directly attributable to such initiatives. However, the lack of direct MARTA rail access will provide an obstacle to expanding the tech presence at City Springs.

Figure: Existing Office Properties

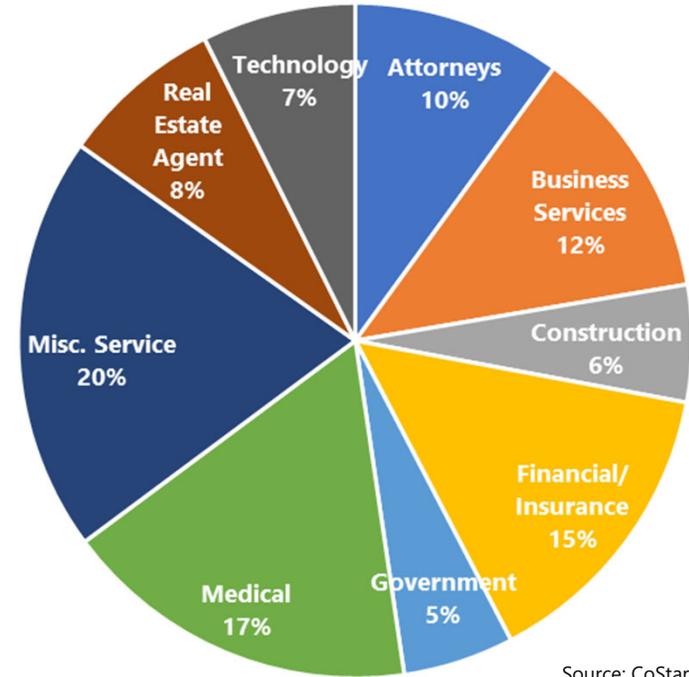


# Office Market Analysis

Figure: Representative City Springs Office Buildings, CoStar Q2-2022



Figure: City Springs Office Floorspace by Economic Sector



Source: CoStar, Q2-2022

# Office Market Analysis

## Submarket Residual Demand

The Central Perimeter office submarket was analyzed to estimate the demand for additional office space in the area over the next 10 years, based on supply and demand patterns, rental rates, new construction, cap rates and other key metrics. The overall demand projected for the entire submarket forms the basis for projecting office demand specifically in City Springs out to 2032.

Total office inventory in Central Perimeter has grown by 1.9 million SF over the past decade, a moderate increase of 5.4% compared to Metro Atlanta's 6.5% increase. Weakening absorption matched with vacancy rates that have remained over 18% has underlain this modest growth. The entire submarket is forecast to support an additional 701,000 SF of new office space over the next decade, over-and-above new properties currently under construction. The accelerated shift to remote working may slow overall office demand even further, however.

Table: Office Submarket Performance Metrics

Office Performance Metrics	Historic Performance (2012)						Current Performance						Avg. Annual Change in New Development Capital Value per SF
	Market Asking Rent	Vacancy Rate	Cap Rate	New Development		Existing Inventory Sale Price per SF	Market Asking Rent	Vacancy Rate	Cap Rate	New Development		Existing Inventory Sale Price per SF	
				Capital Value per SF						Capital Value per SF			
<b>Central Perimeter</b>	<b>\$19.77</b>	<b>18.9%</b>	<b>7.6%</b>	<b>\$215.93</b>	<b>\$149.40</b>	<b>\$30.96</b>	<b>18.3%</b>	<b>6.9%</b>	<b>\$365.88</b>	<b>\$242.07</b>	<b>5.4%</b>		
Class A	\$21.82	16.9%	7.2%	\$250.79	\$165.99	\$33.62	20.1%	6.7%	\$402.34	\$266.41	4.8%		
Class B	\$16.30	25.0%	8.1%	\$150.65	\$116.18	\$26.44	17.0%	7.3%	\$302.17	\$188.36	7.2%		
Class C	\$13.46	17.2%	8.9%	\$125.90	\$112.48	\$21.52	6.1%	7.8%	\$259.08	\$196.62	7.5%		

Table: Office Submarket Residual Demand Projection

Office Submarket Residual Demand	Historic Supply (2012)				Current Supply (2022)				Residual Demand				
	Inventory (SF)	Vacancy Rate	Vacant SF	Occupied SF	Inventory (SF)	Vacancy Rate	Vacant SF	Occupied SF	Current Residual Demand SF	Under Construction SF	10-Year Avg.	2023	2032
											Annual Net Absorption (SF/Yr)	Residual Demand SF	Residual Demand SF (Cumulative)
<b>Central Perimeter</b>	<b>34,765,283</b>	<b>19.0%</b>	<b>6,609,032</b>	<b>28,156,251</b>	<b>36,678,776</b>	<b>18.4%</b>	<b>6,763,405</b>	<b>29,915,371</b>	<b>-972,229</b>	<b>85,871</b>	<b>175,912</b>	<b>-882,188</b>	<b>701,020</b>
Class A	22,811,038	16.9%	3,852,991	18,958,047	25,462,782	20.1%	5,112,743	20,350,039	-631,293	85,871	139,199	-577,965	674,828
Class B	9,011,379	25.0%	2,250,416	6,760,963	8,840,133	17.0%	1,505,703	7,334,430	-374,166		57,347	-316,819	199,301
Class C	2,942,866	17.2%	505,625	2,437,241	2,375,861	6.1%	144,959	2,230,902	33,231		-20,634	12,597	-173,108

Source: CoStar, Q2-2022, Analysis by MXD

# Office Market Analysis

## Location Analysis

The City Springs District’s locational qualities are assessed to determine basic feasibility of additional office in the study area, as well as to calibrate the office demand model used in this study. Key location factors that are widely acknowledged within the office development sector as determining office development success relate to local area quality, amenities, and travel time for executives. These factors were weighted based on MXD’s collective decades of experience in office market analysis and industry textbooks such as published by the Urban Land Institute.

A site rating was allocated to the City Springs District based on a quantitative and/or qualitative assessment of each site factor. Overall, the study area scores a 6.2/10 as an office development area, which is slightly above average when compared to other suburban office nodes found nationally. Weaknesses cited relate to proximity to higher education facilities, prestige of tenants, and rail transit accessibility.

Table: City Springs Office Location Assessment

Office Location Factor	Factor Weighting (1 to 10)	Site Rating 1 = Low 10 = High	Notes
Travel Time for Executives	10	10	Sandy Springs is centrally located to neighborhoods of executive housing.
Amenities within Walking Distance	9	6	Commercial development in City Springs but not extensive or integrated.
Area Quality/Prestigious Tenants	8	3	Major tenants located close to Hwy 400 and MARTA.
Travel Time for Workforce	7	8	761,000 residents within 20-minute drive.
Access to Other Office Employment Nodes	6	7	834,000 jobs within 20-minute drive but no MARTA rail station or major office cluster in City Springs.
Transit Accessibility	6	4	37/100 <i>Transit Score</i> for Roswell Rd @ Hammond Dr (walkscore.com).
Walkability	4	8	79/100 <i>Walk Score</i> for Roswell Rd NE @ Hammond Dr (walkscore.com).
Bikeability	3	4	42/100 <i>Bikeability Score</i> for Roswell Rd NE @ Hammond Dr (walkscore.com).
Access to Recreation Amenities	3	4	Below average amount of parks, river frontage, etc. within walking distance.
Public Expenditure in the Vicinity (Recent & Future)	5	5	City Springs is a major development initiative for the City.
Proximity to Higher Education	1	2	No major educational campus within City Springs or environs.
<b>WEIGHTED SITE RATING (Out of 10)</b>		<b>6.2</b>	

# Office Market Analysis

## Demand Forecasting

Demand for new office development in City Springs was estimated by analyzing the absorption history of the wider Central Perimeter submarket as well as City Springs specifically, the projected residual demand for office in the entire submarket described previously, pipeline trends, as well as the locational attributes of City Springs detailed previously.

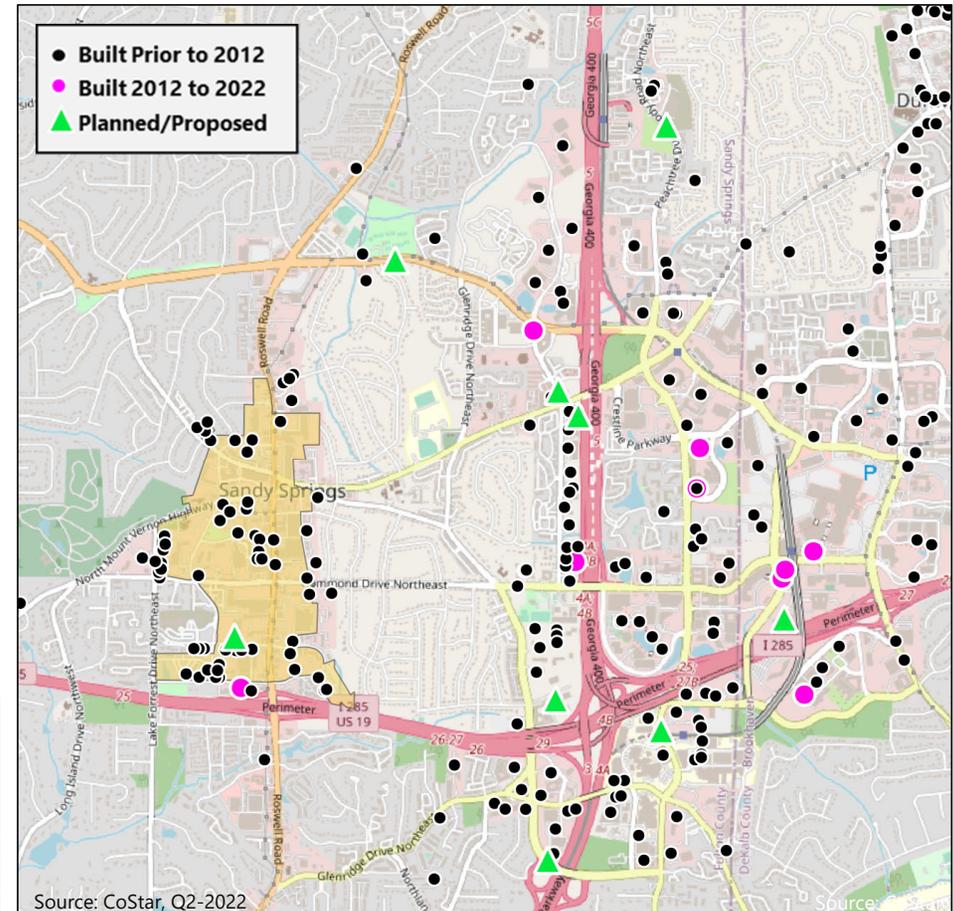
City Springs contains 0.8% of all new office floorspace developed in the submarket over the past decade. Of all the future office development currently in planning or under construction in the submarket, 2.2% is in City Springs. Combining the historic and pipeline data indicates that City Springs could capture 1.5% of the 701,000 SF of new office space anticipated to be developed in the submarket over the next decade. This equates to just 10,800 SF.

However, City Springs' overall development vision is generally more appealing to many tenants over the more corporate and traditional office clusters such as the Perimeter Center area, and the provision of new amenitized office space to replace some of the District's obsolete stock would be in alignment with current market requirements. As such, the achievable market share could potentially reach up to 10% or 70,000 SF over the next decade. A key limitation to office development beyond this total is the lack of MARTA rail access, which is increasingly important as a site selection factor for office development in Metro Atlanta.

Table: Market Share Estimate by Location

Area	2012 Inventory	2022 Inventory	2012-2022 Inventory Growth (SF)	% of 2012-2022 Inventory Growth	Planned/ Under Construction (SF)	% of Planned/ Under Construction	Est. Future Market Share	10-Year Projected Demand
City Springs	654,267	670,267	16,000	0.8%	63,500	2.2%	1.5%	10,796
Rest of Submarket	34,111,016	36,008,509	1,897,493	99.2%	2,766,499	97.8%	98.5%	690,224
<b>TOTAL</b>	<b>34,765,283</b>	<b>36,678,776</b>	<b>1,913,493</b>	<b>100.0%</b>	<b>2,829,999</b>	<b>100.0%</b>	<b>100.0%</b>	<b>701,020</b>

Table: Office Development by Year Built



# Office Market Analysis

## Summary & Implications

- Metro Atlanta's office market is currently in a downturn, challenged by a large amount of speculative construction vacancy, sublet leasing vacancy, large move-outs of businesses reassessing work models, and weak rent growth.
- Even prior to the pandemic, office absorption had begun to slacken, averaging just 2 million SF a year from 2017 to 2019. Yet office construction, much of it speculative, has continued at a steady pace, resulting in increasing vacancy rates metro-wide.
- A large portion of the region's recently delivered or under construction pipeline is concentrated in Metro Atlanta's in-town submarkets, including Midtown, Downtown, Northside Drive/Georgia Tech, and Buckhead.
- The Central Perimeter submarket has experienced much of the same headwinds facing the wider region, with increasing vacancy and slowing rental increases.
- The submarket does benefit from a strategic location, excellent demographics and an inventory of older but high-quality office space that garners higher than average rents but still provides a significant discount to in-town alternatives such as Buckhead and Midtown.
- Currently there is little new office space under planning or construction in the submarket. Developers appear to be biding their time as the macro trend of working from home and the wider pandemic plays out.
- Office in City Springs currently consists of a small stock (670,000 SF) of older low-rise and mid-rise buildings. The average property is just 11,674 SF, and fully 70% of all office space was built prior to 1975. Rents average \$24.21/SF, below the metro average but in alignment with equivalent older stock found in the GA 400/I-285 node.
- Office tenants in City Springs tend to be smaller firms serving the local area. The tech sector is not well-represented, yet the long-term vision for City Springs is very much in alignment with the new environments younger workers are gravitating to (with the important exception of transit access).
- A Residual Demand analysis indicates that the entire Central Perimeter submarket will require an additional 701,000 SF of new office space over the next decade over-and-above what is currently under construction.
- City Springs will continue to be challenged by the major office node in the area built around the GA 400/I-285 node. Most of the office development over the past decade has occurred here, and most office projects currently under planning or development also continue to cluster here.
- **Up to 70,000 SF of new office space is estimated to be warranted in City Springs over the next decade based on historic absorption, pipeline trends and the district's locational attributes.**
- From this analysis, it is recommended that new office in City Springs be concentrated around the recommended Retail/Food & Beverage cluster, within walking distance to a concentration of multi-unit housing.
- Office development could be drawn at a larger scale once City Springs is established as a high-amenity, mixed-used urban/suburban district. Although challenged by lack of MARTA rail access, City Springs could nonetheless appeal to many smaller firms seeking relatively affordable rents amidst a high-amenity, walkable area located in the highly-educated, higher-income northern suburbs of the region.

# 4

## Residential Market Analysis

# Residential Market Analysis

## Metro Atlanta Multi-unit Overview

Metro Atlanta's multi-unit rental sector took a hit at the onset of Covid-19 but has since bounced back quickly posting impressive demand and rent growth figures over the past year. Market conditions were helped by moderate housing construction levels leading up to the pandemic. Multi-unit housing starts have accelerated, but construction activity is only slightly above the national average on a percentage basis.

### Absorption & Deliveries

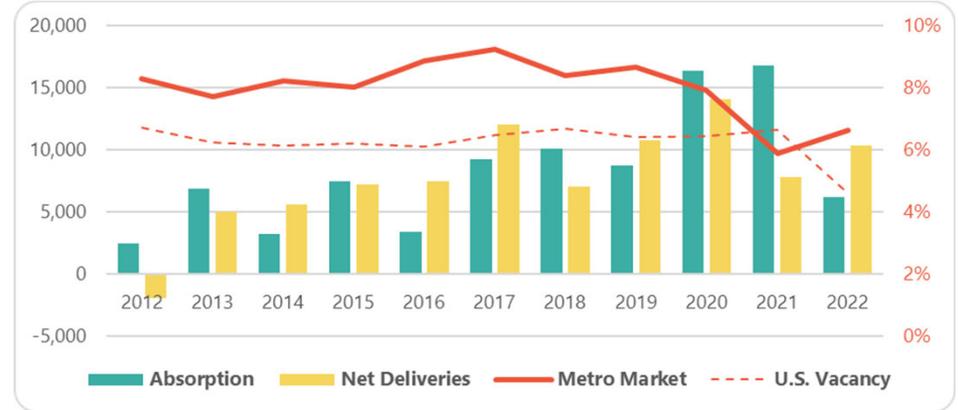
Absorption of new units has trended upwards over the past decade yet is expected to drop in 2022. Meanwhile, net deliveries have only infrequently kept pace with absorption, resulting in decreasing vacancy rates over the past decade.

Metro Atlanta's decreasing vacancy rate was driven primarily through strong demand for multi-unit rather than through widespread demolition of obsolete inventory. This bodes well for overall market conditions.

Examples of Multi-unit Properties in Metro Atlanta

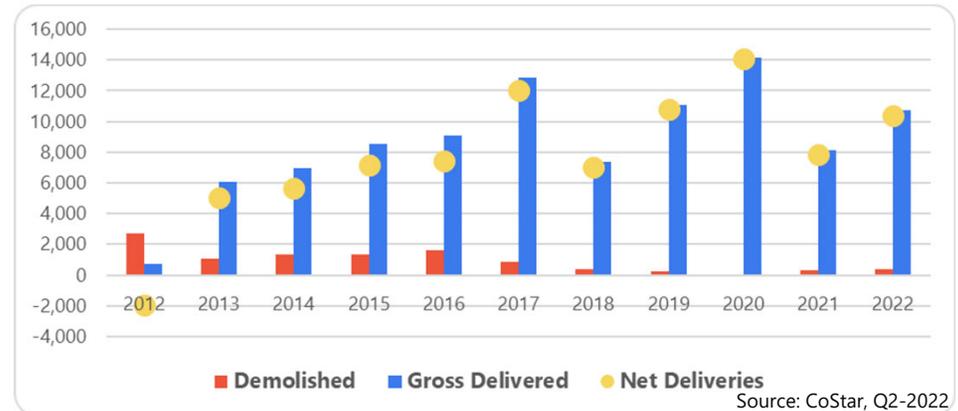


Figure: Metro Atlanta Multi-unit Absorption, Net Deliveries & Vacancy



Source: CoStar, Q2-2022

Figure: Metro Atlanta Demolitions & Deliveries



Source: CoStar, Q2-2022



# Residential Market Analysis

## Vacancy

Multi-unit demand proved resilient in Metro Atlanta following the onset of the coronavirus pandemic. Despite a recent uptick, Atlanta's vacancy rate remains well below the market's 10-year average, particularly for Class B units.

Demand is expected to remain strong, driven by in-migration to the region, but major new supply currently under construction (25,000 units) will likely push vacancies higher over the near term.

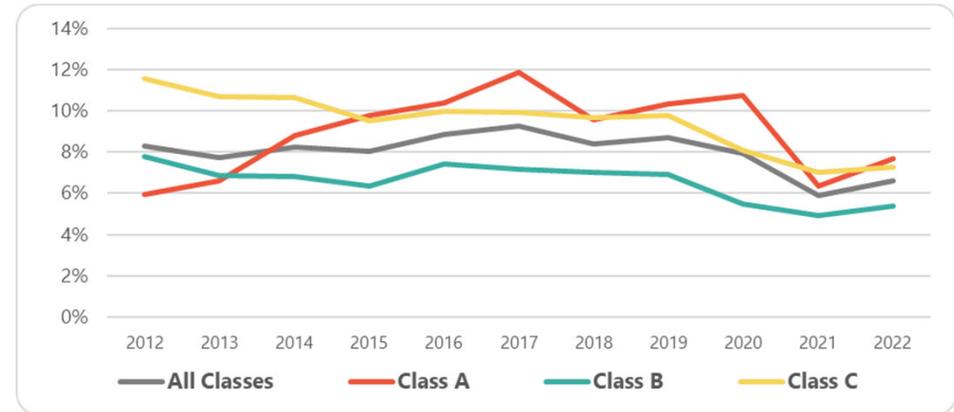
Demand for multi-unit in north Metro Atlanta is driven significantly by educated workers moving to the region for employment opportunities. In other parts of Metro Atlanta, the multi-unit market is supported by a deep pool of renters-by-necessity, including many blue-collar workers. A lack of new workforce housing supply coupled with a wealth of available industrial jobs, has caused the region's blue-collar suburban submarkets to outperform the rest of Metro Atlanta in terms of lower vacancy rates, including the Sandy Springs/Dunwoody submarket.

A vacancy rate of 5.7% in Metro Atlanta is much lower than the 10-year average of 8.1%, which has played a factor in pushing rents higher. Vacancy is highest for Class A properties (6.3%) and is lowest for Class C properties (4.5%) demonstrating a desire for value in an increasingly expensive market. Studio apartments also have a higher vacancy rate than 2 and 3-bedroom units, possibly an impact from the pandemic where renters are seeking more space for home offices.

## Rent

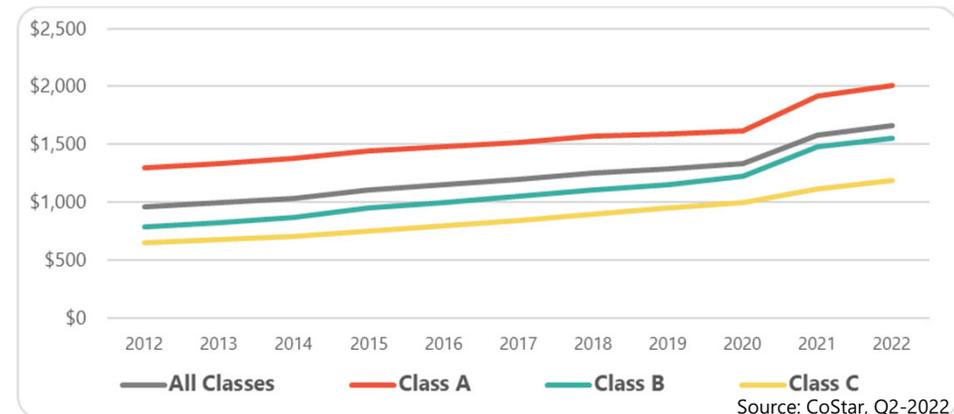
Rent growth is surging in the region and is now about 25% above where it was at the start of 2020. The current year-over-year growth of 14.8% is well above the national average of 10.9%. Rents in Metro Atlanta at \$1,605/month, or \$1.59 per SF, are now slightly above the national average, while they were more than 15% below the national figure in 2010. However, rental growth is moderating, particularly as supply exceeds demand over the near-term.

Figure: Metro Atlanta – Multi-unit Vacancy by Class



Source: CoStar, Q2-2022

Figure: Metro Atlanta Multi-unit Rental Rate by Class



Source: CoStar, Q2-2022

# Residential Market Analysis

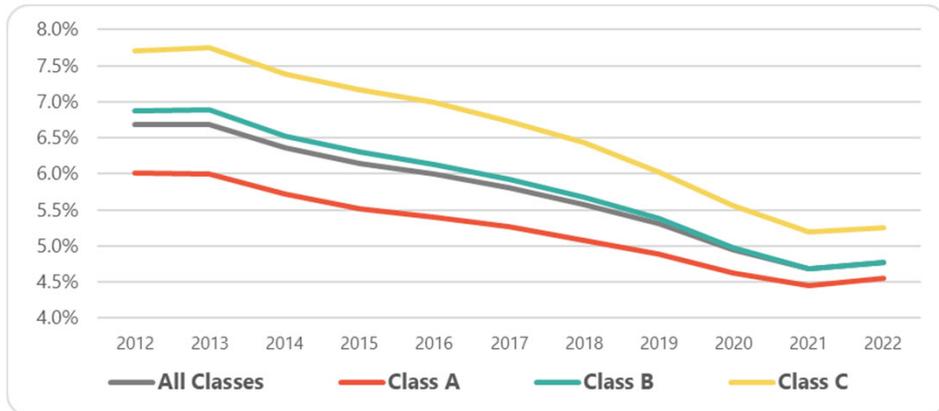
## Cap Rates

Capitalization rates have compressed steadily for multi-unit developments in Metro Atlanta over the past decade, resulting in higher valuations. Considering the substantial rental rate increases of the past several years, the profitability of developing multi-unit residential in the region has been considerable. Over the past year cap rates have tipped upwards but remain near historic lows.

## Under Construction

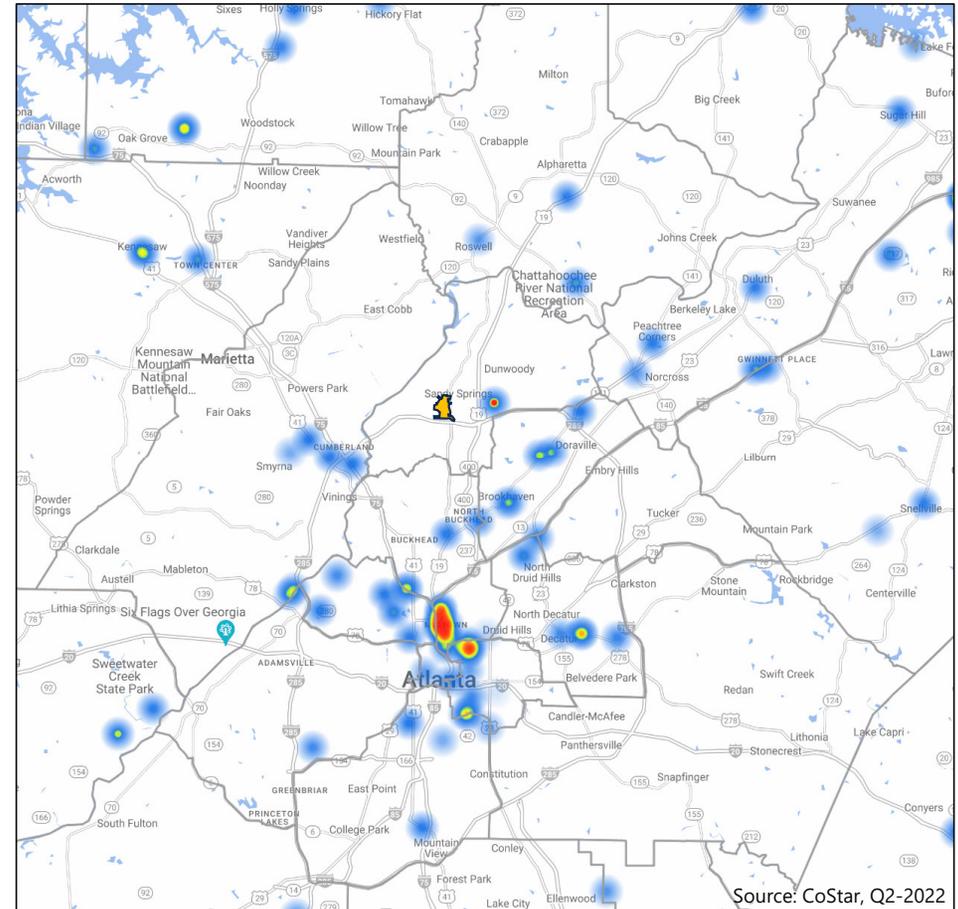
Only 8,000 units were delivered in the region in 2021, compared to more than 14,000 units in 2020. Metro Atlanta now has approximately 25,000 units or 5.3% of inventory under construction, representing the region's largest construction pipeline in more than a decade. Developers have focused on transit-rich, in-town submarkets over the past decade, but suburban districts, particularly in the northeast portion of the region have accounted for a growing share of construction of late.

Figure: Metro Atlanta – Multi-unit Cap Rates by Class



Source: CoStar, Q2-2022

Figure: Multi-unit Currently Under Construction



Source: CoStar, Q2-2022

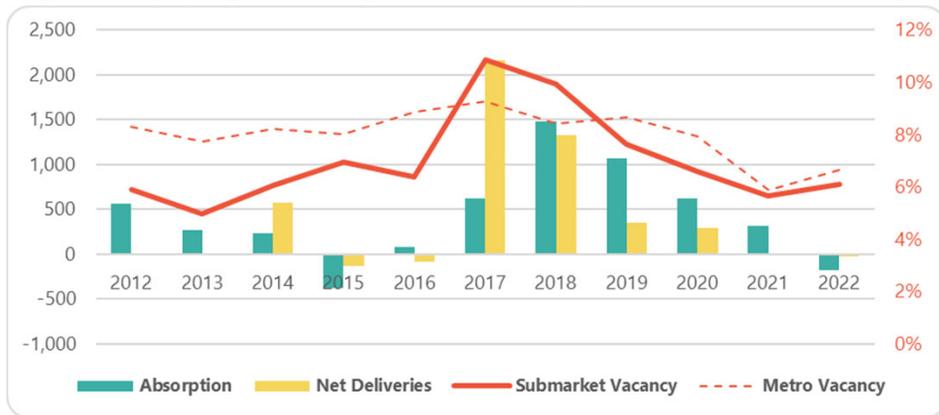
# Residential Market Analysis

## Submarket Multi-unit Overview

The Sandy Springs/Dunwoody submarket offers proximity to jobs and shopping nodes, as well as easy highway and MARTA access. Apartments in the submarket attract renters working in local offices, as well as medical workers at Medical Center. Newer product targets young professionals and out-of-state transplants. While many renters work within the local area, employment centers in Cumberland, Buckhead, and Midtown, as well as the tech-heavy North Fulton suburbs are also within a close commute.

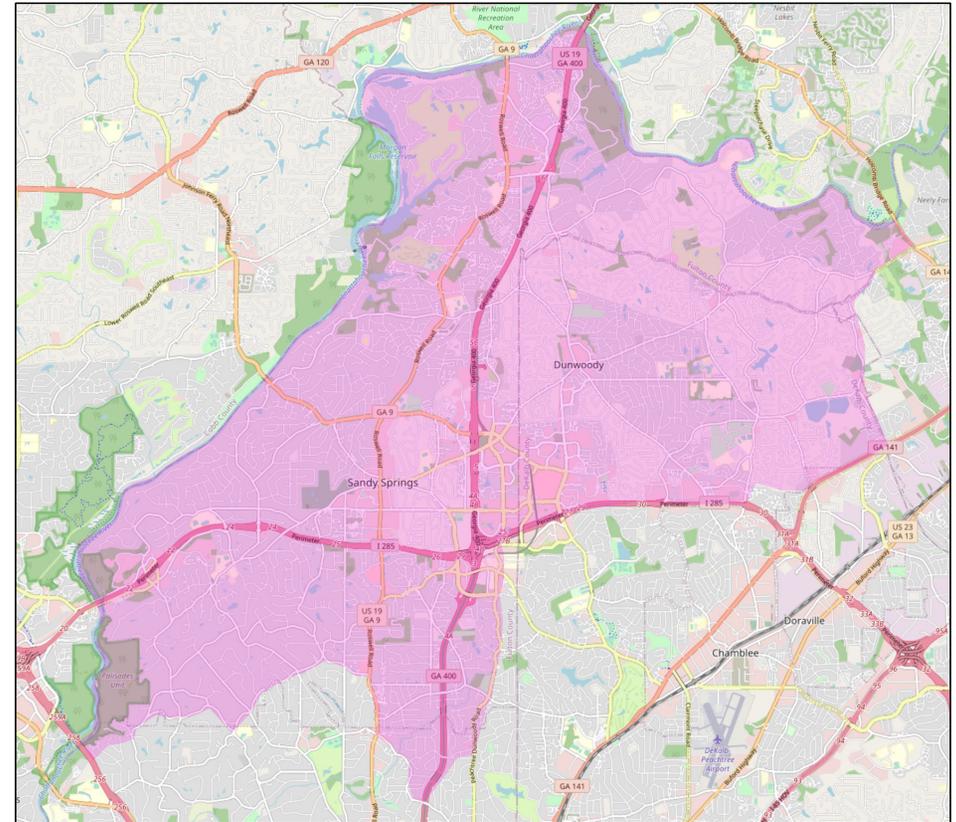
The multi-unit sector in Sandy Springs/Dunwoody has benefited from solid office employment growth, with large corporations like Mercedes-Benz USA and State Farm establishing headquarters in the submarket. Increased employment is driving demand for apartments in the area. However, local developers have cooled their activity in the area, citing challenging local regulations regarding multi-unit project approvals, such as Sandy Springs' requirement of steel/concrete buildings.

Figure: Sandy Springs/Dunwoody – Multi-unit Absorption, Net Deliveries & Vacancy



Source: CoStar, Q2-2022

Figure: Sandy Springs/Dunwoody Multi-unit Submarket



Source: CoStar, Q2-2022

# Residential Market Analysis

## Absorption, Deliveries & Vacancy

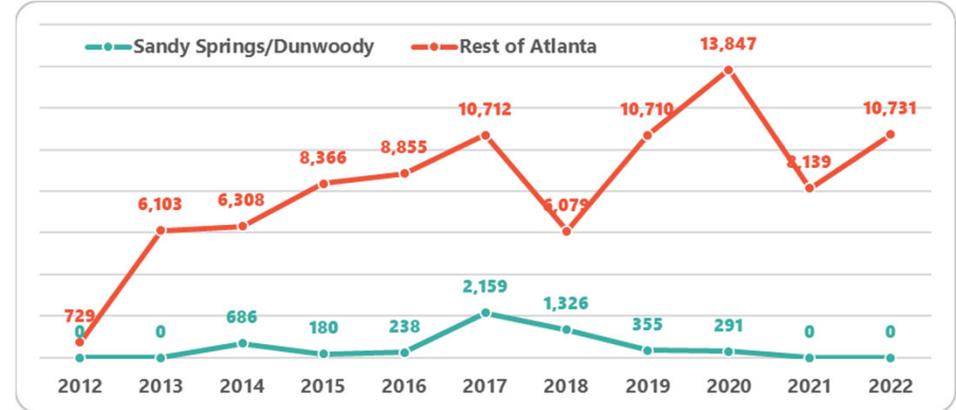
Absorption in Sandy Springs/Dunwoody peaked in 2018 with 1,484 multi-unit homes leased. From 2019, this figure declined steadily to just 314 units in 2021, a drop of 79%. By contrast, in Metro Atlanta, absorption of multifamily units increased by 66% during this time period.

Along with the recent decrease in absorption, a second key recent local trend is a supply surge. In 2017, the introduction of 2,159 new multi-unit homes (all Class A) in the Sandy Springs/Dunwoody submarket caused vacancy to spike from 6% to nearly 11% for all units and nearly 17% for Class A units. This is well above a “healthy” vacancy rate of 5-7% for multi-unit, below which is a typical threshold for multi-unit developers to initiate new projects. The submarket’s vacancy rate has since recovered to 6.2%, and with a moderate near-term supply pipeline, this vacancy rate is expected to drop further.

**It is particularly noteworthy that delivery of new multi-unit product stalled in the Sandy Springs/Dunwoody submarket just as it accelerated in the rest of Metro Atlanta. This is partly explained by the supply surge described above, but it is notable that deliveries have remained at zero over the past two years, despite the return to historic vacancy rates.** This is surprising given the recent significant rent increases and compressed cap rates that make the Sandy Springs/Dunwoody submarket so appealing to develop in. This finding does suggest that multi-unit developers are seeking out other jurisdictions more receptive to their product in which to initiate new development projects, which could be a headwind for the ongoing development of City Springs.

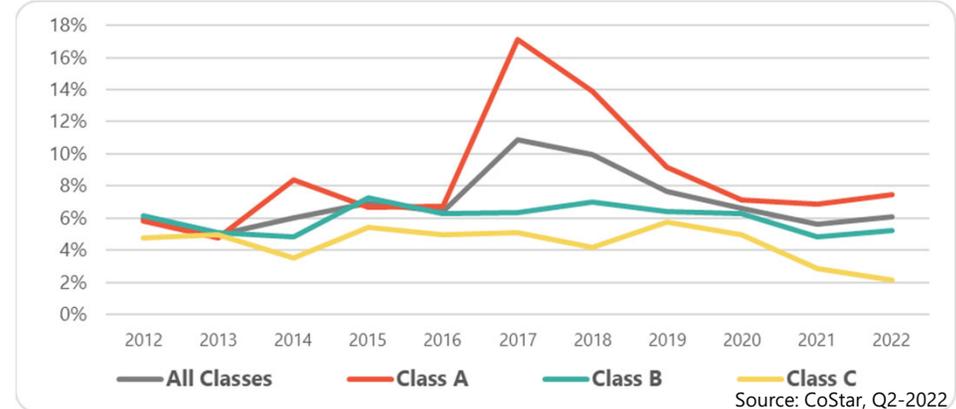
Class A multi-unit product has plateaued at just under 8% vacancy. This is of particular importance to City Springs, as nearly all multi-unit built in the submarket is Class A. As such, the health of the top echelon of the multi-unit sector suggests moderate demand for new product over the near term.

Figure: Sandy Springs/Dunwoody – Multi-unit Gross Deliveries (Units)



Source: CoStar, Q2-2022

Figure: Sandy Springs/Dunwoody Vacancy by Class



Source: CoStar, Q2-2022

# Residential Market Analysis

## Rent

Rents in Sandy Springs/Dunwoody grew 17.3% over the past year, marking a significant rebound from the rent losses the submarket suffered in the months after the pandemic hit. Rents are up substantially in all classes of multi-unit buildings. Trailing 12-month rent growth for Class A properties is 16.6%, and Class C assets have collectively pushed rents by 18.5% over the past year.

Rental growth is starting to moderate; however, the submarket's limited near-term supply pipeline should put upward pressure on rental rates over the near term.

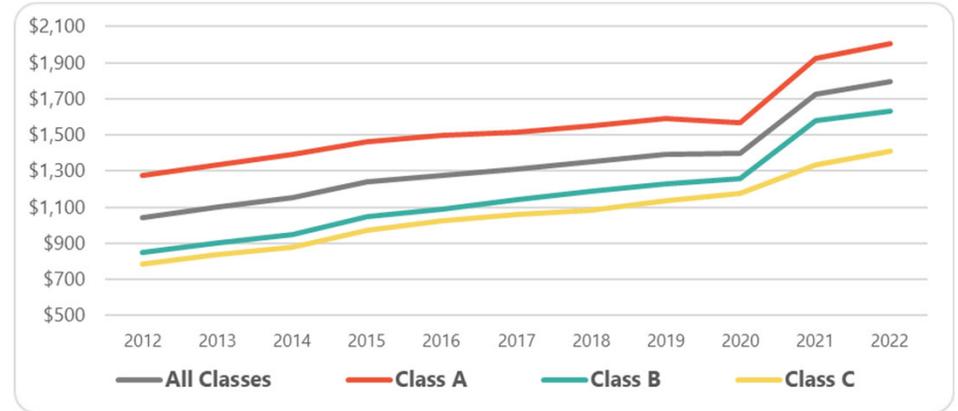
Multi-unit apartments in Sandy Springs/Dunwoody command a premium to the metro average, yielding 9% higher rents. Newer properties built in the past decade are garnering more than \$2/SF, and some of the most recently developed properties are pushing rents above \$2.50/SF. Despite the relative high cost of renting in Sandy Springs/Dunwoody, properties rent for a relative discount compared to Buckhead and other areas of North Fulton.

## Cap Rates

As with Metro Atlanta, multi-unit capitalization rates in Sandy Springs/Dunwoody have compressed steadily over the past decade, resulting in higher valuations. Class A product is realizing a very low 4.4%, which is well below the national average for this sector. Over the past year cap rates have tipped upwards but remain near historic lows.

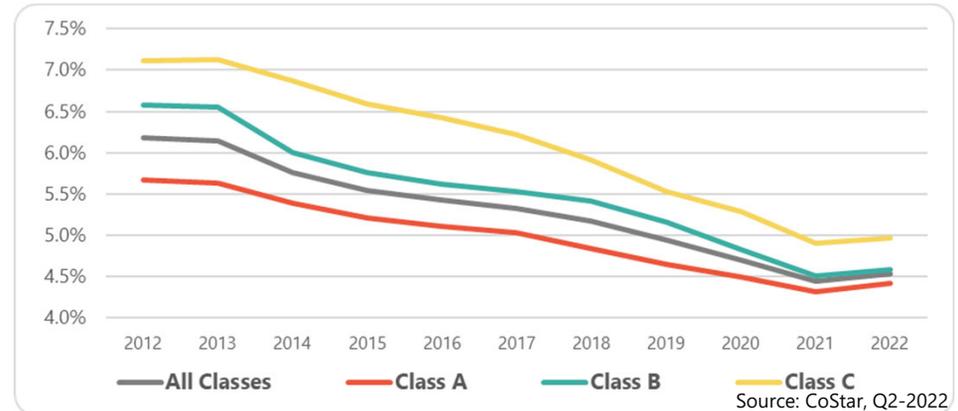
Based on going rental rates, vacancy rates and cap rates, **multi-unit developments in Sandy Springs/Dunwoody have grown in value by an average annual rate of 7.1% over the past decade.** This high level of return suggests that developer interest should return even if demand remains moderate.

Figure: Sandy Springs/Dunwoody Multi-unit Rental Rate by Class



Source: CoStar, Q2-2022

Figure: Sandy Springs/Dunwoody Multi-unit Cap Rates by Class



Source: CoStar, Q2-2022

# Residential Market Analysis

## Under Construction/Proposed New Multi-unit

The approval of new multi-unit in the Sandy Springs/Dunwoody submarket can be challenging for developers. Sandy Springs has modified its zoning rules in recent years to prohibit construction of wood-framed structures greater than three stories and larger than 100,000 SF. Given the high inflation of construction costs in recent years, this new zoning effectively making most forms of apartment development financially unfeasible.

Sandy Springs has amended its zoning codes to allow for greater density in particular areas, and there are a few large projects in the pipeline or under construction. Recent high-density projects are typically met with community opposition impeding the multi-unit supply pipeline.

Developers have primarily concentrated on building near Perimeter Center in places with proximity to MARTA stations, retail, and office nodes. In early 2021, the Dunwoody Development Authority approved tax breaks for the first phase of GID Investment's High Street project, adjacent to the new State Farm campus. The first phase of the development is currently under construction and will include roughly 600 multi-unit homes.

In Sandy Springs, developers are focused on many of the city's older shopping centers along Roswell Road for redevelopment purposes. For example, Jamestown is in the preliminary/pre-submittal stage of redeveloping part of the **Parkside Shops** center, proposing to add 190 multi-unit homes and office components along with green space and the existing retail on the site. On the north side, Fairfield Residential is now permitted for the redevelopment of the site of the **North Springs Shopping Center** into a 286-unit multi-unit complex.

The City of Sandy Springs approved changes to its development code in late 2021, paving the way for the potential rezoning of three shopping centers in the North End district. These changes could allow for increased density and multi-unit development on the sites of several shopping centers: **North River Village**, **River Springs**, and **Northridge Shopping Center**. These potential redevelopments would provide City Springs with an additional level of competition for multi-unit development.



# Residential Market Analysis

## Multi-unit in City Springs

In the past five years 1,352 multi-unit homes were added to the City Springs inventory, for an average of 270 units a year. All new developments are Class A product, with each offering a similar amenity package, including a business center, fitness center, pool and several other smaller features.

The mix of units reflects the local demographic profile of young singles with a high concentration of one-bedroom and two-bedroom apartments. The profile skews to slightly fewer bedrooms than typically found in most suburban multi-unit projects.

Rental rates range from \$2.05/SF to \$2.67/SF for City Springs apartments. The highest rate is for Adley City Springs Apartments (6075 Roswell Road), which is the newest building and skews toward studios and 1-bedroom units, which typically command a higher price per SF.

Figure: Unit Mix Comparison – City Springs to National Market Averages

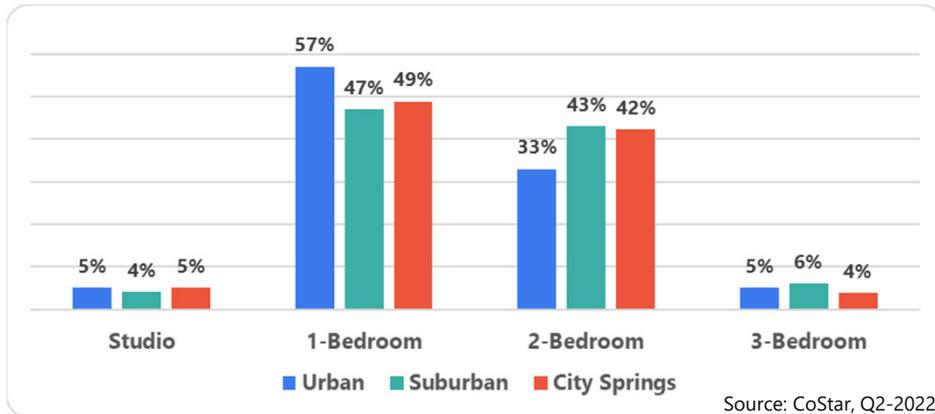
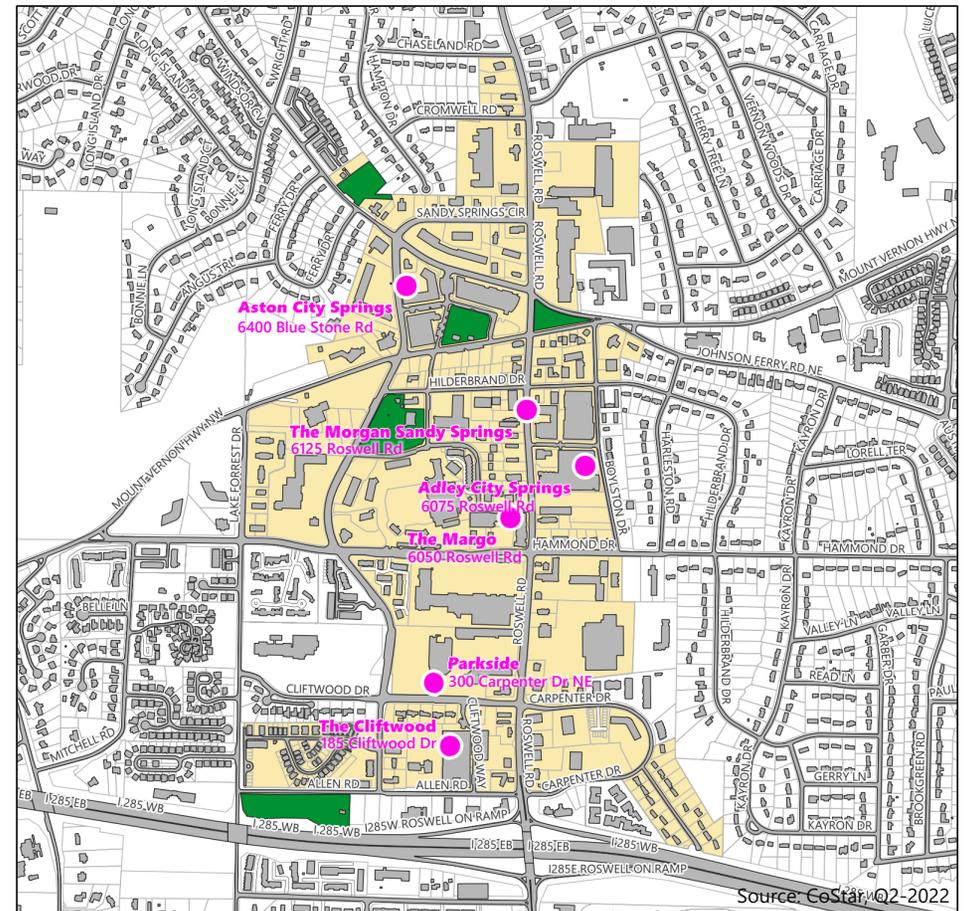


Figure: City Springs Multi-unit Developed in the Past Five Years



# Residential Market Analysis

Table: City Springs Multi-Unit Built in Past Five Years

Development	Address	Units	Rent/SF	Unit Size SF	Year Built	Class	Site Amenities
	<b>Adley City Springs</b> 6075 Roswell Road	Studio: 24 (8%) 1-Bedroom: 143 (49%) 2-Bedroom: 124 (43%) <b>Total: 291</b>	Studio: \$3.37 1-Bedroom: \$2.84 2-Bedroom: \$2.45 <b>All Units: \$2.67</b>	Studio: 637 1-Bedroom: 771 2-Bedroom: 1,130 <b>All Units: 913</b>	2020	A	Business Center, Conference Rooms, Media Center, Pet Washing Station, Pool
	<b>Aston City Springs</b> 6400 Blue Stone Road	1-Bedroom: 152 (52%) 2-Bedroom: 131 (45%) 3-Bedroom: 11 (4%) <b>Total: 294</b>	1-Bedroom: \$2.53 2-Bedroom: \$2.49 3-Bedroom: \$2.65 <b>All Units: \$2.51</b>	1-Bedroom: 735 2-Bedroom: 1,155 3-Bedroom: 1,462 <b>All Units: 949</b>	2018	A	Business Center, Clubhouse, Fitness Center, Grill, Lounge, Pool
	<b>The Morgan Sandy Springs</b> 6125 Roswell Road	1-Bedroom: 149 (48%) 2-Bedroom: 139 (44%) 3-Bedroom: 25 (8%) <b>Total: 313</b>	1-Bedroom: \$2.40 2-Bedroom: \$2.23 3-Bedroom: \$2.18 <b>All Units: \$2.29</b>	1-Bedroom: 790 2-Bedroom: 1,158 3-Bedroom: 1,408 <b>All Units: 1,003</b>	2017	A	Bike Storage, Car Charging Station, Clubhouse, Fitness Center, Gameroom, Pool
	<b>The Margo</b> 6050 Roswell Road	Studio: 15 (7%) 1-Bedroom: 124(61%) 2-Bedroom: 64 (32%) <b>Total: 203</b>	Studio: \$2.68 1-Bedroom: \$2.38 2-Bedroom: \$2.37 <b>All Units: \$2.39</b>	Studio: 620 1-Bedroom: 783 2-Bedroom: 1,060 <b>All Units: 858</b>	2017	A	Business Center, Clubhouse, Fitness Center, Grill, Pet Play Area, Pool
	<b>The Cliftwood</b> 185 Cliftwood Drive	Studio: 30 (12%) 1-Bedroom: 92 (37%) 2-Bedroom: 113 (45%) 3-Bedroom: 16 (6%) <b>Total: 251</b>	Studio: \$2.36 1-Bedroom: \$2.35 2-Bedroom: \$1.86 3-Bedroom: \$1.90 <b>All Units: \$2.05</b>	Studio: 663 1-Bedroom: 775 2-Bedroom: 1,149 3-Bedroom: 1,425 <b>All Units: 971</b>	2017	A	Business Center, Fitness Center, Gated, Grill, Media Center, Pool

Source: CoStar, Q2-2022

# Residential Market Analysis

## For-Sale Multi-unit Product

The Metro Atlanta housing market has performed exceptionally well over the past several years. Home prices increased rapidly in 2021, with the median price of a home sold increasing by 23% from January 2021 to January 2022. Thus far, 2022 has seen a continuation of that trend. The average price for condos and townhomes across the region as of January 2022 was \$306/per SF. This is up from \$225/per SF in January 2019, according to Zillow, a dramatic increase over the past three years.

Until recently, historically-low interest rates boosted buying power, but prices have also been driven by low inventory. Inventory for attached housing had dropped to a historic low of 0.9 months supply by early 2022.

With a buoyant economy and plentiful employment opportunities, Metro Atlanta is one of the top young adult destinations (the leading age cohort in multi-unit purchases) and this has translated into a healthy for-sale multi-unit sector. Desirable areas for condo and townhome buyers must appeal to young buyers by being urban in built-form, providing a similar lifestyle to popular areas in the City of Atlanta such as along the BeltLine and neighborhoods such as Inman Park, the Old Fourth Ward, Buckhead and Midtown.

With rapidly increasing prices, many younger buyers have become priced out of these areas, turning their attention to other neighborhoods south of I-285 such as Brookhaven and Chamblee. I-285 has historically been a psychological border for many young adults who are looking to purchase a condo or townhome, and thus most product has continually been built in nodes closer to Downtown Atlanta. The appeal of "Living Inside the Perimeter" is slowly starting to change as prices increase significantly faster than salaries.

According to interviews with local realtors, active adult (aged 55+), young professionals who cannot afford Midtown or BeltLine neighborhoods, and young families who cannot afford detached single-family homes within the I-285 Perimeter are becoming targets for condo and townhome product in cities such as Sandy Springs, Dunwoody, Brookhaven, Chamblee, and Doraville.

Due to increasing purchase prices in the metro, many buyers are finding themselves priced out of the market entirely. Young adults who prefer to live in more amenity-rich neighborhoods along the BeltLine but cannot afford property are choosing to rent rather than buy.

Figure: Metro Atlanta – Average Sales Price

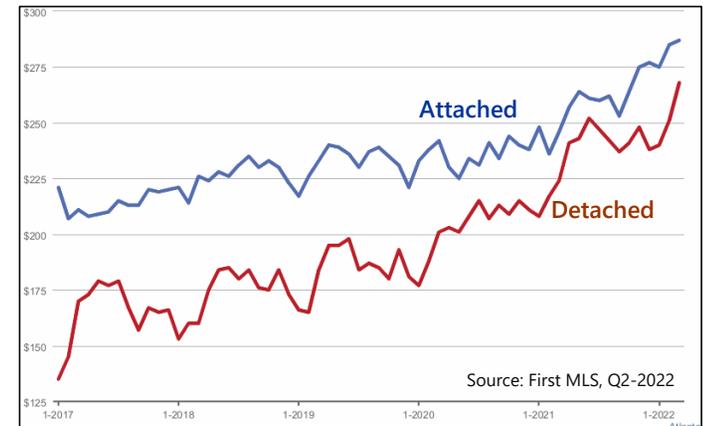
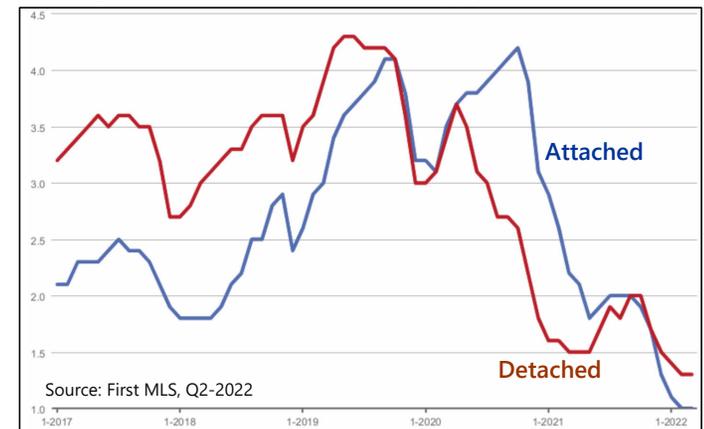


Figure: Metro Atlanta – Months Supply of Homes for Sale



# Residential Market Analysis

Townhome/rowhome and low-rise product continues to be more popular in suburbs located to the north of Buckhead. Midtown and Buckhead are areas of concentration for midrise and high-rise product, with many condo towers between six and twenty stories high.

Attached rental housing remains far more prevalent in Sandy Springs than attached for-sale housing. The Dunhill is an example of new low-rise condo product in Sandy Springs, a 19-unit building with larger-size condos priced at the mid \$400,000 range, or approximately \$330/per square foot for a 1,350 SF condo.

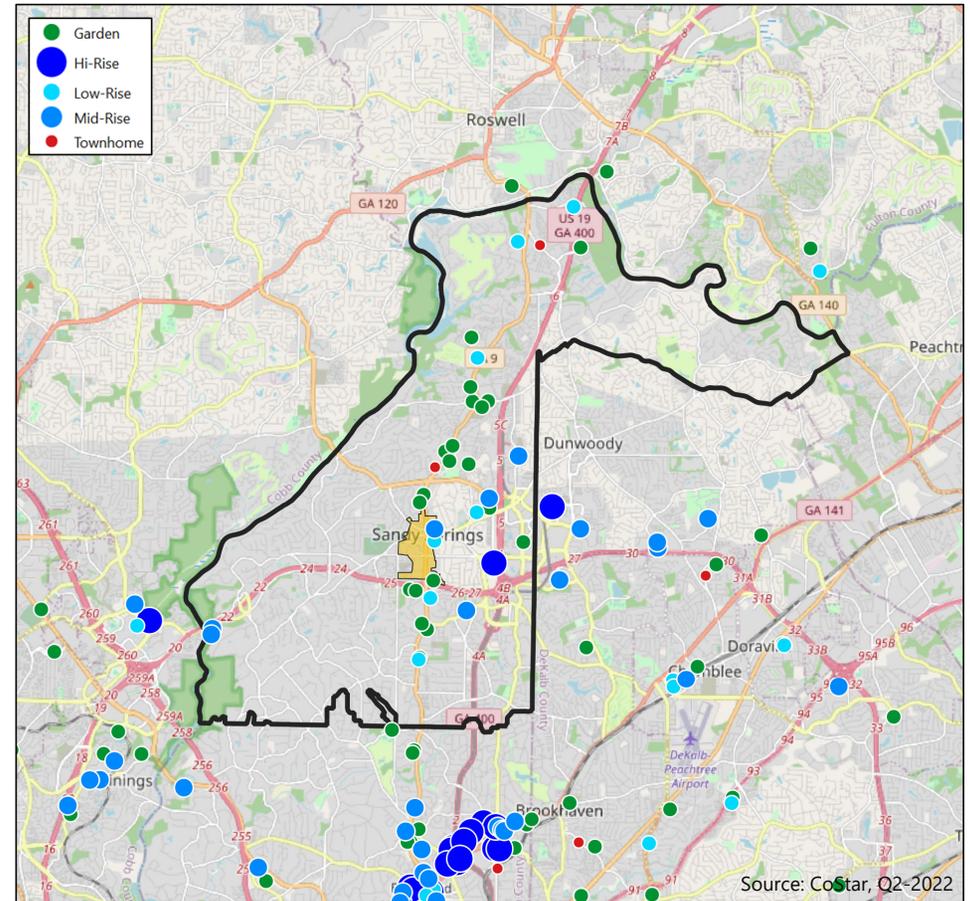
Based on what is planned and under construction for condo and townhome product in the Sandy Springs/Dunwoody submarket, it is expected that larger square footage low-rise, stacked townhome, townhome, and rowhome product will continue to be the most desired for-sale product type.

In addition to The Dunhill, a number of smaller for-sale townhome developments have been built recently in Sandy Springs. However, for-sale units represent only a small fraction of total multi-unit inventory in the local area. **Once City Springs has become an established and compelling destination, with a range of amenities (such as open space enhanced with surrounding shops and restaurants) within walking distance, it is anticipated that it will attract additional for-sale developer interest.** However, over the initial phase of development, it is anticipated that multi-unit rental product will be the dominant form of residential product developed.



The Dunhill, Sandy Springs  
6890 Peachtree Dunwoody Rd

Figure: Sample of Multi-unit For-Sale Typologies



Source: CoStar, Q2-2022



# Residential Market Analysis

## Submarket Residual Demand

The Sandy Springs/Dunwoody multi-unit and single-unit attached submarket was analyzed to estimate the demand for additional homes in the area over the next 10 years, based on key market metrics such as current vacancy, absorption and cap rates. Based on this residual demand analysis, over the next decade, the entire submarket is forecast to support an additional 4,808 rental units by 2032. As described previously, demand for for-sale units is expected to be minimal compared to rental units in the near to medium term.

It is important to note this represents market-driven demand which may not be met with commensurate supply if such growth is not supported by the jurisdictions within the submarket.

Table: Multi-unit Performance Metrics

Multifamily Performance Metrics	Historic Performance (2012)					Current Performance					Avg. Annual Change in New Development Value per Unit
	Market Asking Rent Per Unit/Month	Vacancy Rate	Cap Rate	New Development Value per Unit	Existing Inventory Sale Price per Unit	Market Asking Rent Per Unit/Month	Vacancy Rate	Cap Rate	New Development Value per Unit	Existing Inventory Sale Price per Unit	
<b>Sandy Springs/Dunwoody</b>	\$1,025	5.3%	6.3%			\$1,833	6.2%	4.5%			
Class A	\$1,273	5.8%	5.7%	\$165,028	\$147,620	\$2,004	7.5%	4.4%	\$326,832	\$280,405	7.1%
Class B	\$902	5.1%	6.6%	\$101,781	\$71,084	\$1,723	5.5%	4.6%	\$275,588		10.5%
Class C	\$784	4.7%	7.1%	\$81,900		\$1,412	2.1%	5.0%	\$217,144		10.2%

Table: Multi-unit Submarket Residual Demand Projection

Multifamily Submarket Residual Demand	Historic Supply (2012)				Current Supply (2022)				Residual Demand				
	Inventory (Units)	Vacancy Rate	Vacant Units	Occupied Units	Inventory (Units)	Vacancy Rate	Vacant Units	Occupied Units	Current Residual Demand Units	Under Construction Units	10-Year Avg. Annual Net Absorption (Units/Yr)	2023 Residual Demand	2032 Residual Demand (Cumulative)
<b>Sandy Springs/Dunwoody</b>	29,006	5.3%	1,550	27,456	33,457	6.2%	2,087	31,370	898	-	391	1,289	4,808
Class A	10,395	5.8%	606	9,789	15,392	7.5%	1,150	14,242	223	-	445	668	4,673
Class B	16,389	5.1%	839	15,550	16,301	5.5%	900	15,401	555	-	-15	540	405
Class C	2,222	4.7%	105	2,117	1,764	2.1%	37	1,727	120	-	-39	81	-270

Source: CoStar, Q2-2022, Analysis by MXD

# Residential Market Analysis

## Location Analysis

City Springs' locational qualities are assessed to determine basic feasibility of additional multi-unit and single-unit attached at the site, as well as to calibrate the residential demand model used in this study. Key location factors that are widely acknowledged within the residential development sector as determining residential development success relate to local area quality, amenities, and accessibility to employment and civic facilities. These factors were weighted based on MXD's collective decades of experience in residential market analysis and industry textbooks such as published by the Urban Land Institute.

A site rating was allocated to the City Springs District based on a quantitative and/or qualitative assessment of each site factor. Overall, the study area scores a 7.1/10 as a multi-unit and single-unit attached development site, which is comparably strong to multifamily residential sites found nationally in suburban cities. Weaknesses cited relate to access to recreation, rail transit, major higher education facilities, and "bikeability" for many of the young professionals that make up the local population.

Table: City Springs Multi-unit Location Assessment

Multi-unit Location Factor	Factor Weighting (1 to 10)	Site Rating 1 = Low 10 = High	Notes
Reputation & Prestige of Area/School District	10	10	Sandy Springs is well-regarded as a place to live, particularly for families.
Walkability	9	8	79/100 <i>Walk Score</i> for Roswell Rd NE @ Hammond Dr (walkscore.com).
Access to Retail Amenities	8	7	Major retail nodes within short commute. Limited/fragmented retail along Roswell Rd.
Access to Recreation Amenities	7	4	Below average amount of parks, water amenities, etc. within close proximity.
Proximity to Employment	6	7	834,000 jobs within 20-minute drive but no MARTA station or job cluster in City Springs.
Automobile Accessibility	6	9	761,000 residents within 20-minute drive.
Sense of Privacy, Security & Tranquility	5	8	Low crime rate. Overall walkable high-amenity area with medium-density housing.
Transit Accessibility	4	4	37/100 <i>Transit Score</i> for Roswell Rd @ Hammond Dr (walkscore.com).
Visibility to Traffic (to generate tenant awareness)	3	7	30,000+ vehicle per day along Roswell Rd NE.
Access to Higher Education Facilities	3	2	No major educational institution within City Springs or environs.
Bikeability	3	4	42/100 <i>Bikeability Score</i> for Roswell Rd NE @ Hammond Dr (walkscore.com).
Proximity to Medical Facilities	2	10	Major health care facilities in the area.
Access to Cultural Amenities	1	7	Performing Arts Center and other cultural destinations.
<b>WEIGHTED SITE RATING (Out of 10)</b>		<b>7.1</b>	

# Residential Market Analysis

## Demand Forecasting

Demand for multi-unit and single-unit attached development in City Springs was estimated by analyzing the absorption history of the various subareas within the Sandy Springs/Dunwoody submarket, the projected residual demand in the entire submarket described previously, as well as the locational attributes of City Springs detailed previously. Numbers below are designated by CoStar and do not reflect the number of units on page 46 of the Master Plan report.

Downtown Sandy Springs contains approximately 32% of all new residential units developed in the submarket over the past decade, second only to Perimeter Center. Future units currently in planning or under construction are largely concentrated in Perimeter Center (81% of total), while the City Springs District contains just 5% of these future deliveries.

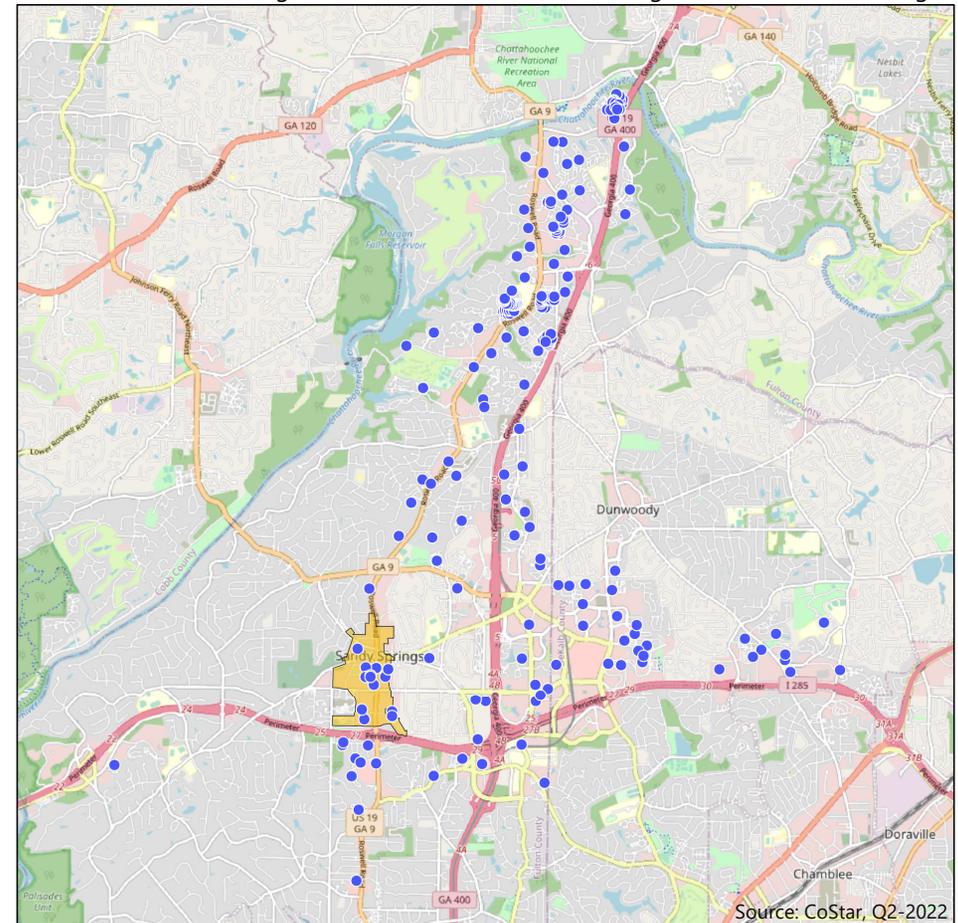
Combining the historic and near-term future trend data indicates that City Springs could capture 18% of the 4,808 new residential units anticipated to be developed in the submarket over the next decade. This equates to 865 units. However, considering City Springs' locational strengths for multi-unit and overall development vision, this market share could reach up to 25% or 1,202 units. These totals are over-and-above units currently under construction.

Table: Market Share Estimate by Neighborhood

Neighborhood*	2012 Inventory	2022 Inventory	2012-2022 Growth	% of Growth	Planned/Under Construction	% of Planned/Under Construction	Est. Future Market Share
Downtown Sandy Springs	457	2,039	1,582	32%	190	5%	18%
Dunwoody	5,456	5,692	236	5%	-	0%	2%
Perimeter Center	5,878	8,078	2,200	45%	3,392	81%	63%
Sandy Springs	13,154	14,049	895	18%	586	14%	16%
South Sandy Springs	1,311	1,311	-	0%	-	0%	0%
<b>TOTAL</b>	<b>26,256</b>	<b>31,169</b>	<b>4,913</b>	<b>100%</b>	<b>4,168</b>	<b>100%</b>	<b>100%</b>

\* Neighborhood names and boundaries as designated by CoStar

Figure: Submarket Multi-unit and Single-unit Attached Buildings



Source: CoStar, Q2-2022



# Residential Market Analysis

## Summary & Implications

- Metro Atlanta's residential sector has experienced several record-setting years as new supply has failed to keep pace with a surge in demand driven by strong in-migration to the region.
- New supply has recently accelerated to 25,000 new multi-unit and single-unit attached units under construction which will keep the region's vacancy rate from dropping further below its current 5.7%.
- Across the region, smaller rental units such as studios and 1-bedrooms are posting higher vacancy rates than larger units with 2- and 3-bedrooms, reflecting the impact of the pandemic where renters are seeking more space including home offices.
- Rent in Metro Atlanta has grown by 25% over the past two years and is now slightly more expensive than the national average but still well below most coastal cities.
- New multi-unit construction in Metro Atlanta has concentrated primarily in transit-rich, in-town submarkets as well as suburban districts particularly in the northeastern suburbs.
- The Sandy Springs/Dunwoody submarket has performed well in recent years and has been buoyed by several large corporations moving to the area including Mercedes-Benz USA and State Farm.
- Both communities in the submarket are regarded by developers as challenging to seek approvals in, and this has served to cool development in the area in recent years, even as multi-unit and single-unit attached development surged in the rest of Metro Atlanta.
- A supply surplus of multi-unit in 2017 has also acted to reduce new construction as several years of absorption were required to reduce vacancy rates to a profitable level for new supply.
- In the Sandy Springs/Dunwoody submarket, rental rates have surged by 17.3% over the past year, while cap rates have compressed down to a very low 4.4%. As a result, developments have grown in value by an average of 7.1% per year over the past decade, an enticing prospect for potential developers.
- A Residual Demand analysis indicates that the entire Sandy Springs/Dunwoody submarket could support an additional 4,808 new multi-unit and single-unit attached homes over the next decade over-and-above what is currently under construction.
- According to the Urban Land Institute, suburban multi-family developments draw the majority of their tenants from a three-mile radius. As such, City Springs will be in direct competition with Perimeter Center for this projected submarket demand, which benefits from MARTA access, major employment nodes and a regional retail offering. However, City Springs offers a potentially more compelling address for young professional renters, with a more authentic urban/suburban setting.
- Reflecting on the demographic analysis, multi-unit market performance metrics, recently-completed developments, as well as interviews with local realtors, there appears to be strong support for higher-end single-unit attached and multi-unit developments in City Springs.
- **Between 865 and 1,202 new multi-unit and single-unit attached rental units are forecast to be developable in City Springs over the next decade, over-and-above units currently under construction. For-sale units represent a small fraction of total multi-units in the area and demand over the next decade is considered limited until the City Springs "address" is established.**
- For-sale condo development is considered a limited opportunity for City Springs in the near-term, however once the district is an established "address" among young professionals, and the amenity base has been expanded, an opportunity for significant condo development is also anticipated.

# 5

## Hotel Market Analysis

# Hotel Market Analysis

## Metro Atlanta Hotel Overview

The Metro Atlanta hospitality market maintains a strong position in 2022 with indicators showing positive recovery since the downturn of the pandemic in 2020. Occupancy rates rose to 60% at the end of 2021 compared to a low of 47.8% at the end of 2020 and are nearing the 10-year average of 65%. Significant reductions in international visitors and conferences greatly impacted Downtown and Midtown hotels causing a much sharper decrease in occupancy rates relative to suburban and exurban hotel submarkets, which attract the majority of their business from domestic leisure travelers.

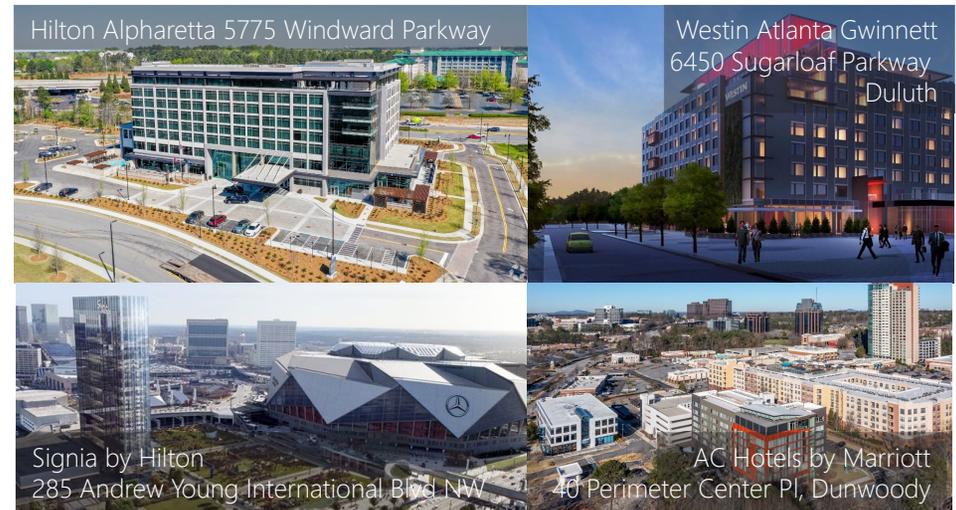
Average daily rates (ADR) are strong across the metro market and are near pre-pandemic levels for the Metro Atlanta market, demonstrating that hotels are not relying on discounts to attract visitors. Increasing occupancy rates and rising ADR create positive revenue per available room (RevPAR) with approximately 2% to 3% annual growth, continuing the trend of recovery. RevPAR is expected to reach 2019 levels by 2024.

Construction across the market saw 3,500 rooms across 25 properties delivered in 2021 compared to 2,600 rooms in 2020. Currently 4.6% of total inventory or approximately 5,100 rooms are under construction as of Q1 2022, higher than the national average of 2.8%. New supply has focused on large, upscale and luxury properties, and construction has been most prominent in Downtown, Midtown, Alpharetta and the northeastern suburbs, where occupancy rates and room rates have shown the greatest resurgence.

Prior to the pandemic, demand for the Metro Atlanta hospitality market was continuing to grow at approximately the same rate as supply, resulting in hotel occupancy hovering around 70% since 2015. At the same time, ADR growth was steady, driving 2%-3% annual RevPAR growth.

The current trend for hotel properties is to be built in-or-alongside mixed-use, commercial, or entertainment developments. Recent examples include:

- The 249-room **Hilton Alpharetta** on Windward Parkway with office and residential,
- The 346-room **Westin Gwinnett Hotel** connected to Duluth's Infinite Energy Center's 72,000 SF convention space coming in 2023,
- The 975-room **Signia by Hilton** next to the Georgia World Congress Center which will open with 75,000 SF of meeting space and broke ground in 2021 to open 2023, and
- The 156-room **AC Hotel by Marriott** at Perimeter Center.



# Hotel Market Analysis

Figure: Metro Atlanta Hotel 12-Month Occupancy Rate (July 1, 2021 to June 30, 2022)

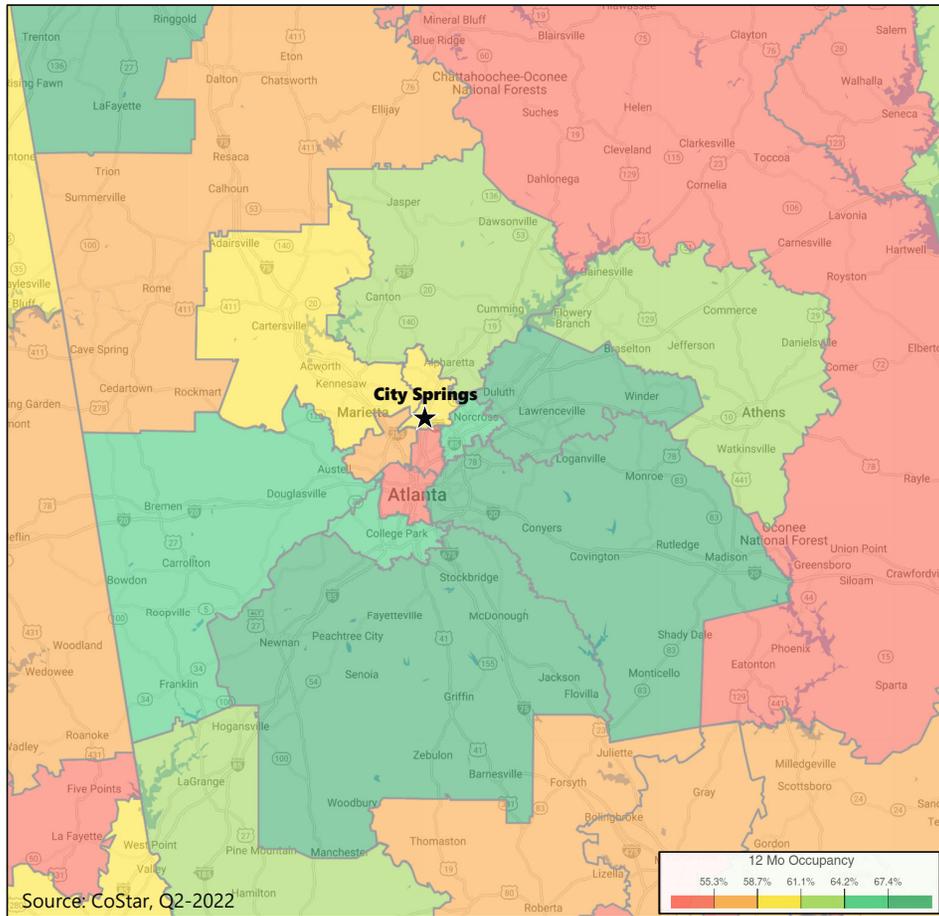
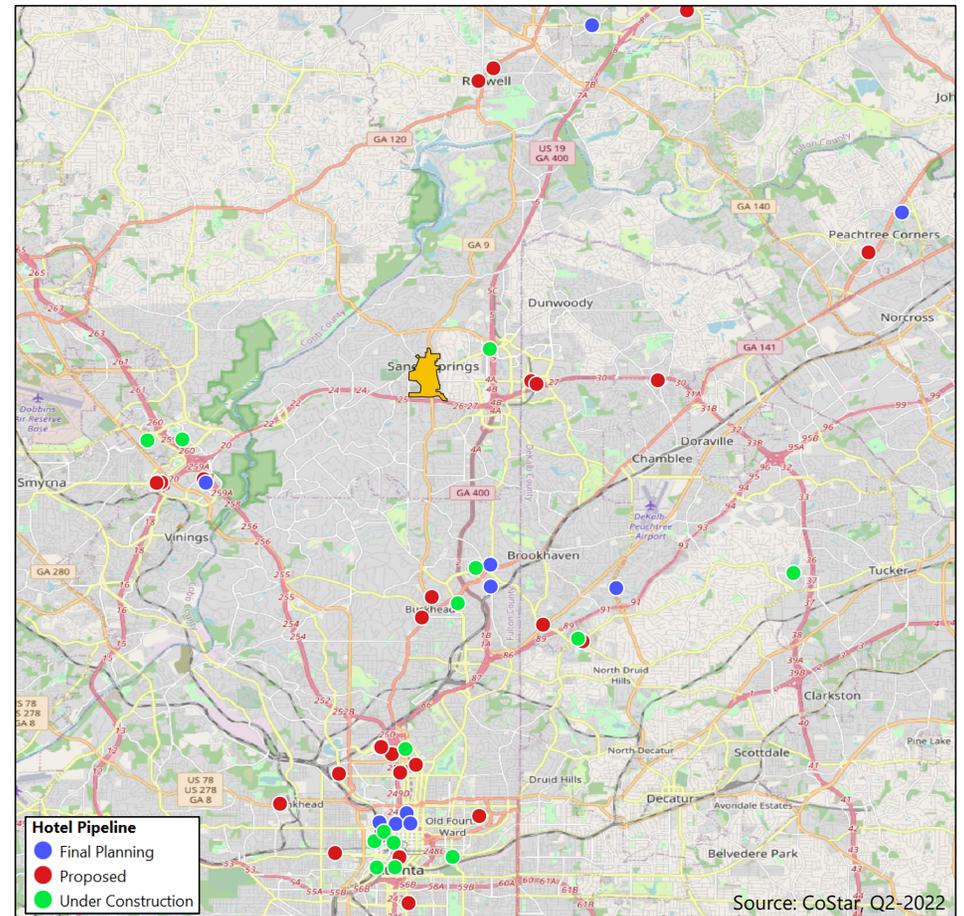


Figure: North Metro Atlanta Hotel Pipeline



# Hotel Market Analysis

## Submarket Hotel Overview

Perimeter Center/Roswell is a smaller hotel submarket containing just over 5% of the region's total inventory. While there are currently no 5-star hotel properties in the submarket, there is a **substantial concentration of 4.5-star rooms (27.2% of inventory) and 4-star rooms (28.4% of inventory)**.

Hotels in Perimeter Center/Roswell are generally larger than most other markets, **averaging 152 rooms per property**. This is above the Metro Atlanta market average of 116 rooms and well above the U.S. average of 90 rooms.

Like the region, the submarket is still enduring the effects of the pandemic but is beginning to recover. Rising since a low point of 41% in February 2021, **occupancy** is currently 58%, slightly under the Metro Atlanta average of 60%. Economy hotels (3-star rating) demonstrated the highest occupancy rates in the submarket prior to the pandemic and have since recovered to their pre-Covid rates of 79%.



Figure: Central Perimeter/Roswell Submarket Room Inventory by Class

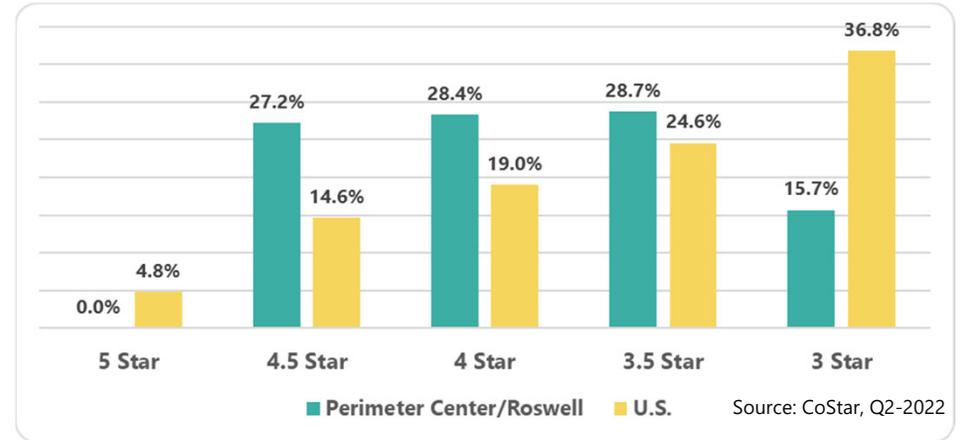
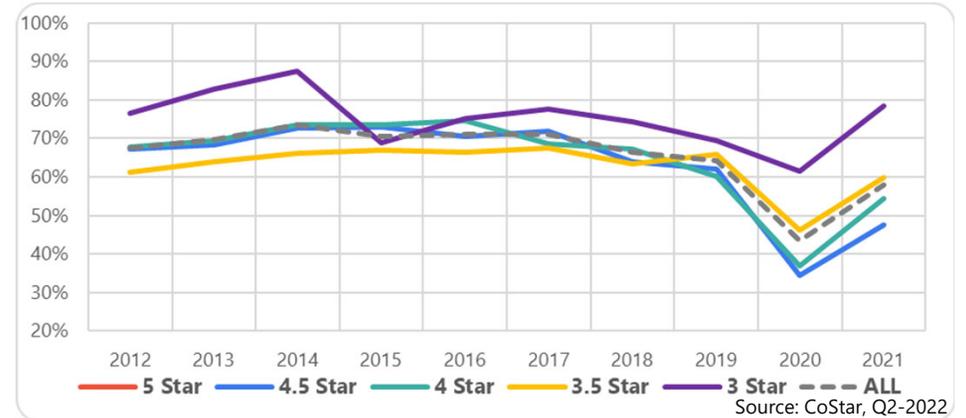
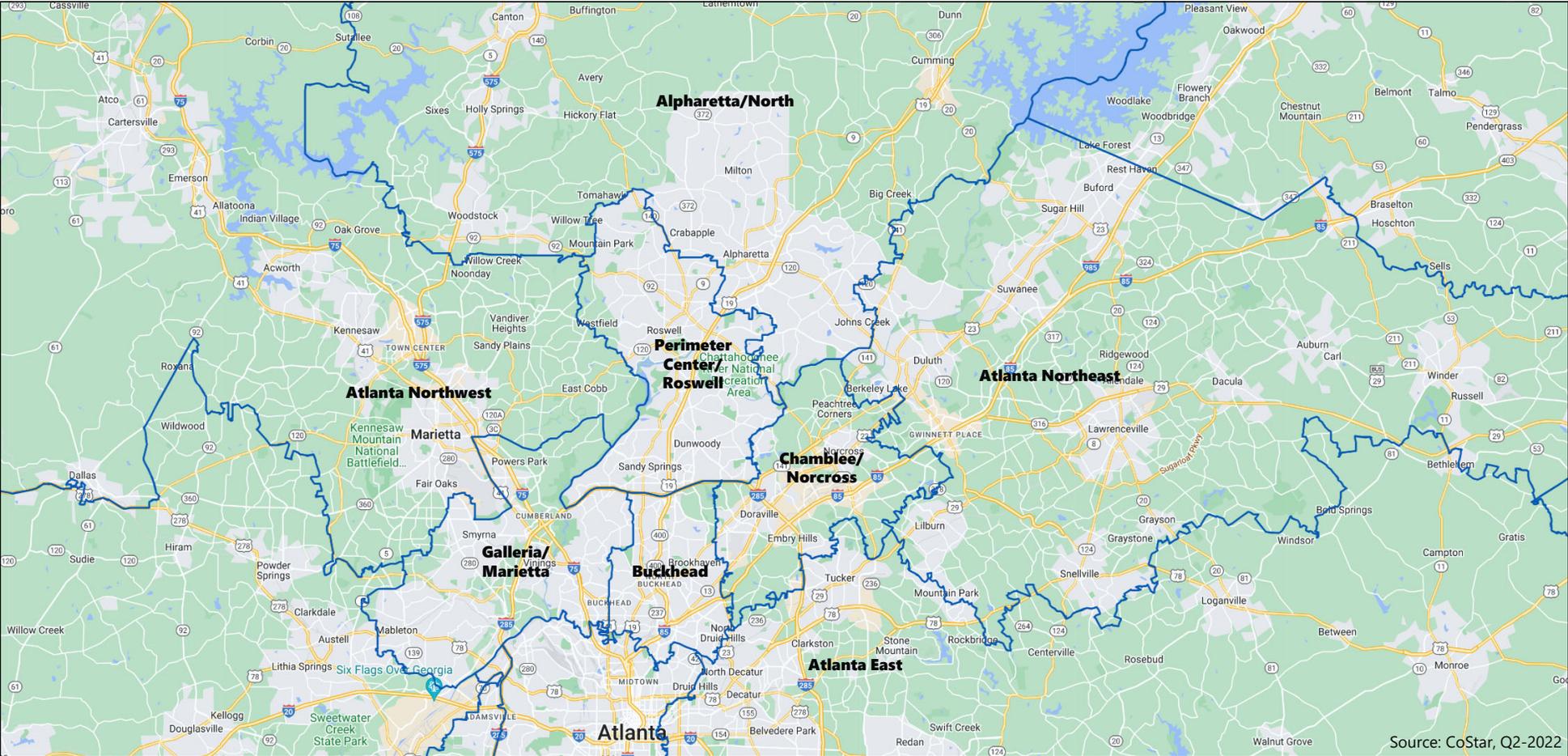


Figure: Central Perimeter/Roswell Submarket Occupancy Rate by Class



# Hotel Market Analysis

Figure: North Metro Atlanta Hotel Submarkets



Source: CoStar, Q2-2022

# Hotel Market Analysis

**Average daily rate (ADR)** for all classes of hotel bottomed out in 2020 averaging just \$87.23. With the recovery in travel, ADR is on track to average \$102.06 in 2022. This is still below the pre-pandemic ADR of \$120.48 in 2019. Based on current trends, it should take several years for occupancies to increase to where hotels can aggressively increase their rates, particularly for 4.5-star and 4-star properties.

**Revenue per available room (RevPAR)** reflects occupancy and ADR growth with a low of \$31.34 in February 2021 rising to \$60.25 by July 2022. Year-over-year (YOY) RevPAR was positive with a change of 42.7% at the end of the year compared to -58.7% at the lowest in Feb 2021. RevPAR is expected to steadily rise back towards pre-pandemic levels over the next few years.

After a lull in hotel expansion, six new hotels opened in the submarket in recent years:

1. Hampton Inn & Suites by Hilton Atlanta Perimeter Dunwoody (4565 Ashford Dunwoody Rd) – 132 rooms, opened 2016.
2. Residence Inn Atlanta Perimeter Center (4695 Ashford Dunwoody Rd NE) – 127 rooms, opened 2017.
3. Hyatt Place Atlanta Perimeter (1232 Hammond Dr) – 176 rooms, opened 2020.
4. AC Hotels by Marriott (40 Perimeter Center Pl) – 156 rooms, opened 2021.
5. Hyatt House Sandy Springs (5785 Peachtree Dunwoody Road) – 129 rooms, opened 2021.
6. Aloft Hotel Sandy Springs (6401 Barfield Road) – 140 rooms, opened 2022.

Although these new hotels have added a significant amount of new supply to the local market, they also provide a new mix and positioning of hotel that was previously unavailable. The study area now has a more diverse mix of hotels at different price points and positioning. The Hampton Inn and Residence Inn target mid-market accommodation, the Marriott, Crowne Plaza, and Embassy Suites target business and conference, while the new AC Hotel and Hyatt Place target a younger, trendy, and upscale clientele.

Figure: Perimeter Center/Roswell Submarket ADR by Class

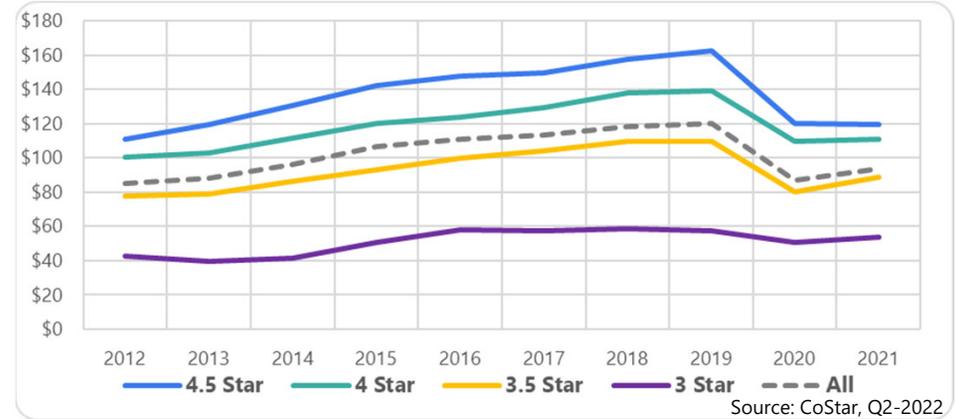


Figure: Perimeter Center/Roswell Submarket RevPAR by Class



# Hotel Market Analysis

There are additional hotels planned in the pipeline that will further increase supply. Campus 244 at 244 Perimeter Center Parkway will have a 145-room Element Hotel, the brand's third location in Metro Atlanta after Buckhead and Midtown. High Street by GID is permitted for two hotels totaling 400 rooms in its mixed-use development. Brands and timing have yet to be announced and are likely to be constructed in the second phase of development.

The amount of new hotel supply in the pipeline is surprising, given the tepid demand growth of recent years. Specifically, demand for hotel rooms in Perimeter Center/Roswell has grown much more slowly than neighboring submarkets, averaging just 0.3% a year between 2011 and 2019. By comparison, room night demand grew by 2.8% a year for Metro Atlanta during this period. The recently completed 140-room Aloft Hotel in Sandy Springs, represents a 2.4% addition to the existing inventory.

Figure: Average Annual Increase in Hotel Room Night Demand, 2011-2019

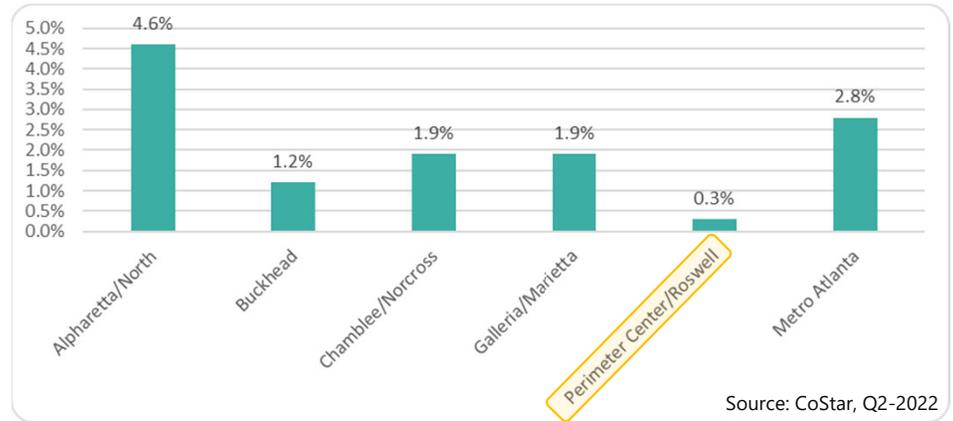
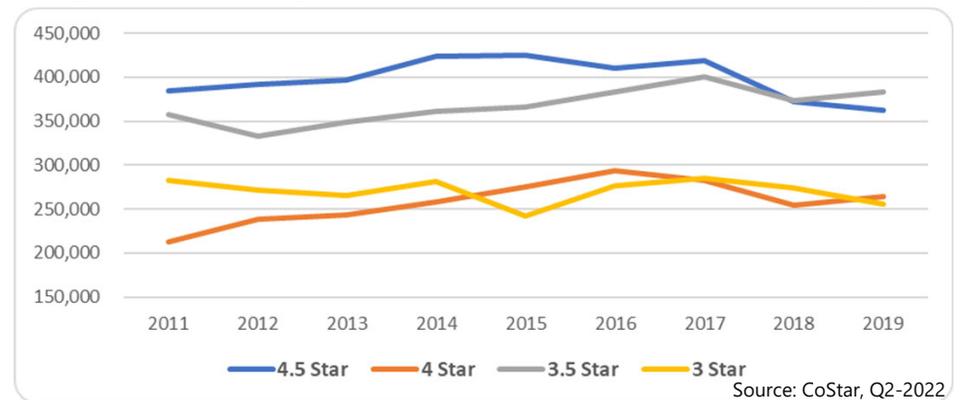


Figure: Hotel Room Deliveries in Perimeter Center/Roswell Submarket



Figure: Hotel Room Night Demand in Perimeter Center/Roswell Submarket by Class



# Hotel Market Analysis

## Submarket Residual Demand

The Perimeter Center/Roswell hotel submarket was analyzed to estimate the demand for additional hotel rooms of various classes in the area over the next 20 years, based on supply and demand patterns, ADR, occupancy rates, projects in the pipeline, cap rates and other key metrics. Due to the impact of Covid-19 from 2020 to 2022 on the hotel sector, the year 2019 is used as the measure of current demand so as not to negatively skew projections.

Overall demand remained flat throughout the previous decade, with moderate increases for mid-priced rooms and decreasing demand for both upper price (4.5 star) and economy (3 star) rooms. Additional mid-priced rooms introduced during the past several years have dampened occupancy rates and RevPAR in this segment.

**The Submarket Residual Demand model demonstrates market demand for 300 hotel rooms over the next decade.** The demand model was conducted prior to the opening of the Aloft Hotel on Barfield Road. The Aloft Hotel takes up 140 of these rooms, while the proposed 145-room Element Hotel will largely take up the balance of future demand. As such, little additional inventory beyond what is already in the pipeline is expected to be developed in the submarket over the next decade.

An additional consideration for this forecast is the demand potential represented by City Springs' Performing Arts Center (PAC) and Conference Center at City Springs. The Americans for the Arts organization indicates that on average state resident attendees to nonprofit performing arts centers spend \$0.81 on overnight lodging. Based on the Byers Theatre capacity of 1,070 and the Studio Theatre capacity of 350 people, and assuming 200 events per year at 90% capacity yields an estimated attendance of 256,000. At \$0.81 per attendee, hotel revenue generated is approximately \$207,000. With average daily rates at \$102, this suggests support for 2,030 room nights or nine rooms based on an occupancy rate of 65%. While this brief analysis is predicated on a number of assumptions and cannot substitute for a full economic impact study of the PAC, it does provide some indication of the limited effect of suburban venues on generating hotel nights. A first-to-market advantage is discussed later in the Recommendations & Positioning section of this Appendix.

Table: Hotel Submarket Residual Demand Projection

Hotel Submarket Residual Demand	Historic Supply (2012)				Current Supply (2019)				Residual Demand					
	Inventory (Rooms)	Occupancy Rate	Supply Room Nights (Million)	Demand Room Nights (Million)	Inventory (Rooms)	Occupancy Rate	Supply Room Nights (Million)	Demand Room Nights (Million)	2019 Residual Demand Rooms	Supply Room Nights 2022 (Million)	Net New Rooms Delivered 2020-2022	10-Year Total Deliveries (Rooms)	2022 Residual Demand Rooms	2032 Residual Demand Rooms
Perimeter Center/Roswell	5,056	67.4%	1,833,664	1,235,386	5,416	64.1%	1,974,672	1,265,535	-141	2,129,211	423	781	-484	297
5-Star									0		0	0	0	0
4.5-Star	1,595	67.3%	582,175	391,824	1,609	62.0%	585,117	362,812	-104	587,285	5	19	-107	-88
4-Star	962	67.9%	351,130	238,250	1,205	60.0%	439,825	264,031	-86	582,706	391	634	-413	221
3.5-Star	1,493	61.2%	544,945	333,392	1,593	65.9%	581,445	383,103	6	620,500	106	206	-80	126
3-Star and Under	1,006	76.5%	355,414	271,920	1,008	69.4%	368,285	255,589	43	338,720	-80	-78	115	37

# Hotel Market Analysis

## Location Analysis

City Springs' locational qualities are assessed to determine basic feasibility of hotel development in the district. Key factors supporting hotel success relate to proximity to major visitor generators such as employment nodes, higher education facilities and destination amenities.

Overall City Springs scores a 4.7/10 as a hotel development site, which is below average compared to other hotel development sites found nationally. Weaknesses cited relate to a lack of proximity to visitor generators, as well as poor visibility into City Springs from I-285.

Despite the low score for City Springs, it should be noted that hotels are changing their site selection criteria. With the advent of widespread GPS usage, online booking and evolving tastes (particularly among young adults), many new boutique hotel concepts are being developed in less traditional environments such as revitalized suburban downtown areas (such as City Springs). A sample of these types of hotels is provided at the end of this section.

Table: City Springs Hotel Location Assessment

Hotel Location Factor	Factor Weighting (1 to 10)	Site Rating 1 = Low 10 = High	Notes
Regional Accessibility (Car and Transit)	10	8	761,000 residents and 834,000 jobs within 20-minute drive but no MARTA rail station.
Visibility from Regional Thoroughfares	9	3	Visibility into City Springs from I-285 is limited. Roswell Rd is a major arterial.
Local Employment Density	8	4	Major tenants driving hotel demand are located close to GA 400 and MARTA.
Tourist Destinations in Local Area	7	2	Minimal number of tourist destinations within a 10-minute drive.
Retail/Food & Beverage within 5-Minute Drive	7	6	Limited and fragmented currently but slated to improve.
Natural Setting/Views/Waterfront	6	2	Relatively few natural elements in the City Springs area.
Walkability	5	8	79/100 <i>Walk Score</i> for Roswell Rd NE @ Hammond Dr (walkscore.com).
Proximity to Airport	3	5	30-minute drive to airport, which is average for the metropolitan area.
Access to Destination Amenities	3	3	Limited amount of parks, entertainment, water amenities, etc. within walking distance.
Proximity to Higher Education, Medical or Similar	2	6	Proximity to Medical District but no major higher education facilities nearby.
Travel Time for Workforce	1	5	Centrally-located but local residents do not feature prominently in the hospitality employment sector.
<b>WEIGHTED SITE RATING (Out of 10)</b>		<b>4.7</b>	

# Hotel Market Analysis

## Hotels in The City Springs Vicinity

There are no hotels currently within the City Springs boundary. However, two properties sit just adjacent.

The **Comfort Inn Sandy Springs-Perimeter** at 5793 Roswell Rd NE first opened in 1971, and last renovated in 2003. The 80-room property includes 390 SF of meeting space. Occupancies averaged from 36% to 50% in the five years leading up to the pandemic, while operating expenses exceeded 80% of gross revenue (typically this is closer to 60%). The property sold in 2019 for \$103,570/room, which is well below the cost of new build for this price point. The purchase price was based on a cap rate of 7.22% and RevPAR reported in 2020 was just over \$32, or slightly below the submarket average for the economy market segment.

The **InTown Suites Sandy Springs** is located at 355 Hammond Dr NE. The 71-room economy hotel was opened in 1999. In 2021, the property generated room revenue of \$1.282M, or a RevPAR of just over \$50, well above the submarket average.

No new hotels are proposed, being planned or under construction in City Springs. Hotels built in the past decade were concentrated in the core I-285/GA 400 interchange area, closer to the concentration of office, retail, medical activity as well as MARTA rail stations. The new Aloft Hotel and proposed Element Hotel are also located in this core area.



# Hotel Market Analysis

Figure: Hotel Inventory



# Hotel Market Analysis

## Boutique Hotel Long Term Opportunity

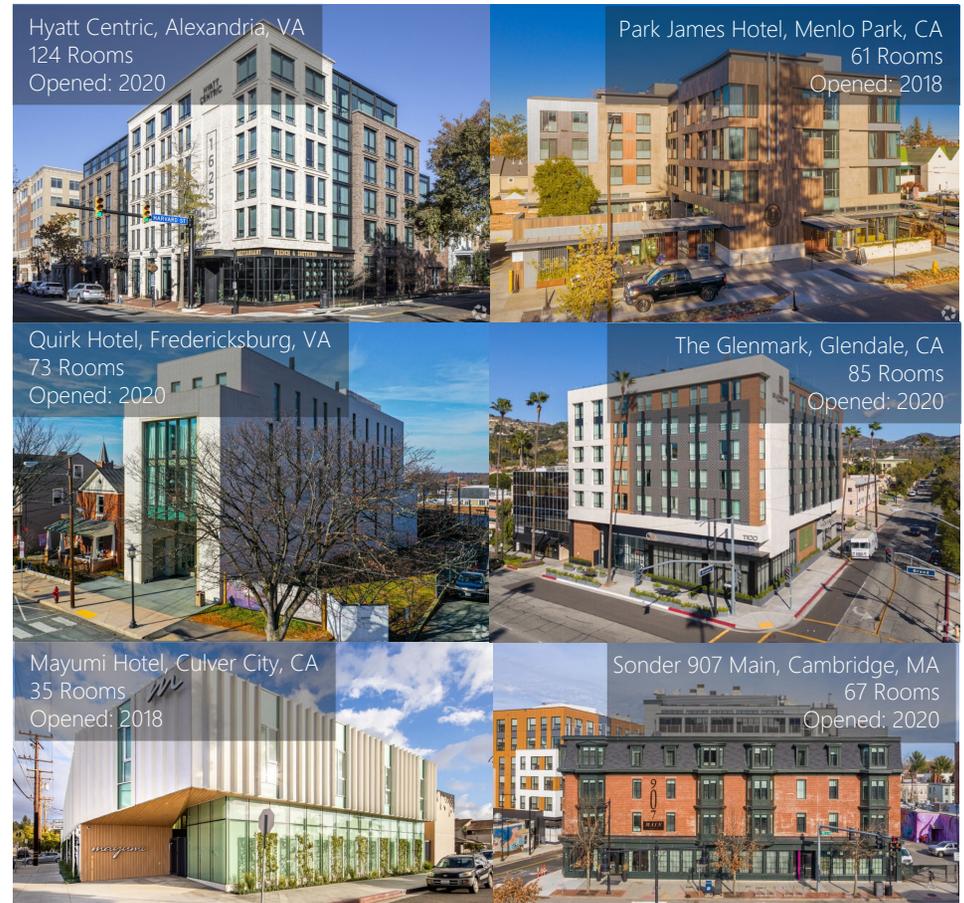
With limited demand over the next decade, it will be difficult to attract a hotel developer in City Springs. An established critical mass and superior accessibility of the core Perimeter Center area is a draw for hotels. However, this does not preclude the opportunity for a smaller boutique hotel in City Springs, particularly as the amenity base is expanded. A hotel may also want to be first-to-market and work with a developer early on.

Many examples exist of successful boutique hotels in suburban locales like City Springs. This is a new phenomena and is still in its infancy, but it does point to a potential longer-term opportunity for City Springs to target as it evolves.

While the specific site factors underlying each property's development are beyond the scope of this study, it is important to note that they are all located in affluent suburbs of some of the biggest metropolitan areas in the country. In this sense, they are a similar development context to Sandy Springs. A high-level review of each of these properties' locational context reveals that they are located in suburban downtown areas that offer a higher density of housing, employment, recreation and retail amenities than found in City Springs. As such, this underscores the longer-term opportunity of a boutique hotel in City Springs, once the current development vision for the area has been more fully realized.

It is important to note that the room size for these properties ranges from 35 to 124 rooms, and the average is 74 rooms. This sets the target size for a boutique hotel at City Springs over the longer term.

Figure: New Boutique Hotels in Suburban Downtowns



# Hotel Market Analysis

## Summary & Implications

- The Metro Atlanta hospitality market is recovering quickly from the pandemic. Average Daily Rates (ADR) are returning to 2019 levels while occupancy rates are also improving.
- Construction of new hotels has returned to pre-pandemic levels. Currently 5,100 rooms are under construction in the region. Development is concentrated in Downtown, Midtown, Alpharetta and several northeastern suburbs. New properties are frequently developed in or alongside mixed-use, commercial or entertainment developments.
- The Perimeter Center/Roswell hotel submarket has a concentration of larger 4.5-star and 4-star properties, reflective of the high percentage of business travelers as a source of business.
- The submarket is recovering at a slightly slower pace than the metro area. Even prior to Covid, demand for hotel rooms largely stalled between 2012 and 2019. Overall development energy in the region has concentrated elsewhere, particularly in the urban core and outermost northern suburbs.
- Despite the tepid demand in growth, new supply delivered has continued at a steady pace with 423 new rooms introduced to the submarket since 2019. As such, occupancy rates have remained low.
- A total of 297 new hotel rooms are estimated to be warranted for the submarket over the next decade. Two new hotel projects in the pipeline will take up nearly all this future demand.
- Despite these market conditions and City Springs' locational challenges as a hotel location, a longer-term opportunity for a smaller boutique hotel in City Springs is a possibility based on the nascent but growing trend towards smaller niche hotels in revitalized suburban downtown areas.

# 6

## Recommendations & Positioning

# Recommendations & Positioning

## 10-year Development Potential

The City Springs study area has the potential for mixed-use development including residential, office, retail, and hotels. Based on the forecast demand for the Metro Atlanta and its component submarkets, an estimate of the amount of each land use that can be supported in the study area is made based on its relative strengths and growth potential.

Table: City Springs 10-Year Market Demand Estimate

LAND USE	CONSERVATIVE SCENARIO	MODERATE SCENARIO	AGGRESSIVE SCENARIO
Residential (For-Rent + For-Sale)	900 UNITS	1,100 UNITS	1,300 UNITS
Office	11,000 SF	40,000 SF	70,000 SF
Retail	84,000 SF	155,000 SF	179,000 SF
Hotel	0 Rooms	50 Rooms (Boutique Hotel)	75 Rooms (Boutique Hotel)

Note: The demand estimates are projections based upon MXD’s specific methodology, and that other factors may influence future development.

# Recommendations & Positioning

## Three Big Ideas

Emerging from the market and feasibility land use analysis and case study profiles in Appendix A, the following three big ideas intend to differentiate City Springs as a unique destination and drive the vision for redevelopment.

### 1) Create a pedestrian-friendly Main Street

Roswell Road is a primary arterial that moves vehicular traffic within Sandy Springs and connects residents to adjacent communities. A more pedestrian-friendly Main Street would be beneficial to creating a better sense of place. Blue Stone Road or Hilderbrand Drive may be ideal targets since the City Springs mixed-use development has catalyzed growth on the northern portion of Blue Stone, and city-owned properties line both streets.

**Create a pedestrian-friendly Main Street**

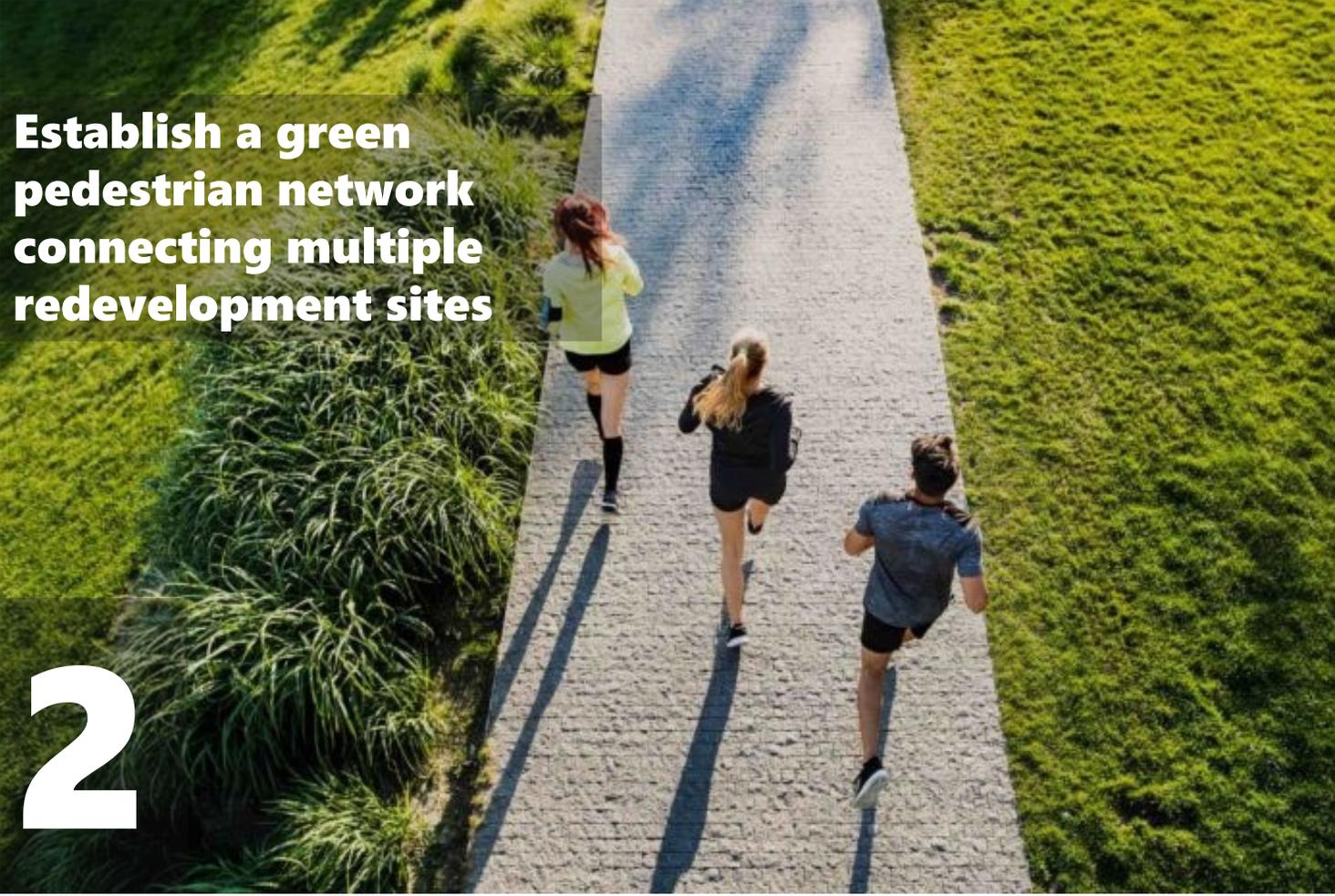


# Recommendations & Positioning

## 2) Establish a green pedestrian network connecting multiple redevelopment sites

Many parts of City Springs are not yet considered pedestrian friendly. Implementation of other Master Plan recommendations can create a network of parks, plazas, and streets that are safe, green, and healthy for residents, visitors, and workers. This will enable pedestrians to connect between various redevelopment sites as City Springs builds out over time.

Various uses may include green streets, pocket parks, community gardens, multi-use trails, playgrounds, and others.



**Establish a green pedestrian network connecting multiple redevelopment sites**

**2**

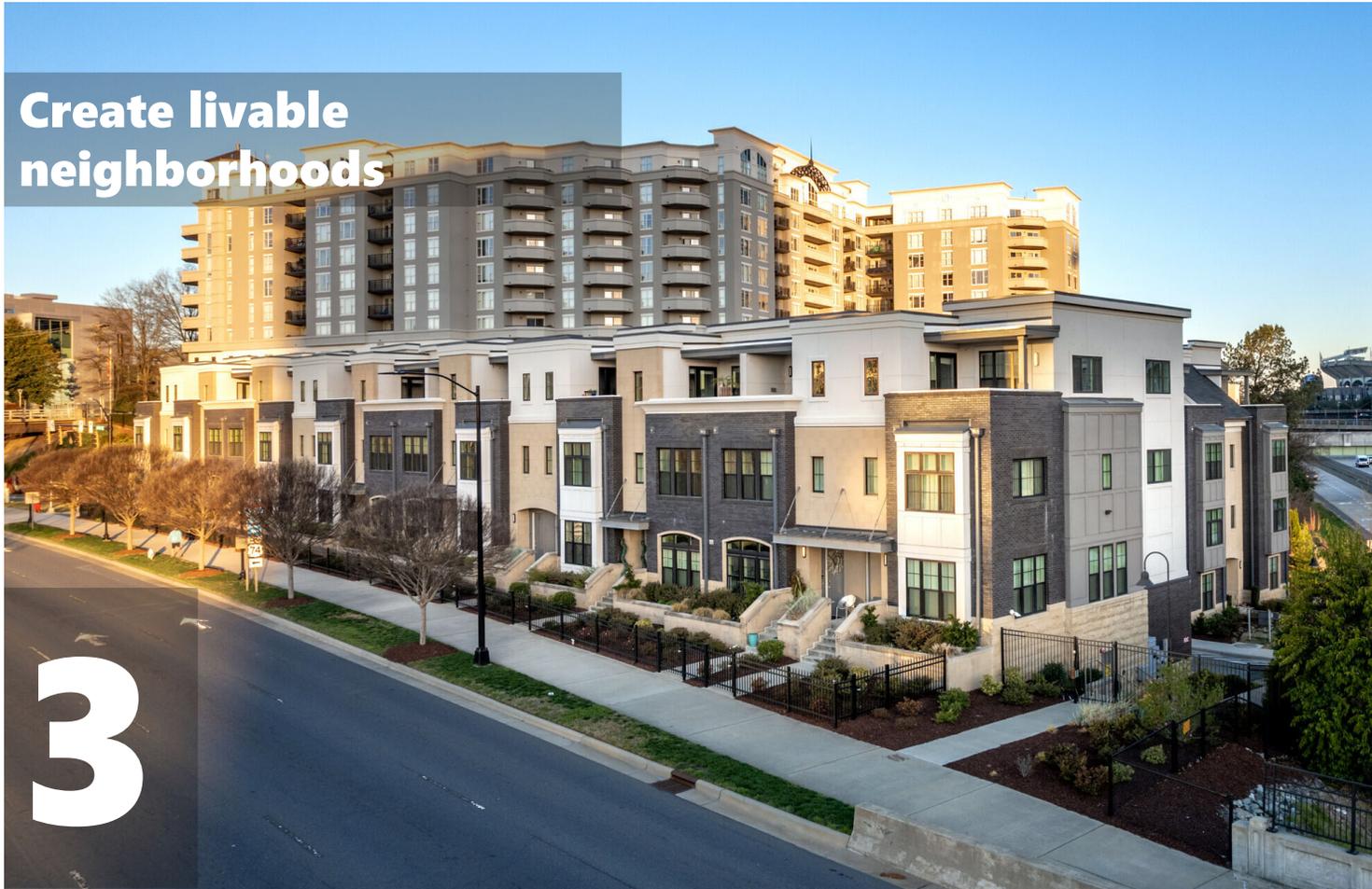
# Recommendations & Positioning

## 3) Create livable neighborhoods

While areas such as Perimeter Center, Cumberland, and Buckhead focus on higher density development with large-scale office and entertainment uses, City Springs can differentiate itself as a truly livable neighborhood. This is accomplished through developing a mix of low and mid-rise development that includes a variety of housing types.

Housing diversity, family-friendly amenities, cool restaurants, arts & culture, parks and trails, local events, and co-working spaces will create a high quality of life and a desirable neighborhood.

Create livable neighborhoods



# Recommendations & Positioning

## Recommendations & Positioning

Building on the city-led City Springs development of 2018 and looking forward to what this area could become over the next decade, redevelopment of the study area should create a unique identity that is distinct from other nodal centers in North Atlanta.

There is already a focal point in City Springs with the City Hall, City Green, and the Performing Arts Center. Redevelopment of existing properties in the City Springs study area, especially along Roswell Road and adjacent streets, provides an opportunity to rejuvenate the area through quality development, urban design, and placemaking. This will increase connectivity between neighborhoods and grow the central community “heart” that serves Sandy Springs as a hub for shopping, dining, entertainment, and community services.

Nearby nodes such as Perimeter Center and Cumberland Galleria are high density areas that feature large corporate office towers, enclosed malls, power centers, convention centers, and sports facilities, along with increased traffic from these uses. This differs from what City Springs can become.

Strong local demographics including high household incomes point towards a high-quality attractive environment that attracts young professionals, young families, and downsizing seniors who desire the amenities of Midtown and Buckhead but prefer a lower density and safe environment.

**Based on the market analysis and competitive positioning, City Springs should be a community comprised of a wide-range of housing types for people of all stages of life, with accessible places of work, boutique shopping, and a strong amenity package.**



## Recommendations & Positioning

Due to the large size of the study area, phasing should focus on redevelopment of properties near City Hall to build upon the critical mass already established. Redevelopment of properties on the edge of the study area should consider how they will connect to the center of City Springs and integrate over time, ensuring that redevelopments do not occur in silos.

Numerous small properties spread throughout the study area should be amalgamated to trigger redevelopment. The City should work with property owners and developers to create larger sites that are more conducive to multi-unit residential and mixed-use projects.

Residential has the strongest demand in the short term, followed by unique retail, dining, and entertainment concepts. Small boutique office that targets professional tenants may also be viable. Hotel is considered a longer-term play, although the lack of hotel in the study area may prompt a developer to enter as first-to-market based on future plans for City Springs.

A primary “Main Street” should be established in the study area, whether that is Blue Stone Road, Hilderbrand Drive, or another street that could be pedestrian friendly and have a mix of uses.

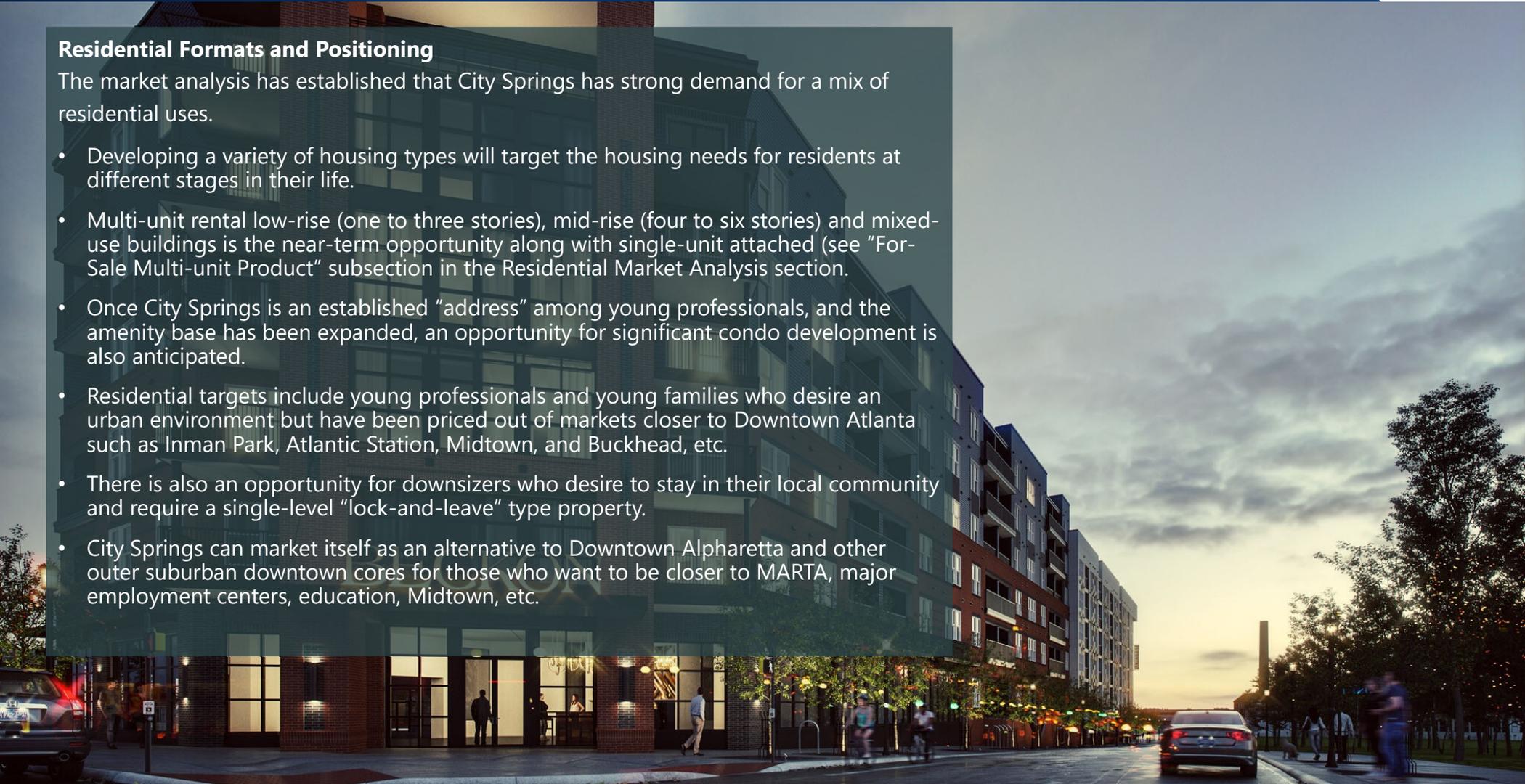


# Recommendations & Positioning

## Residential Formats and Positioning

The market analysis has established that City Springs has strong demand for a mix of residential uses.

- Developing a variety of housing types will target the housing needs for residents at different stages in their life.
- Multi-unit rental low-rise (one to three stories), mid-rise (four to six stories) and mixed-use buildings is the near-term opportunity along with single-unit attached (see "For-Sale Multi-unit Product" subsection in the Residential Market Analysis section).
- Once City Springs is an established "address" among young professionals, and the amenity base has been expanded, an opportunity for significant condo development is also anticipated.
- Residential targets include young professionals and young families who desire an urban environment but have been priced out of markets closer to Downtown Atlanta such as Inman Park, Atlantic Station, Midtown, and Buckhead, etc.
- There is also an opportunity for downsizers who desire to stay in their local community and require a single-level "lock-and-leave" type property.
- City Springs can market itself as an alternative to Downtown Alpharetta and other outer suburban downtown cores for those who want to be closer to MARTA, major employment centers, education, Midtown, etc.



## Recommendations & Positioning

- Buildings should be fitted with high quality materials and be designed to integrate into City Springs, rather than built as “silos”.
- Highrise formats are prevalent in Midtown and Buckhead but are not recommended for the local submarket. Highrise residential is more preferred for TOD development in the Perimeter Center area.
- Higher density units should be concentrated towards City Hall and along Roswell Road.
- Townhomes, rowhomes and zero lot line homes on the edges of the City Springs boundary will provide a respectful transition to the adjacent single-family neighborhoods.



## Recommendations & Positioning



### Office Formats and Positioning

Office is recommended as a supplementary component in City Springs due to a weak market over the immediate to medium term.

- High competition from nodes along MARTA such as Buckhead and the Perimeter Center limit future office in City Springs.
- Changing nature of the workplace due to Covid-19 indicates that employers will be looking for more flexible smaller spaces close to their workforce.
- City Springs can appeal to many smaller firms seeking relatively affordable rents amidst a high-amenity, walkable area located in a highly-educated, higher-income Metro suburb.
- Short-term focus on smaller boutique office and multi-tenant office in mixed-use and multi-use projects will offer space not currently found in the local market.
- New office in City Springs should be concentrated around retail/F&B clusters, multi-unit housing, and local amenities.
- Target professional services, medical, real estate, management, finance, and small tech firms.
- Office development could be drawn at a larger scale once City Springs is established as a high-amenity, mixed-used urban/suburban district. Larger scale office should be located on redevelopment sites closer to I-285.

# Recommendations & Positioning

## Retail Formats and Positioning

An opportunity to shift and diversify the retail mix in the City Springs area.

- High Street is expected to absorb most of the near-term retail demand in the submarket. Other nearby nodes are also shifting and slowly expanding their retail offerings.
- Repositioning and redevelopment of the Parkside Shops by Jamestown will be a catalyst for changing the perception of retail in City Springs.
- Construction of new multi-unit residential in City Springs will drive demand for new retail concepts.
- Emphasis should be on “less is more” retail positioning. The tenant mix should be curated and high-quality, with an emphasis on smaller footprint retailers, preferably local or new to the Metro Atlanta market.
- City Springs District should focus on a compact amount of boutique retail focused near to the City Green. The mix should consist of neighborhood-oriented shopping, upscale conveniences, new-to-market restaurants (including many independents), entertainment/recreation concepts, and a limited amount of boutique shops (i.e. small and/or independent shops but not necessarily at an upscale price point).
- This can include specialty grocer, butcher shop, cafes, bakery, chef-driven restaurants, specialty retail (gifts, housewares, etc.), hair salon and barbershops, nail salon, day spa, etc.
- The area is currently characterized by young professional singles and couples earning high incomes. Future residential positioning in City Springs is geared towards young professionals, young families, and downsizers. This is optimal for boutique-style shopping.



## Recommendations & Positioning

- A pedestrian friendly “restaurant row” that features destination restaurants, craft breweries, distilleries, cideries, wine bars, etc. would be a differentiator in the local market.
- Connectivity is required between existing retail developments to create a more pleasing shopping experience. Ensure that new or retrofitted developments have pedestrian or vehicle connectivity between sites.
- A designated Main Street could act as a “garden street”, a park-like mixed-use corridor of uses with outdoor spaces intertwined with restaurants and boutique shops.
- Open space and street level uses will allow for indoor and outdoor dining and entertainment opportunities.



## Recommendations & Positioning

### Hotel Formats and Positioning

A large existing inventory of hotel rooms coupled with a pipeline of additional hotels in the submarket limits further demand over the next decade.

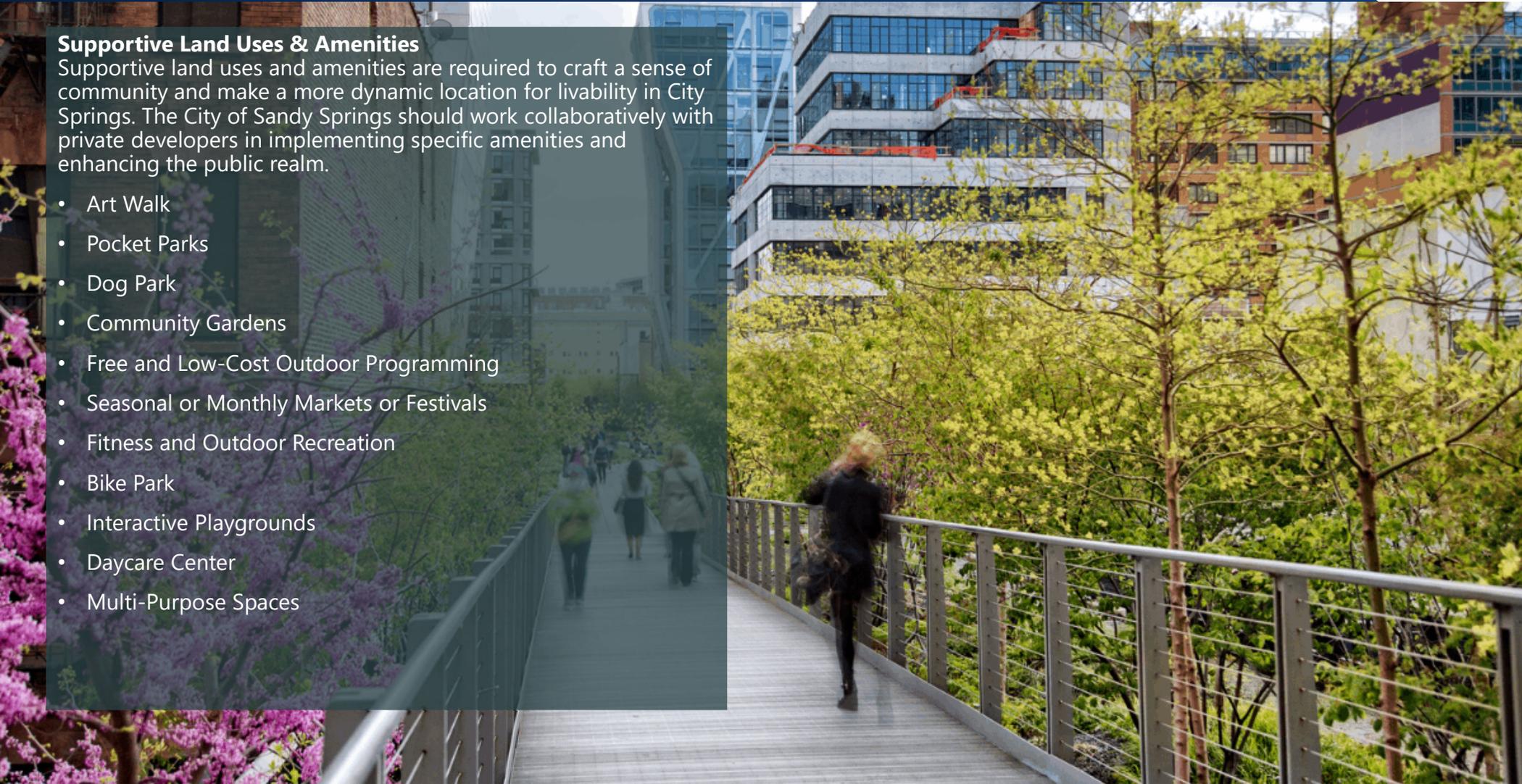
- Increased redevelopment in City Springs, coupled with a high amenity package will make the area more attractive for a hotel development.
- Market findings demonstrate limited demand for hotel over the next ten years in the City Springs district; however, a small boutique hotel is recommended if a developer/operator would desire to be first to market. Boutique hotels require a minimum number of rooms to make them financially viable depending on land values, parking, amenity package, etc.
- The submarket is limited in its luxury offerings, target positioning should be a 4 or 4.5-star hotel such as Autograph Collection by Marriott or Curio Collection by Hilton. An independent boutique hotel with a destination restaurant could also be viable.
- A boutique hotel should be located near City Hall and the Performing Arts Center to leverage the critical mass established at City Springs. The Performing Arts Center and nearby restaurants will also create synergy with the hotel.
- A local developer may want to be “first to market” in City Springs.

# Recommendations & Positioning

## **Supportive Land Uses & Amenities**

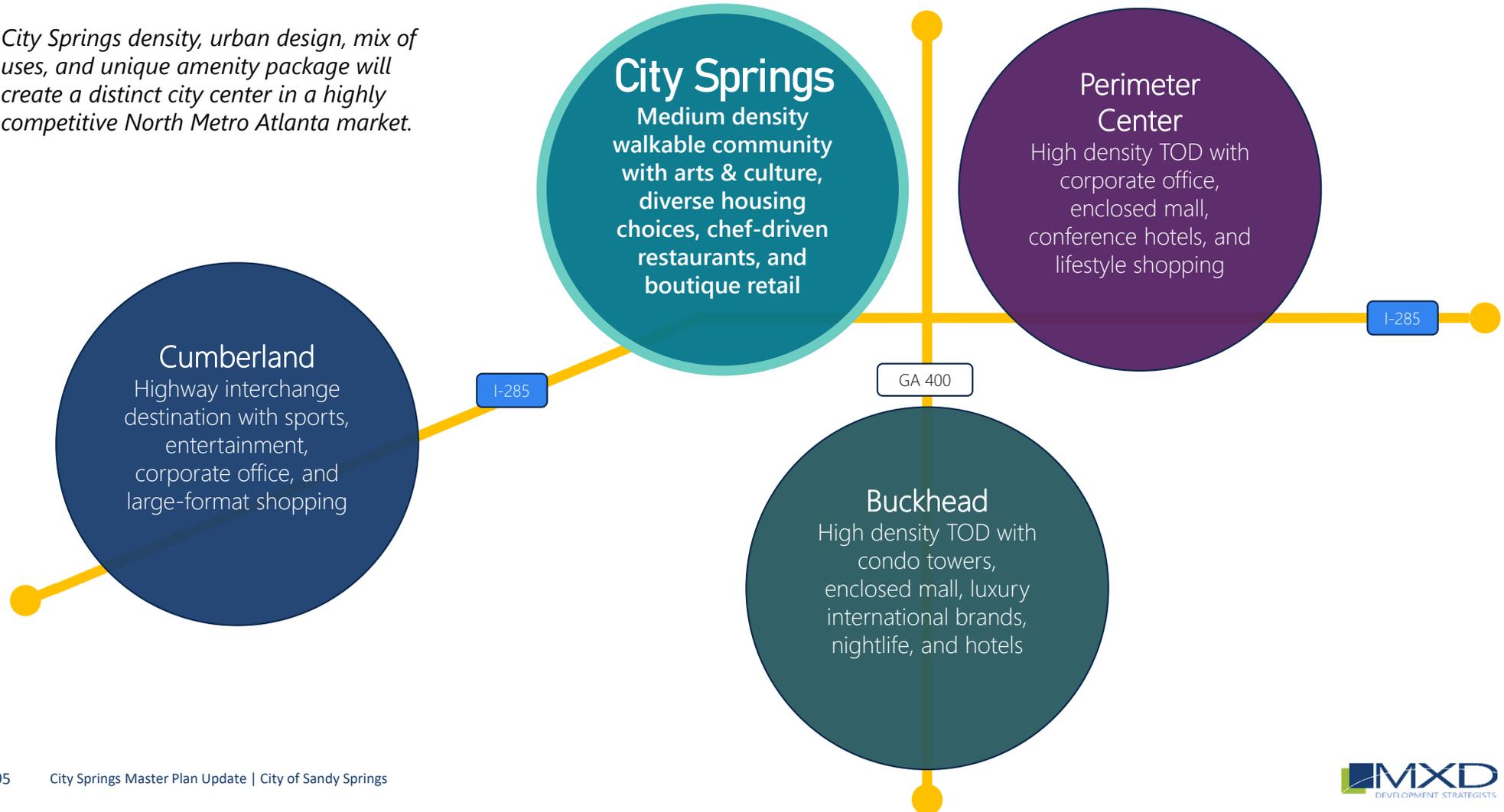
Supportive land uses and amenities are required to craft a sense of community and make a more dynamic location for livability in City Springs. The City of Sandy Springs should work collaboratively with private developers in implementing specific amenities and enhancing the public realm.

- Art Walk
- Pocket Parks
- Dog Park
- Community Gardens
- Free and Low-Cost Outdoor Programming
- Seasonal or Monthly Markets or Festivals
- Fitness and Outdoor Recreation
- Bike Park
- Interactive Playgrounds
- Daycare Center
- Multi-Purpose Spaces



# Recommendations & Positioning

*City Springs density, urban design, mix of uses, and unique amenity package will create a distinct city center in a highly competitive North Metro Atlanta market.*



A

# Suburban Redevelopment Best Practices

# Suburban Redevelopment Best Practices

## Introduction

- Three precedents of suburban city developments in the United States were profiled to garner an understanding of the site context and planned development mix. The case studies also identify zoning and regulatory initiatives that assisted to catalyze the transition to mixed-use districts.
- The case study profiles identify key takeaways that can be considered and applied to the City Springs District to facilitate the transformation of the site into a multi-use district for residents, workers, and visitors.
- The criteria used to select the three precedents include demographics (high median household income, high levels of educational attainment, etc.), similar character and scale to Sandy Springs, along with similar context including proximity to highway network.
- The case studies profiled include:
  - Merrifield – *Fairfax County, Virginia*
  - Bridge Street Corridor – *Dublin, Ohio*
  - SouthPark – *Charlotte, North Carolina*



Source: Fairfax County



Source: MKSK



Source: CoStar

# Merrifield – Fairfax County, Virginia

## Development Overview

Merrifield is a census-designated place located in Fairfax County, Virginia. It is home to the approximately 31-acre mixed-use Mosaic District, consisting of residential, hotel, office, retail, and park space. Completed in 2018, the district is the “town center” of the Merrifield community and is located within the Merrifield Commercial Revitalization Area (CRA). Encompassing both the Mosaic District and CRA is the Merrifield Suburban Center, which is an area of approximately 1,550 acres, containing a mix of uses.

Aided by the Greater Merrifield Business Association, property owners, and neighborhood leaders, Fairfax County has defined a vision for the community that embraces both its location and existing amenities, while integrating mixed use developments that serve the community.

Fairfax County’s Comprehensive Plan also outlines development and design objectives for implementation into two core areas, with a focus on encouraging pedestrian-friendly and walkable streets. The establishment of a local grid of streets linked by a central roadway has also enhanced connectivity.

Source: Fairfax County: Merrifield Commercial Revitalization Area, The Mosaic District; Merrifield Annual Revitalization Report, 2015



Source: Google Earth

# Merrifield – Fairfax County, Virginia

## Land Use - Merrifield Suburban Center (MSC)

The Merrifield Suburban Center is categorized into four land use designations, each with its own set of principles and design features.

### Core Areas

- Highest development intensities.
- Most urban areas of the MSC: the Town Center Area (Mosaic District) and the Transit Station Area.
- Mixed-use development - office, residential, retail, hotel, major entertainment uses, institutional, cultural, recreational, and governmental uses.

### Adjacent to Core Areas

- Will have the potential to become more urban and pedestrian-oriented in character, but will have less intense development than the core areas.

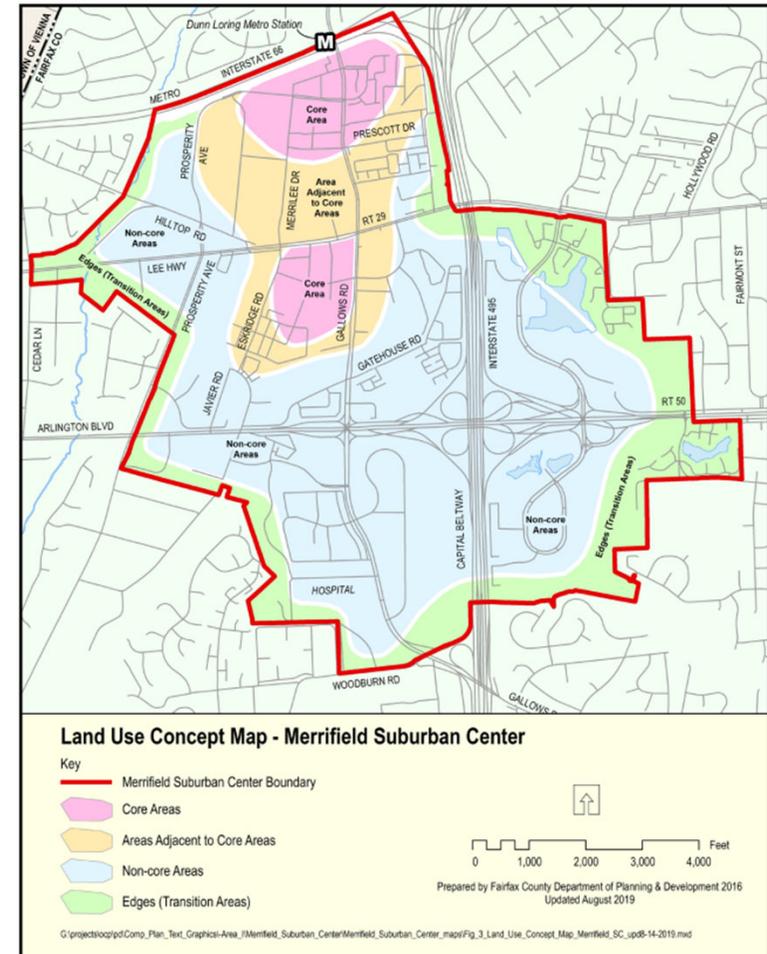
### Non-Core Areas

- More pedestrian oriented but will have a predominantly suburban appearance.
- High quality development - site and building design and materials.
- Open space amenities to provide a sense of place in a suburban setting.

### Edge Areas

- Define the limits of the MSC and provide a significant degree of land use compatibility with the adjacent residential neighborhoods.
- Include permanent open space, transitional uses - low rise and/or low intensity office, neighborhood retail, garden apartments, and expansive roadway rights-of-way.

Source: 2017 Edition of the Comprehensive Plan - Merrifield Suburban Center



Source: 2017 Edition of the Comprehensive Plan - Merrifield Suburban Center



# Merrifield – Fairfax County, Virginia

## Merrifield Commercial Revitalization District

Contained within the larger Merrifield Suburban Center, the Merrifield CRA is located between I-66, the Capital Beltway, and the Dunn Loring-Merrifield Metro Station. It is where both 'core area' land use designations are located. The Merrifield CRA has a total area of 774.78 acres and has a population of 10,076. The Merrifield CRA was designated in 1998 by the Providence District Board of Supervisors, to encourage new development, revitalization, and redevelopment to support the area's economic viability.

Merrifield's CRA designation assisted in the creation of Fairfax County's first Tax Increment Finance District and Community Development Authority in 2009. It allowed for the development of the Town Center through a public-private partnership.

Development of the Mosaic District was at the forefront of revitalization efforts within the CRA.

Source: Fairfax County: Merrifield Commercial Revitalization District; Fairfax County Public Investment in Support of Private Development: Economic Development Tools including Tax Increment Financing (TIF)

Figure: Merrifield Commercial Revitalization District Boundaries



Source: Fairfax County Development Activity Web Map

# Merrifield – Fairfax County, Virginia

## District Development The Mosaic District

"We view our project as the ember of a much larger urban plan that will be the catalyst of economic and community development for a much larger district."

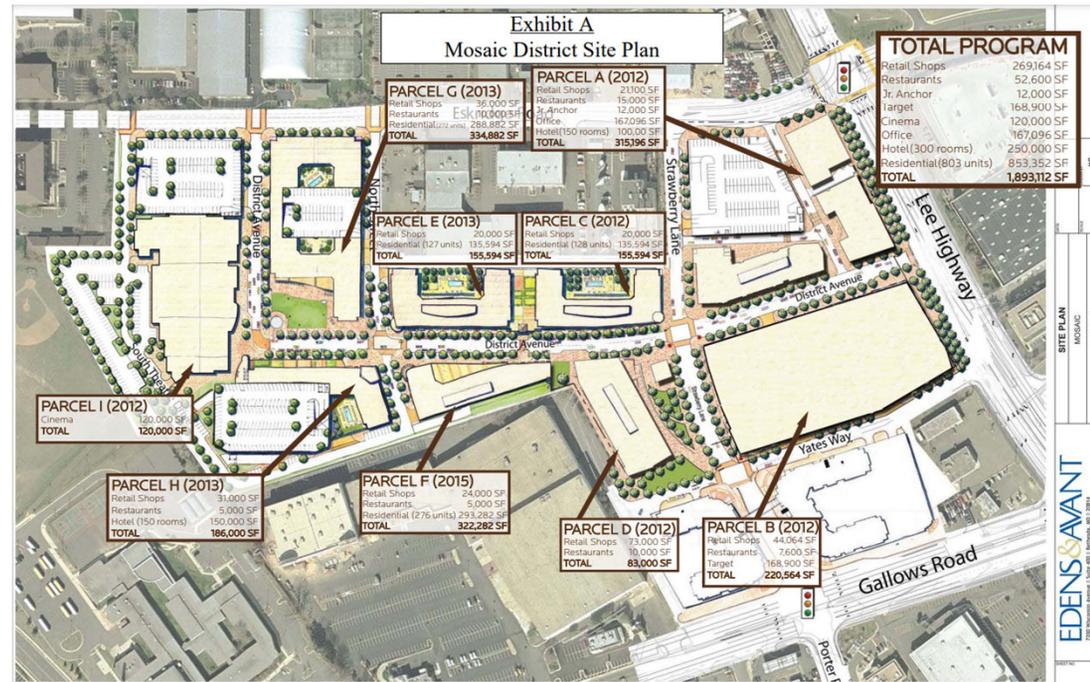
- Jodie W. McLean,  
President and Chief Investment Officer of Edens & Avant

The District benefitted from Tax Increment Financing to help fund public infrastructure with Planned Development Commercial (PDC) and Planned Residential Mixed Use (PRM) designations. Assisted by retail real estate owner, operator and developer Edens & Avant, the development of the mixed-use district was understood to be the catalyst project for Fairfax County's long-term revitalization plans.

According to financial figures collected in 2021, this former industrial area saw a 1,734% increase in assessed value, from \$38,271,740 before redevelopment to \$663,560,710 after redevelopment. Annual property taxes collected in 2021 also reflected an increase in tax revenue, from \$409,508 before redevelopment to \$7,564,592 after redevelopment.

Source: CISION PR Newswire, 2010; Fairfax County Public Investment in Support of Private Development: Economic Development Tools including Tax Increment Financing (TIF)

Figure: Mosaic District Site Plan



Source: Fairfax County Special Assessment Report No. 13

# Merrifield – Fairfax County, Virginia

## Recent Development Projects

Recent redevelopment projects and transportation improvements have catalyzed further development of the Merrifield community, achieving several of the goals set forth in the Comprehensive Plan. Redevelopment in the CRA is attracting new users and residents, bringing economic benefit for the surrounding community. Since the Plan's adoption in 2001, eight new streets and 25 new intersections have been constructed, each with bicycle or pedestrian friendly amenities.

Source: Merrifield Annual Revitalization Report, 2015

### INOVA Health Care Services

- A 258,000 SF expansion of the Fairfax Hospital campus, to include a new Cancer Treatment and Research Center.

### Fairview Park

- An 86-acre site turned into 2.4 million square feet of mixed-use development.
- Includes an outdoor plaza, first floor retail, indoor and outdoor amenities.

### Halstead Square

- Mixed-use development consisting of 80,375 SF of retail, 150 room boutique hotel, and 6200+ residential units.
- Located south of the Dunn Loring Metro near prosperity Avenue and Gallows Road.

### Caboose Brewing Co.

- Adaptive reuse of an existing industrial building as an alcohol production facility and brewery, including beer production, restaurant and retail sales.



Source: Fairfax County



Source: Google Earth



Source: halsteadsquare.com



Source: Caboose Brewing Co.

Sources: Fairfax County; Focus on NoVA Real Estate; Annandale Today; Lincoln Property Company; New Amenities For The Dunn Loring Metro & Merrifield Submarket

# Bridge Street Corridor – Dublin, Ohio

## Development Overview

Bridge Street Corridor is a 1,100-acre major commercial district located in Dublin, Ohio. It includes a mix of older shopping areas, Dublin's historic town center, and low-density office spaces. The Corridor was developed to form a new town center, incorporating higher-density, walkable neighborhoods. Initial planning efforts for the Corridor commenced in 2009 and were followed by the creation of The Bridge Street District Plan. The District Plan incorporates several documents within it, including those developed as part of the Bridge Street Corridor Study process. Documents such as the Vision Report (adopted by City Council in 2010) and Planning Foundations document have assisted in the implementation of unique design principles and development objectives in the District.



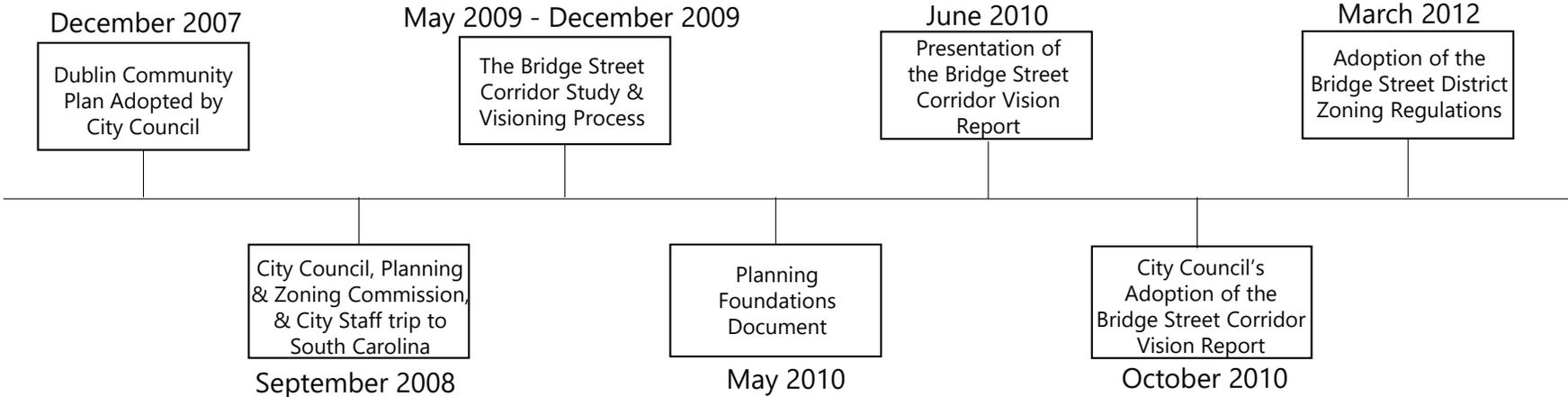
Source: MKSK

Source: Good Clancy: Bridge Street Corridor Plan; City of Dublin

# Bridge Street Corridor – Dublin, Ohio

## Timeline of the Bridge Street District Corridor Development

- Much of the preliminary analysis for the Bridge Street District Plan was informed by the 2007 Dublin Community Plan, which also identified Historic Dublin as a “special planning area”.
- In 2008, City Council, the Planning & Zoning Commission, and City staff visited Greenville, South Carolina to study design principles and objectives that would be applicable to Dublin.
- The 2009 Bridge Street Corridor Study comprehensively explored Historic Dublin and informed the Planning Foundations and Vision Report documents, through the analysis of emerging market and economic opportunities, avenues for growth and preservation, and opportunities for a more sustainable pattern of future development.
- The 2010 Planning Foundations document summarizes the findings of the Study and outlines emerging trends and community goals. It also identifies unique opportunities emerging from the planning process.
- The 2010 Vision Report considers the optimal role for the corridor, with respect to the background information revealed through the Planning Foundations document and sets a precedent for development approaches and objectives for the future.
- In 2012, the City adopted the Bridge Street District Zoning Regulations that comprehensively implemented illustrative elements and the “Vision Principles” of the Vision Plan. The “hybrid” regulations allow for a combination of conventional zoning regulations.
- Each of these steps in Dublin’s planning process contributed to the development of the Bridge Street District Plan, and the vibrant, walkable, mixed-use District that continues to experience redevelopment and growth.



Source: City of Dublin Community Plan: Overview and Purpose; The Planning Process; Implementing the Vision



# Bridge Street Corridor – Dublin, Ohio

## Bridge Street District Plan

Figure: Bridge Street Corridor Vision Plan



Source: Bridge Street Corridor Study Vision Report

### Development Objectives:

- Take advantage of the area's existing assets and amenities (Historic Dublin, Scioto River, access to regional road systems).
- Put forth a more sustainable pattern for future development.
- Capitalize on emerging market opportunities.
- Plan for emerging housing and commercial development markets, to ensure the vision is economically viable.
- Plan for shifting demographics and future demand for high-value, mixed-use development set in walkable environments.
- Establish a vision for the transformation of underutilized land in the city's core.
- Enhance Dublin's overall economic strength and quality of life.

Source: Bridge Street District - Dublin Community Plan: Overview and Purpose

# Bridge Street Corridor – Dublin, Ohio

## District Development

### Character Districts

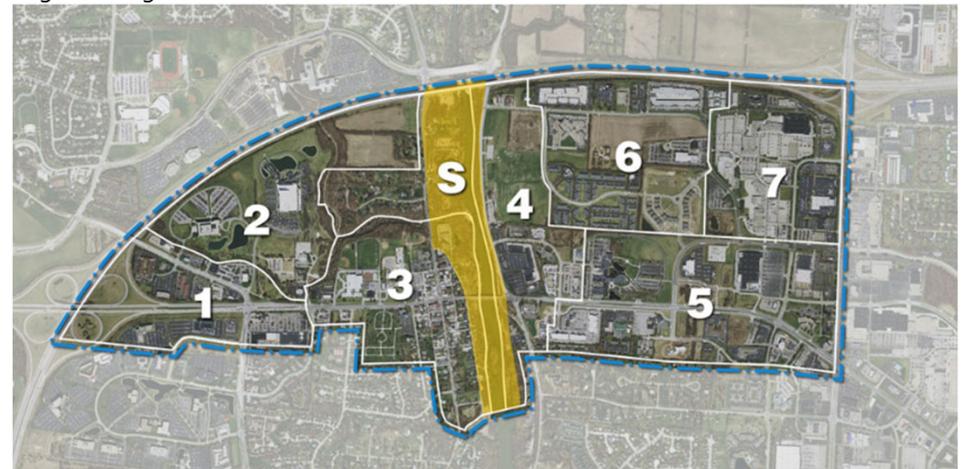
The Bridge Street Corridor Vision outlines seven unique districts across the study area. Looking at the study area as a series of districts is important for several reasons:

- The different areas have unique existing conditions - access, topography, development history, land ownership, adjacent land uses, and other factors that significantly affect potential development opportunities, challenges and character.
- Each district will reflect applications of the vision principles through their development potential.
- Most development opportunities in the study area are geared toward walkable, mixed-use settings that depend on relatively concentrated development activity in specific places.
- Concentrations of development require unique characteristics that deepen their appeal to different niche markets.
- Districts can help direct development phasing in ways that maximize the benefit of development at every stage.
- New walkable mixed-use development will benefit from being concentrated in certain areas to establish “critical masses” of place, activities, and infrastructure.

Source: Bridge Street Corridor Study: Vision Report

1. Bridge Street Gateway District
2. Indian Run District
3. Historic Dublin District
4. Riverside District
5. Dublin-Granville Road District
6. Tuller/Greenway District
7. Sawmill District
- S. Scioto River Overlay

Figure: Bridge Street District: Character Districts



Source: City of Dublin Community Plan: Overview and Purpose

# Bridge Street Corridor – Dublin, Ohio

## Recent Development Projects

### Bridge Park

- Newest and only walkable, mixed-use community in downtown Dublin.
- 30 acres located along the Scioto River.
- Cornerstone of the city's long-term vision for the Bridge Street District.
- Features luxury condos and apartments, a grocery, restaurants, shops, Class A office space, entertainment venues, a hotel and conference center and multiple green spaces.

### New Library (Dublin Branch of the Columbus Metropolitan Library) & Public Garage

- Library: 41,000 square feet of usable space, a larger homework help center and gathering spaces for the community.
- Public Garage: Four-levels, 549-spaces, adjacent to the new Dublin Branch Library with 200 parking spots reserved for library use and the rest available for public parking for Downtown Dublin.

### Pedestrian Bridge – The Dublin Link

- Pedestrian and bicycle accessible.
- Spans the Scioto River in the heart of Dublin connecting the future Riverside Crossing Park on the east side of the river as well as nearby commercial, residential and retail to Downtown Dublin on the west side.

### Riverside Crossing Park

- Located on the east and west sides of the Scioto River, connected by the Pedestrian Bridge.
- Offers public plazas providing access to restaurants, shops, and a new library.

Source: Dublin Chamber of Commerce: Downtown Dublin & the Bridge Street District; City of Dublin: Development Projects

Figure: Bridge Park



Source: City of Dublin: Development Projects

Figure: Dublin Branch of the Columbus Metropolitan Library



Source: City of Dublin: Development Projects

Figure: The Dublin Link



Source: City of Dublin: Development Projects

Figure: Riverside Crossing Park



Source: City of Dublin: Development Projects

# SouthPark – Charlotte, North Carolina

## Development Overview

SouthPark is a suburban activity center located six miles south of Downtown Charlotte, North Carolina. The area is comprised of retail, residential, and commercial nodes, and was originally dairy farmlands. SouthPark Mall was originally constructed on the site in the 1970s and became the economic anchor of the surrounding area. The expansion of the mall continued through the late 20th century as it changed and reinvented itself to follow the changing economic market. The mall's success also prompted the development of multi and single-family residential neighborhoods, as well as office developments within the surrounding area.

While SouthPark was historically a location for office and retail, it has more recently evolved from a suburban activity center to an urban activity center. With more than \$800 million invested into the center, it has become the most concentrated area of new development. As of 2016, more than 2,000 residential units were either recently delivered, under construction, or proposed. Records indicate that 1.3 million square feet of new office space had been entitled since 2000, and an additional 375,000 square feet was promised. Further, 550,000 square feet of new retail was under consideration through the rezoning process.

Source: Urban Land Institute, SouthPark, Charlotte , North Carolina



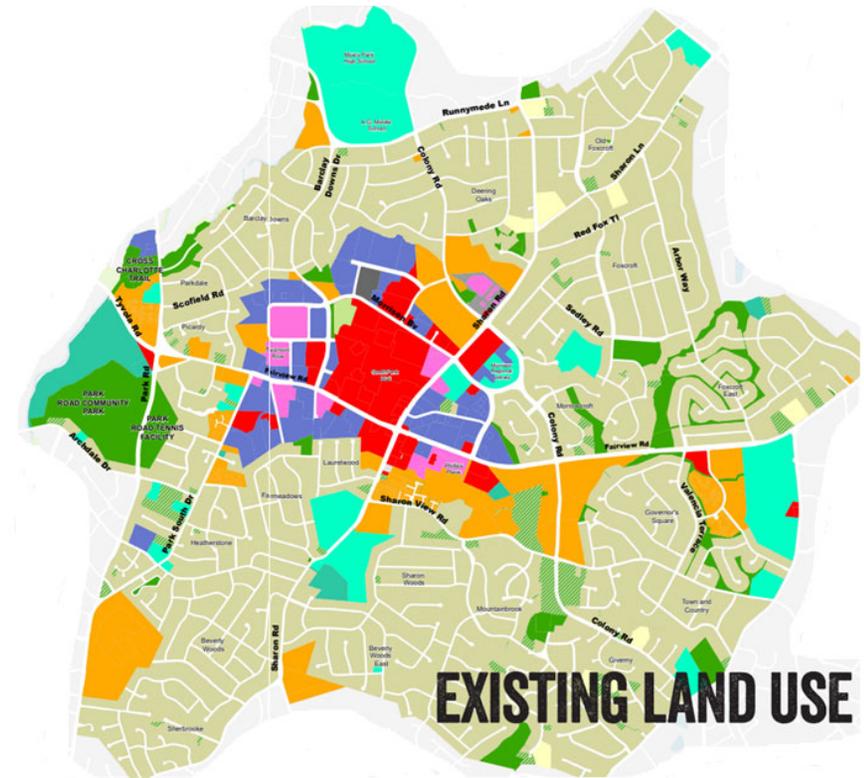
Source: Google Earth

# SouthPark – Charlotte, North Carolina

## Land Use

- SouthPark is generally organized as a regional activity center with several neighborhoods surrounding it.
- Existing land uses and their intensities in the activity center represent an area that is changing from a more suburban to a more urban place.
- Buildings are getting taller, development is becoming more compact, and surface parking lots are being replaced with parking decks.

Source: SouthPark CNIP Summary Report, 2018



Source: SouthPark CNIP Summary Report, 2018

# SouthPark – Charlotte, North Carolina

## SouthPark Comprehensive Neighborhood Investment Program (CNIP)

The SouthPark CNIP is intended to support the identification and implementation of public investments, that will help to sustain the high levels of private investment already underway.

The 2018 SouthPark CNIP identified “Six City-Wide CNIP Goals”:

- A well-connected network of streets, sidewalks, greenways, and bike lanes that link to and enhance existing community assets.
- Easy accessibility to transit and the larger regional network of streets.
- Better connections between neighborhoods and major employment, institutional, and retail areas.
- Successful public/private partnerships that leverage investments and catalyze changes occurring in neighborhoods.
- Greater coordination with public safety, code enforcement, social services, and education.
- Enhanced engagement with residents in determining which investments meet their collective aspirations.

Source: City of Charlotte: SouthPark CNIP; SouthPark CNIP 2021: Reconfirming Community Priorities

### CNIP Projects

- Barclay Downs Dr. Sidewalk - \$2.5 million
- Backlot Trail Phase 1, Real Estate Acquisition - \$2.575 million
- Enhanced Crosswalks - \$1.6 million
- The Loop Framework - \$400,000
- Briar Creek Wayfinding - \$250,000
- Public-Private Partnerships - \$1.5 million

Source: SouthPark CNIP 2021: Reconfirming Community Priorities

# SouthPark – Charlotte, North Carolina

## The Loop Framework

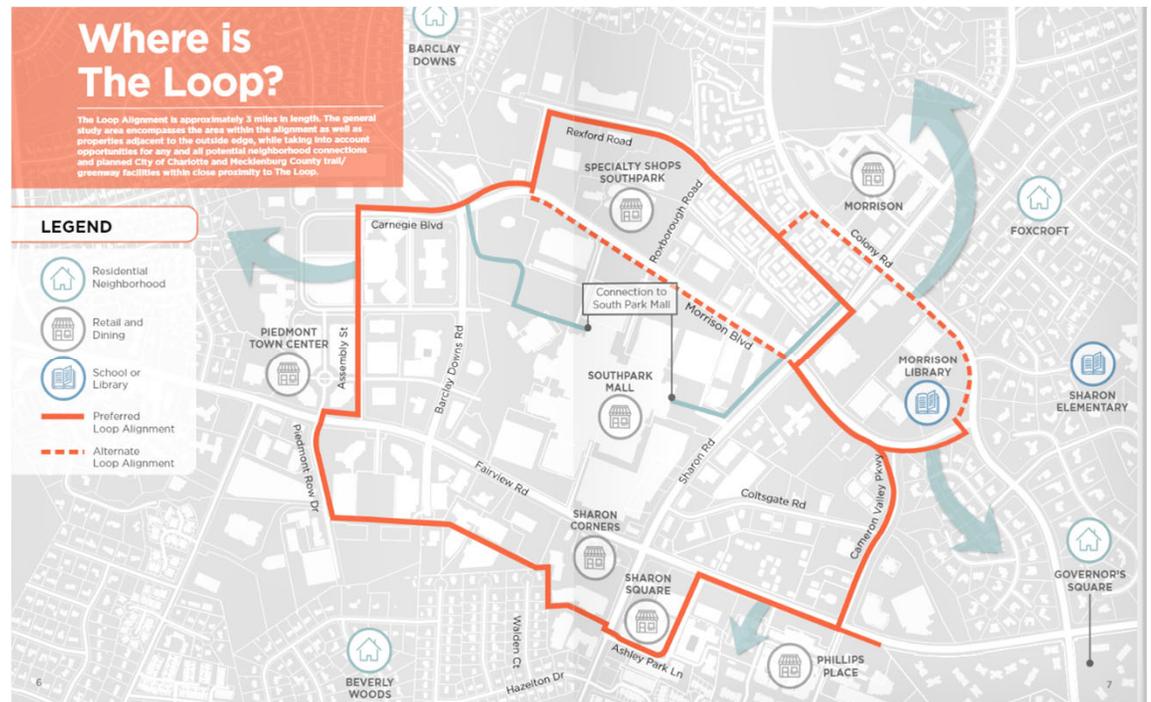
*“The Loop can be a catalyst to bring SouthPark the kind of energy and vitality seen in other great places.”*

The Loop is a 3-mile route around the SouthPark activity center that caters to bicycle and pedestrian traffic. It connects shops, restaurants, hotels, and parks and enhances connectivity between destinations and public spaces. The intent is to not only provide a healthy alternative to vehicular travel throughout the district, but to magnify the impacts of private investments in or near the public realm, and to create greater attraction.

Both existing and proposed streets will connect a system of destinations that users can bike and walk to within the activity center. Unused portions of private and public land adjacent to The Loop will provide an opportunity to create linear parks through the placement of seating areas, and the creation of public plazas.

The Loop is expected to produce economic benefits through an increase in residential property values.

Source: theloopclt.org



Source: theloopclt.org

# SouthPark – Charlotte, North Carolina

## Recent Development Projects

Each listed development is located near or within the boundaries of the proposed Loop, enhancing connectivity and walkability of key destinations.

### Apex SouthPark

- Mixed-use development encompassing 345 luxury apartments, a 175 room Hyatt Centric Hotel, 68,000 SF worship center for SouthPark Church, and 90,000 SF of ground floor retail.

### Phillips Place

- 164,000 SF mixed-use center including 26 small shops and restaurants, 402 apartment units, and a 124-room hotel.

### Piedmont Town Center

- Mixed-use project including 110,726 SF retail, 416,000 SF office, and residential (179 condo units).

### The Colony - Ongoing

- Redevelopment of an existing 350-unit apartment complex into a mixed-use community that will include 990 multifamily units, a 200-room hotel, a 70,000 SF grocery store, 200,000 SF of ancillary retail, and 200,000 of office.

Source: apexsouthpark.com; Schlosser Development: The Colony; Lincoln Harris: Phillips Place, Lincoln Harris: Piedmont Place

Figure: Apex SouthPark



Source: apexsouthpark.com

Figure: Phillips Place



Source: Lincoln Harris: Phillips Place

Figure: Piedmont Town Center



Source: Lincoln Harris: Piedmont Town Center

Figure: The Colony



Source: Axios Charlotte

## Key Takeaways & Considerations

- Generate street grids to enable greater walkability and pedestrianization.
- Develop districts or subareas that are characterized by a unique set of functions.
- Generate linking pathways for pedestrian and/or bicycle traffic to connect destination locations.
- Create flexible land use guidelines and zoning regulations that allow for mixed use developments and the tailoring of development priorities.
- Create a “core” of critical mass from which development can diverge from. City Springs has already made progress of creating this core of development.
- Plan for transitional uses closer to single family residential neighborhoods to ensure appropriate scale and built form. Sandy Springs already has specific requirements related to this in the city's development code.
- Add in parks, plazas, and greenways to achieve a more activated, vibrant, and connected community. City Springs already has several parks and plazas and can build upon what is already there.
- Various policies and incentives are required to be implemented by the jurisdiction to enable and trigger redevelopment.

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APPENDIX

**F.**

# Programs & Incentives Supplement

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# City Springs Master Plan Update Programs and Incentives

Appendix to City Springs  
Master Plan Update

December 2022



MARKET- DRIVEN  
DEVELOPMENT STRATEGIES™

# Introduction

MXD's Market Analysis, located in the Appendix of the Master Plan Update, identified significant opportunities for infill and redevelopment in the study area. This includes multifamily residential, single family attached residential, retail, office, and hotel. Due to a variety of factors including increased construction costs, policy guidelines, and developer resistance to certain projects, many cities in Metro Atlanta are required to provide incentives to enable and initiate innovative private development.

The Recommended Programs and Incentives are suggested based on best practice research, Existing Incentives provided by the city, and the context of the Master Plan Update. Supporting certain programs and incentives will allow the city to implement certain aspects of the Master Plan Update, maintain and establish vitality of the district, and create renewal in various areas to form a cohesive and connected livable center through a mix of desired uses.

Existing Incentives currently adopted by the City are first examined. Five Recommended Programs and Incentives are then presented. The identified potential programs and incentives are based on existing statutory provisions and parameters available in Sandy Springs that may change over the course of the next decade. The city should continue to revisit potential programs and incentives available on an ongoing basis.

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# Existing Incentives

# Existing Incentives

## **Sandy Springs Economic Development Incentive Policy For Businesses And Employment Growth**

*The City of Sandy Springs, at its sole discretion, may provide certain economic development assistance or incentives to attract, retain, or expand businesses located or to be located within the corporate limits of the City that are consistent with the following requirements and criteria:*

1. Achieve City goals, as may be established and revised by the City of Sandy Springs from time to time;
2. Result in the location, expansion or retention of a business within the City;
3. Demonstrate the financial and management capability to implement and sustain the business;
4. Create a minimum number of full-time positions working at a business located within the City, as described under section "Available Incentives". For large employers, these full-time positions must meet or exceed the average wage level within the City of Sandy Springs; and
5. Provide new capital investment for a business relocating or expanding in the City, as described under section "Available Incentives". Note: Capital investment must be in new construction, an addition to an existing facility or capital improvements. For purposes of this policy, "capital improvements" means property improvements that either will enhance the property value or will increase the useful life of the property.
6. Agree to designate "Sandy Springs" as the city listed in the business's mailing address.

Source: Sandy Springs Economic Development Incentive Policy Fact Sheet

## **City Goals**

The following economic goals and strategies are considered City goals as a part of this policy:

1. Attract and retain a variety of employment opportunities for Sandy Springs residents.
2. Encourage and support a high level of diverse, quality retail business and services, with an emphasis on local businesses that contribute to the City's sales and property tax base so that needed infrastructure, physical amenities, services and expansion of such services are provided.
3. Create a vibrant, unique downtown as a "destination" for Sandy Springs.
4. Encourage and support tourism, entertainment, arts and culture as an important contributor to the City's overall economic health.
5. Sustain the long-term economic well-being of the City and its citizens through redevelopment and revitalization efforts.

Source: Sandy Springs Economic Development Incentive Policy Fact Sheet

# Existing Incentives

## Available Incentives

- 1. Expedited Permitting Process:** The City may expedite the permitting process required for business location or expansion. The City's Community Development Department is experienced with fast-tracking permit approvals to insure conservation of time and expense for a prospective business.
- 2. Waiver of Permit/Impact Fees:** The City may waive all building permit fees associated with the business relocation/expansion including all fees associated with new construction, plan review and tenant finishes. Additionally, businesses relocating to the City that meet the criteria defined in this policy may be exempt from impact fees assessed pursuant to Chapter 107 of the Sandy Springs Code of Ordinances (Impact Fee Ordinance).
- 3. Waiver of Business and Occupation Taxes:** The City may waive applicable business license taxes assessed pursuant to Chapter 54, Article V of the Sandy Springs Code of Ordinances (Business and Occupation Taxes) up to the sum of seventy-five thousand dollars (\$75,000) on an annual basis. This waiver may be for a period of up to three (3) years depending upon the total capital investment, length of location commitment, and jobs created (see tables below.)

Large Employer Incentives				
		Tier I	Tier II	Tier III
Minimum Criteria	Number of New Jobs Created <sup>1</sup>	15	50	100+
	Amount of Capital Investment	\$1 million	\$1 to \$5 million	\$5 million
	Number of Years Commitment	4	7	10
	Location	Citywide	Citywide	Citywide
Incentives Available	Business Tax Waiver	1 year	2 years	3 years
	Expedited Permitting	Yes	Yes	Yes
	Building & Impact Fee Waiver	Yes	Yes	Yes
Retail and Hospitality Incentives				
		Tier I	Tier II	Tier III
Minimum Criteria	Number of New Jobs Created	5	10	15+
	Amount of Capital Investment	\$250,000	\$500,000	\$750,000
	Number of Years Commitment	4	7	10
	Location	Redevelopment Zone	Redevelopment Zone	Redevelopment Zone
Incentives Available	Business Tax Waiver	1 year	2 years	3 years
	Expedited Permitting	Yes	Yes	Yes
	Building & Impact Fee Waiver	Yes	Yes	Yes

Source: Sandy Springs Economic Development Incentive Policy Fact Sheet

Source: Sandy Springs Economic Development Incentive Policy Fact Sheet

# Existing Incentives

## Economic Development Incentive Policy for Affordable Housing

*The Affordable Housing Incentive Policy has been adopted to provide incentives to encourage a mix of uses and range of housing options in areas appropriate for redevelopment and to expand the City's affordability to middle- income residents, provide support for seniors and other special-needs populations.*

There is specific eligibility requirements and criteria that private developers must meet to be given consideration for incentives:

- Any housing project that proposes to create at least 150 new or replacement housing units and at least 20% of the units will be made available to individuals or families with annual incomes of no more than 120% of the annual median income of all households in Sandy Springs; or
- Any housing project of at least 150 housing units that proposes to replace at least 150 existing rental housing units with no less than 75% of the units intended for home ownership.

City Council may also determine that a specific project will bring benefit to the City that is consistent with its objectives and goals and provide consideration for incentives.

The available incentive for affordable housing is to waive all permit fees associated with construction and plan review of the project. Projects that meet the criteria may also qualify to be exempt from impact fees.

Source: Economic Development Incentive Policy for Affordable Housing

## City Goals

The following housing goals and strategies are considered City goals as a part of this policy:

1. Preserve existing single family neighborhoods by locating new housing in select redevelopment areas;
2. Increase the supply of housing and the range of housing choices;
3. Promote workforce and mixed-income housing;
4. Provide housing options to complement local employment growth and improve the City's jobs-housing balance;
5. Provide housing for seniors and other special-needs populations; and
6. Focus new housing supply in mixed-use areas.

Source: Economic Development Incentive Policy for Affordable Housing

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# Recommended Programs and Incentives

# Recommended Programs and Incentives

There are five programs and incentives that are applicable to the City Springs District that would accelerate and further enable redevelopment of underutilized sites. The five programs and incentives were confirmed through best practice research and discussions with City staff.



These recommendations provide a toolkit for the city to assist in the implementation of the City Springs Master Plan Update; however, further investigation is required by City staff to determine which programs and incentives would be optimal for specific transportation, infrastructure, and development programs. Approval from Mayor and Council is also required prior to moving forward.

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# Continue Development Authority Involvement

# Municipal Development Authorities

## **Development Authority Creation**

Under Georgia Statute, local government authorities can be created in three ways: by general enabling act, local laws, and Constitutional Amendments. There are 11 types of authorities that can be created through a general enabling act including a Development Authority and Downtown Development Authority.

## **Sandy Springs Development Authority**

- The Development Authority is an independent body that operates under the direction of a seven-member board and meets on an as-needed basis. Members serve four-year terms, and each member is appointed by the Mayor and confirmed by City Council.
- The Development Authority provides catalytic funding for desirable economic development projects in Sandy Springs by providing access to capital and other financial incentives.

## **Development Authority Incentives & Programs**

The Authority provides taxable and tax-exempt bond financing opportunities pursuant to the Georgia Development Authorities Law to stimulate diverse, high-quality economic development. Bonds can facilitate financing for a company or institution that allows it to buy land, build new facilities, expand existing facilities, upgrade equipment, or otherwise make investments that enhance value and create jobs within Sandy Springs.

## **Applicability for City Springs District**

The mission statement of the Sandy Springs Development Authority expresses the intent to support projects that align with City goals and can be used to assist and encourage specific items from the City Springs Master Plan Update. The Development Authority should explore options to enable opportunities to provide new homeownership pathways in the City Springs District, when those projects meet base criteria for consideration.

The Development Authority should also consider partnerships with the private development community on an as-needed basis if the projects have a public component and will bring desirable outcomes for the district from a taxation or economic development perspective.

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# Development Approval Process

# Fast Track Entitlements

## Development Approval Process Streamlining

The entitlement process refers to “the legal method of obtaining the necessary approval(s) for the right to develop property for a specific use”.

Many factors are considered before granting approval, including proposed use, previous use, conformity with current zoning ordinances, or requests for amendments to zoning ordinances to allow the proposed use. Private developers are often deterred by complicated, poorly defined, and time-consuming approval processes, as well as additional barriers to approval by governments and the public.

The additional costs and time associated with the development approval process, as well as uncertainty and the possibility of delays, is a major deterrent for some developers who lose potential sales revenue for every month that developments are not under construction. With the potential for impacts to eventual product cost and project feasibility, streamlining the process is an attractive option.

### Applicability for City Springs District

Streamlining the process could include adjustments or reductions to submission and review requirements, the timeline for development proposals, and the timeline for review and commenting by governing bodies. A shorter approval period would cut pre-construction costs as ready-to-redevelop land would sit for shorter periods of time, allowing developers to construct, market, and sell property in a timely fashion.

Streamlining would also allow for the elimination of project-by-project approval processes, giving projects that meet the standards the chance to proceed to design and permit processes.

Sources: Regional Transportation Authority. (2012). Streamlining the Entitlement Process for Transit-Oriented Development: Best Practices Summary; Urban Land Institute. (2019). Creating Effective Public/Private Partnerships.

Figure: Example Developer Checklist For Streamlined Approval

	Administrative Review	Historic Preservation Commission	Plan Commission	Zoning Board of Appeals	City Council	Estimated Approval Time
New Development/Redevelopment	Review and Recommendation		Review and Recommendation		Final Approval	2 months
Major Reconstruction/Addition	Review and Recommendation		Final Approval			1 month
Change of Use	Final Approval					1 month
Change of Owner	Final Approval					1 month
Site Improvement (Landscape, Parking)	Final Approval					1 month
Outdoor Dining	Final Approval					2 weeks
Signs	Final Approval					2 weeks
Large Signs & Murals on Existing Buildings	Review and Recommendation		Final Approval			
Internally Illuminated Signs	Review and Recommendation		Final Approval			
Awnings & Canopies	Final Approval					2 weeks
Lighting	Final Approval					2 weeks
Facade Improvements	Final Approval					1 month
Collective & Shared Parking	Final Approval					1 month
Parking Waiver	Review and Recommendation		Review and Recommendation		Final Approval	6 weeks
Variation	Review and Recommendation		Public Hearing		Final Approval	2 months
Special Use	Review and Recommendation			Public Hearing	Final Approval	2 months
Zoning Change/Amendment	Review and Recommendation		Public Hearing		Final Approval	2 months
Subdivision Plats	Review and Recommendation		Public Hearing		Final Approval	2 months
Local Landmark Buildings	Review and Recommendation	Final Approval				1 month

■ Review and Recommendation   
 ■ Public Hearing   
 ■ Final Approval

## Example of a Streamlined Development Process

### Blue Island, Illinois

Adopted a new zoning district for their TOD area on June 12, 2012.

- Entitled the Uptown Transit-Oriented District,
- Includes a streamlined approval process for TOD projects.
- Includes a checklist to be used by developers to determine the approval process for their proposed project.

Source: Regional Transportation Authority. (2012). Streamlining the Entitlement Process for Transit-Oriented Development: Best Practices Summary

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# Public Private Partnerships

# Public Private Partnerships

## Public Private Partnerships (PPPs)

Public/private partnerships are a form of alliance between government entities and private developers to achieve a common goal. These partnerships may also include other actors such as non-profit associations, non-governmental institutions, and intermediary groups. Citizens and neighborhood groups are also important stakeholders within the process.

Development PPPs have the power to transform blighted or underused sites within a community and are often proactively formed to achieve key public objectives such as downtown revitalization, transit-oriented development, or affordable housing.

Development PPPs can be formed by municipalities that have public land for inclusion within a project, or municipalities that wish to repurpose surplus public facilities for private use. These agreements may also be initiated when a developer is unable to undertake a project without assistance from a host municipality. Developers may require assistance from municipalities with navigating site assembly, overly restrictive zoning, remediation, public facilities etc.

## Example of Public Private Partnership

*Brickell City Centre*

*Miami, Florida*

- A 6.5 million-square-foot mixed use project by Swire Properties.
- Government participation included the adoption of a Special Area Plan, which allowed for certain deviations from the code because of the size, scale, and complexity of the project.
- The County Transit Agency, the Florida Department of Transportation, and the City of Miami conveyed easements and small parcels to the developer at market rates, which helped facilitate the development.

Source: Kasdin, N. (2016). Successful Public/Private Partnerships: From Principles to Practices, Urban Land Institute.

Source: Urban Land Institute. (2016). Successful Public/Private Partnerships: From Principles to Practices

# Public Private Partnerships

## Applicability for City Springs District

Participating in Public Private Partnerships is advantageous for the City to ensure that certain public benefits are received, or complex redevelopments are built to city-specific standards. The City should be selective and specific when entering into PPPs with private developers and other entities.

There are four specific PPPs that would be proactive to investigate on a case-by-case basis:

1. Partnerships to develop a public/private parking structure.
2. Partnerships for redevelopment of City-owned land.
3. Partnerships for parks, walking trails, and green space on privately-owned land.
4. Partnerships for roadways and infrastructure.

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# Facade Improvement and Urban Placemaking Programs

# Facade Improvement and Urban Placemaking Programs

## Facade Improvement Programs

Facade Improvement Programs provide funding to commercial and mixed-use property owners and tenants of property to renovate, restore, or redesign the facades on their buildings. This program improves the appearance of commercial and mixed-use buildings by modernizing and enhancing the facades which in turn improves the overall streetscape. When successfully implemented in downtown settings, Facade Improvement Programs provide more pleasing environments, a more enjoyable walking experience for visitors, increase lease rates, and generate more tax revenue.

While one-time lump-sum grants are the most common form of the program, low interest loans, tax credits, and design assistance can also be integrated to incentivize owners and tenants to improve the look of their building's exteriors.

### Facade Improvement Program – Madison, GA

#### Facade Grant Program

Within the Downtown Development Area, the Downtown Development Authority of Madison (DDA) supports a grant program to stimulate investment in the preservation and revitalization of downtown buildings. These grants provide matching reimbursement funds for approved improvement projects (repairs and in-progress projects are not eligible).

Source: Madison, Georgia

### Facade Improvement Program – Toccoa, GA

#### Facade Grant Funding

The City of Toccoa's Facade Grant Program is a competitive program originated by the Downtown Development Authority (DDA) designed to encourage new or existing property owners to improve the appearance of buildings in the Main Street District. Details of the program include:

- Eligible facades are easily visible and in public right-of-ways.
- Improvements must preserve the individual character of each building with its unique features.
- All improvements must meet the Historic Preservation Commission's design guidelines if located within the Historic District and have an approved Certificate of Appropriateness (COA) before being eligible for funding.
- The maximum granted per facade is up to \$5,000 on a 50/50 matching basis.
- The maximum granted per project is limited to \$20,000 on a 50/50 matching basis for four facades.
- Only one renovation project will be eligible per property in a 3-year time period.
- Facade grant funds may be used for exterior improvements only.

Source: Mains Street Toccoa, GA

# Facade Improvement and Urban Placemaking Programs

## Invest Atlanta Commercial Property Improvement Grant

*Small Business owners are eligible to apply for grants of up to \$50,000 that can be used for both internal and external improvements to their commercial property. Small businesses across the city are eligible with priority to minority-owned small businesses in disinvested areas, as identified in the One Atlanta Economic Mobility Plan.*

Eligibility requirements:

1. For-profit and nonprofit small businesses operating in commercial properties with a total building size smaller than 15,000 square feet located in the City of Atlanta are eligible to apply.
2. Small businesses who lease their commercial space should have a minimum of 1-year left on their lease and will need approval from the property owner.
3. Applicants must provide a current City of Atlanta business license.
4. Owners of vacant commercial properties that meet the size requirements may be eligible to apply.
5. Small businesses in multi-tenant commercial buildings smaller than 15,000 square feet are eligible.
6. Awardees must provide a match equal to at least 10% of the grant award.
7. Priority will be given to small businesses located in disinvested areas of the city.

Source: Invest Atlanta: Atlanta Commercial Property Improvement Grant.

## Ineligible Applicants include:

1. Properties constructed in the last 10 years are not eligible.
2. Properties with national credit tenants (i.e., national chain businesses) are not eligible.
3. Properties occupied by religious institutions and public agencies are not eligible.
4. Properties not zoned for commercial use are not eligible.
5. Properties operating as package stores or for purposes of adult entertainment, including gambling, are not eligible.

Source: Invest Atlanta: Atlanta Commercial Property Improvement Grant.

# Facade Improvement and Urban Placemaking Programs

## Eligible Uses for the Invest Atlanta Commercial Property Improvement Grant

- Painting
- Lighting
- Windows, doors, framing, etc.
- Signage, canopies, awnings, etc.
- Gates, fencing, landscaping, etc.
- Building surface repairs: concrete, siding, limestone, etc.
- Surface upgrades on the ground: tiling, asphalt resurfacing, etc.
- Eligible interior improvements include:
  - Flooring, walls and ceiling upgrades
  - HVAC, water heater, plumbing, electrical, and other systems repairs
  - Structural repairs to walls, floors, stairs, and interior doors
- Certain soft costs, such as architectural and planning services are eligible but shall not exceed 10% of grant amount.

\*Operations, inventory, and other soft costs are not eligible expenses.

Source: Invest Atlanta: Atlanta Commercial Property Improvement Grant.

# Facade Improvement and Urban Placemaking Programs

## Urban Placemaking Programs

Public spaces are where residents, shoppers, and employees of City Springs interact daily, and the need to meet the growing demand of the population of the area. Placemaking is the creation of places and building communities that have a unique identity. It can include urban design, active programming, landscaping, and art, amongst other items.

Urban Placemaking Programs are in place to promote and incentivize enhancements to spaces. Private developers may not include placemaking in their plans as there may be significant upfront costs to construction as well as ongoing upkeep costs upon delivery of the development. These programs are not implemented as often as Façade Improvement Programs since they can be more difficult to define and negotiate.

A successful Urban Placemaking Program requires planning tools approved by council to assist in achieving the objectives of social vibrancy, beautification, connectivity, and the creation of memorable places.

## Promoting Privately Owned Public Spaces – Singapore

The Singapore Urban Redevelopment Authority (URA) introduced unified design standards and incentives for privately owned public spaces in 2017. If a developer includes public space into their redevelopment project, they can qualify for a density bonus or gross floor area exemption.

The Singapore URA also requires minimum amounts of public space to be integrated into a project based on the development's total gross floor area. Design requirements may include free 24-hour access, public seating, landscaping, bike racks, pathways, greenspace and shading.

Source: Singapore URA

## Station North Arts & Entertainment District – Baltimore, MD

### Tax Breaks and Incentives to Increase Arts & Culture

The City of Baltimore worked with State officials to designate the Station North area as a Maryland State Arts & Entertainment District. There are more than 20 A&E districts in Maryland. This designation allows for certain tax breaks and incentives that make it attractive for arts and culture to accelerate in an area. These include:

- Income tax break for qualifying artists that live in the City of Baltimore and produce and sell their works in the Station North district.
- Property tax incentives for renovating spaces in the Station North district that will be used for artistic purposes. This must be approved by the city with stipulations.
- Tax emptions for certified arts and entertainment activities occurring in the district.

Tax credits can be up to ten years depending on the qualifications.

Source: Urban Institute, 2015

# Facade Improvement and Urban Placemaking Programs

## Applicability for City Springs District

There is limited placemaking in the City Springs District aside from the existing City Springs Campus. The city will continue to face challenges of attracting development that will create new exciting and memorable places that establish a visual identity for City Springs.

It will be beneficial for Sandy Springs to work with current landowners and the development community to set expectations of the type of placemaking required in the district. It should be a primary goal of the Master Plan Update to create and enhance a unique sense of place through a balance of natural, built, and art forms. Promoting safe, inclusive, and vibrant places that foster community well-being will also be advantageous for the private development community when marketing their developments.

Grants, tax breaks, and incentives are all important tools that Sandy Springs can use to implement placemaking on privately owned land. This includes further investigation of:

- Minimum public space designations on any developments in the City Springs district.
- Density bonuses for significant public space or arts & culture additions to the design of the development.
- Activation of underused spaces on privately-owned land.
- Tax breaks for spaces designated as Arts & Culture.
- Grants for constructing outdoor patios, sidewalks, landscaping, and tree canopies on private land.

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# Bonus Height Zoning

# Bonus Height Zoning/Graduated Height Density

## **Bonus Height Zoning/Graduated Height Density**

Height Bonuses, which are already written into the Sandy Springs Development Code and have been applied to new zoning districts (such as North End mixed-use), are granted when a developer provides certain public benefits. Graduated Height Density is a method used to encourage cooperation in land assembly. Allowances for taller development in some cities encourages developers to assemble adjacent properties to allow for taller buildings on larger sites, leading to higher land values per square foot. Developers are incentivized to pay more to combine properties, which encourages landowners to sell their land for redevelopment. This may encourage higher density on larger sites through voluntary land assembly.

## **Applicability for City Springs District**

To achieve its goals of creating public amenities throughout the District, the City may choose to consider the following criteria to identify target locations that would be eligible for Bonus Height and Graduated Height Density incentives:

- Prioritize Opportunity Sites as identified in the City Springs Master Plan through zoning overlays that regulate area-specific height bonuses that reflect desired height within the District.
- Prioritize areas within the District core that lack open space to promote this plan's intent for walkability and connectivity, making more efficient use of land by encouraging greater height and a balanced floor area ratio (FAR) to achieve additional open space opportunities.
- Prioritize areas that vary in topography to protect existing viewsheds throughout the District.

The City Springs District has many small and oddly configured parcels under 2 acres in size that would be difficult to redevelop on their own. Property owners and developers must be incentivized to purchase multiple properties and combine for larger-scale redevelopment. Graduated Height Density could allow developments to become more profitable through additional height if they consist of combined properties.

To encourage redevelopment in the City Springs District, developers could receive additional building height if they provide specific items that meet the goals and needs of the District. This includes:

- Opportunities for homeownership
- Residential affordability
- Public green spaces
- Public art

## **Example of Bonus Height Zoning**

*Journal Square neighborhood*

*Jersey City, New Jersey*

- Adopted similar zoning regulation/incentive.
- Has many small lots dating from its original settlement in the 17th century.
- Has zoning that allows six times higher housing on sites larger than 60,000 square feet (5,600 sq m) than on sites smaller than 6,000 square feet (557 sq m), to encourage assembly of fragmented land.

"A developer who assembles 12 lots measuring 5,000 square feet (465 sq m) each to produce a 60,000-square-foot site can therefore build six times more housing than if the lots were developed separately. This windfall gives property owners a strong incentive to join in land assembly for new housing."

Source: Urban Land Institute: How Zoning Can Ease Land Assembly

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APPENDIX

**G.**

# **Glossary of Terms**

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## Glossary of Terms

**Absorption** - The amount of square footage or number of units occupied, leased, or sold in a specific market over a defined amount of time.

**Average Daily Rate (ADR)** - A measure of the average rental revenue earned for an occupied room per day. ADR is calculated by dividing total room revenue by the number of rooms sold. A higher ADR may display success in maximizing room rates in a specific market.

**Capitalization Rate / Cap Rate** - The rate of financial return expected on a real estate property based on the income that the property is expected to generate. Cap rates are used to measure and compare financial returns for multiple real estate assets. A cap rate is calculated by dividing the properties Net Operating Income (NOI) from its total property asset value.

**Fenestration** - The arrangement of windows and doors on the elevations of a building.

**Green Streets** - Green Streets are landscaped streetside planters or swales that capture stormwater runoff and allow it to soak into the ground as soil and vegetation filter pollutants.

**Gross Lease Rate** - A commercial real estate lease whereby the tenants pay the property owner a set amount and the property owner are responsible for paying all additional costs and expenses associated with the property.

**Last Mile Options** - Describes the beginning or end of an individual trip made primarily by public transportation. In many cases, people will walk to transit if pedestrian infrastructure is present.

**Mobility as a Service/Mobility on Demand** - Integration of various forms of transport services into a single mobility service accessible on demand

**Multi-unit Housing** - A lot containing two or more attached or detached dwelling units. Multi-unit includes apartments, condominiums and "stacked flats".

**Net Deliveries** - The amount of new construction square footage or number of units in a specific market over a defined amount of time.

**Net Lease Rate** - A commercial real estate lease whereby the tenant pays the property owner base rent, with all expenses in addition to the base rent required to be covered by the tenant.

**Non-Capital Intensive Parking Access** -

**Occupancy Rate** - Percentage of all available square footage or units that are leased or occupied in a specific market.

**Single-unit Attached Housing** - Two or more dwelling units in a row in which each unit is located on an individual lot and has its own front and rear access to the outside, no unit is located over another unit, and each unit is separated from any other unit by one or more vertical common walls.

**Single-unit Detached Housing** - One dwelling unit on a single lot.

**Smart parking technology** - Smart Parking is a parking strategy that combines technology and human innovation in an effort to use as few resources as possible—such as fuel, time and space—to achieve faster, easier and denser parking of vehicles for the majority of time they remain idle.

**Speculative construction** - Describes a process in which unused land is purchased or a building project is undertaken with no formal commitment from any end users.

**Submarket** - A defined area in a larger specific market. A submarket in a metropolitan area could be considered a neighborhood, city, or cluster of cities.

**Revenue Control** - Real time computerized parking systems for transient and credentialed customers available in varying levels of functionality and complexity which allow parking owners and operators to control access and collect parking revenues from users.

**Revenue Per Available Room (RevPAR)** - A measure of a hotels performance in filling available rooms at a specific average daily rate. RevPAR is calculated by either dividing total room revenue by number of rooms available or multiplying a hotels ADR by its occupancy rate.

**Vacancy Rate** - Percentage of all available square footage or units that are not leased or occupied in a specific market.



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