City of Bulverde

DOWNTOWN BULVERDE VILLAGE:
A VISION FOR THE FUTURE

February 10, 2015

Credits and Acknowledgements

Mayor and City Council

Bill Krawietz, Mayor

Rob Hurst, Mayor Pro Tem

Yvonne L. Chapman, Councilmember

Kirk Harrison, Councilmember

Gene Hartman, Councilmember

Ray Jeffrey, Councilmember

Citizens and Stakeholders of Bulverde and the Downtown Bulverde Village

BSB Activity (Senior) Center

BSB Chamber of Commerce

BSB Economic Development Foundation

BSB Emergency Services

BSB Library

Bulverde Airport

Bulverde Area Arts Center

Bulverde Village Merchants Association

City of Bulverde Planning and Zoning Commission

Comal County

Friends of the Park

Friends of the Village

Provisions (Bulverde Food Pantry)

City of Bulverde Staff

E. A. Hoppe, City Administrator

John Nowak, Director of Public Works

Ginger Hofstetter, Finance Director

Gary Haecker, Chief of Police

Danny Batts, City Secretary

Consultant Team

Mark Bowers, Kimley-Horn

Ignacio Mejia, Jacobs

Farzine Hakimi, Jacobs

Jeremy Wyndham, Jacobs

Bill Cunningham, Ricker Cunningham

Anne Ricker, Ricker Cunningham

Monica Heid, Prologue Planning Services

Table of Contents

Tables/Figures   **Page**

CHAPTER 1.

Introduction

CHAPTER 1. Introduction

The City of Bulverde, Texas is situated on Cibolo Creek in Comal County in the Texas Hill Country, about 20 miles west of New Braunfels and 20 miles north of San Antonio. The area was originally occupied by several different Native American tribes, followed by Spaniards, Tejanos and German immigrants, who settled in the area around 1850 to raise sheep, goats, cattle and crops including corn, oats, wheat, barley and cotton. Evidence of this German heritage still survives in the rock walls and structures of rough-hewn wood, stone and corrugated tin that are sprinkled throughout the community and in the nearby area. These structures are icons of the past and are still treasured today by the residents of Bulverde.

Bulverde remained a very small community (1960 population: approximately 100) until the 1970's, when some of the large tracts of ranch land began to be subdivided for the development of residential areas with large lot configurations. In the late 1990's and early 2000's, five small cities in the Bulverde area, which now form the current geography of Bulverde, completed the election processes necessary for their individual incorporation and the overall incorporation of all five into one larger municipality. Between 2000 and 2010, the population of Bulverde fluctuated but grew by approximately 20%, from around 3,750 to just over 5,000. The number of households in the City limits also increased during the same period by approximately 25%, from 1,350 to just over 1,800. Today, the community is approximately 9.6 square miles in area and is served by three major highways: US Highway 281, State Highway 46 and Farm/Market Road (FM) 1863.

Downtown Bulverde Village (DBV), as it is referred to in this study, is the historic heart of the city. It is located along Bulverde Road, west of Highway 281. The crossroads is at the intersections of Bulverde Road, Bulverde Lane and Cougar Bend, and several of the most significant structures in the city's history—the post office, the original general store, the cotton gin—were located in the Downtown Bulverde Village area.

BACKGROUND AND PURPOSE

The City of Bulverde has clearly stated its interest in planning for the future of Downtown Bulverde Village (DBV).   In *Sunrise 2025*, the City's comprehensive plan, there is a specific goal relative to DBV.

Community Development Goal 5: Develop an "old village center" with defined edges.

- **Objective 5.1:** Make the Village of Bulverde more identifiable.

    - **Action 5.1.1:** Use the City Hall as a focal point for community activities.

    - **Action 5.1.2:** Enact signage, design standards, and overlay zones called for in the Comprehensive Plan.

- **Objective 5.2:** Encourage people to visit the Village of Bulverde.

    - **Action 5.2.1:** Work with the Chamber of Commerce to develop strategies that make Bulverde attractive to visitors.

    There is a wide array of other relevant statements in the plan that express goals for the overall city, many of which also support this planning effort for Downtown Bulverde Village, including:

Land Use Development Goals:

- Ensure that we have plans and ordinances that support and guide development consistent with the goals and objectives in the Bulverde Comprehensive Plan.

- Manage the future growth of the City to preserve the character and uniqueness that is Bulverde, as well as the integrity, compatibility and value of existing and new neighborhoods.

- Encourage land development that enhances an aesthetically pleasing appearance for the city.

- Develop an annexation strategy that enables us to manage future growth and protects and enhances Bulverde's quality of life and that adds to the economic vitality of the city.

Community Development Goals:

- Preserve the natural/rural character of the city as much as possible.

- Encourage an aesthetically pleasing appearance for the city.

- Encourage tasteful development of all kinds including affordable housing, roads, signs, lights, buildings, parks and some higher density type development where appropriate.

- Use the relaxed atmosphere of the Hill Country to Bulverde's advantage.

- Preserve existing neighborhood integrity and create livable neighborhood environments.

Economic Development Goals:

- Promote appropriate economic development.

- Diversify and expand the tax and economic base through the promotion of desired businesses and activities.

- Promote Bulverde as an attractive center for retailing, services, health care, entertainment and education.

- Involve the business community and the local Chamber of Commerce in Bulverde's growth and development.

- Develop Bulverde's historical and natural assets to take advantage of heritage tourism in the Hill Country region.

- Plan for future infrastructure needs that will accommodate prospective businesses and activities.

Historical Heritage Preservation Goals

- Preserve and enhance Bulverde's heritage.

- Preserve and enhance historic and archaeological sites and other unique aspects of the community.

- Develop Bulverde's historical and natural assets for the citizen's enjoyment and for potential heritage tourism.

- Manage the future growth of Bulverde to preserve the heritage and character of the community.

Transportation Goals

- Promote a transportation network that is safe and efficient while at the same time discourages high speeds, four-lane roads and heavy traffic within the City.

- Support transportation alternatives to the automobile such as hike/bike networks and pedestrian circulation.

Infrastructure Goals

- Promote a reliable source of water for future development and areas of town that can be economically retrofitted with pipelines.

- To protect the environment, promote the provision of central sewerage in appropriate areas.

- Address stormwater drainage issues in both existing and future developments.

- Maintain and improve the condition of existing city streets and ensure that future roads are built to lasting standards while preserving aesthetic integrity.

- Encourage underground utilities.

- Coordinate future infrastructure improvements to ensure the most economical, effective and aesthetic provision and maintenance of infrastructure (water, sewer, drainage, streets and communications).

Community Services Goals

- Ensure adequate quantity and equal distribution of parks, open space, and recreational facilities.

    In addition, very specific statements are included in the 2014-2015 Bulverde City Council's Goals and Near-Term Action Items:

    Goal: Enhance the viability and vibrancy of the Downtown Bulverde Village area

- Complete the visioning process for the Downtown Bulverde Village and develop an implementation strategy for future private and public investments as well as any identified code and zoning changes.

- Review available Code Enforcement mechanisms to enhance the image of the Downtown Bulverde Village and its entryway corridors.

- Continue to work with Comal County on their reinvestment and redevelopment of County facilities in this area.

    There are also other goals and action items that could promote the development and revitalization of Downtown Bulverde Village relative to:

- Orderly and managed development of Bulverde;

- Transportation improvements and greater mobility;

- Parks and recreation opportunities ;

- Facilitating better marketing and branding of the City; and

- Promoting the managed growth of desirable business development.
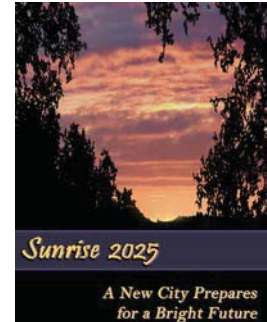
APPROACH

In 2014, the City of Bulverde engaged a team of consultants from Jacobs Engineering, Ricker Cunningham and Prologue Planning Services to work with the community to create a vision and an implementation plan for the future of Downtown Bulverde Village. The team met with and briefed the City Council shortly after its selection to lay out an approach to the project. This approach has proven effective in numerous cities in Texas and surrounding states and is structured around three distinct but interconnected elements:

Physical Opportunities. An evaluation of existing conditions to help identify not only the challenges and constraints in the Study Area, but also the assets and opportunities already available or planned for the near future (see Chapter 2, Evaluation of Existing Conditions). These existing conditions include:

- Zoning;

- Land use;

- Land parcelization and ownership patterns;

- Infrastructure (transportation, utilities, other);

- Natural assets; and

- Community facilities.

Existing Zoning
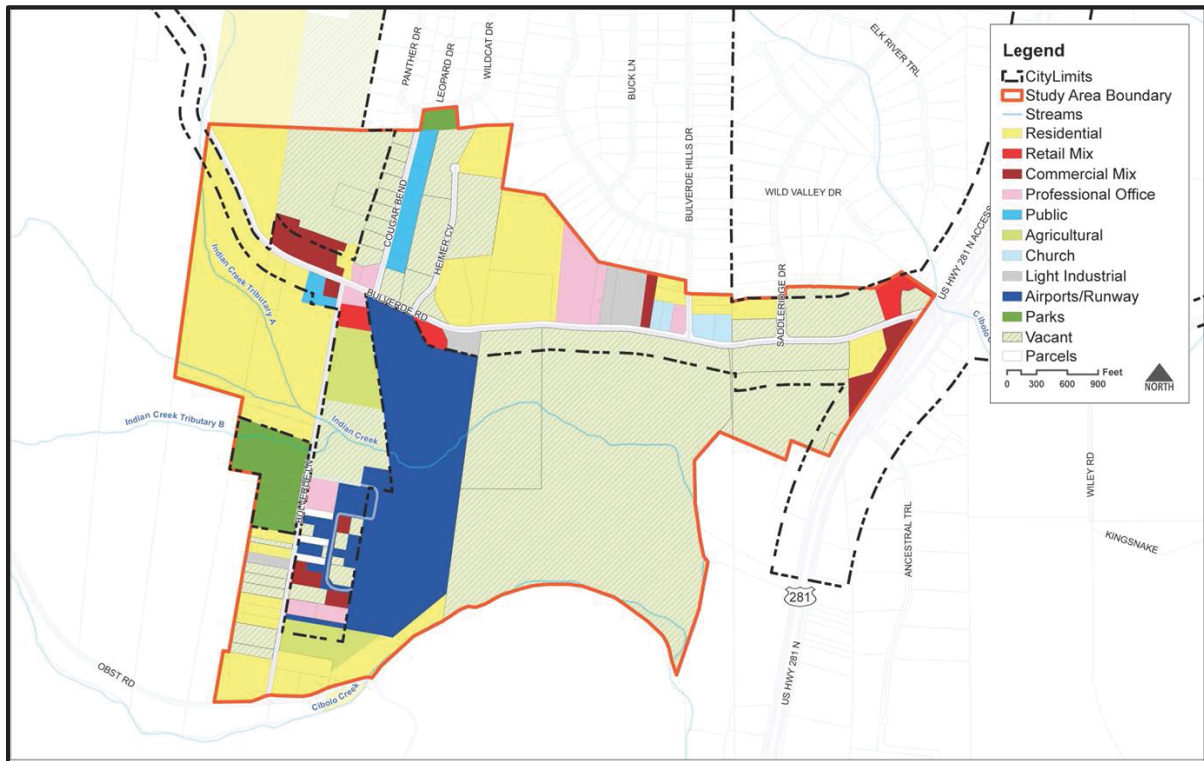
Market Potential. A market analysis evaluates key demographics and trends in the Market Trade Area—population, number and size of households, age, income, ethnicity, etc.—to determine the demand for retail, office and industrial space and various types of housing—single-family attached and detached and apartments (see Chapter 3, Market Context). The market study addresses:

- Market Trade Area boundaries;

- Supply and demand by land use category (short-term, mid-term, and long-term);

- Demographics in the Trade Area; and

- Barriers to investment.

Median Household Income
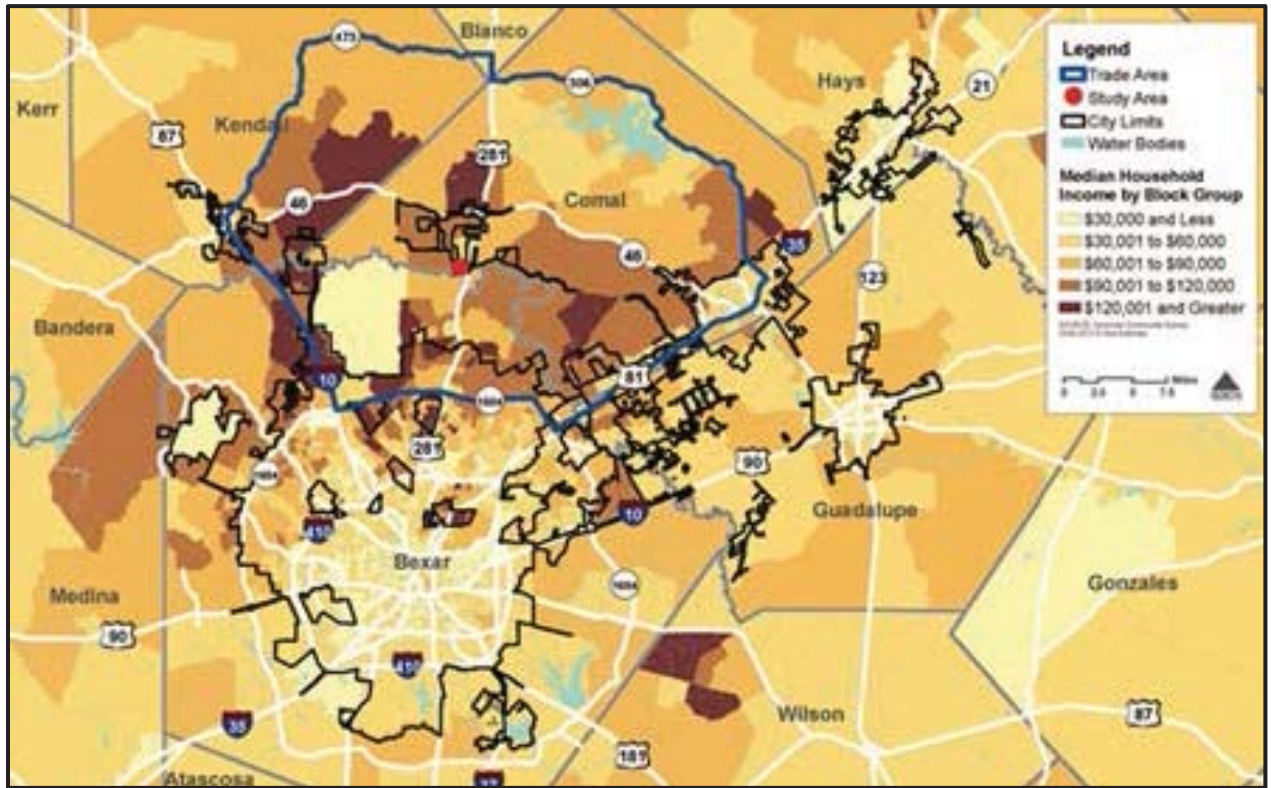
Community Aspirations. The community's hopes for the future of the area are gathered through a public involvement process, which uses a variety of techniques designed to solicit input from a broad cross-section of the community (see Chapter 4, Community Aspirations/Public Involvement):

- Stakeholder interviews;

- Online information;

- Online surveys;

- Community engagement events; and

- City Council briefings and public hearings.

The Vision. The vision for Downtown Bulverde Village lies where these three elements—Physical Opportunities, Market Potential and Community Aspirations—meet. Once the vision has been agreed upon, the Implementation Strategy gives the city a menu of options for achieving that vision.
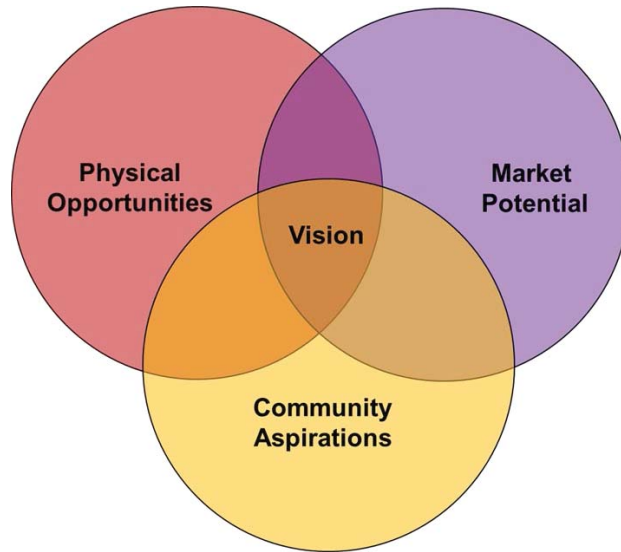
Throughout the process there was tremendous support and input from the City Council. The community was also very involved, attending workshops, participating in individual and small group interviews and providing feedback via online surveys.

Several themes emerged as the Council and the community presented their ideas and opinions to the consultant team:

- Keep the village quaint but progressive, preserving the existing aesthetics and character of Downtown Bulverde Village with small, unique businesses, distinctive architecture, rustic building materials and open spaces.

- Emulate the theme and approach taken by Boerne, Gruene and Wimberley.

- Use the new Bulverde Community Park as a catalyst to attract future development.

- Include features and uses designed to accommodate and attract pedestrians and cyclists— sidewalks, trails, enhanced crosswalks—in the design of future infrastructure.

- Install signage on Highway 281 to announce and direct people to the Village.

These themes were also very consistent with a number of the goals and objectives in the City's Sunrise 2025 plan.

THE PLAN

The end result of this effort is a set of three plans:

- A Land Use and Building Type Framework Plan;

- A Transportation and Urban Design Framework Plan; and

- An Implementation Plan, including a set of tools for the City to consider as it moves forward.
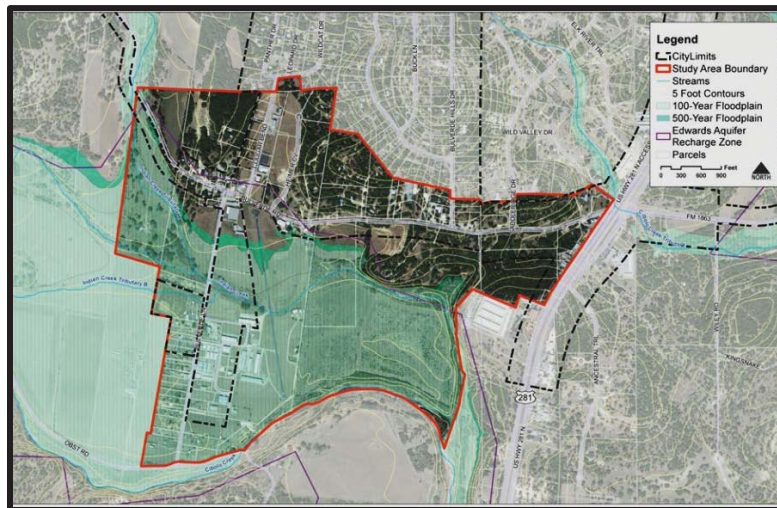
RECOMMENDATION

The final recommendation was presented to the City Council on January 13, 2015, for their review and adopted on February 10, 2015.

CHAPTER 2.
Evaluation of
Existing Conditions

CHAPTER 2. Evaluation of Existing Conditions

LAND USE

Existing land uses can be an indicator of the overall health of a downtown area. Too much of the same use constructed during a similar time frame can erode the desirability and marketability of an area, resulting in flat or decreasing property values. A healthy mix of uses is necessary to provide the housing stock, employment, shopping, services and recreational opportunities that create healthy downtowns.

The majority of the land within the DBV Study Area is vacant, with major undeveloped parcels of land along Bulverde Road, Cougar Bend and Heimer Cove. Several other large parcels are currently indicated to be in residential uses; however, in many cases, these properties are homesteads with individual residences on large parcels of land. These vacant and residential properties provide great opportunities for new development to occur over time as individual owners determine that they would like to develop their properties in a manner that can support the vision for the DBV area.

Public uses in the Village area are clustered along the eastern side of Cougar Bend and at the southwest corner of Bulverde Road and Bulverde Lane. These uses provide an important civic component to DBV. A mix of commercial uses exists along Bulverde Road west of Bulverde Lane. These uses provide a good foundation upon which a commercial core can be developed. There is a major industrial presence on the southeast quadrant of the Study Area, including several light industrial uses and an airport with supporting hangars. The airport could provide an additional transportation mode for bringing visitors to the DBV area. Overall, the existing land uses in the area provide a strong foundation on which to develop a unique, vibrant downtown district.

Existing Land Use Map
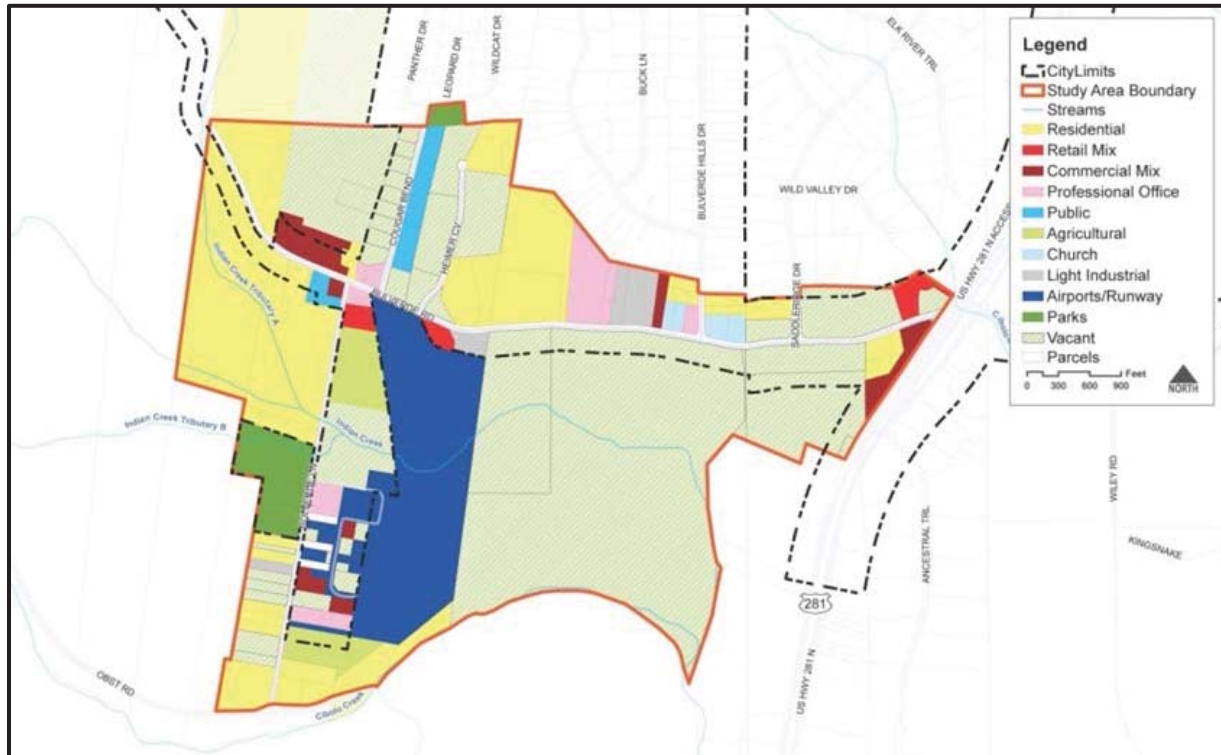
ZONING

Existing zoning can be a deterrent to achieving a desired outcome for a downtown area if it is not aligned with the community vision or market. For the most part, the existing zoning within the Study Area supports the commercial uses envisioned in the area, but not necessarily in the specific locations where they are envisioned. The predominant zoning category is C1 (Commercial) which allows for a variety of light commercial uses, including retail and office. There is C2 (Commercial) zoning at the intersection of Bulverde Road and Bulverde Lane, and along the south side of Bulverde Road east of Cougar Bend. This zoning category allows many of the same uses as the C1 district, with the addition of heavier commercial uses including air conditioning sales and car washes. The C3 (Commercial) zoning exists along US 281 and along Bulverde Road near its intersection with US 281. This is the heaviest commercial zoning category in Bulverde and provides the widest range of commercial uses, including automobile-related uses and mobile home sales.

It is important to note that a large portion of the Study Area is unzoned. This is due to the fact that those areas do not lie within the Bulverde City Limits, and therefore the City has limited zoning authority within those areas. Additionally, none of the existing zoning districts within the Study Area allow for residential uses. In order to achieve the future vision for the DBV area, some changes in zoning will likely be required.

Existing Zoning Map
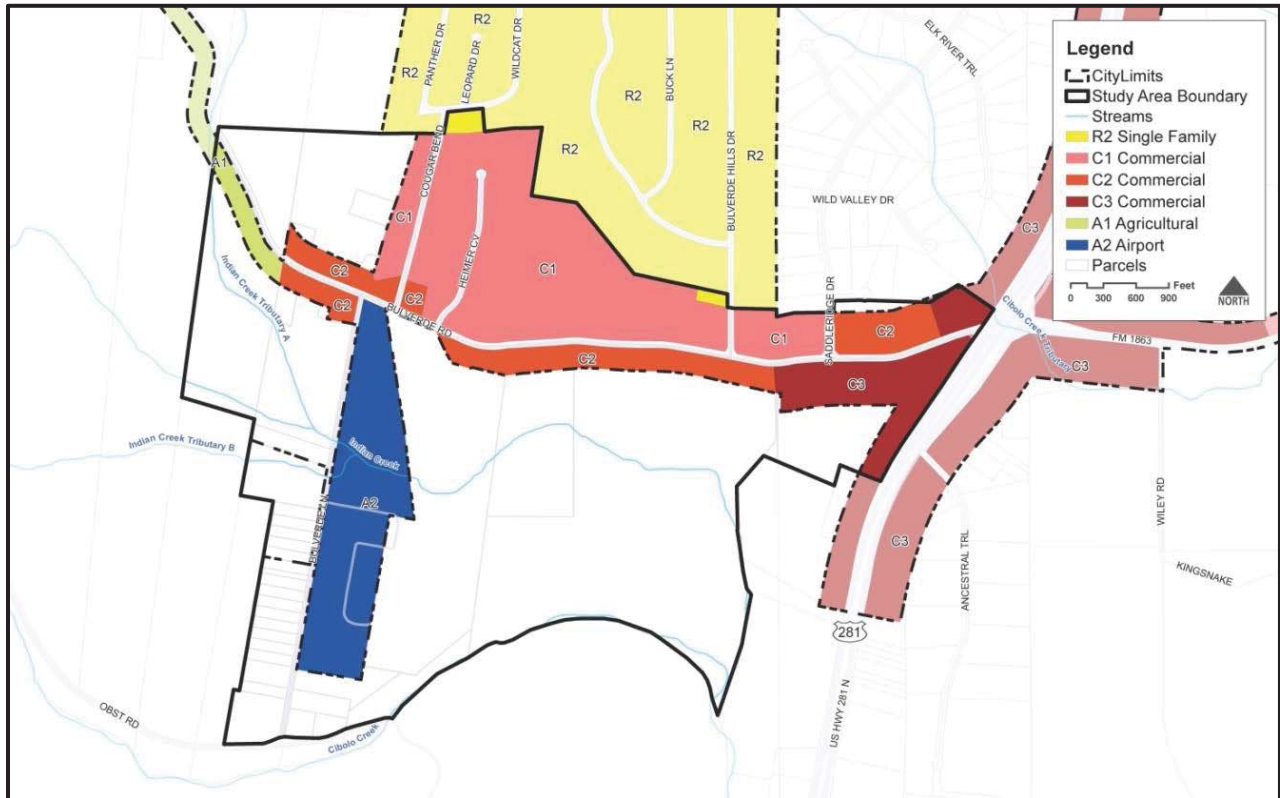
STRUCTURES

The configuration of buildings, the sizes of their footprints and the public spaces that they enclose (streets, sidewalks, etc.) can have a direct correlation on the perceived aesthetic quality of an area as well as its desirability as a business location. The existing character of the Downtown Bulverde Village Study Area is indicative of a small town or hamlet. Several buildings are clustered at the intersection of Bulverde Road and Bulverde Lane and form a small core downtown area. An additional cluster of buildings with larger floorplates is clustered on the airport property and supports the core operations of that facility. The remaining buildings in the Study Area are located along the north side of Bulverde Road with large open spaces between them, reinforcing the rural character of the area.

Existing Structures Map
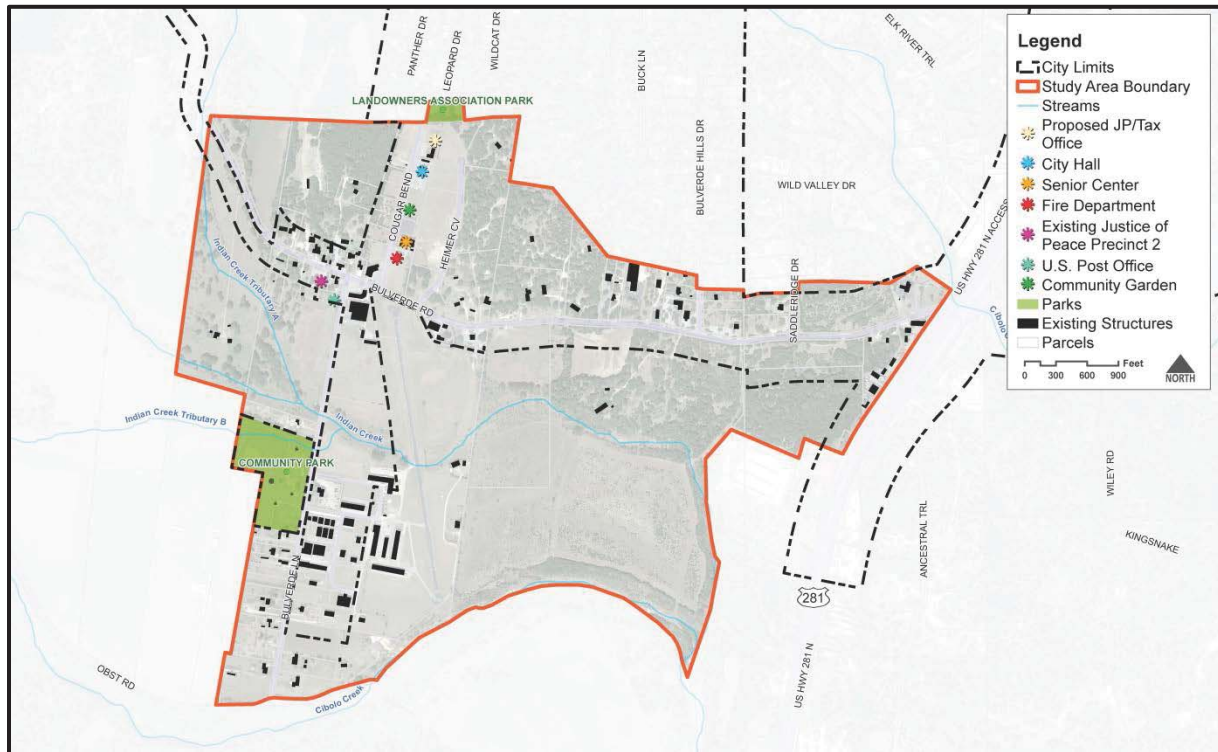
NATURAL SYSTEMS

More than half of the DBV Study Area is within the 100-year floodplain. The floodplain roughly parallels the alignment of Bulverde Road and provides significant constraints to the development of structures in the southern half of the Study Area. The Edwards Aquifer Recharge Zone is an environmentally sensitive area that provides a conduit for groundwater recharge from the surface to the Edwards Aquifer. Since the Edwards Aquifer is a major source of drinking water in the region, the protection of the recharge zone from pollutants is critical. The limits of this recharge zone roughly follow the same alignment as the 100-year floodplain. Within this recharge zone, the Texas Commission on Environmental Quality (TCEQ) requires review and approval of development plans.

While the floodplain and recharge zone create significant limitations on development of the southern half of the Study Area, these areas do provide valuable open space that can support natural habitat and passive recreational activities which could add great value to the overall character and development in the DBV area.

Existing Natural Systems Map
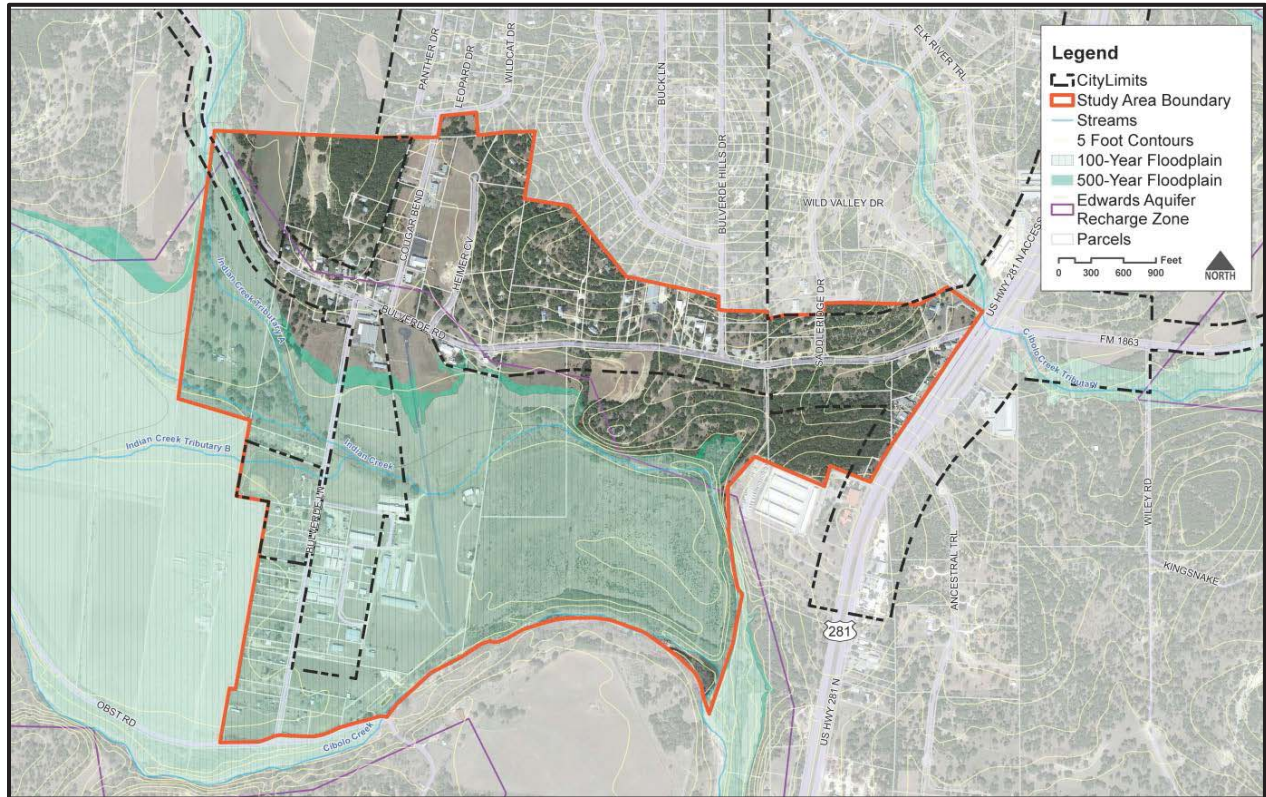
TRANSPORTATION

The transportation system in downtown Bulverde today consists entirely of two-lane asphalt roadways with minimal shoulders and drainage ditches on both sides. Recent counts on Bulverde Road in the vicinity of the downtown area are just over 5,000 vehicles per day, well within the capacity of a two-lane road. The existing roadways provide adequate capacity for the current traffic volumes but will not accommodate the vision for the future Downtown Bulverde Village. There are also no trails or special pedestrian crossing features presently in place.

UTILITIES

The infrastructure system in downtown Bulverde is sufficient for supporting the existing facilities and residences; however, to accommodate the expected growth and the community's vision for the future of DBV, the infrastructure needs to be expanded. Citizens and stakeholders noted during the community workshops and stakeholder interviews that the current state of the sewer system, water, natural gas and fiber optic services, which could be either an inadequacy or a lack of the service, were limiting development. Several stakeholders said that proposed development projects had not proceeded due to the lack of sewer system or natural gas infrastructure. The majority opinion was that if sewer, water and gas services were available, development would come to downtown Bulverde.

Existing Utilities Map
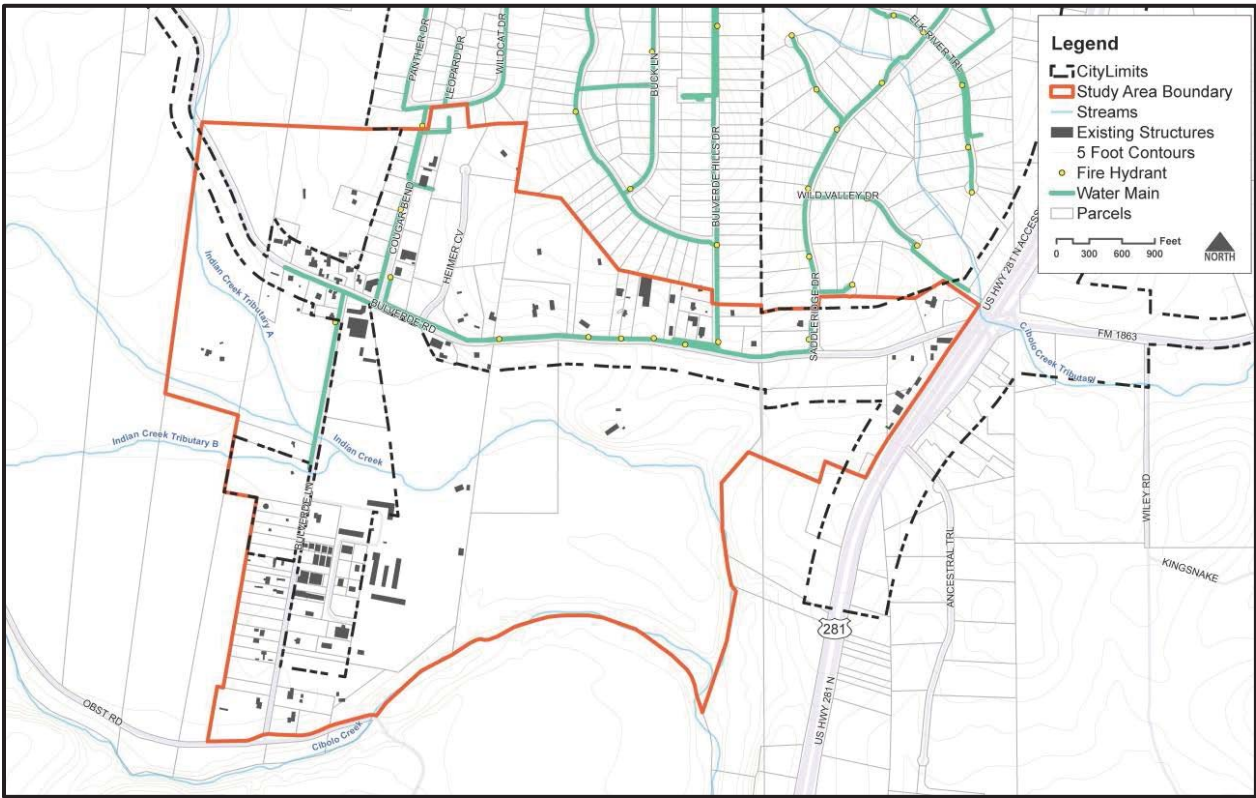
CHAPTER 3.
Market Context
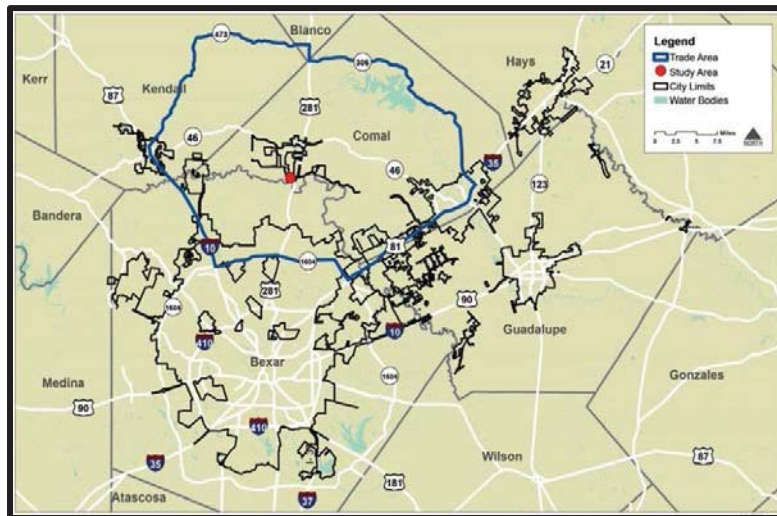
CHAPTER 3 – MARKET CONTEXT

Introduction

This chapter summarizes the market context analysis for the Downtown Bulverde Village Study Area. The purpose of the market analysis was to:

- Assess current and future market conditions in the northern San Antonio metro area;

- Evaluate the Study Area's current and future attractiveness for various land use types within the northern San Antonio market;

- Ensure planning and investment decisions for the Study Area are grounded in market and economic reality; and

- Provide an independent, third-party story to tell potential developer and investor audiences.

Trade Area Determination

The market analysis summarized herein focused on identifying market opportunities for various land uses within the project Trade Area. A Trade Area is that area from which a project(s) or area will draw the majority of its residents (housing), patrons (retail) and employees (office)—the area that will likely be a source of competition and demand. The boundaries of the Trade Area are often irregular as they are influenced by:

- **Physical Barriers**—The presence of certain physical barriers including highways, arterials, and significant structures which influence driving and shopping patterns;

- **Location of Possible Competition**—The inventory of potentially competitive project which could diminish the market share available to the project;

- **Proximity to Population and/or Employment Concentrations**—Concentrations in an area which could translate into more population and households to support the project (density and "rooftops");

- **Zoning**—A restrictive or favorable regulatory environment which will influence a developer's interest in delivering projects in one location vs. another;

- **Market Factors**—Conditions which will set sale and lease prices, influence a developer's interest or impact the project's revenue potential (value); and

- **Drive Times, Spending and Commuting Patterns**—Habits and patterns that have been established which could impact the project's ability to capture market share (or require re-education).

Based on these factors, the Downtown Bulverde Village Trade Area includes most of Comal County and part of Bexar County, as well as the north San Antonio suburbs (See Figure 1).

Figure 1: Downtown Bulverde Village Trade Area
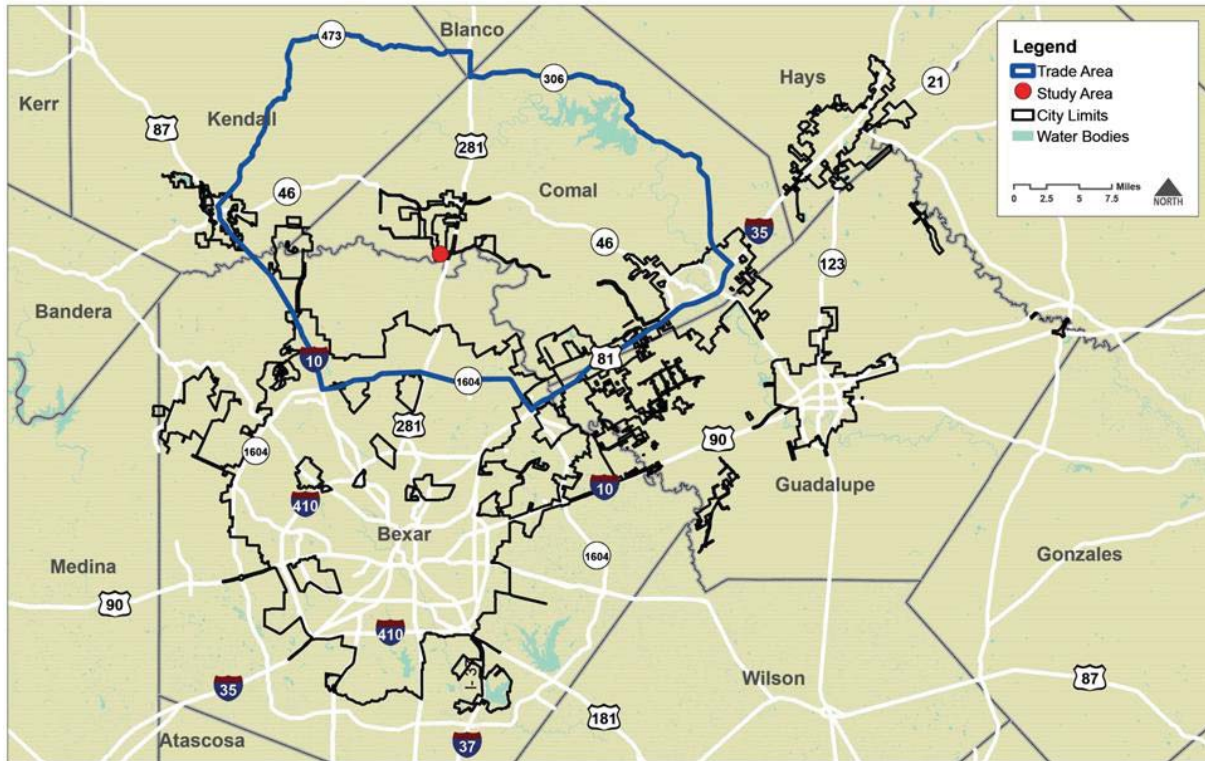
Demographic and Psychographic Characteristics

Key demographic characteristics for the Trade Area are summarized as follows:

- Over the last 4 years, the Trade Area has grown at a rate over twice that of the Metro Area overall.

- The Trade Area's average household size is lower than the Metro Area overall. Not surprisingly, the Trade Area has a higher share of one- and two-person households; however, the significantly lower share of renter households indicates a high concentration of smaller, though affluent, households.

- The Trade Area's age profile skews toward either end of the age group range, with a higher degree of school-age children and a higher share of persons age 65 and over. The Trade Area has a significantly higher median age than the Metro Area overall.

- The Trade Area has a significantly higher degree of college-educated residents, as compared to the Metro Area overall.

- Incomes in the Trade Area are also substantially higher than those for the Metro Area.

- The Trade Area's ethnic profile shows lower degrees of Hispanic and African-American residents and a higher degree of Asian-American residents compared to the Metro Area.

    Table 1 provides a summary of Trade Area demographic indicators.

Table 1: Trade Area Demographic Indicators

2014 Estimates unless noted	Bulverde Trade Area	Greater San Antonio Metro Area
2010 Population	183,542	2,142,508
2014 Population	210,484	2,292,310
Annual Population Growth (2010-2014)	3.5%	1.7%
Average Household Size	2.80	2.92
% 1- and 2-Person Households	60%	57%
Percent Renters	23%	35%
Percent Age 65+	13%	11%
Percent Age <18	25%	21%
Median Age	39.0	33.7
2012 Percent w 4-yr College Degree	34%	25%
2012 Percent Self-Employed (16+)	10%	10%
Median Household Income	$84,600	$51,900
Per Capita Income	$32,400	$21,800
Percent with Income <$25K	11%	26%
Percent with Income $100K+	42%	18%
Percent Hispanic (of any race)	29%	52%
Percent African-American	4%	6%
Percent Asian	4%	2%

Source: U.S. Census Bureau; San Antonio/Bexar County Metropolitan Planning Organization; Alamo Area Council of Governments; Claritas, Inc.; & Ricker|Cunningham.

Psychographics

Psychographics is a term used to describe the characteristics of people and neighborhoods which, instead of being purely demographic, speak more to attitudes, interests, opinions and lifestyles. PRIZM (Claritas, Inc.) is a leading system for characterizing geographical areas (neighborhoods) and the local workforce into one of 66 distinct market segments based on their demographics (age, education level, income, whether there are children in the household) and consumption habits (what goods they purchase, what type of dining they do, what kind of car they drive, what media they use, where they travel). These segments are classified into four urbanization categories—Urban, Suburban, Second City or Town and Rural—and level of affluence. Characteristics range from urban and very affluent at the high end of the scale to rural and less affluent at the lower end. These characteristics factor into projections for the demand for various types of goods and services.

Commercial retail developers are interested in understanding a community's psychographic profile, since it is an indication of its residents' propensity to spend across select retail categories. Residential developers are also interested in understanding this profile as it tends to suggest preferences for certain housing product types.

As shown in Table 2, the Bulverde Trade Area is dominated by upper class psychographic segments, indicating high incomes and high disposable retail spending. In fact, nearly 2/3 of Trade Area households fall into PRIZM's top income/wealth segments.

Table 2: Trade Area Psychographic Indicators

Lifestyle Segment	Area Households	% of Total Households	U.S. Index=100*
God's Country	9,504	12.5%	505.3
Movers and Shakers	3,530	4.6%	444.6
Executive Suites	2,839	3.7%	673.3
Home Sweet Home	2,455	3.2%	184.6
Greenbelt Sports	2,033	2.7%	158.8
Younger Years Subtotal	**20,361**	**26.8%**	**--**
Winner's Circle	10,526	13.9%	1,316.3
Country Squires	7,867	10.4%	566.8
Kids and Cul-de-Sacs	4,385	5.8%	370.7
Blue Blood Estates	2,718	3.6%	388.7
Big Sky Families	1,180	1.6%	84.9
Family Life Subtotal	**26,676**	**35.1%**	**--**
Big Fish, Small Pond	5,485	7.2%	386.5
Traditional Times	3,693	4.9%	119.1
Upper Crust	2,055	2.7%	150.5
Simple Pleasures	1,844	2.4%	72.7
Middleburg Managers	1,676	2.2%	59.9
Mature Years Subtotal	**14,753**	**19.4%**	**--**
Total Above Segments	**61,790**	**81.4%**	**--**
Total Trade Area	**75,942**	**100.0%**	**--**

* Indicates concentration of this segment relative to U.S. average. A segment index of 200 would mean that this group contains 2 times the concentration of employees/households compared to the average U.S. community.

Source: Claritas, Inc. and Ricker|Cunningham.

Market Supply and Demand by Land Use Type

An analysis of the <u>current</u> performance of real estate products within an overall market, as well as competitive projects within a Trade Area, provides an indication of whether an area may be ready for new development and/or redevelopment. It also helps to identify potential gaps in the market—niches that new development/redevelopment could fill.   The information which follows presents a summary of current supply and demand conditions for competitive land uses within the Trade Area.

Residential Supply

The Trade Area includes all or portions of the Cities of Bulverde and New Braunfels and unincorporated Comal County. Over the last five years, these three areas have issued, on average, 1,082 residential building permits annually. Of these permits issued, only 2% constituted multi-family permits.

Table 3: Trade Area Building Permits

Trade Area City	2009	2010	2011	2012	2013	Total	Annual Avg.	% of Trade Area
Bulverde								
Single Family	7	9	9	9	13	**47**	9	0.9%
Multi-Family (2+ units)	0	0	0	0	0	**0**	0	0.0%
Total Units	7	9	9	9	13	**47**	9	0.9%
New Braunfels								
Single Family	351	356	490	612	898	**2,707**	541	51.2%
Multi-Family (2+ units)	0	0	0	26	100	**126**	25	100.0%
Total Units	351	356	490	638	998	**2,833**	567	52.4%
Unincorporated Comal County								
Single Family	425	448	483	477	695	**2,528**	506	47.9%
Multi-Family (2+ units)	0	0	0	0	0	**0**	0	0.0%
Total Units	425	448	483	477	695	**2,528**	506	46.7%
Bulverde Trade Area								
Single Family	783	813	982	1,098	1,606	**5,282**	1,056	100.0%
Multi-Family (2+ units)	0	0	0	26	100	**126**	25	100.0%
Total Units	783	813	982	1,124	1,706	**5,408**	1,082	100.0%

Source: U.S. Census Bureau and RickerICunningham.

Residential Demand

Demand for Trade Area residential units is a function of newly formed households, whether they arise through natural increase or net in-migration. As shown in Table 4, the Trade Area is expected to experience demand for approximately 26,400 new housing units over the next 10 years. Assuming the ratio of rental to owner-occupied units remains at approximately 25%, this would translate into demand for 6,600 new rental units and 19,800 new ownership units.

Table 4: Trade Area Residential Demand

Residential Demand Analysis			Households	2014	75,942		
Bulverde Trade Area				2019	88,038	Annual Growth Rate	3.0%
10-yr Demand Estimates				2029	102,060		
			Household Growth (2014-24)		26,118	Adjust for 2nd homes,	
						demolition, vacancy	1.0%
			Adjusted Unit Requirement		26,379	% Rental	25%

| | | | | | Trade Area Demand from New Households (10-yr) | | | |
Household Income Range (2010 dollars)	Approximate Rent Range	Supportable Home Price Range	Current Households in Income Bracket	New Households by Income Bracket	Total Units	Estimated % Rental	Total Rental Units	Total Ownership Units
up to $15K	up to $375	up to $75K	5%	5%	1,319	90%	1,187	132
$15-25K	$375 - $625	$75 to $100K	6%	6%	1,583	85%	1,345	237
$25-35K	$625 - $875	$100 to $150K	7%	7%	1,847	75%	1,385	462
$35-50K	$875 - $1,000	$150 to $200K	10%	9%	2,374	45%	1,068	1,306
$50-75K	$1,000+	$200 to $250K	17%	17%	4,484	15%	673	3,812
$75-100K	$1,000+	$250 to $350K	12%	13%	3,429	10%	343	3,086
$100-150K	$1,000+	$350 to $500K	20%	20%	5,276	8%	422	4,854
$150K and up	$1,000+	$500K and up	23%	23%	6,067	3%	182	5,885
Totals			100%	100%	26,379	25%	6,605	19,774

Source: U.S. Census; San Antonio/Bexar County MPO; Alamo Area COG; Claritas, Inc.; and Ricker|Cunningham.

Retail Supply

Summary retail supply characteristics for the Trade Area are presented as follows:

- Trade Area retail space will compete primarily in the Far North Central retail submarket. This submarket currently has over 4.8 million square feet of retail space, of which 11.3 percent was vacant as of the 1st Quarter 2014.

- Community centers and power centers comprise approximately 74 percent of total submarket space, with 1.9 million and 1.7 million square feet, respectively. Vacancy rates within community and power centers are 10.1% and 9.2%, respectively. Average rental rates are highest in power centers, at $26.20, followed by neighborhood centers at $22.28 per square foot, triple net, respectively. In a triple net lease, the landlord and the tenant share the costs of maintenance, taxes and insurance for the property.

- Community centers are described by the International Council of Shopping Centers (ICSC) as centers containing approximately 125,000-400,000 square foot of gross leasable area, usually configured in a straight line as a strip, and offering general merchandise and convenience-oriented services. ICSC characterizes power centers as those typically containing 250,000 to 600,000 square feet of gross leasable area and anchored by one or more large stores, such as discount department stores, off-

price stores or wholesale clubs, with only a few small tenants.

In comparison, the overall San Antonio Metro Area currently shows lower vacancy rates for community, power and neighborhood center space, but lower rental rates for community and neighborhood center space.

Table 5 presents a summary of retail indicators for the Far North Central submarket and the San Antonio Metro Area as a whole.

Table 5: Trade Area Retail Market Conditions

Retail Indicator	1st Qtr 2014		Retail Indicator	1st Qtr 2014	
	Far North Central	San Antonio Metro Area		Far North Central	San Antonio Metro Area
Regional Center			**Neighborhood Center**		
# of Buildings	0	8	# of Buildings	25	303
Rentable Sq Ft	0	7,436,215	Rentable Sq Ft	867,522	18,033,541
Vacancy Rate	0.0%	3.9%	Vacancy Rate	18.0%	15.3%
Net Absorption	0	75,104	Net Absorption	7,001	115,276
Under Construction Sq Ft	0	0	Under Construction Sq Ft	125,000	235,488
Avg Quoted Rent/Sq Ft	--	NA	Avg Quoted Rent/Sq Ft	$22.28	$15.06
Community Center			**Power Center**		
# of Buildings	12	43	# of Buildings	5	31
Rentable Sq Ft	1,923,261	6,839,864	Rentable Sq Ft	1,685,989	12,285,283
Vacancy Rate	10.1%	9.2%	Vacancy Rate	9.2%	6.1%
Net Absorption	5,741	(2,306)	Net Absorption	25,734	102,973
Under Construction Sq Ft	40,000	40,000	Under Construction Sq Ft	0	259,656
Avg Quoted Rent/Sq Ft	$21.39	$19.99	Avg Quoted Rent/Sq Ft	$26.20	$26.47
Convenience/Strip Center			**All Space**		
# of Buildings	21	114	# of Buildings	63	499
Rentable Sq Ft	400,401	2,404,097	Rentable Sq Ft	4,877,173	46,999,000
Vacancy Rate	11.0%	12.9%	Vacancy Rate	11.3%	10.1%
Net Absorption	2,800	(2,739)	Net Absorption	41,276	288,308
Under Construction Sq Ft	0	0	Under Construction Sq Ft	165,000	535,144
Avg Quoted Rent/Sq Ft	$19.06	$15.82	Avg Quoted Rent/Sq Ft	$21.94	$16.42

Source: REOC San Antonio and Ricker│Cunningham.

Retail Demand

Future demand for retail/restaurant/service space is determined by the potential level of retail expenditures in a given Trade Area from two sources: those dollars spent by Trade Area residents outside the Trade Area ("leakage") and those generated by new household growth. Tables 6 and 7 summarize the calculations of both of these sources of retail demand. For each major retail category, current household retail expenditures (demand) are compared to current retail sales (supply) in the Trade Area to determine if there is a retail surplus (supply exceeds demand) or leakage (demand exceeds supply). Table 6 shows that leakage exists in six retail categories: electronics and appliances; food and beverage stores; clothing and accessories; sporting goods, hobby, books and music; general merchandise; and miscellaneous stores. The remaining categories currently have retail surpluses where supply exceeds demand. As summarized in Table 6, the level of leakage estimated in current retail

categories is approximately $199.1 million in retail spending, which could support an additional 544,100 square feet of space.

Table 6: Trade Area Retail Leakage

Retail Category	Estimated 2014 Household Retail Demand	Estimated 2014 Retail Sales (Supply)	Estimated 2014 Retail Void (Leakage)	Estimated Retail Sales/s.f.	New Retail Space Needed to Recapture Void/Leakage
Furniture & Home Furnishings	$67,746,695	$102,129,527	$0	$275	0
Electronics & Appliance	$56,301,359	$39,830,196	$16,471,163	$300	54,904
Bldg Materials, Garden Equipment	$314,652,611	$435,638,868	$0	$375	0
Food & Beverage (Grocery)	$323,897,699	$243,163,524	$80,734,175	$450	179,409
Health & Personal Care	$156,423,875	$168,238,175	$0	$400	0
Clothing and Accessories	$153,341,576	$140,558,264	$12,783,312	$300	42,611
Sporting Goods,Hobby, Book, Music	$59,562,257	$44,598,934	$14,963,323	$300	49,878
General Merchandise	$337,696,646	$283,743,327	$53,953,319	$375	143,876
Miscellaneous Stores	$75,914,578	$55,733,474	$20,181,104	$275	73,386
Foodservice & Drinking Places	$308,054,592	$385,159,254	$0	$425	0
Total	**$1,853,591,888**	**$1,898,793,543**	**$199,086,396**		**544,063**

Source: San Antonio/Bexar County MPO; AACOG; Claritas, Inc.; Urban Land Institute; and Ricker|Cunningham.

Projected demand from new household formation over the next 10 years is determined by multiplying growth in households with that portion of household income typically spent on general retail and service purchases. Table 7 shows the level of demand by retail category that will be generated by new household formation.

As shown, an additional $637.5 million in retail spending is anticipated from new household growth. The combination of demand from retail leakage and household growth results in total demand for approximately 2.3 million square feet of new retail space in the Trade Area over the next 10 years.

Table 7: Trade Area Retail Demand from New Households

Retail Category	Estimated 2014 Household Retail Demand	Estimated 2014 Retail Sales (Supply)	Annual Household Growth Rate (2014-2024)	Net New Household Retail Demand	New Retail Space Needed for Household Growth
Furniture & Home Furnishings	$67,746,695	$102,129,527	3.0%	$23,299,198	84,724
Electronics & Appliance	$56,301,359	$39,830,196	3.0%	$19,362,960	64,543
Bldg Materials, Garden Equipment	$314,652,611	$435,638,868	3.0%	$108,214,187	288,571
Food & Beverage (Grocery)	$323,897,699	$243,163,524	3.0%	$111,393,724	247,542
Health & Personal Care	$156,423,875	$168,238,175	3.0%	$53,796,733	134,492
Clothing and Accessories	$153,341,576	$140,558,264	3.0%	$52,736,680	175,789
Sporting Goods,Hobby, Book, Music	$59,562,257	$44,598,934	3.0%	$20,484,436	68,281
General Merchandise	$337,696,646	$283,743,327	3.0%	$116,139,408	309,705
Miscellaneous Stores	$75,914,578	$55,733,474	3.0%	$26,108,267	94,939
Foodservice & Drinking Places	$308,054,592	$385,159,254	3.0%	$105,945,020	249,282
Total	$1,853,591,888	$1,898,793,543		$637,480,611	1,717,869

Source: San Antonio/Bexar County MPO; AACOG; Claritas, Inc.; Urban Land Institute; and Ricker|Cunningham.

Office Supply

The office supply characteristics for the Trade Area can be summarized as follows:

- Trade Area office space will compete primarily in the Far North Central office submarket. This submarket currently has over 2.7 million square feet of office space, of which 10.3 percent was vacant as of the 1st Quarter 2014.

- Class A space comprises approximately 54 percent of total submarket space, with 1.5 million square feet. Class B space comprises the remainder of office space in the submarket. Vacancy rates within Class A and B space are 3.4% and 18.7%, respectively. Average rental rates for Class A and B space are $27.41 and $22.86 per square foot, full service, respectively. In a full service lease, all maintenance, taxes and insurance costs are paid by the landlord and factored into the rental rate.

- According to the National Association of Industrial and Office Parks (NAIOP), Class A office space is considered the highest-quality space. It is often situated in a high-visibility location or a desirable area and typically features quality design, materials and amenities both inside and out. Class B space is typically more average with regard to these same qualities, but is of greater quality than Class C office space.

Table 8 presents a summary of office indicators for the Far North Central submarket and the San Antonio Metro Area as a whole.

Table 8: Trade Area Office Market Conditions

Office Indicator	1st Qtr 2014	
	Far North	San Antonio
Class A		
# of Buildings	11	58
Rentable Sq Ft	1,464,519	9,927,703
Vacancy Rate	3.4%	10.2%
Net Absorption	10,071	163,164
Under Construction Sq Ft	0	195,550
Avg Quoted Rent/Sq Ft	$27.41	$25.27
Class B		
# of Buildings	48	287
Rentable Sq Ft	1,227,257	15,199,862
Vacancy Rate	18.7%	22.2%
Net Absorption	16,771	179,110
Under Construction Sq Ft	0	0
Avg Quoted Rent/Sq Ft	$22.86	$19.89
Class C		
# of Buildings	0	94
Rentable Sq Ft	0	3,289,741
Vacancy Rate	--	25.4%
Net Absorption	--	(6,602)
Under Construction Sq Ft	--	0
Avg Quoted Rent/Sq Ft	--	$14.77
All Space		
# of Buildings	59	439
Rentable Sq Ft	2,691,776	28,417,306
Vacancy Rate	10.3%	18.4%
Net Absorption	26,842	335,672
Under Construction Sq Ft	0	195,550
Quoted Rates/Sq Ft	$23.53	$19.77

Source: REOC San Antonio and Ricker│Cunningham.

Office Demand

Demand for new office space is derived from two primary sources: expansion of existing industry and the relocation of new companies into the market. Employment projections by industry classification for the Trade Area were used to estimate demand over the next 10 years. Assuming an overall 3.1% sustained annual employment growth rate, the Trade Area should add approximately 23,828 new jobs over the next 10 years. Assuming differing levels of office space needed across various industry categories, the analysis revealed demand for over 1.7 million square feet of new office space over this period.

Table 9: Trade Area Office Demand

Industry Category	Estimated 2014 Employees	Estimated Growth Rate 2014-2024	Estimated 2024 Employees	Estimated New Employees	Estimated % in Office Space	Estimated Net New Office Employees	Sq Ft per Office Employee	Estimated 10-yr Office Demand
Natural Resources, Mining and Construction	7,899	2.7%	10,310	2,411	40%	965	200	192,902
Manufacturing	3,424	2.3%	4,298	874	5%	44	200	8,741
Trade, Transportation and Utilities	14,777	2.6%	19,102	4,324	10%	432	200	86,485
Information	649	2.6%	838	190	80%	152	200	30,368
Financial Activities	8,648	2.9%	11,510	2,862	90%	2,576	200	515,150
Professional and Business Services	6,779	3.6%	9,655	2,876	80%	2,301	200	460,178
Educational and Health Services	6,700	4.2%	10,111	3,410	20%	682	200	136,408
Leisure and Hospitality	8,880	3.4%	12,406	3,526	10%	353	200	70,513
Other Services (includes Self-Employed)	3,871	2.8%	5,102	1,231	30%	369	200	73,868
Government	6,174	3.0%	8,297	2,123	30%	637	200	127,393
Totals	**67,800**	**3.1%**	**91,628**	**23,828**	**36%**	**8,510**	**200**	**1,702,005**

Source: San Antonio/Bexar County MPO; Texas Workforce Commission; Claritas, Inc.; and Ricker│Cunningham.

Study Area Market Share

The degree to which the Study Area is able to capture a share of new demand within the Trade Area (and beyond) will be a by-product of initiatives advanced as a result of this redevelopment effort. Successful development will depend in large part on the repositioning of the Study Area including: balancing regulations and incentives in an effort to minimize risk; improving the physical realm so as to define it as a unique and identifiable place; and bridging any financial feasibility gaps that may result. Redeveloping the area as a community-serving destination will increase its ability to capture not only a greater share of Trade Area demand, but also make it a more effective host environment for uses serving close-in markets. Redevelopment projects by themselves will serve to prove up market support for uses and products in the Study Area, and the development economic equation will stabilize (an inevitable eventuality of effective redevelopment initiatives). Success will breed success and the market itself will serve to inspire investment among other land owners and support higher and better uses at fiscally appropriate densities. The following considerations will ultimately affect the ability of the Study Area to capture market demand.

Top Down Considerations

▪ Demand for certain land uses

▪ Demographic and psychographic conditions which support land uses

▪ Untapped market niches (product voids)

▪ Competitive projects (proposed, planned and under construction)

Bottom Up Considerations

▪ Physical capacity of the area

▪ Vision and desire for certain uses and product types

▪ Parcel size, ownership (public and private), owner investment objectives

▪ Zoning (and other regulations)

External Considerations

- Delivery system—property owners, developers, lenders, etc.

- Financing markets--availability of capital

- Market forces beyond those currently in the market

Other Considerations

- Public support for a long-term vision

CHAPTER 4.

Community Aspirations /

Public Involvement

CHAPTER 4. Community Aspirations / Public Involvement

The Downtown Bulverde Village area is a special place in the hearts of the community. Several of the most historic places and structures in the city are located there or nearby, and there are certain characteristics in the Village area—in the features of the buildings and in the natural areas that surround it—that make this part of the city unique. In order to determine which characteristics were most important to the community and which new uses, building types and urban design elements would fit best within the existing and future DBV envisioned by the community, input was gathered using a variety of different methods.

COUNCIL BRIEFINGS

The project was initiated with a briefing of the City Council in July 2014 at which the consultant team introduced themselves and explained their approach to the project. Throughout the remainder of the process, the Council received progress reports (August and October 2014) and a final public hearing was held in January 2015.

Among the direction given by the Council at the first briefing was to:

- Keep the village quaint but progressive.

- Emulate the theme and approach taken by Boerne, Gruene and Wimberley.

- Use the new Bulverde Community Park as a catalyst to attract future development.

STAKEHOLDER INTERVIEWS

From the beginning, it was clear that area stakeholders—business and property owners; leaders at the Chamber of Commerce and the Economic Development Corporation; representatives from other public and non-profit agencies; the owner and users of the airport—were not only interested in the future of Downtown Bulverde Village, but also concerned that without intervention, new development could change the character of the area in a negative way.

Thirty stakeholders were interviewed by the consulting team in August and October in eight different sessions that grouped participants according to their relationship or interest in the area. There was a high degree of consensus among the people interviewed, and some of the most common comments received during the discussions were:

- The existing character of DBV—its small, unique businesses and distinctive architecture—should be preserved.

- Desirable uses in the Village in the future could include a bed-and-breakfast inn, small homes on small lots appropriate for seniors and unique shops and restaurants with outdoor dining areas (not chain operations or big box users).

- The vision should include features and uses designed to accommodate and attract pedestrians and cyclists.

- The Bulverde Road/Bulverde Lane name similarity is confusing to people.

- Signage is needed, particularly at the intersection of 281 and Bulverde Road, to direct visitors to the Village; standards should be developed so that new signage is consistent with the DBV character.

- The lack of a sewer system has kept development from occurring in DBV and must be addressed; the lack of natural gas service has been an issue for some potential developers, but less so than the sewer deficiency.

COMMUNITY EVENTS

To add to the perspective received from the Council and the key stakeholders and to inform the public in detail about the purpose and approach to the process, two Community Events were held. An equally important purpose for these meetings was to solicit feedback on some of the preliminary concepts being considered by the consultant team. Nineteen persons signed in at the first workshop on August 26, 2014, and 35 at the second on October 14, 2014. At each of the workshops, the consultant team facilitated discussions and gathered input at a series of stations related to important elements of the plan—Desirable Uses and Building Types, Urban Design and Transportation, Market and Economics—and a formal briefing was conducted by the consultants to ensure that participants had a good understanding of the process and the work that had occurred to date and what lay ahead in the process.

Responses to the demographics questionnaire distributed at the first event indicated that:

- 60% of the participants were female, 40% male.

- 42% had lived in Bulverde 20 years or more; 25% for 1 to 5 years.

- 42% were 31-50 years of age and the same percentage were in the 65-79 age bracket.

Among the comments at the stations from the participants at the first Community Event were:

- People like the rustic charm and aesthetics of DBV.

- Rustic building materials should be required for any new construction.

- Bulverde Lane should be widened for pedestrians and cyclists.

- Sidewalks are needed to connect businesses with future public parking.

- New lighting should be installed along Bulverde Road.

- Crosswalks should be improved with contrasting materials to enhance pedestrian safety and slow traffic.

- The area needs a walkable gathering place for retail, farmers market, etc.

- A designated square would add character to DBV.

- Signage should be installed on 281 to announce and direct people to the Village.

- The new park is a great asset for the area and could help spur development.

The second Community Event, which also included a Council briefing, was held on October 14, 2014. This workshop was also organized as an open house structured around stations and a presentation by the consultants. Only one individual completed the demographics questionnaire, so a representative set of characteristics could not be derived from this limited information; however, a number of comments were collected at the stations to help direct the consultant team in their efforts, including:

- A family-oriented restaurant, a brew pub and/or a venue like Gruene Hall would be desirable uses in DBV.

- A lake or water feature and/or a parking lot could be developed in the floodplain area south of Bulverde Road.

- The number of lights on Cougar Bend should be reduced and the ones that are removed should be reused elsewhere (some asked whether lighting was necessary at all).

- Consideration should be given to adding public restrooms.

    Among the most desirable land uses for various parts of the Study Area as expressed by workshop participants were:

- Senior living (most popular), small cottages, patio homes or homes built in a cluster configuration and housing on the upper floors of commercial buildings (less popular);

- Restaurants, retail boutiques, studio/gallery space and an inn or a bed-and breakfast facility;

- A business park in the area between the existing Village and Highway 281;

- Commercial uses along Highway 281;

- Multi-family near the crossroads of Bulverde Road/Bulverde Lane/Cougar Bend; and

- A plaza or gazebo on Cougar Bend.

Preferred urban design elements included entry features incorporating stone elements, landscaping and historic references, such as a windmill. Street trees and planter boxes were also favored.

ONLINE SURVEYS

In addition to the interviews and community workshops, two online surveys were conducted for the purpose of gathering input from community members who might not have been a part of the other activities. Both surveys included multiple-choice questions that asked participants to rank the importance of certain concepts to a successful DBV and several demographic questions to determine some of the characteristics of the survey takers—age, length of residency and frequency of visits to DBV, for example. The first survey also included some open-ended questions.

Survey #1 was open for several weeks in July and August, 2014; 193 individuals responded. The demographic questions indicated that:

- 60% of those taking the survey were female, 40% male (roughly).

- 29% were 31-50 years of age, 42% were 51-64 years of age and 25% were in the 65-79 age bracket.

- 18% had lived in Bulverde for six to 10 years, 22% for more than 10 but less than 20 years and 33% for 20 years or more.

    Five issues were identified as most important by survey takers:

- Maintain the quaint character of the DBV area.

- Preserve the natural features in the area.

- Improve the infrastructure.

- Develop guidelines that will create a consistent theme.

- Attract new businesses to DBV.

    The five least important items, according to the survey, were:

- Add housing to DBV.

- Develop DBV as a commercial area.

- Develop a gateway/entryway to the City and DBV.

- Strengthen the civic/government presence in DBV.

- Create a destination that will draw people from outside the city to DBV.

Some of the responses from the online survey regarding the least important issues appear to be inconsistent with the comments received from the workshop participants. This is most likely because the survey takers did not have the benefit of the images that were displayed at the workshop stations

and in the presentations. At the community events, images depicting various uses, different gateway/entry features, various housing types (mostly cottages) and commercial buildings were shown to help participates envision the types of buildings and urban design elements that might be appropriate for the DBV area. Many of these images received favorable ratings.

With regard to the question about the importance of developing DBV as a commercial area, there was no clear explanation of the term "commercial" in the survey or the intensity of the commercial uses being discussed, so the intent may have been misunderstood. Elsewhere in the survey, and in the community workshops and stakeholder interviews, unique, small-scale commercial uses were determined to be appropriate uses in Downtown Bulverde Village.

Finally, as to creating a destination that would draw people from outside the area to DBV, in other public input opportunities, the community indicated they envisioned the DBV of the future as a quaint area similar to Boerne or Gruene, both of which are popular tourist destinations. Those participating in the community events appeared to understand that in order for the area to thrive, it would need support not only from the citizens of Bulverde, but also from a larger Trade Area. This was also confirmed in the Market Analysis part of this project.

Besides a set of multiple-choice questions, the first survey included some open-ended queries. The most common responses to those questions indicated that:

- Most of those taking the survey were involved in DBV because they had visited businesses or attended events there.

- There was no consensus as to the importance of the airport in the future of DBV or the need for a major feature, use or activity in the area.

- Assets that could be catalysts for development in DBV included the park, a farmers market and an art walk, however, there was not a clear consensus.

- Desirable businesses and activities in DBV included food/beverage businesses, shopping, art, entertainment, housing, parking and trails.

35 people responded to the second survey, which was posted during October and November of 2014.

Responses to the demographic questions indicated that:

- 43% of the survey takers were male, 57% female.

- 63% were in the 51-64 age group, 26% in the 31-50 age category, and 11% were 65-79 years of age; there were no participants in the 0-17 years, 18-30 years and 80+ age brackets.

- 34% had lived in Bulverde for more than 10 years but less than 20 years; 17% had resided in the city in each of two categories—6 to 10 years and 20 years or more.

The second survey included only multiple-choice questions. The questions tested the support for several concepts that had been proposed at the community meetings.

- 80% were either strongly supportive or somewhat supportive of the construction of a public parking lot in DBV to support businesses and special events.

- 80% supported or somewhat supported the adoption of a more detailed set of standards for architecture and building materials in DBV.

- 71% supported or somewhat supported the use of special paving materials or bricks to highlight key intersections.

- 83% were supportive or somewhat supportive of creating a list of trees and plants specially selected for use along Bulverde Lane in the Study Area.

- 77% were supportive or somewhat supportive of small cottage-style housing for seniors and the development of a plaza, gazebo, pavilion, arbor, community garden or other central gathering place or a DBV landmark (two separate questions).

- Nearly 86% supported or somewhat supported the construction of accommodations for bicycles and pedestrians, such as sidewalks, trails or walking/biking paths, with 71% strongly in support.

- In an average week, 51% visited the DBV area 1-3 times; 20% did not visit DBV in an average week and the same percentage visited 4-6 times a week.

- 29% of those responding had not visited Bulverde Community Park since it opened in April of 2014; an equal percentage had visited 1-3 times; 15% had visited 10 or more times.

The survey indicated a high level of support for these particular concepts among the survey respondents. The concept receiving the highest level of opposition (23% somewhat opposed or strongly opposed) had to do with the use of special paving materials or bricks to highlight key intersections; however, this concept was supported by the remaining 71%. The second least popular idea (17% somewhat opposed or strongly opposed) was for the development of a plaza, gazebo, pavilion, arbor, community garden or other central gathering place or a DBV landmark. Even so, 77% were in support of this concept.

FRONT PORCH NEWS

In addition to the options described above for gathering community input and insight, articles and updates was published throughout the study process to advise citizens and business owners of the purpose of the project and to invite their participation, either in person at the community workshops or by taking part in the online surveys. These articles were published in the *Front Porch News*, the City of Bulverde's monthly news magazine, which is available online and in hard copy form.

FINDINGS AND CONCLUSIONS

The public involvement process for this project incorporated a variety of techniques to solicit input from the community about their thoughts, ideas and vision for the future of Downtown Bulverde. Utilizing these different methods not only enabled more people to be a part of the process, but gave the study team vital information about the community's desires for a revitalized Downtown Bulverde Village. In general, many of the proposed concepts received high levels of endorsement and a number of ideas were either proposed or ratified, providing important direction for the study team's efforts.

# CHAPTER 5.

Framework for the Future
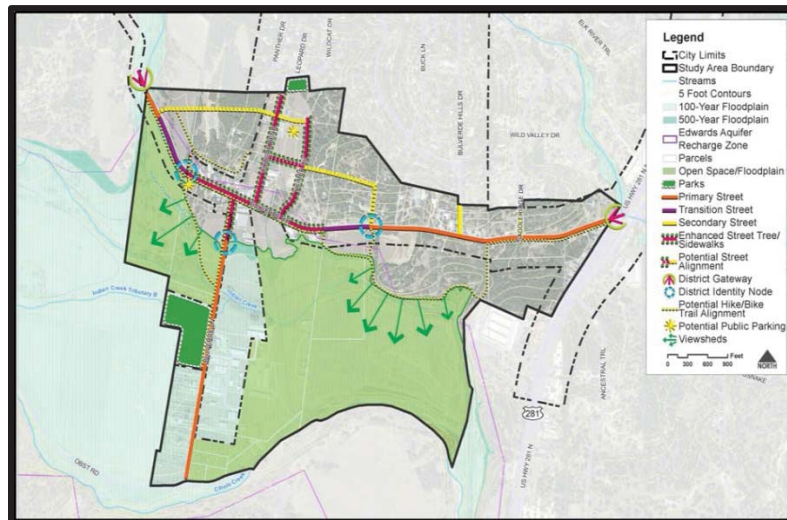
CHAPTER 5. Framework for the Future

LAND USE FRAMEWORK PLAN

The Land Use Framework Plan establishes the different development character zones that will be the building blocks for implementing the vision for DBV expressed by local stakeholders. The vision is not one of wholesale redevelopment of the DBV, but rather focuses on enhancing the unique, quaint character that exists today. It builds upon proven urban design principles by establishing distinct districts (commercial, civic and residential) that provide a unique mix of uses that can work together to support the success of one another. Each of these districts would be located in a manner that creates and organizes a compact, walkable environment.

Land Use Framework Plan
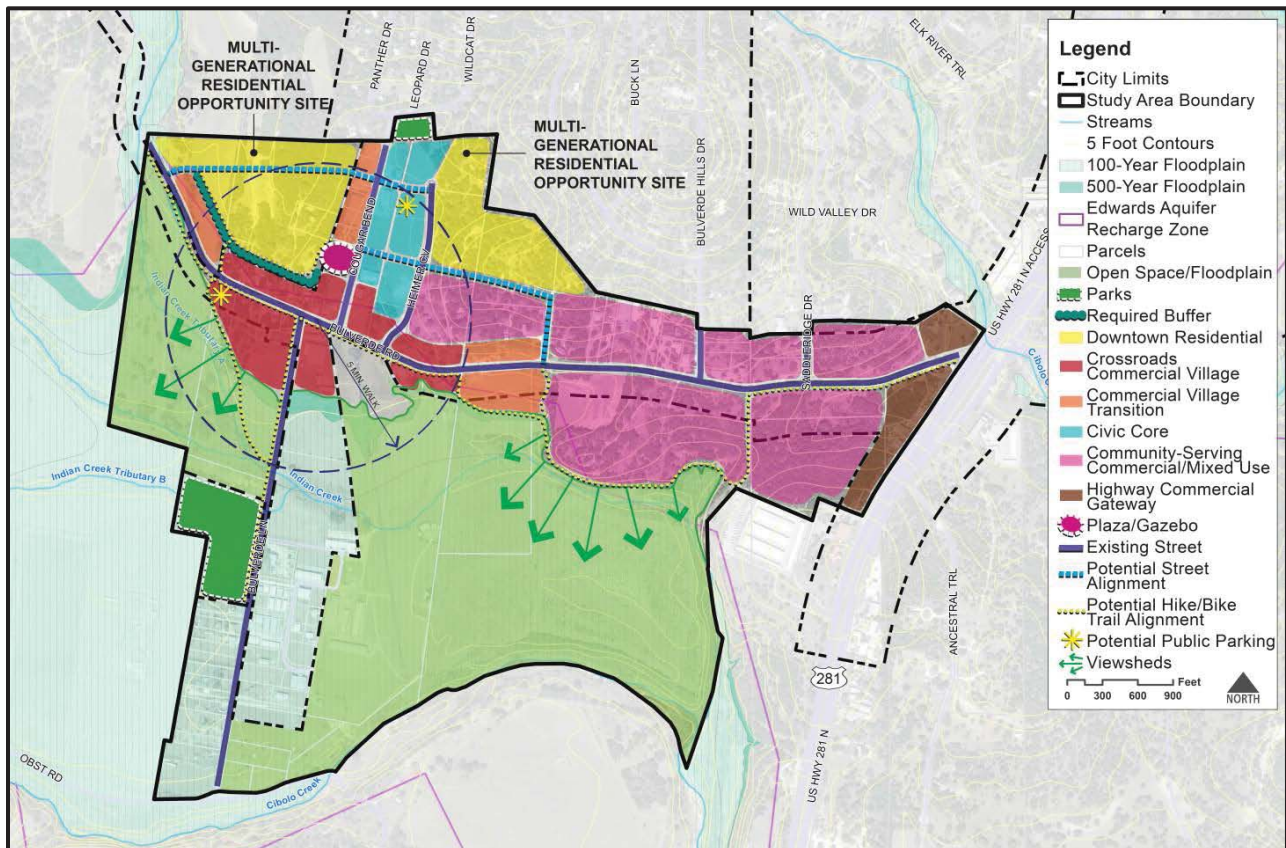
The heart of DBV surrounds the intersections of Bulverde Road at Bulverde Lane, Cougar Bend and Heimer Cove. The existing buildings in this area are located close to the roadways creating a unique sense of place. The Land Use Framework Plan identifies this area as the Crossroads Commercial Village. The vision for this area would build upon the existing context by encouraging infill buildings of a scale and character similar to the existing structures to house additional restaurants, a variety of smaller scale shops (specialty retail, antique shops, galleries) and lodging (bed and breakfast). This commercial heart of DBV will be the location of the main activities and attractions that will draw both locals and tourists to the area in order to experience Bulverde as "The Front Porch of the Hill Country."

Crossroads Commercial Village - Prototypical Images

Immediately north of the Crossroads Commercial Village, between Cougar Bend and Heimer Cove, the emphasis will be on enhancing the existing public investments in the area to establish a formal civic core. Today this area is home to the Bulverde City Hall, Senior Center and the Comal County Annex. The Land Use Framework Plan suggests that future needs in this Civic Core area might also be accommodated on the vacant, publicly-owned properties in the area, along with other uses that could enhance DBV, including additional parks, the community garden, public parking and a public plaza or gazebo. New investment in this area could add life to DBV by providing an enhanced venue for special events such as the Annual Art Walk and 4th of July Celebration.

*Civic Core - Prototypical Images*

The Downtown Residential districts would be established on the northern edge of the Study Area. These districts will not only provide a needed residential component that will contribute to the viability of the commercial uses in the area, but also form an appropriate transition to the residential neighborhoods adjacent to the Study Area on the north. In keeping with the theme of creating a compact, walkable environment in the DBV area, the Downtown Residential Districts are envisioned to provide "cottage housing" on smaller lots that will be attractive to multiple generations (empty nesters and single adults) seeking a housing product with fewer maintenance needs.

Downtown Residential / Residential Buffer - Prototypical Images

While these three districts form the core of the DBV, additional districts are envisioned to provide supporting activities and uses that will enhance DBV. The Commercial Village Transition districts would be established along Bulverde Road and Cougar Bend and would form the transition into the Crossroads Commercial Village. The buildings in these areas would likely have larger floorplates than in the Crossroads Commercial Village area and would be spaced farther apart and set further back from the roadways. While the pedestrian realm will still be an important component of these districts, the focus will be upon connecting pedestrians to the Crossroads Commercial District on new multi-purpose trails.

Commercial Village Transition - Prototypical Images
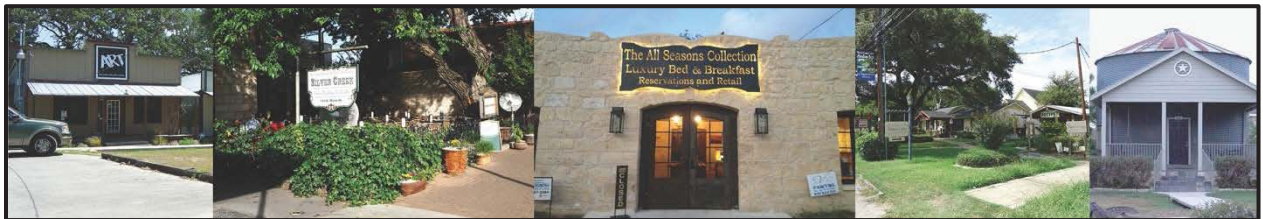
The Community Serving Mixed-Use districts would be located along Bulverde Road east of the DBV area, and are envisioned to form a transition between US 281 and the Village. The rural character of Bulverde Road in this area would be maintained by setting buildings further back on properties screened by

existing trees. The uses planned for this area would support the surrounding community and the DBV area and could include professional offices, assisted living centers, lodging (bed and breakfast inns or small hotels) and studios for artists needing larger spaces than the Crossroads Commercial Village can accommodate. The Commercial/Mixed-Use Districts on the south side of Bulverde Road can take advantage of the floodplain/open space areas to the south by capitalizing on the view and by providing space for outdoor activities in support of the nearby businesses, including hiking/biking paths or nature trails.

Community Serving Commercial / Mixed-Use - Prototypical Images

The Highway Commercial Gateway district is focused on those properties that have immediate frontage along US 281. It is intended to provide a location for larger, highway-oriented commercial uses that would not be appropriate in the other districts within the Study Area. Since these districts are the front door to the DBV area, development of these properties should focus on a high level of design and the use of quality materials.

*Highway Commercial Gateway - Prototypical Images*

URBAN DESIGN / TRANSPORTATION FRAMEWORK PLAN

The Urban Design Framework Plan identifies a set of urban design elements—gateways, identity nodes, paving enhancements, street furniture—that would be appropriate in Downtown Bulverde Village. The design characteristics of each of these elements was confirmed by participants at the community

meetings in August and October, 2014. Each was selected to complement the environment in DBV today, which Bulverde citizens and stakeholders described as quaint and rustic. The rustic character would be achieved within the public realm through the use of architectural elements, special landscape and hardscape treatments, specialty signage and art.

*Urban Design / Transportation Framework Plan*
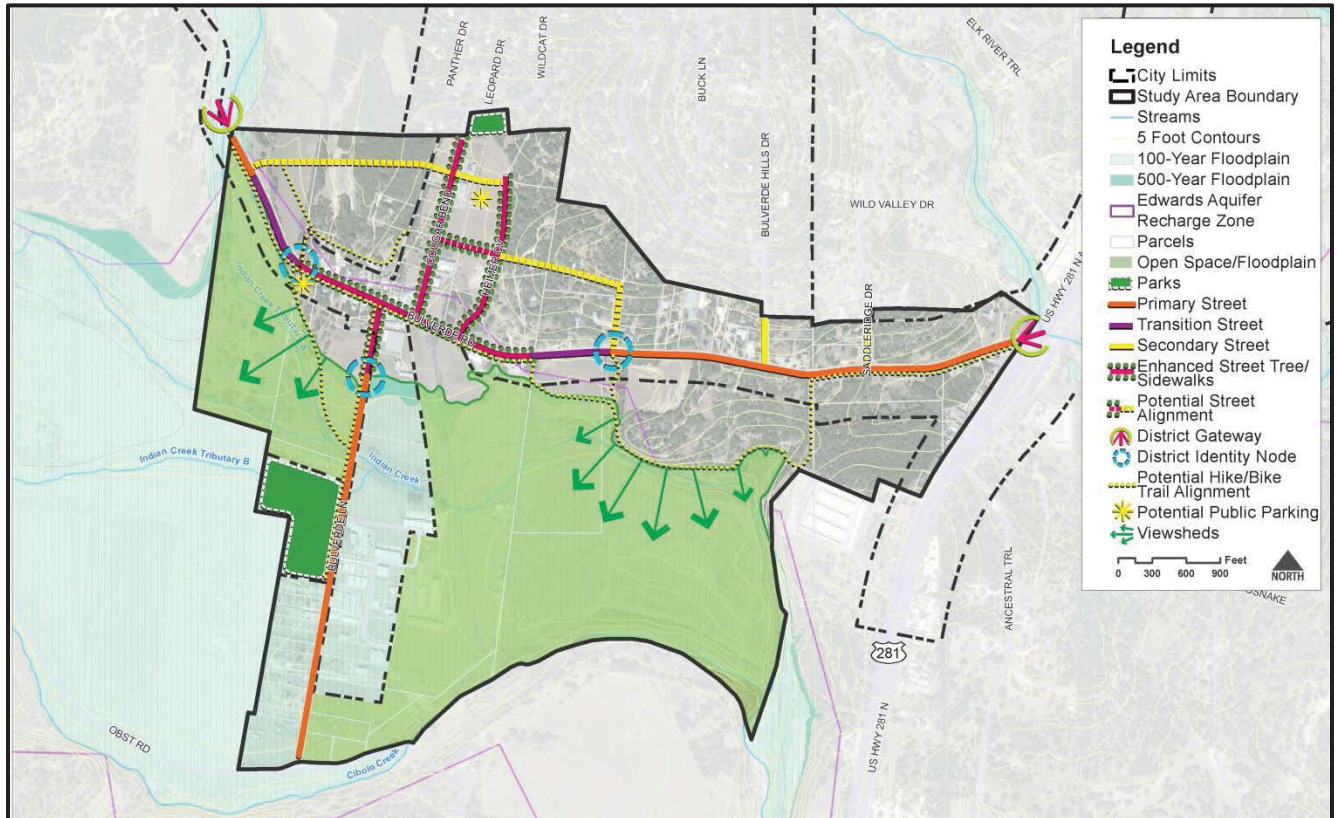
District Gateways and District Identity Nodes

The Urban Design and Transportation Framework Plan identifies locations for District Gateways and District Identity Nodes. The District Gateways will serve as entry portals on the eastern and western ends of Bulverde Road, the corridor that leads into Downtown Bulverde Village. The District Identity Nodes are located near the Crossroads Commercial part of the Village, which is the heart of the district. One of these nodes is shown on Bulverde Road east of Bulverde Lane, one on Bulverde Road west of Bulverde Lane and one on Bulverde Lane south of Bulverde Road.

Several of the preferred District Gateways and Identity Node images are shown below. They incorporate stone, water, landscape materials and symbols of the heritage of the Bulverde area. The District Identity Nodes are envisioned at a smaller scale than the District Gateways, which are meant to attract attention from a further distance.

District Gateways and District Identity Nodes
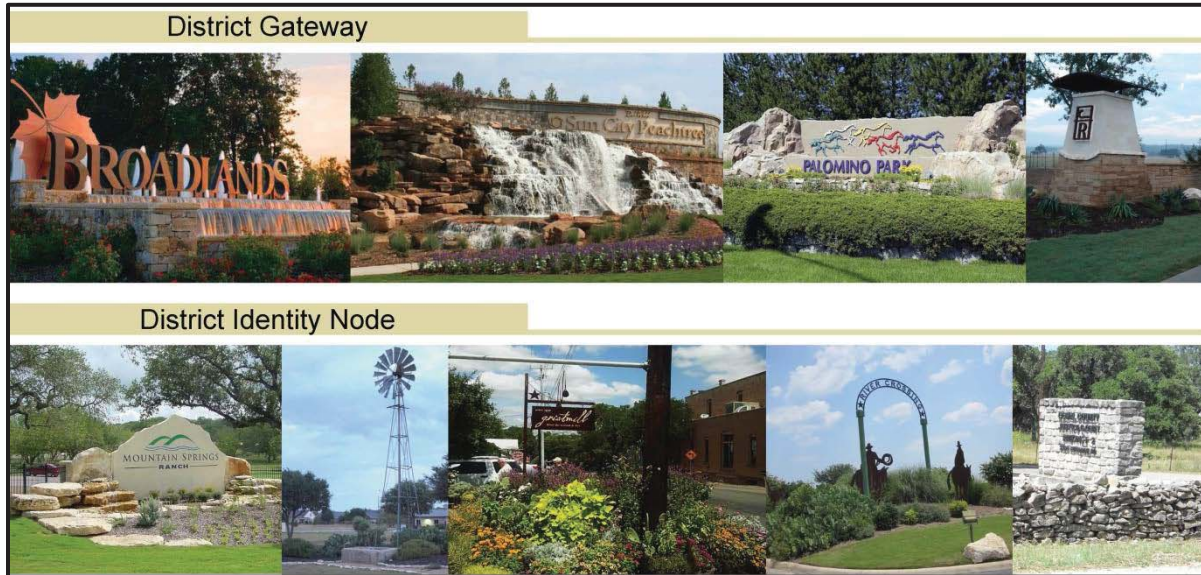
Public Parking

The lack of public parking is a concern to residents with respect to the Downtown Bulverde Village. The availability of clearly marked, convenient parking will be crucial to the success of the businesses in DBV. The Urban Design Framework identifies two locations for potential Public Parking lots, one on City property northeast of City Hall and another in the floodplain area south of Bulverde Road and west of Bulverde Lane. These facilities would also address the need for parking for special events such as the community fair in the fall and the tree lighting ceremony in December.

Viewsheds

The Urban Design Framework also notes views to the vast open space and natural area south of Downtown Bulverde Village. These Viewshed areas will probably remain mostly undeveloped because they are in the floodplain, but they represent an opportunity for the hike-and-bike trails the community hopes to see. For the most part, these trails are shown along the shoulders of Bulverde Road, but where site conditions permit, the alignment could veer away from the edge of the roadway and meander through the greenways and floodplain along the edge of Indian Creek Tributary.

Public Realm Elements

The citizens of Bulverde and other stakeholders expressed a strong desire for a Downtown Bulverde Village that is both quaint and progressive. They want to maintain the existing character of DBV through the use of rustic building materials for new construction—wood, stone, tin. The urban design elements and street furnishings in the Public Realm should be chosen from a palette that reflects this same vision.

Public Realm Elements (Street Furniture)

Pedestrian Light	Bench

Trash Receptacle	Planters

Bike Racks	Tree Wells

Light Bollard

Enhanced Crosswalk / Pavement Material

The Urban Design Framework identifies the areas appropriate for street tree enhancement. Street trees should be carefully selected from varieties that are adapted to the climate and soil conditions of the area and compatible with the adjacent land uses and streetscape the community envisions. These trees

must be planted in anticipation of the restricted growing area and the limited amount of impervious surface that will surround them. The following is a list of recommended street trees and a set of corresponding images.

Allee Elm, *Ulmus parvifolia 'Ener II'*

Bigtooth Maple, *Acer grandidentatum*

Cedar Elm, *Ulmus crassifolia*

Chinquapin Oak, *Quercus muhlenbergii*

Lacey Oak, *Quercus laceyi*

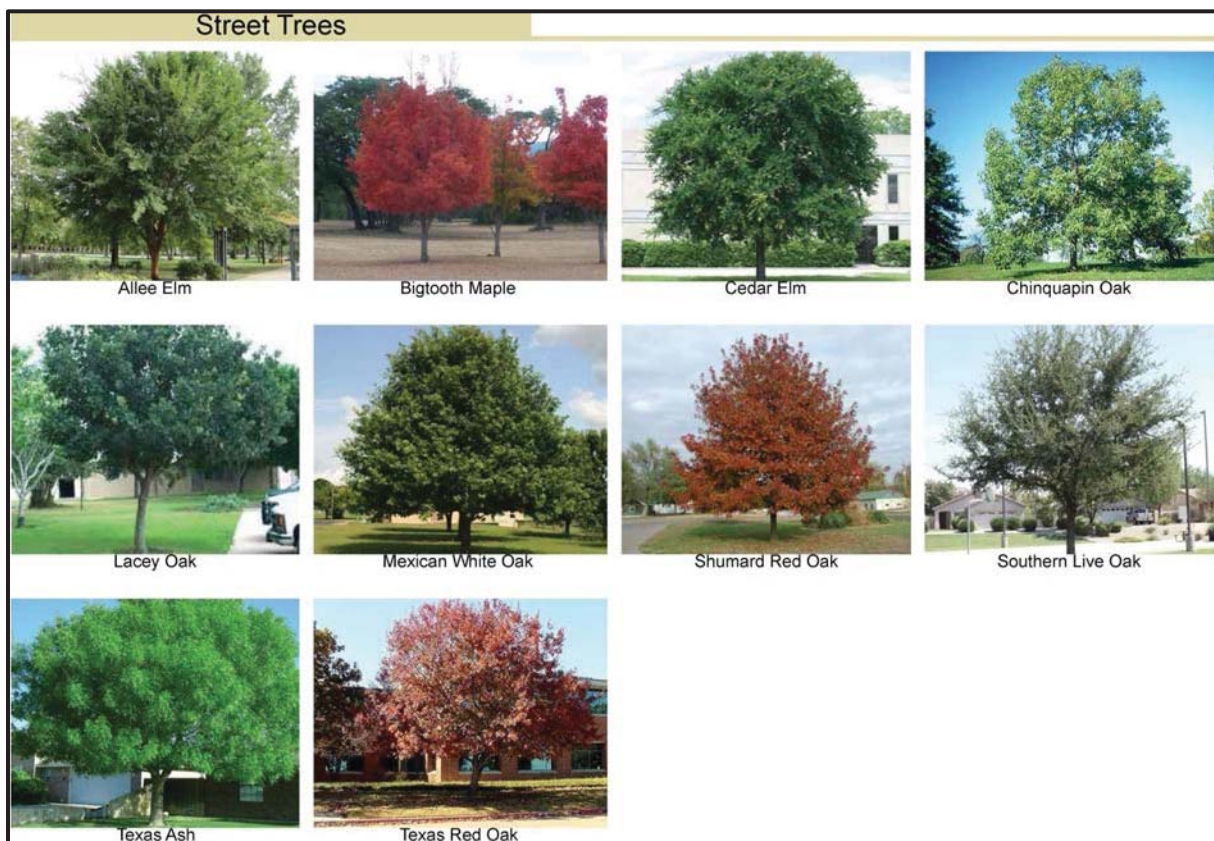Mexican White Oak, *Quercus polymorpha*

Shumard Red Oak, *Quercus shumardii*

Southern Live Oak, *Quercus virginiana*

Texas Ash, *Fraxinus texensis*

Texas Red Oak, *Quercu texana*

Recommended Street Trees

TRANSPORTATION FRAMEWORK

The relationship between the future land uses in the Village and the transportation system that serves them is an important one. Existing roadway conditions and the improvements necessary to accommodate the redevelopment of the area must both be considered. The transportation plan must accomplish a combination of things:

- Address the immediate needs of the DBV area;

- Create better connectivity between commercial and mixed-use areas and residential neighborhoods;

- Accommodate the new uses the community hopes to see;

- Accommodate all applicable modes of transportation (auto, bicycle, and pedestrian);

- Develop alternate routes to accommodate community events held in the DBV area; and

- Allow for expansion of the roadway with minimal reconstruction.

Existing Roadway Conditions

The transportation system in downtown Bulverde today consists entirely of two-lane asphalt roadways with minimal shoulders and drainage ditches on both sides. Recent counts on Bulverde Road in the vicinity of the downtown area are just over 5,000 vehicles per day, well within the capacity of a two-lane road. These roadways can adequately serve the current traffic volumes but will not accommodate the vision for the future Downtown Bulverde Village. There are no trails or special pedestrian crossing features currently in place.

Future Roadway Conditions

As Bulverde and the surrounding area continue to grow over the next few decades, the traffic volumes on Bulverde Road, Bulverde Lane and the other streets in the DBV area are expected to increase significantly. According to the Alamo MPO's 2040 travel demand model, the projected volume on Bulverde Road between US 281 and Bulverde Lane is over 12,300 vehicles per day. Similarly, the projected volume on Bulverde Road west of Bulverde Lane is over 20,000 vehicles per day. The roadway sections being recommended can be expanded with minimal reconstruction as traffic volumes increase. This will provide the maximum flexibility to the City of Bulverde as changes in the roadway network become necessary due to increasing traffic volumes.

Recommended Typical Roadway Sections

The following typical roadway sections will accommodate automobiles in a pedestrian- and bike-friendly downtown area while maintaining flexibility for possible expansion in the future. There are several different sections, each designed to address the adjacent land use and the desired pedestrian environment.

- Primary Street

- Transition Street

- Secondary Street

- Enhanced Street – Angle Parking
- Enhanced Street – Parallel Parking

Primary Street

As the traffic volumes on Bulverde Road and Bulverde Lane leading into the heart of DBV increase, the need for additional capacity and multimodal accommodations will be addressed with 12' through lanes, full 8' paved shoulders and a 14' two-way center left-turn lane. These improvements will provide for better safety and more capacity.
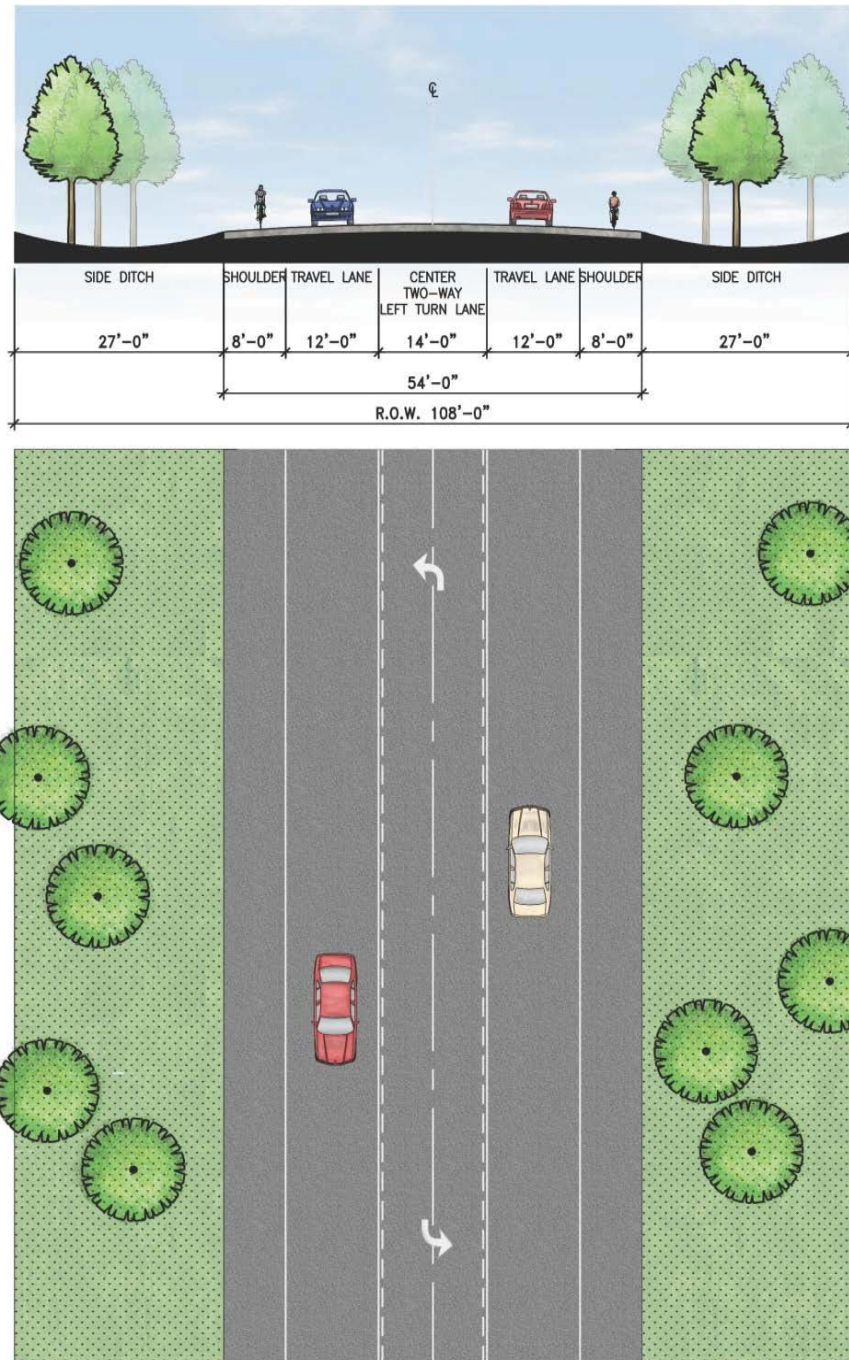
Transition Street

As vehicles approach the Village, traffic will need to begin slowing to prepare drivers for the possibility of increased conflicts such as driveway openings, pedestrian activity and bicycle traffic. Narrowing the width of the travel lanes from 12' to 11' in certain segments of Bulverde Road will prompt drivers to start making the transition to a different type of roadway and pedestrian/cycling environment on their way into the heart of DBV.
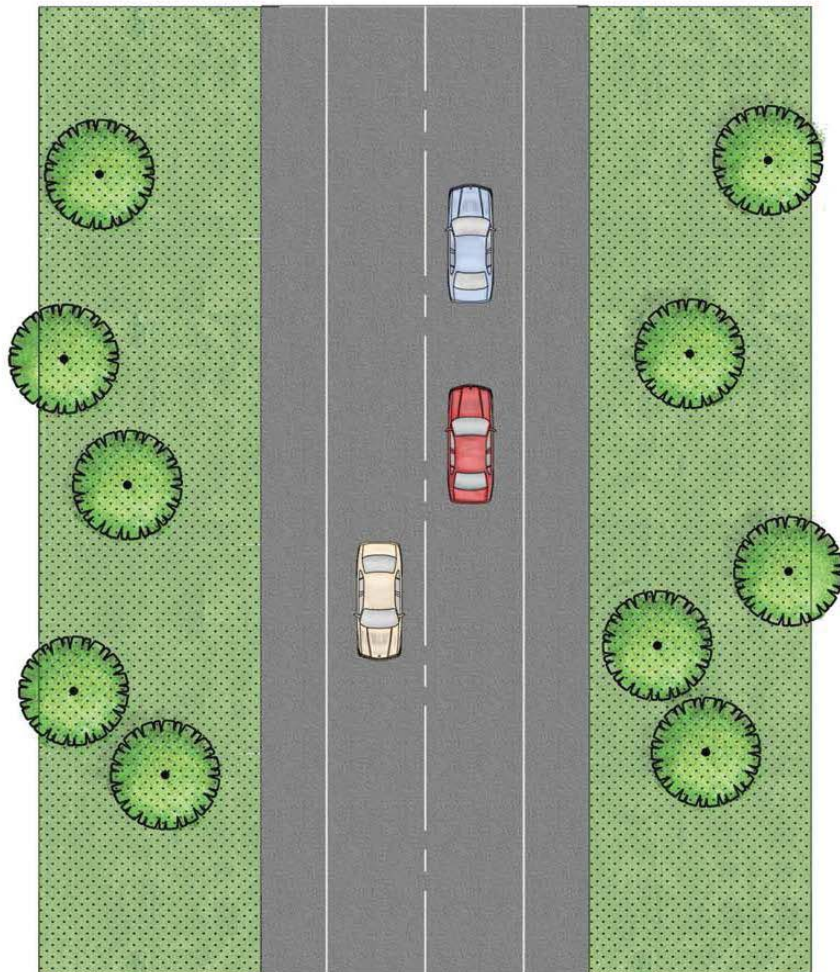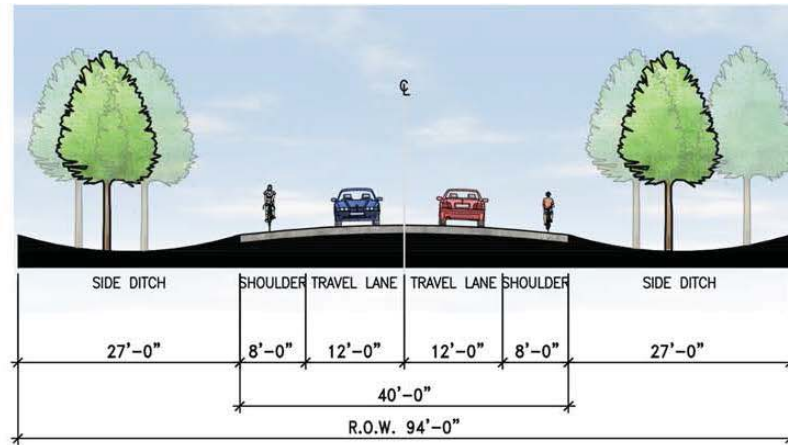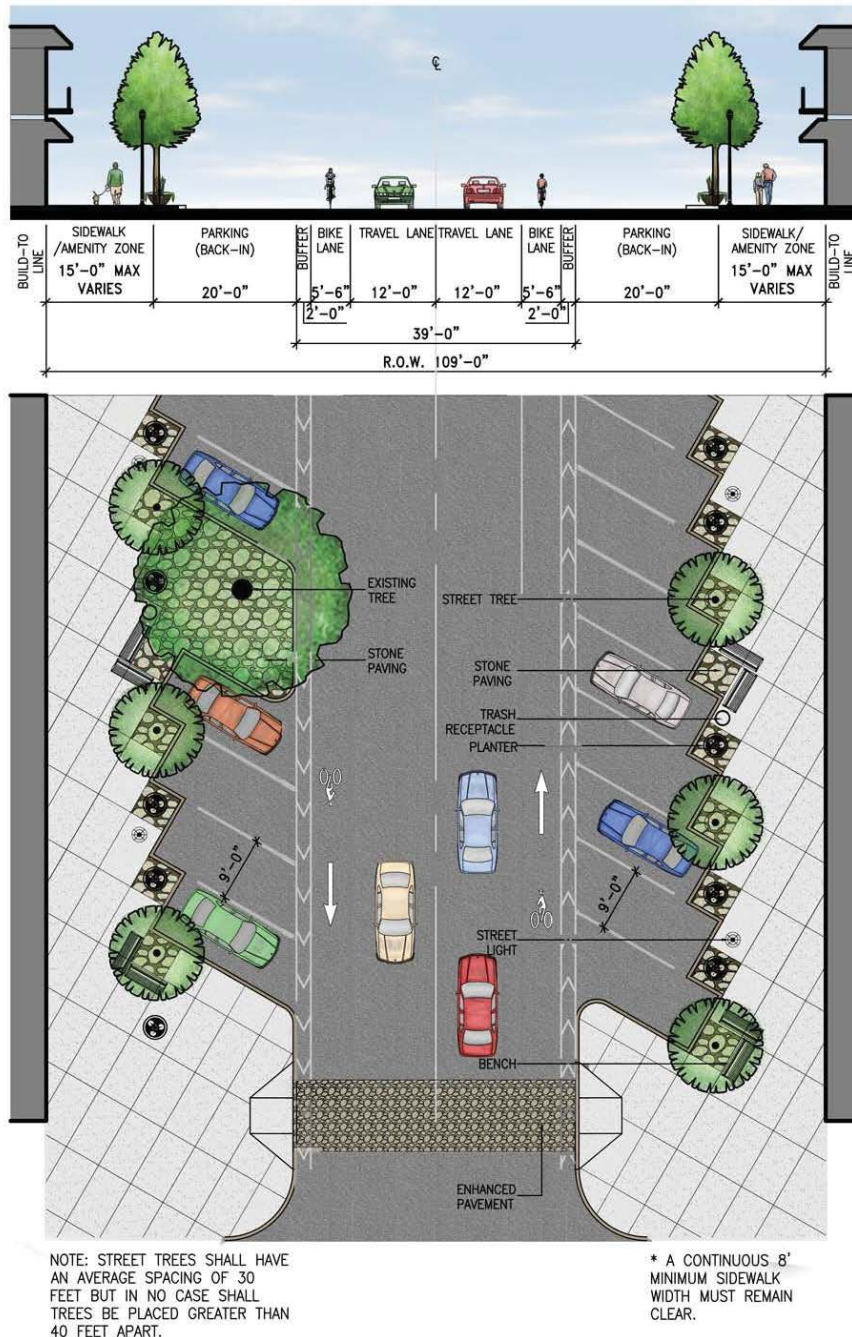
Secondary Street

For the lower volume streets off the main arterials—in the area identified for Downtown Residential development, for example—a two-lane street is recommended, with paved roadway shoulders for safety and bicycle use.
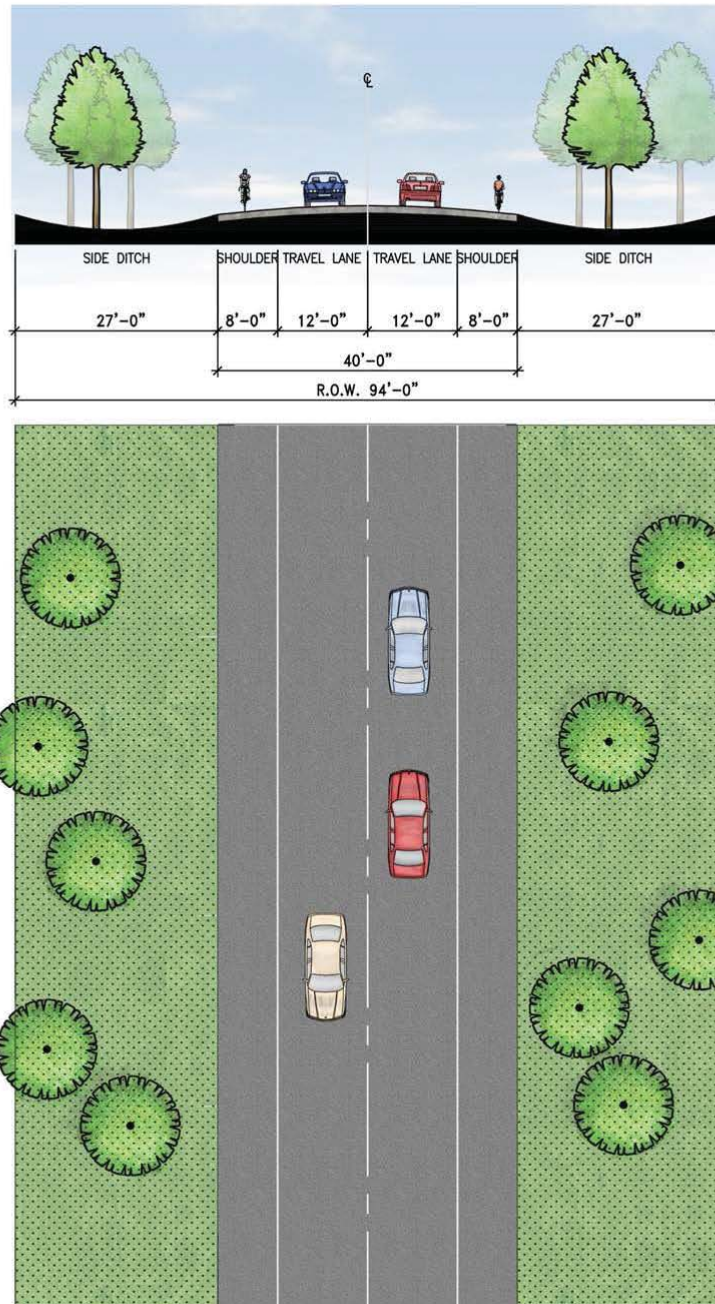
Enhanced Street – Angle Parking

Downtown Bulverde Village is envisioned as a special destination for both local residents and out-of-town visitors. Designing the transportation system for all modes of travel, especially bicycles and pedestrians, will create an environment conducive to the activities the redevelopment is meant to encourage. The proposed street section for the Commercial Crossroads area includes generous sidewalk areas, back-in or head-in angle parking, bike lanes with delineation/buffers for improved safety, curb extensions at intersections to reduce pedestrian crossing time and distance and enhanced crosswalks for safety.

NOTE: STREET TREES SHALL HAVE AN AVERAGE SPACING OF 30 FEET BUT IN NO CASE SHALL TREES BE PLACED GREATER THAN 40 FEET APART.

* A CONTINUOUS 8' MINIMUM SIDEWALK WIDTH MUST REMAIN CLEAR.

Enhanced Street – Parallel Parking

The existing 65' right-of way in Downtown Bulverde Village creates pinch points where buildings are located on or very close to the right-of-way line. To address this condition, the sidewalk/amenity zone in this section is tighter and the bike lane buffers are compromised or eliminated. Parallel parking is accommodated where existing site conditions are permanent (not likely to redevelop) or existing trees need to be protected.
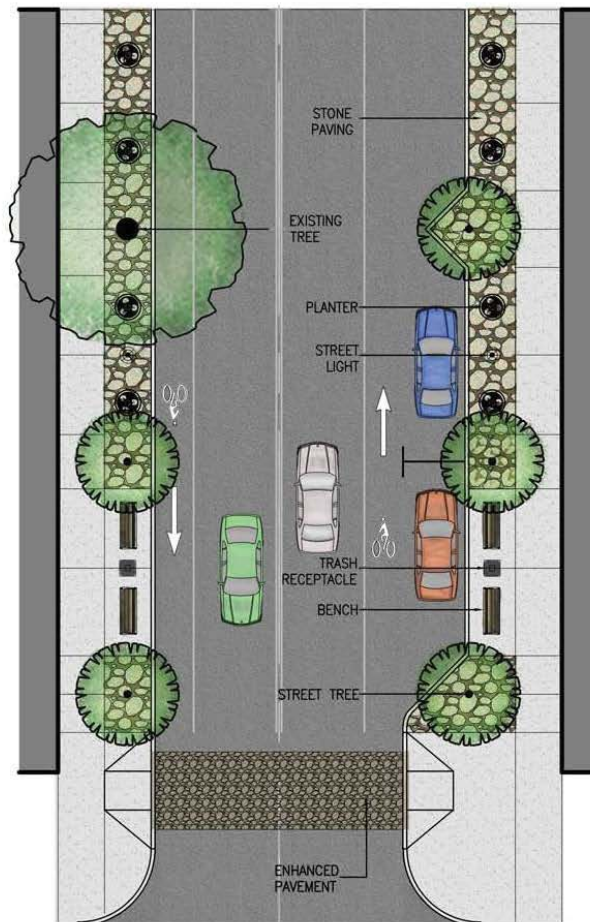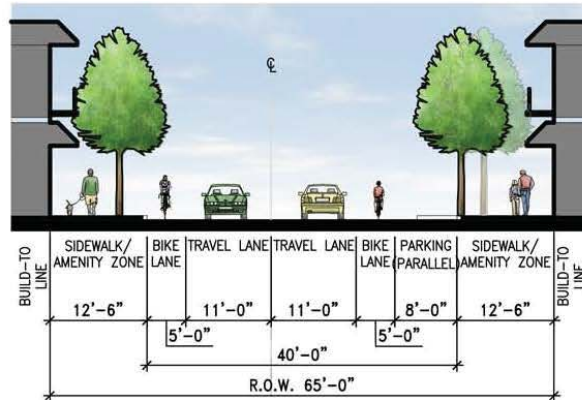
NOTE: STREET TREES SHALL HAVE AN AVERAGE SPACING OF 30 FEET BUT IN NO CASE SHALL TREES BE PLACED GREATER THAN 40 FEET APART.

* A CONTINUOUS 6' MINIMUM SIDEWALK WIDTH MUST REMAIN CLEAR. PARKING WHERE APPLICABLE

56

CHAPTER 6.

Implementation

Strategy Layers

Strategic Directives

City Council/P&Z

Downtown Bulverde Village

Market Opportunities and Barriers

Implementing Entities
(City Staff, Economic Development Foundation, Business/Property Owners, etc.)

Market Opportunities and Vision

Actions
(Projects, Programs and Policies)

Investors / Private Sector

Realized Vision

Community Support
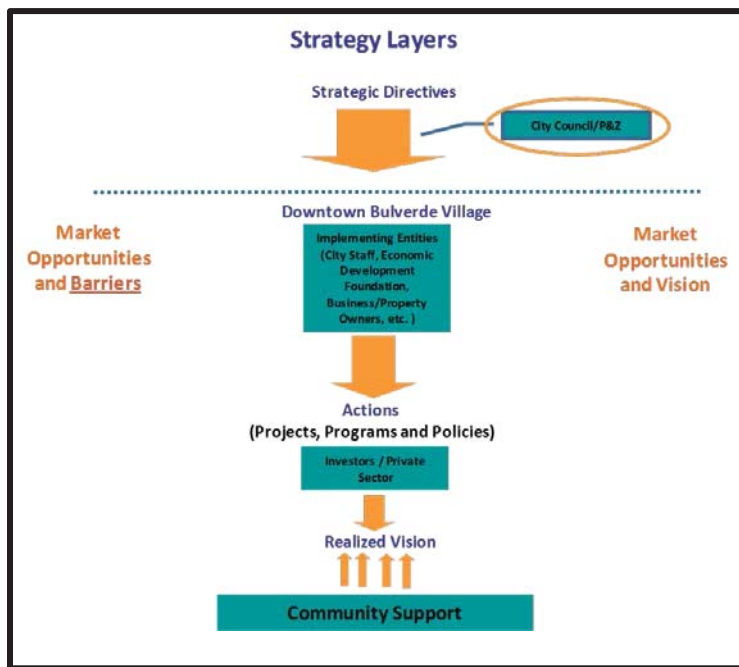
CHAPTER 6. Implementation

In any revitalization initiative, clarification of the vision and desired results is followed by definition of a strategy for promoting development and redevelopment. As explained during the study process, success will depend on the implementation of a series of actions designed to capitalize on market opportunities and overcome barriers, collectively "readying the environment for investment." Key to achieving the ultimate vision expressed here will be the continued monitoring of these efforts to ensure they are effectively addressing the unique circumstances of the Study Area and the properties within it. Through the approach described below, the City and its public (Chamber of Commerce and Economic Development Foundation) and private (landowners) partners will be the early lead in this revitalization initiative. The underlying objective is to build community support as progress is visible and send a message that the Study Area is evolving and that it is an increasingly attractive place to invest.

No single project will revitalize or "kick start" Downtown Bulverde Village. The definition of "actions" is broad as it applies here and may include any or all of the following, which have been identified to promote opportunities and overcome barriers:

- Public, private or public/private projects;

- Physical projects and educational programs;

- Public relations and programs that build feelings of cooperation and collaboration; and

- Policy reform.

Ideally, investors, developers and lenders seek out environments with market opportunity and prospects for success, devoid of obstacles and sound in sustainability. This approach—identifying and implementing specific actions—will:

- Build community goodwill;

- Provide on-going opportunities for public participation;

- Allow key stakeholders to have a role in the revitalization effort;

- Send a message that the Study Area is successful and making positive strides; and

- Create an increasingly attractive environment for investment and development.

GUIDING PRINCIPLES

The range of actions to move the strategy forward were identified based on a foundation of guiding principles. All of these guiding principles are responsive to the conditions present, market opportunities and stakeholder input received. While general in nature, they serve as a guide for City leadership's deliberation on policies, programs and specific projects that would directly impact the Village.
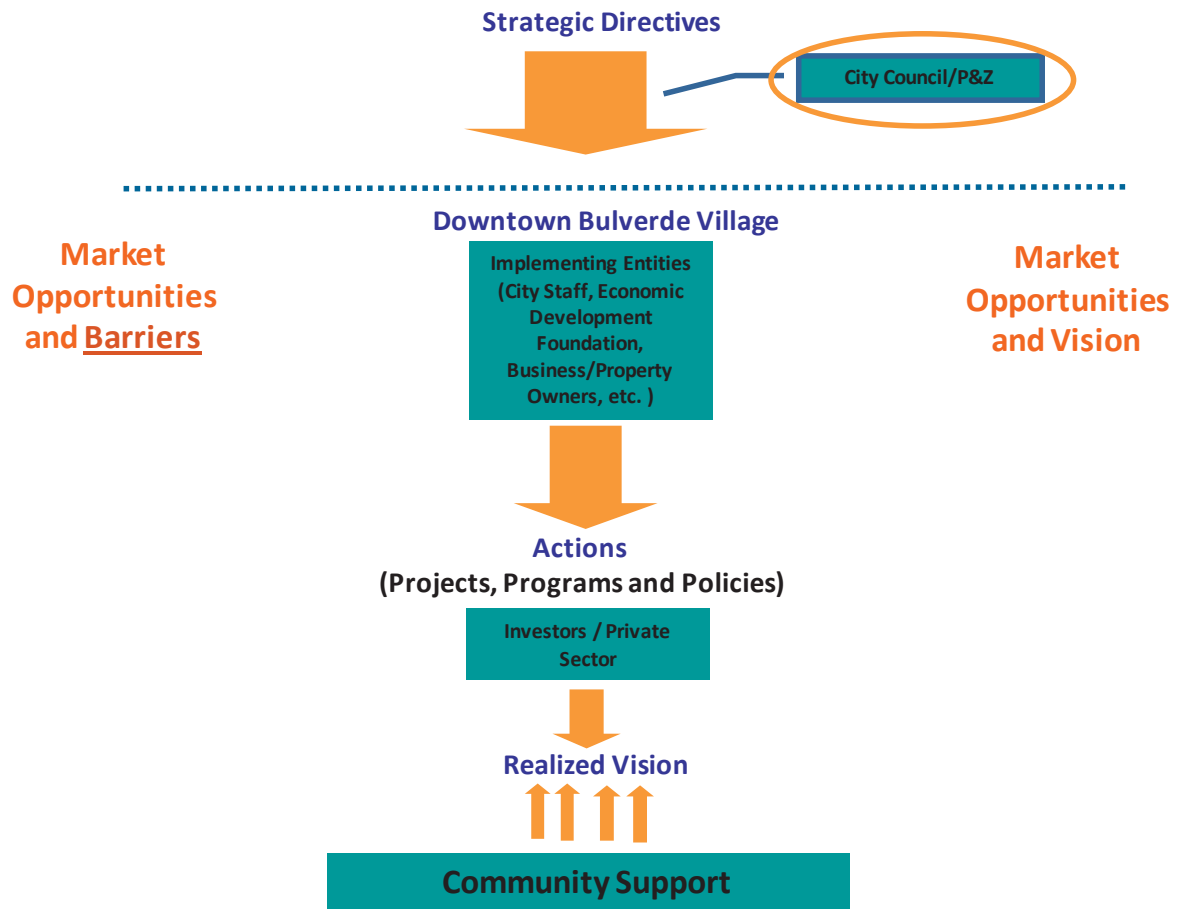
- The City will maintain a proactive attitude towards redevelopment and new investment consistent with the vision for Downtown Bulverde Village.

- The community's vision for Downtown Bulverde Village will be reflected in supporting policies and regulations.

- Development will be directed by short-term guidelines and long-term standards that recognize not only new concepts derived through this study process, but also the general requirements that are part of the Bulverde's Village Overlay regulations.

- The City will consider providing assistance for meritorious projects that adhere to the community's vision for the Downtown Bulverde area.

- Preference will be given to projects emphasizing a greater diversity of uses and serving broader market segments.

- Capital investments will embody Bulverde traditions and history.

- Gateways and other urban design elements will be developed to enhance the identity of Downtown Bulverde Village.

- Future commercial uses will be encouraged along Bulverde Road, Bulverde Lane and along a portion of Cougar Bend.

- New buildings will be of an appropriate scale and character to blend in with the existing character of today's Downtown Bulverde Village.

- Housing suitable to people of all ages and means will be permitted in Downtown Bulverde Village to help diversify the land uses, support other compatible uses and cultivate new development opportunities.

- Existing neighborhoods will be respected with regard to buffering, transitions and adjacent uses.

As shown in the diagram below, these Guiding Principles establish the foundation from which new implementation initiatives and actions were formulated. It is important to note that the efforts of City leaders should be focused above the line shown in the diagram, evaluating strategic directives as they are formulated by implementing entities below the line.

Downtown Bulverde Village Implementation Framework

Strategy Layers

Strategic Directives

City Council/P&Z

Downtown Bulverde Village

Implementing Entities
(City Staff, Economic
Development
Foundation,
Business/Property
Owners, etc.)

**Market
Opportunities
and Barriers**

**Market
Opportunities
and Vision**

Actions
(Projects, Programs and Policies)

Investors / Private
Sector

Realized Vision

Community Support

STRATEGIES AND ACTIONS FOR CHANGE

The challenges to investment and reinvestment are multifaceted, and the solutions must be as well. As new development focuses on the northern edge of the community, Downtown Bulverde continues to struggle. Competition from development in nearby communities has also cut into Bulverde's market share and threatens to thwart new investment, causing further decline.

The public and private sectors will face the challenge of revitalizing the Downtown Bulverde Village together. Its competitive position will continue to be eroded unless:

- It is significantly repositioned in the market;

- The infrastructure in the area is improved to support existing and future business and residential activity;

- The economic challenges inherent in infill and corridor redevelopment in an older, historic area are recognized and overcome; and

- There is aggressive recruitment of niche opportunities.

The past several years have been particularly challenging for the real estate industry. The trend of declining values extended even to healthy markets during that time. Now, as there are signs of renewed vigor in several real estate sectors, opportunities for unique infill developments are becoming available. For the City of Bulverde, there is no better time to position itself for taking advantage of these opportunities. This strategy will be the roadmap to advancing the City's and stakeholders' vision towards reality and to ensuring that redevelopment of Downtown Bulverde Village is accomplished in a way that balances private investment objectives with community goals.

Ultimately, the City of Bulverde, its Council, Planning and Zoning Commission, staff and citizenry will have to select a course of action to create the environment for change. The information presented here is designed to provide a range of actions for consideration and sound decision-making.

Strategies

Potential strategies for overcoming investment challenges and capitalizing on opportunities are grouped in the following categories:

- "Shape" Market Perception

- Diversify Commercial Mix

- Expand Housing Choices

- Enhance the Public Realm

- Grow the Funding Tool Box

Each category title is described below according to its role in overcoming investment challenges and capitalizing on market opportunities.

Shape Market Perception

One of the biggest challenges associated with development/redevelopment in an aging area is changing negative market perceptions. With the adoption of the Downtown Bulverde Village strategy a new image must be established for the Study Area. Information generated during the planning process must be used to develop marketing and promotional materials which tell the whole story of the Study Area, past and present. The audiences for these materials can be private sector interests (developers, investors, property owners, businesses) or public sector/institutional partners (schools, churches, neighborhood associations). Emphasis should be placed on the City's commitment to DBV, planned improvements, available incentives and consumer profiles. The City cannot wait for investors to look for an opportunity, and it cannot leave them to interpret generic information on their own. Communities and neighborhoods need to tell their own story.

Diversify Commercial Mix

During the planning process, six land use areas were identified as having relatively unique market, physical, economic and social characteristics. A unified strategy to integrate and connect these disparate areas will be a critical part of creating a new market identity for Downtown Bulverde Village.

The majority of the land within DBV is either vacant or consists of one of two uses—commercial or civic. There is not really a concentration of businesses and there is little variety of uses and nearly no residential units to support the businesses currently located there. A more effective mix and a better integration of land uses will foster a more unified sense of place and respond better to market opportunities in the surrounding Trade Area.

Expand Housing Choices

Market opportunities identified during the planning process included unmet demand for a variety of housing products not readily available in the Bulverde Trade Area. Primary among these opportunities was the range of housing types that could accommodate 55+ age groups. Lower maintenance, smaller units could be easily accommodated in the Study Area, provided the physical connections and access to amenities are in place as well.

This expansion of housing products, particularly in proximity to the core of Downtown Bulverde, will not only fill an unmet need in the community, but also provide support for Downtown businesses.

Enhance the Public Realm

The aesthetic environment of a redevelopment area often dictates the success of its businesses and the satisfaction and even safety of its residents. As critical as it is to an area's economic success, the aesthetic environment is typically the first element to show its age. As the public realm begins to display signs of deterioration, private properties quickly follow. The tipping point for a redevelopment area, between potential revitalization and further decline, is when private investment and reinvestment slow to a trickle. Because the public sector has the longest-term investment or stake in a redevelopment area, it will be public investment that reverses the decline in aesthetics. One of the empirical truths in redevelopment is that private investment will follow public investment. By enhancing the public realm—"greening the street"— throughout Downtown Bulverde Village, the City will be able to leverage its investment to attract additional private investment and reinvestment, resulting in higher-quality development and well-served markets.

Grow the Funding Tool Box

A lack of funding is sometimes considered the most obvious barrier to the advancement of a community redevelopment plan. Comprehensive and area-specific planning in the City of Bulverde comes at a time when demands on local government are high and resources are limited. The responsibility for implementing redevelopment and reinvestment strategies and the many public projects that contribute to the evolution of aging or underperforming areas of a community has historically been borne predominantly by the public sector. Success depends on creativity and multiple solutions. Some communities consider adoption of governing regulations (tools such as the comprehensive plan, zoning ordinances, planned development ordinances, design review/overlay regulations and the like) to be the beginning and end of their implementation strategy. While these tools are necessary, they are only one component of the overall implementation process and they typically occur early in the redevelopment cycle. Implementation, as presented here, is much more comprehensive in scope and includes considerably more than just a design for the City's regulatory agenda.

The City of Bulverde, in its attempt to revitalize an important segment of its community, must be able to provide the broadest possible range of resources, including, at a minimum, assistance with site acquisition and building and facade improvements; start-up capital; relocation assistance; and business

counseling. The list of potential strategies presented in the Implementation Matrix could provide either direct or indirect economic benefits to projects in Downtown Bulverde Village.

Actions for Change

To implement the strategies described above, concrete actions will be required. In this Implementation Plan, a series of distinct but inter-related action items has been identified. Some will apply throughout the entire DBV Study Area; others will apply only to certain subareas within the district. These action items will require varying levels of staff commitment and public funding and will be undertaken at different points in time. All of these factors should be considered by the City as it moves forward to develop an overall plan for the advancement of the initiatives described above.

IMPLEMENTATION MATRIX

The Implementation Matrix details the actions necessary to implement the overall strategies for the future of Downtown Bulverde Village.

The matrix is categorized by the six land use areas within the DBV area—Crossroads Commercial Village; Civic Core; Downtown Residential; Commercial Village Transition; Community Serving Commercial/Mixed-Use; Highway Commercial Gateway—and includes a category called Corridor-Wide, which applies to the entire Study Area.

These strategies and action items are presented in the following format.

Land Use Type: The land use category identified in the Downtown Bulverde Village Framework Plan to which the Strategy and/or the Action Item applies to the overall DBV Corridor.

Strategy: A method for bringing about a desired future.

Action for Change: A specific step taken to implement or achieve a strategy.

Timing: Time frame for implementing strategies (Short-Term – 1 to 3 years; Mid-Term – 3 to 5 years; Long-Term – 5+ years).

Level of Intervention: The extent to which the City may be proactive in investing resources—dollars, staff time, political will, policy or regulatory changes, etc. (Low, Medium, High).

CONCLUSION

The Downtown Bulverde Village Implementation Plan has been developed to articulate a vision, concept and strategy for the future use and development/redevelopment of properties in the Study Area. The analyses and recommendations presented herein are intended to assist the City and property/business owners in the Study Area with identifying and implementing the projects, programs, policies and funding options necessary to serve future development initiatives. Further, it identifies specific objectives and strategic actions that will make this unique area of the community a better place to live, conduct business, shop and visit.

This strategy is based on a realistic understanding of physical and market conditions and is intended to respond to the needs and desires of the City and the business and property owners. Together, the public and private sectors face the challenge of advancing the identity of Downtown Bulverde Village in the marketplace. This document will serve as the guidepost for those efforts. It should be regularly revisited and amended as more is learned about the market and the challenges to investment in the

Study Area and as the area evolves over time.

The success of the overall effort will depend upon:

- Committed, on-going leadership;

- Collaboration among the various Study Area stakeholders;

- Coordination of multiple initiatives;

- Removal of challenges/obstacles to investment; and

- Ongoing communication between all of the affected parties.