

# DHA DOWNTOWN AND NEIGHBORHOOD PLAN

Durham Housing Authority & City Of Durham  
Durham, North Carolina

November, 2019

## APPENDIX





# APPENDIX

## LIST OF DOCUMENTS

**Incorporated by reference and available  
on the project website**

**([www.durhamhousingauthority.org/development/ddnp/](http://www.durhamhousingauthority.org/development/ddnp/))**

### **A. RESIDENT SURVEY RESULTS**

### **B. MARKET STUDIES**

### **C. CONCEPTUAL ALTERNATIVES**

- Oldham Tower & Liberty Apartments
- DHA Office & Criminal Justice Building
- Rigsbee Avenue Substation
- Fayette Place
- Southside Phase III
- Forest Hill Heights
- J.J. Henderson

### **D. MEETING MATERIALS AND SUMMARIES**

## DHA & Downtown Neighborhood Planning Resident Survey

NOTE: All surveys were administered to Heads of Household; percentage calculations exclude "No Response" from the denominator  
As of March 6, 2018, survey achieved and overall response rate of 87%, with 350 responses among the 403 residents (at least 1/2 of questions answered)

### RESIDENT BACKGROUND INFORMATION

Q1. Are you the head of household?

Answer Choices	Responses	
Yes	98.6%	360
No	1.4%	5
<b>Answered</b>		<b>365</b>

Q2. If you are not the head of household, are you authorized to speak on behalf of this household?

Answer Choices	Responses	
Yes	80%	4
No (STOP THE SURVEY)	20%	1
<b>Answered</b>		<b>5</b>

Q3. In which DHA housing site do you live?

Answer Choices	Responses	
JJ Henderson Housing Center	45.3%	165
Liberty Street	22.8%	83
Oldham Towers	19.8%	72
Forrest Hill Heights	12.1%	44
<b>Answered</b>		<b>364</b>

### HOUSING AND REDEVELOPMENT

Q4. If your housing is redeveloped, would you be interested in returning to a new unit in the downtown planning area once redevelopment is complete?

Answer Choices	Responses										
	All Sites	Oldham Towers	Liberty Street	JJ Henderson	Forrest Hill Heights						
Yes, I would like to return to a replacement unit in the downtown planning area	71.0%	250	78.3%	54	54.4%	43	72.5%	116	84.1%	37	
No, I would not like to return	10.5%	37	4.4%	3	12.7%	10	13.1%	21	6.8%	3	
Maybe, but I need more information before I can state a preference	18.5%	65	17.4%	12	32.9%	26	14.4%	23	9.1%	4	
No Response		6		2		2		2		0	
<b>Answered</b>		<b>358</b>									

Q5. If your housing is redeveloped you may need to move off site. What type of subsidized unit would you prefer to be relocated to during construction?

Answer Choices	Responses										
	All Sites	Oldham Towers	Liberty Street	JJ Henderson	Forrest Hill Heights						
Move into a unit at another DHA community INSIDE the downtown planning area	53.7%	188	68.1%	47	39.2%	31	51.9%	82	63.6%	28	
Move directly to a newly built replacement unit, if available	22.0%	77	2.9%	2	12.7%	10	10.1%	16	4.6%	2	
I need additional information before I can state my preference	15.7%	55	14.5%	10	32.9%	26	22.8%	36	11.4%	5	
Move into a unit at another DHA housing site OUTSIDE the downtown planning area	8.6%	30	14.5%	10	15.2%	12	15.2%	24	20.5%	9	
No Response		6		2		2		2		0	
<b>Answered</b>		<b>356</b>									

## HOUSING AND REDEVELOPMENT

Q6. If your housing site is redeveloped, what are the top FIVE physical improvements that you would like to see in the new housing? (SELECT UP TO 5)

Answer Choices	Responses									
	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
More recreational space (courts, playground, exercise room)	50.3%	164	57.1%	36	65.8%	50	44.4%	64	32.6%	14
A mix of residential and non-residential uses such as health services, educational services, or stores	43.3%	141	38.1%	24	35.5%	27	56.3%	81	20.9%	9
More indoor community/shared space (community room, community center)	40.8%	133	58.7%	37	29.0%	22	37.5%	54	46.5%	20
Features that improve visibility and safety such as porches, wide sidewalks, gathering spaces, or outdoor lighting	40.8%	133	38.1%	24	55.3%	42	28.5%	41	60.5%	26
More outdoor open/green space	39.6%	129	52.4%	33	27.6%	21	40.3%	58	39.5%	17
A mix of different types of housing such as townhouses, multifamily buildings, senior apartments, and assisted-living apartments	35.0%	114	17.5%	11	38.2%	29	44.4%	64	23.3%	10
More attractive buildings/building design	28.5%	93	34.9%	22	36.8%	28	19.4%	28	34.9%	15
Lower density buildings (12-50 units)	27.0%	88	38.1%	24	55.3%	42	28.5%	41	60.5%	26
A combination of affordable and market rate units	23.3%	76	14.3%	9	30.3%	23	25.0%	36	18.6%	8
Higher density buildings (50 units or more)	20.2%	66	22.2%	14	15.8%	12	25.7%	37	7.0%	3
Other+A92	10.43%	34	4.80%	3	9.20%	7	13.90%	20	9.30%	4
No Response		32		8		5		18		1
<b>Answered</b>		<b>358</b>								

## HOUSING AND REDEVELOPMENT

Q7. Would you need a unit with any of the following special accommodations if you returned to the redeveloped site? (CHECK ALL THAT APPLY)

Answer Choices	Responses									
	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
Physical accessibility (e.g., ramps, wider doorways, grab bars in bath, etc.)	36.1%	127	29.6%	21	33.3%	27	32.7%	53	59.1%	26
Hearing accessibility (e.g., door bell and fire alarm with strobe light)	21.0%	74	12.7%	9	37.0%	30	13.0%	21	31.8%	14
Visual accessibility (e.g., tactile flooring - "bumps" at top and bottom of stairs, etc.)	10.5%	37	7.0%	5	11.1%	9	9.3%	15	18.2%	8
Do not need any special accommodations	56.3%	198	59.2%	42	46.9%	38	61.1%	99	43.2%	19
No Response		6		3		1		1		1
<b>Answered</b>		<b>358</b>								

## NEIGHBORHOOD RESOURCES AND SERVICES

Q8. How would you rate your current neighborhood as a quality and convenient place to live?

Answer Choices	Responses									
	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
Excellent	30.1%	105	36.2%	25	10.3%	8	28.9%	46	60.5%	26
Good	34.1%	119	27.5%	19	28.2%	22	40.9%	65	30.2%	13
Fair	22.3%	78	29.0%	20	19.2%	15	25.2%	40	7.0%	3
Poor	13.5%	47	7.3%	5	42.3%	33	5.0%	8	2.3%	1
No Response		6		1		3		2		0
<b>Answered</b>		<b>355</b>								

## NEIGHBORHOOD RESOURCES AND SERVICES

Q9. What is your PRIMARY mode of transportation? (CHECK ONLY ONE)

Answer Choices	Responses									
	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
Bus	56.9%	201	65.2%	45	40.0%	32	65.8%	106	41.9%	18
Your own car/truck/vehicle	26.1%	92	13.0%	9	47.5%	38	18.6%	30	34.9%	15
Walk/Wheel Chair	5.4%	19	7.3%	5	3.8%	3	3.7%	6	4.7%	2
Ride from family or friends	4.0%	14	4.3%	3	0.0%	0	0.0%	0	7.0%	3
Access Van	2.8%	10	1.4%	1	0.0%	0	0.0%	0	9.3%	4
Ride from someone else (aide, payee, social worker)	2.0%	7	5.8%	4	0.0%	0	0.0%	0	2.3%	1
Taxi, Uber or Lyft	1.4%	5	0.0%	0	1.0%	1	2.5%	4	0.0%	0
Other	1.4%	5	2.9%	2	7.5%	6	9.3%	15	0.0%	0
No Response		2		1		1		0		0
<b>Answered</b>		<b>355</b>								

Q10. How big a barrier is transportation when trying to get to work, school, appointments, recreation, or to meet daily needs like shopping for groceries?

Answer Choices	Responses									
	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
Very big – I have no access to transportation	3.7%	13	2.9%	2	2.5%	2	5.0%	8	2.3%	1
Somewhat big - I have unreliable access to transportation	8.6%	30	2.9%	2	16.5%	13	8.2%	13	4.7%	2
Not very big - I usually have access to transportation	14.6%	51	8.7%	6	17.7%	14	15.0%	24	16.3%	7
No problem - I always have access to transportation	73.1%	256	85.5%	59	63.3%	50	72.7%	114	76.7%	33
No Response		5		1		2		2		0
<b>Answered</b>		<b>355</b>								

Q11. How do you usually access the internet? (CHECK ALL THAT APPLY)

Answer Choices	Responses									
	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
I do not have regular access to the internet	43.7%	146	52.6%	33	21.5%	18	49.0%	75	52.6%	20
My own smart phone or other mobile device	43.1%	144	40.6%	26	64.6%	51	37.3%	57	26.3%	10
Home Computer	20.4%	68	10.9%	7	26.6%	21	20.9%	32	21.1%	8
I do not use, do not know how, or do not want to use the internet	5.1%	17	1.6%	1	5.1%	4	7.2%	11	2.6%	1
At the library	3.9%	13	3.1%	2	2.5%	2	5.9%	9	3.9%	13
A friend, neighbor, or family member's home computer, phone or mobile device	2.7%	9	0.0%	0	2.5%	2	3.9%	6	2.6%	1
At work or school	2.1%	7	3.1%	2	2.5%	2	2.0%	3	0.0%	0
At another public place that has internet service	0.6%	2	1.6%	1	0.0%	0	1.3%	2	0.0%	0
Other	1.2%	4	1.6%	1	3.8%	3	0.7%	1	0.0%	0
No Response		21		6		2		8		5
<b>Answered</b>		<b>355</b>								

**NEIGHBORHOOD RESOURCES AND SERVICES**

Q12. Have you used any of the following services/programs in the past 12 months?

Please indicate your INTEREST in any services that you HAVE NOT used.

Please indicate your SATISFACTION with any services that you HAVE used.(SELECT ONE RESPONSE FOR EACH ROW)

ALL SITES	HAVE NOT USED		Among those who HAVE NOT USED, INTERESTED in Using this Service		USED		IF USED: SATISFIED		No Response	Total
	%	Count	%	Count	%	Count	%	Count	Count	Count
Adult education	89.9%	284	25.7%	73	10.4%	33	93.9%	31	36	316
Financial literacy	93.5%	287	21.3%	61	6.5%	20	90.0%	18	44	307
Food or grocery assistance	53.3%	176	34.1%	60	47.3%	156	95.5%	149	22	330
Health care services	45.4%	149	27.5%	41	55.2%	181	96.7%	175	24	328
Job training	91.1%	277	18.4%	51	8.9%	27	88.9%	24	44	304
Mental health services	82.4%	253	13.4%	34	18.2%	56	96.4%	54	45	307
Parent/Family suport	89.2%	265	9.8%	26	11.1%	33	97.0%	32	52	297
Senior/Disabled programs	81.7%	254	31.9%	81	19.3%	60	90.0%	54	39	311
Youth programming	97.6%	286	14.7%	42	2.7%	8	75.0%	6	54	293
Other	98.9%	89	9.0%	8	1.1%	1	100.0%	1	51	90
<b>ADULT EDUCATION</b>									<b>Answered</b>	<b>352</b>
Oldham Towers	89.2%	58	29.3%	17	10.8%	58	86.0%	1	4	69
Liberty Street	94.6%	70	35.7%	25	5.4%	70	100.0%	0	6	80
JJ Henderson Housing Center	86.7%	116	15.4%	18	13.3%	116	94.0%	1	26	160
Forrest Hill Heights	90.7%	39	33.3%	13	9.3%	39	100.0%	0	0	43
<b>FINANCIAL LITERACY</b>										
Oldham Towers	93.8%	48	20.0%	12	6.3%	4	100.0%	4	5	64
Liberty Street	93.2%	44	56.8%	25	6.8%	5	60.0%	3	6	74
JJ Henderson Housing Center	94.5%	100	20.0%	20	5.5%	7	100.0%	7	33	127
Forrest Hill Heights	90.5%	34	11.8%	4	9.5%	4	100.0%	4	0	42
<b>FOOD OR GROCERY ASSISTANCE</b>										
Oldham Towers	49.3%	18	45.5%	15	50.7%	34	100.0%	34	2	67
Liberty Street	61.0%	30	36.2%	17	39.0%	30	93.3%	28	3	77
JJ Henderson Housing Center	46.9%	49	26.9%	18	53.8%	77	93.5%	72	17	143
Forrest Hill Heights	67.4%	19	34.5%	10	34.9%	25	100.0%	15	0	43
<b>HEALTH CARE SERVICES</b>										
Oldham Towers	50.0%	23	30.3%	10	50.0%	33	97.0%	32	3	66
Liberty Street	54.1%	30	25.0%	10	47.3%	35	91.4%	32	6	74
JJ Henderson Housing Center	41.5%	44	27.9%	17	59.2%	87	98.9%	86	13	147
Forrest Hill Heights	36.6%	11	26.7%	4	63.4%	36	96.2%	25	2	41
<b>JOB TRAINING</b>										
Oldham Towers	96.8%	46	24.6%	15	3.2%	2	100.0%	2	5	63
Liberty Street	89.0%	44	32.3%	21	11.0%	8	87.5%	7	7	73
JJ Henderson Housing Center	87.3%	101	8.2%	9	12.7%	16	87.5%	14	31	126
Forrest Hill Heights	97.6%	35	14.6%	6	2.4%	1	100.0%	1	1	42

**NEIGHBORHOOD RESOURCES AND SERVICES**

	Among those who HAVE NOT USED, INTERESTED in								No Response	Total
	HAVE NOT USED	Using this Service	USED	IF USED: Satisfied						
<b>MENTAL HEALTH SERVICES</b>										
Oldham Towers	80.4%	45	15.1%	8	19.6%	11	100.0%	11	6	63
Liberty Street	84.5%	50	16.7%	10	15.5%	11	100.0%	11	9	71
JJ Henderson Housing Center	74.8%	87	11.2%	11	26.0%	34	94.1%	32	29	131
Forrest Hill Heights	100.0%	37	11.9%	5	0.0%	0	NA	0	1	42
<b>PARENT/FAMILY SUPPORT</b>										
Oldham Towers	93.8%	54	10.0%	6	6.3%	3	100.0%	4	5	64
Liberty Street	94.4%	53	20.9%	14	5.6%	3	100.0%	4	9	71
JJ Henderson Housing Center	84.2%	97	4.0%	4	16.7%	20	95.0%	19	37	120
Forrest Hill Heights	88.1%	35	5.4%	2	11.9%	5	100.0%	5	1	42
<b>SENIOR/DISABLED PROGRAMS</b>										
Oldham Towers	79.5%	35	38.6%	22	20.5%	9	88.9%	8	4	64
Liberty Street	89.7%	52	23.5%	16	10.3%	6	66.7%	4	6	74
JJ Henderson Housing Center	72.5%	69	27.4%	26	26.7%	37	91.9%	34	29	131
Forrest Hill Heights	81.0%	17	50.0%	17	19.0%	8	100.0%	8	0	42
<b>YOUTH PROGRAMMING</b>										
Oldham Towers	98.2%	55	8.3%	5	1.8%	1	100.0%	1	5	61
Liberty Street	88.9%	40	40.3%	27	11.1%	5	80.0%	4	7	72
JJ Henderson Housing Center	98.2%	109	6.8%	8	1.8%	2	50.0%	1	41	118
Forrest Hill Heights	100.0%	40	4.8%	2	0.0%	0	NA	0	1	42

Q13. What, if any, are things that make it difficult for you to use the services that the DHA Resident Services Department offers? (CHECK ALL THAT APPLY)

Answer Choices	Responses									
	All Sites	Oldham Towers	Liberty Street	JJ Henderson	Forrest Hill Heights					
None; I do not have any trouble accessing DHA's services	61.4%	204	77.6%	52	41.3%	31	63.8%	95	63.4%	26
I don't know about the services that DHA provides	30.1%	100	11.9%	8	45.3%	34	30.2%	45	31.7%	13
DHA's services are offered at inconvenient times	6.6%	22	4.5%	3	9.3%	7	8.1%	12	0.0%	0
It takes too long to get services; there is a waitlist	3.9%	13	3.0%	2	8.0%	6	2.0%	3	4.9%	2
I don't have transportation to the services I need	3.9%	13	0.0%	0	0.0%	0	6.0%	9	2.4%	1
I find the process of obtaining services confusing or overwhelming	2.4%	8	1.5%	1	4.0%	3	2.0%	3	2.4%	1
The services that I need are not available	2.4%	8	1.5%	1	2.7%	2	2.7%	4	0.0%	0
I'm not eligible for the services I need/want	0.6%	2	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Other	2.1%	7	1.5%	1	2.5%	2	3.1%	5	4.7%	2
<b>No response</b>		<b>20</b>		<b>2</b>		<b>5</b>		<b>11</b>		<b>2</b>
		<b>Answered</b>		<b>352</b>						



**NEIGHBORHOOD RESOURCES AND SERVICES**

Q14. What, if any, are things that make it difficult for you to use the non-DHA services that are available in your community? (CHECK ALL THAT APPLY)

Answer Choices	Responses									
	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
None; I do not have any trouble accessing the services	67.3%	218	76.1%	51	52.8%	38	66.2%	96	78.1%	32
I don't know about the services that are available	22.8%	74	16.4%	11	34.7%	25	23.5%	34	9.8%	4
The services are offered at inconvenient times	4.6%	15	3.0%	2	8.3%	6	4.0%	7	0.0%	0
I don't have transportation to the services I need	4.3%	14	0.0%	0	1.4%	1	5.5%	8	4.9%	2
It takes too long to get services; there is a waitlist	4.0%	13	1.5%	1	9.7%	7	3.5%	5	0.0%	0
The services are too expensive	2.8%	9	0.0%	0	1.4%	1	4.1%	6	4.9%	2
The services that I need are not available	2.5%	8	1.5%	1	2.8%	2	2.8%	4	2.4%	1
I'm not eligible for the services I need/want	2.5%	8	0.0%	0	6.0%	5	2.1%	3	0.0%	0
I find the process of obtaining services confusing or overwhelming	2.2%	7	0.0%	0	2.8%	2	2.8%	4	2.4%	1
Other	2.2%	7	1.5%	1	1.3%	1	3.8%	6	7.0%	3
<b>No response/N/A</b>		<b>28</b>		<b>2</b>		<b>8</b>		<b>15</b>		<b>2</b>
	<b>Answered</b>	<b>352</b>								

Q15. Please check all of the services you need at this time (i.e., immediate needs). (CHECK ALL THAT APPLY)

Answer Choices	Responses									
	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
None	28.4%	95	30.4%	21	18.8%	15	28.1%	45	32.6%	14
Computer literacy classes	29.6%	99	31.9%	22	23.8%	19	24.4%	39	44.2%	19
Dental services	29.0%	97	33.3%	23	35.0%	28	24.4%	39	16.3%	7
Emergency food bank	27.2%	91	24.6%	17	36.3%	29	21.9%	35	23.3%	10
Vision care	25.4%	85	36.2%	25	18.8%	15	23.1%	37	16.3%	7
Wellness programs for healthy living, nutrition, weight loss, and fitness	23.7%	79	30.4%	21	26.3%	21	15.6%	25	27.9%	12
Stop smoking services	17.1%	57	20.3%	14	18.8%	15	16.3%	26	4.7%	2
Adult Education (i.e. GED, Certifications (CNA), Bachelors...)	16.5%	55	15.9%	11	28.8%	23	8.8%	14	16.3%	7
Transportation assistance	15.6%	52	8.7%	6	16.3%	13	17.5%	28	11.6%	5
Budgeting/Financial Management/Credit Repair	13.2%	44	10.1%	7	21.3%	17	11.3%	18	2.3%	1
Assistance applying for public benefits	12.9%	43	11.6%	8	17.5%	14	9.4%	15	14.0%	6
Assistance with household errands (e.g., grocery shopping)	11.4%	38	7.3%	5	11.3%	9	11.3%	18	14.0%	6
Job Training/Job Readiness Training	10.5%	35	15.9%	11	15.0%	12	6.3%	10	4.7%	2
Help with financial and legal business, such as assistance with paying bills or having a power of attorney	9.9%	33	8.7%	6	18.8%	15	5.0%	8	9.0%	4
Mental health counseling/services	8.7%	29	5.8%	4	15.0%	12	7.5%	12	2.3%	1
Home inspection and lease violation prevention	7.8%	26	2.9%	2	11.3%	9	6.3%	10	11.6%	5
Youth programming (after school, mentoring, etc.)	6.6%	22	1.5%	1	22.5%	18	0.6%	1	4.7%	2
Remove/expunge criminal conviction or other legal services	6.0%	20	5.8%	4	7.5%	6	5.6%	9	2.3%	1
In home personal care assistance (nursing, bathing, dressing)	5.7%	19	7.3%	5	6.3%	5	5.0%	8	2.3%	1
Individual or family counseling	4.5%	15	9.0%	2	11.3%	9	2.5%	4	0.0%	0
Child Care	3.3%	11	1.5%	1	11.3%	9	0.0%	0	2.3%	1
Substance abuse treatment	3.0%	10	2.9%	2	3.8%	3	2.5%	4	2.3%	1
Other	4.8%	16	4.4%	3	1.3%	1	8.8%	14	0.0%	0
<b>No Response</b>		<b>18</b>		<b>0</b>		<b>7</b>		<b>10</b>		<b>1</b>
	<b>Answered</b>	<b>352</b>	<b>334</b>							

**CRIME AND SAFETY**

Q16. How safe do you consider the following? (CHECK ONE FOR EACH ROW)

ALL SITES	Very safe		Somewhat safe		Somewhat unsafe		Very unsafe		No response	Total
	%	Count	%	Count	%	Count	%	Count		
Neighborhood during the day	43.7%	150	40.8%	140	7.6%	26	7.9%	27	9	323
Neighborhood at night	28.7%	97	32.0%	108	18.9%	64	20.4%	69	14	338
Inside your apartment	82.5%	287	13.5%	47	2.6%	9	1.4%	5	4	348
Oldham Towers	Very safe		Somewhat safe		Somewhat unsafe		Very unsafe		No response	Total
Neighborhood during the day	29.9%	20	56.7%	38	4.5%	3	9.0%	6		
Neighborhood at night	21.5%	14	35.4%	23	23.1%	15	20.0%	13	4	65
Inside your apartment	87.0%	60	11.6%	8	0.0%	0	1.5%	1	0	69
Liberty Street	Very safe		Somewhat safe		Somewhat unsafe		Very unsafe		No response	Total
Neighborhood during the day	10.4%	8	49.4%	38	14.3%	11	26.0%	20		
Neighborhood at night	0.0%	0	20.5%	16	21.8%	17	57.7%	45	2	78
Inside your apartment	66.7%	52	23.1%	18	5.1%	3	5.1%	4	2	78
JJ Henderson Housing Center	Very safe		Somewhat safe		Somewhat unsafe		Very unsafe		No response	Total
Neighborhood during the day	59.6%	93	33.3%	52	6.4%	10	60.0%	1		
Neighborhood at night	42.2%	65	34.3%	53	17.5%	27	5.8%	9	6	154
Inside your apartment	86.1%	136	11.4%	18	2.5%	4	0.0%	0	2	158
Forrest Hill Heights	Very safe		Somewhat safe		Somewhat unsafe		Very unsafe		No response	Total
Neighborhood during the day	67.4%	29	27.9%	12	4.7%	2	0.0%	0		
Neighborhood at night	43.9%	18	39.0%	16	12.2%	5	4.9%	2	2	41
Inside your apartment	90.7%	39	7.0%	3	2.3%	1	0.0%	0	0	43

Q17. Have you or anyone you know experienced any of the following crimes in your current home or in the neighborhood? (CHECK ALL THAT APPLY)

Answer Choices	Responses									
	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
None	48.2%	165	36.8%	25	15.8%	12	68.4%	106	51.2%	22
Gun shots	37.7%	129	48.5%	33	76.3%	58	16.1%	25	27.9%	12
Sale and/or use of drugs	20.8%	71	25.0%	17	40.8%	31	12.3%	19	9.3%	4
Assault/Physical Attack	15.8%	54	23.5%	16	18.4%	14	14.2%	22	4.7%	2
Paying for or Selling Sex	12.6%	43	17.7%	12	14.5%	11	11.6%	18	4.7%	2
Theft	11.1%	38	13.2%	9	11.8%	9	9.7%	15	11.6%	5
Bullying	10.5%	36	14.7%	10	15.8%	12	7.7%	12	4.7%	2
Gang-related activity	10.2%	35	10.3%	7	29.0%	22	3.9%	6	0.0%	0
Burglary	8.2%	28	8.8%	6	11.8%	9	5.2%	8	9.3%	4
Domestic Violence	7.9%	27	11.8%	8	13.2%	10	5.2%	8	2.3%	1
Murder	7.0%	24	5.9%	4	23.7%	18	0.7%	1	2.3%	1
Youth violence	7.0%	24	2.9%	2	22.4%	17	3.2%	5	0.0%	0
Graffiti	5.0%	17	5.9%	4	15.8%	12	0.0%	0	2.3%	1
Sexual assault/rape	4.1%	14	14.7%	10	1.3%	1	1.9%	3	0.0%	0
Robbery	1.2%	4	0.0%	0	2.6%	2	0.0%	0	0.0%	0
Other	3.5%	12	5.8%	4	3.8%	3	6.4%	10	2.3%	1
<b>No Response</b>		<b>10</b>		<b>1</b>		<b>4</b>		<b>5</b>		<b>0</b>
		<b>Answered</b>		<b>352</b>						

## CRIME AND SAFETY

Q18. What are the TOP THREE safety improvements that you feel would make your housing and your neighborhood safer? (SELECT UP TO 3)

Answer Choices	Responses									
	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
Better security systems	50.3%	162	54.7%	35	53.3%	40	38.3%	54	69.1%	29
Better street lighting	50.3%	162	34.4%	22	48.0%	36	57.5%	81	64.3%	27
More frequent and/or visible police patrol	46.6%	150	35.9%	23	46.7%	35	52.5%	74	35.7%	15
Community policing	32.6%	105	31.3%	20	24.0%	18	34.0%	48	45.2%	19
Community Crime Watch Program	23.0%	74	26.6%	17	29.3%	22	19.9%	28	16.7%	7
Anti-gang initiatives	10.6%	34	10.9%	7	30.7%	23	2.8%	4	0.0%	0
Fencing and gates	8.4%	27	4.7%	3	13.3%	10	5.0%	7	16.7%	7
Youth violence/crime prevention programs	7.8%	25	9.4%	6	14.7%	11	5.7%	8	0.0%	0
Development features that increase "Eyes on the Street" (e.g., porches, sidewalks, gathering spaces)	6.8%	22	6.3%	4	10.7%	8	5.7%	8	4.8%	2
More opportunities for socialization, friendships/companionship among neighbors	5.6%	18	6.3%	4	2.7%	2	7.8%	11	2.4%	1
Other	7.8%	25	18.8%	13	0.0%	0	13.1%	21	4.7%	2
No Response		30		5		5		19		1
<b>Answered</b>		<b>352</b>								

## EMPLOYMENT

Q19. Please describe your current employment status. (CHECK ONLY ONE)

Answer Choices	Responses									
	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
Unemployed and unable to work due to a disability or medical restrictions	39.8%	137	45.0%	31	30.0%	23	46.2%	72	26.0%	11
Retired	36.0%	124	35.0%	24	10.0%	8	40.0%	63	69.0%	29
Part-time (<35 hours/week)	10.2%	35	12.0%	8	21.0%	16	7.0%	11	0.0%	0
Unemployed and currently looking for work	5.5%	19	1.0%	1	17.0%	13	3.2%	5	0.0%	0
Full-time (35+ hours/week)	4.4%	15	1.0%	1	16.0%	12	1.0%	1	2.0%	1
Unable to work for another reason (e.g., caring for children, sick relatives)	4.1%	14	6.0%	4	6.0%	5	2.6%	4	2.0%	1
No Response		7		0		3		4		0
<b>Answered</b>		<b>351</b>								

Q20. If you are currently working, or looking for work, what are the challenges that make it difficult for you or other adults in your household to find and/or keep work?

Answer Choices	Responses									
	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
Lack of transportation	14.5%	10	0.0%	0	20.0%	8	11.0%	2	0.0%	0
Affordable child care	11.6%	8	0.0%	0	20.0%	8	0.0%	0	0.0%	0
Disability	10.1%	7	11.0%	1	12.0%	5	6.0%	1	0.0%	0
No job opportunities available in the area	10.1%	7	11.0%	1	10.0%	4	11.0%	2	0.0%	0
Caring for a family member who is sick or disabled	5.8%	4	0.0%	0	10.0%	4	0.0%	0	0.0%	0
Lack of job skills/education	5.8%	4	0.0%	0	5.0%	2	11.0%	2	0.0%	0
Medical/Health restrictions	4.3%	3	0.0%	0	2.0%	1	11.0%	2	0.0%	0
Criminal record	2.9%	2	0.0%	0	5.0%	2	0.0%	0	0.0%	0
No job experience	2.9%	2	11.0%	1	0.0%	0	6.0%	1	0.0%	0
None	44.9%	31	67.0%	6	37.0%	15	50.0%	9	100.0%	1
No Response		6		0		3		3		0
<b>Answered</b>		<b>75</b>								

**EMPLOYMENT**

Q21. Do any other adults (18 or older) living with you currently work for pay?

Answer Choices	Responses - All Sites		NOTE: responses did not vary substantially by site							
Yes	10.0%	12								
No	90.0%	108								
N/A - no other adults live with me		217								
No Response		13								
<b>Answered</b>		<b>350</b>								

Q22. Please note your highest level of education.

Answer Choices	Responses									
	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
Less than High School	39.4%	134	45.6%	31	34.6%	27	32.0%	49	65.9%	27
High School Diploma/GED	30.9%	105	23.5%	16	37.2%	29	35.3%	54	14.6%	6
Some College or trade school, no degree	17.9%	61	22.1%	15	16.7%	13	17.7%	27	14.6%	6
Certificate Program	2.6%	9	4.4%	3	2.6%	2	2.0%	3	2.4%	1
Associate's Degree	3.8%	13	2.9%	2	3.9%	3	5.2%	8	0.0%	0
Bachelor's degree	4.4%	15	1.5%	1	5.1%	4	6.5%	10	0.0%	0
Graduate or professional degree	0.9%	3	0.0%	0	0.0%	0	1.3%	2	2.4%	1
No Response		10		0		2		7		1
<b>Answered</b>		<b>350</b>								

**HEALTH**

Q23. In general, how would you rate your health?

Answer Choices	Responses									
	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
Excellent	11.3%	38	17.9%	12	17.1%	13	6.6%	10	7.3%	3
Good	42.0%	141	43.3%	29	39.5%	30	40.8%	62	48.8%	20
Fair	39.3%	132	31.1%	21	38.2%	29	44.1%	67	36.6%	15
Poor	6.3%	21	6.0%	4	1.3%	1	8.6%	13	7.3%	3
Very Poor	1.2%	4	1.5%	1	3.9%	3	0.0%	0	0.0%	0
No Response		10		0		3		6		1
<b>Answered</b>		<b>346</b>								

Q24. What type of health insurance plan do you have?(CHECK ALL THAT APPLY)

Answer Choices	Responses									
	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
I do not have health insurance	11.3%	38	10.6%	7	13.2%	10	13.2%	20	2.4%	1
Medicaid	65.7%	220	72.7%	48	73.7%	56	60.5%	92	58.5%	24
Medicare	53.7%	180	56.1%	37	26.3%	20	57.9%	88	85.4%	35
Private insurance plan through my employer, or a family member's employer	7.8%	26	7.6%	5	7.9%	6	7.2%	11	12.2%	5
Private insurance plan through the North Carolina exchange (i.e., Affordable Care Act, healthcare.gov)	3.9%	13	3.0%	2	2.6%	2	4.6%	7	2.4%	1
Insurance through the VA	3.9%	13	3.0%	2	0.0%	0	7.2%	11	0.0%	0
Not Sure	1.2%	4	1.5%	1	1.3%	1	1.3%	2	0.0%	0
Other	0.9%	3	1.5%	1	1.3%	1	2.0%	3	0.0%	0
No Reponse		11		1		3		6		1

Q25. How long has it been since you have seen a health professional for any reason?

Answer Choices	Responses - All Sites	
Less than one year	89.0%	300
1-2 years	7.4%	25
3-5 years	1.8%	6
More than 5 years	1.8%	6
No Response		9
<b>Answered</b>		<b>346</b>

NOTE: responses did not vary substantially by site

Q26. Do you see a health professional on a regular basis for any of the following reasons?

Answer Choices	Responses									
	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
For regular annual check-ups	71.3%	214	72.4%	42	62.6%	42	69.4%	93	88.1%	37
To treat diagnosed condition/illness	23.7%	71	25.9%	15	25.8%	17	26.1%	35	9.5%	4
I do not see a health professional on a regular basis	3.3%	10	1.7%	1	6.1%	4	3.0%	4	2.4%	1
For emergency room visits	1.3%	4	0.0%	0	4.6%	3	0.8%	1	0.0%	0
Have not received health services in the past 12 months	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	0.3%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0
No Response		9		0		4		5		0
<b>Answered</b>		<b>309</b>								

## HEALTH

Q27. Where do you most often go when you or anyone in your household is sick or in need of health services? (CHECK ONLY ONE)

Answer Choices	Responses									
	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
Other Primary Care Doctor	41.3%	124	44.8%	26	54.4%	37	28.0%	37	64.3%	27
Lincoln Community Health Center	30.0%	90	25.9%	15	25.0%	17	32.6%	43	31.0%	13
Hospital Emergency Room	8.0%	24	8.6%	5	14.7%	10	6.1%	8	2.4%	1
Duke Family Med/Primary Care	4.7%	14	10.3%	6	1.5%	1	3.8%	5	2.4%	1
Duke Outpatient Clinic	3.7%	11	1.7%	1	1.5%	1	7.6%	10	0.0%	0
VA Hospital	3.7%	11	1.7%	1	1.5%	1	6.8%	9	0.0%	0
Duke Hospital, cancer, Women's Health, Duke other	3.0%	9	3.4%	2	0.0%	0	4.5%	6	0.0%	0
UNC Medical Center	2.0%	6	1.7%	1	0.0%	0	3.8%	5	0.0%	0
Non-Emergency Services from Hospital	1.3%	4	1.7%	1	0.0%	0	2.3%	3	0.0%	0
Just For Us (at-home senior care)	1.0%	3	0.0%	0	0.0%	0	2.3%	3	0.0%	0
Urgent Care Center (e.g., MedAccess, MinuteClinic, FastMed)	0.7%	2	0.0%	0	0.0%	0	1.5%	2	0.0%	0
Have not received health services in the past 12 months	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	1.3%	4	0.0%	0	1.5%	1	0.8%	1	0.0%	0
No Response		9		0		2		7		0
<b>Answered</b>		<b>309</b>								

## HEALTH

Q28. What, if any, challenges do you face in accessing quality affordable health care? (CHECK ALL THAT APPLY)

Answer Choices	Responses									
	All Sites	Oldham Towers	Liberty Street	JJ Henderson	Forrest Hill Heights					
Cost	10.5%	34	6.3%	4	28.2%	20	5.4%	8	5.0%	2
Lack of transportation	6.8%	22	3.1%	2	7.0%	5	6.1%	9	12.5%	5
Eligibility	5.6%	18	6.3%	4	9.9%	7	4.1%	6	2.5%	1
Long waiting room times	5.0%	16	4.7%	3	11.3%	8	1.4%	2	7.5%	3
Waitlist	1.5%	5	0.0%	0	5.6%	4	0.0%	0	2.5%	1
Offices are not open when I need them	1.5%	5	0.0%	0	4.2%	3	1.4%	2	0.0%	0
Don't know where to access services	1.5%	5	1.6%	1	0.0%	0	1.4%	2	5.0%	2
I don't need health care services	1.2%	4	1.6%	1	1.4%	1	70.0%	1	2.5%	1
Other	0.9%	3	1.5%	1	1.3%	1	1.3%	2	0.0%	0
None	74.9%	242	79.7%	51	54.9%	39	81.1%	120	80.0%	32
No Response		22		3		8		9		2
	<b>Answered</b>	<b>345</b>								

## CHILDREN AND EDUCATION

NOTE: This section was only administered to households with children living at Liberty Street; the other 3 sites do not house families with children

Q29. Do you have any children under 18 currently living in your household?

Answer Choices	Responses	
Yes	9.0%	31
No	91.0%	313
	<b>Answered</b>	<b>344</b>

Q30. Do you have any children ages 0-5 currently living in your household?

Answer Choices	Responses	
Yes	29.0%	9
No	71.0%	22
	<b>Answered</b>	<b>31</b>

Q31. What child care arrangements do you have for your children ages 0-5? (CHECK ALL THAT APPLY)

Answer Choices	Responses	
Other child care center	37.5%	3
Cared for in your home by someone else (babysitter, nanny, relative, friend)	37.5%	3
Early Head Start	12.5%	1
Cared for in your home by yourself/parent	12.5%	1
Attends kindergarten		1
No Response		2
	<b>Answered</b>	<b>9</b>

Q32. Do you have any school-aged children (K-12) currently living in your household?

Answer Choices	Responses	
Yes	87.1%	27
No	12.9%	4
	<b>Answered</b>	<b>31</b>

**CHILDREN AND EDUCATION**

Q33. Please indicate the name of the school(s) where each of your school-aged (K-12) children attend. (IF CHILD NOT ATTENDING SCHOOL, WRITE N/A)

Answer Choices	Responses	
Eastway Elementary	26.7%	12
Riverside High School	20.0%	9
Brodgen Middle	13.3%	6
Club Blvd	6.7%	3
Sherwood Githens Middle School	6.7%	3
Carter Community School	4.4%	2
Achievement Academy	2.2%	1
Healthy Start Academy	2.2%	1
Hillside New Tech	2.2%	1
Hope Valley	2.2%	1
Kill Durham	2.2%	1
Maureen Joy Charter School	2.2%	1
Merrick Moore	2.2%	1
Neal	2.2%	1
Parkwood Elementary	2.2%	1
Shepherd Middle School	2.2%	1
<b>Answered</b>		<b>27</b>

Q34. Do any of your children participate in organized after school programs? (i.e., sports, dance, art, music, Boy/Girls Scouts, or other after school)

Answer Choices	Responses	
Yes	23.1%	6
No	76.9%	20
No Response		1
(Responses include: Seedlings, Durham PAL Basketball, Eastway Cheerleading, Tutoring, Baseball, After School)		
<b>Answered</b>		<b>27</b>

Q35. What are the reasons that your child does NOT participate in out of school programs? (CHECK ALL THAT APPLY)

Answer Choices	Responses	
Hours of the program don't work with your schedule	27.8%	5
No programs available	22.2%	4
Programs cost too much	22.2%	4
Lack of transportation to get to programs	16.7%	3
Concerns about gang and neighborhood violence	11.1%	2
Don't know what programs are available	11.1%	2
Don't Know	5.6%	1
Other (please specify)	16.7%	3
No Response		3
<b>Answered</b>		<b>21</b>

Q36. In general, how would you rate the health of your children? (CHECK ALL THAT APPLY)

Answer Choices	Responses	
Excellent	67.7%	21
Good	35.5%	11
Fair	0.0%	0
Poor	0.0%	0
Very Poor	0.0%	0
<b>Answered</b>		<b>31</b>

**CHILDREN AND EDUCATION**

Q37. What type of health insurance plan do your children have? (CHECK ALL THAT APPLY)

Answer Choices	Responses	
My children are not covered by health insurance	3.1%	1
Children's Health Insurance Program (CHIP)	93.8%	30
Health insurance plan through my employer, or a family member's employer	3.1%	1
Private insurance plan through the North Carolina exchange (i.e., Affordable Care Act)	0.0%	0
Not Sure	0.0%	0
No Response		0
Other (please specify)		
<b>Answered</b>		<b>31</b>

Q38. Do any of your children have a diagnosed special need (e.g., physical, behavioral, academic, learning) (CHECK ALL THAT APPLY)

Answer Choices	Responses	
No, I do not have a child with a special need	71.0%	22
Yes, and he/she is receiving services to support that need	19.4%	6
Yes, but he/she is NOT receiving services to support that need	9.7%	3
<b>Answered</b>		<b>31</b>

**CONCLUSION**

Q39. What are the things you like MOST and/or LEAST about your housing and neighborhood?

LIKES	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
Access to downtown/Location/Convenient	154	39.0%	35	49.3%	35	45.5%	68	35.1%	16	30.2%
Quiet, Peaceful	65	16.5%	8	11.3%	4	5.2%	29	14.9%	24	45.3%
Community/Neighbors/People	43	10.9%	7	9.9%	6	7.8%	27	13.9%	3	5.7%
Safety, Security	29	7.3%	3	4.2%	0	0.0%	26	13.4%	0	0.0%
Privacy	14	3.5%	3	4.2%	8	10.4%	2	1.0%	1	1.9%
Area/Neighborhood	13	3.3%	1	1.4%	6	7.8%	5	2.6%	1	1.9%
Nothing	11	2.8%	1	1.4%	10	13.0%	0	0.0%	0	0.0%

DISLIKES	All Sites		Oldham Towers		Liberty Street		JJ Henderson		Forrest Hill Heights	
	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
Nothing	86	28.2%	12	22.2%	10	13.0%	57	40.4%	7	21.2%
Lack of security/Crime	54	17.7%	9	16.7%	29	37.7%	13	9.2%	3	9.1%
Loitering/Outsiders/People walking through parking lot	46	15.1%	3	5.6%	29	37.7%	8	5.7%	6	18.2%
Community/Neighbors/People	28	9.2%	4	7.4%	3	3.9%	15	10.6%	6	18.2%
Lack of cleanliness/Upkeep of building/Rodents/Landscaping	23	7.5%	5	9.3%	4	5.2%	10	7.1%	4	12.1%
smoking, enforcement of rules	8	2.6%	1	1.9%	1	1.3%	3	2.1%	3	9.1%
Lack of privacy	7	2.3%	7	13.0%	0	0.0%	0	0.0%	0	0.0%
Rear parking	4	1.3%	3	5.6%	1	1.3%	0	0.0%	0	0.0%

NOTE: This question allowed respondents to give open-ended responses that we reviewed and tabulated based on similar responses.



**DRAFT MEMORANDUM**

TO: Rhae Parkes, EJP  
FROM: Sarah Woodworth  
RE: Draft: Durham Site Retail Analysis  
DATE: August 1, 2018

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**PURPOSE OF TECH MEMO**

The purpose of this Technical Memorandum is to provide a summary of W-ZHA's retail analysis and findings to date. W-ZHA evaluated the retail potential for the following sites:

- Oldham/Liberty
- JJ Henderson
- Forest Hill Heights
- Southside Phase III
- Fayette Place
- Hunt Station

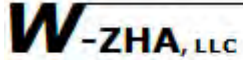
Attached as a separate document is a Technical Appendix that details our analysis for each Site.

The Retail Landscape section summarizes Downtown Durham and its primary trade area in terms of demographics, retail expenditure potential and retail sales. Trends are highlighted for comparison goods, convenience goods and eating and drinking.

Comparison goods include general merchandise stores, apparel, furnishings and other similar types of merchandise. Convenience goods include grocery stores, liquor stores, and pharmacies. Eating and drinking establishments include restaurants, bars, take-out food establishments and catering companies.

The Downtown Performance section summarizes Downtown's capture of trade area sales.

Finally, each Site's characteristics and retail development potential is summarized.



## RETAIL LANDSCAPE

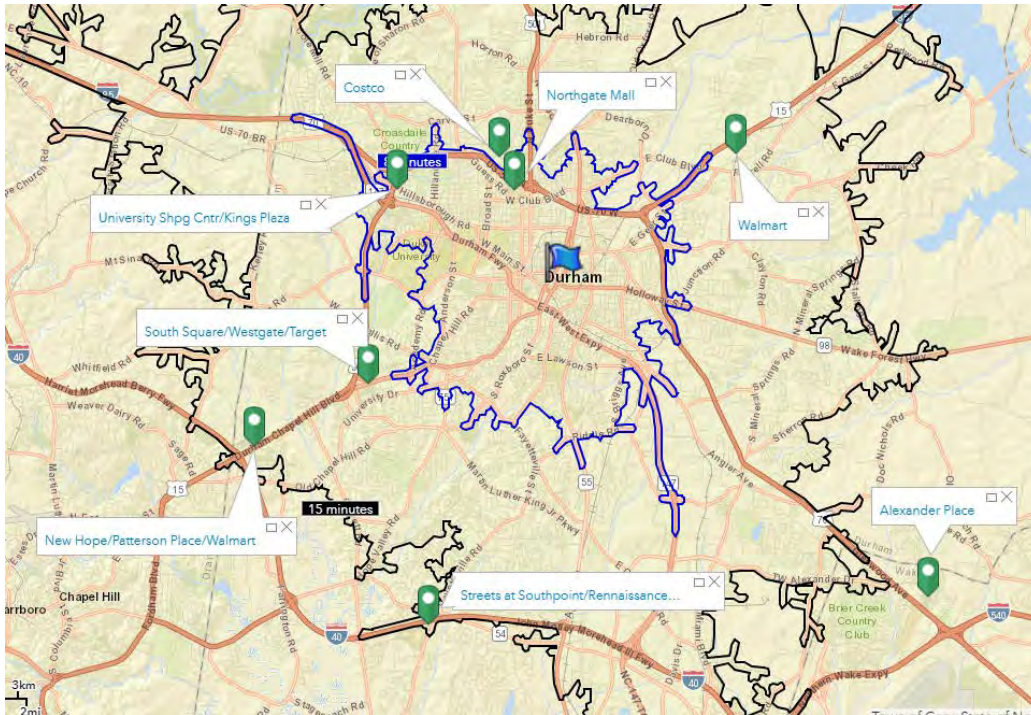
### COMPARISON GOODS

1. The major retail nodes where comparison goods are available ring the Downtown with newer centers locating a 10- to 15-minute drive south/southwest where incomes are high.

Comparison shopping centers and stores ring the Downtown. Community shopping centers are located within an 8-minute drive of Downtown and are mostly located to the north and west.

FIGURE 1

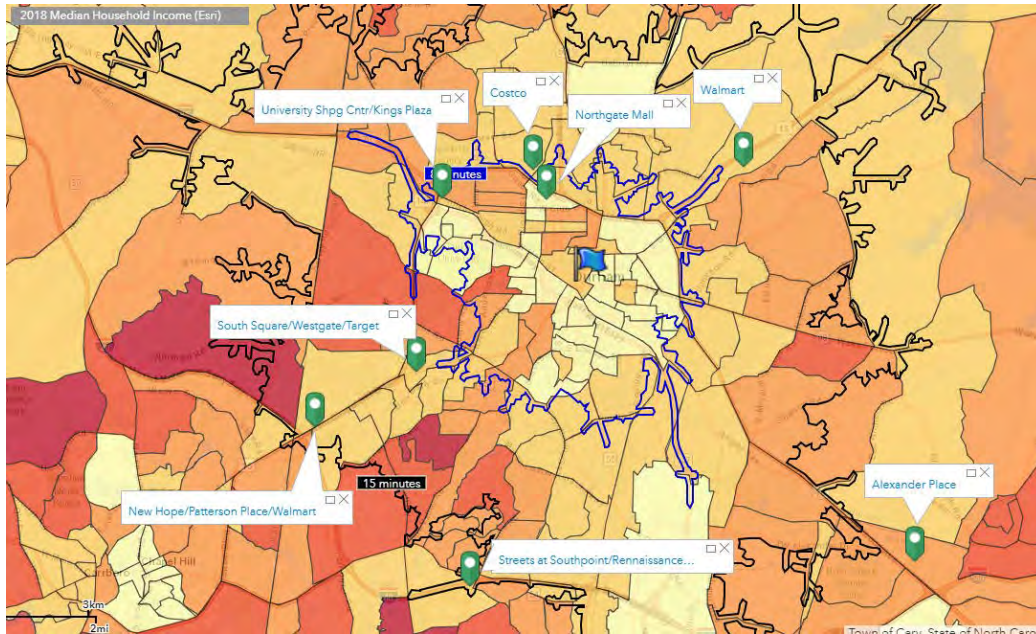
Major Comparison Goods Nodes  
8- and 15-Minute Drive from Downtown



Generally, the newer comparison shopping centers and stores are located to the south/southwest where households with higher incomes reside (see Figure 2).

**FIGURE 2**

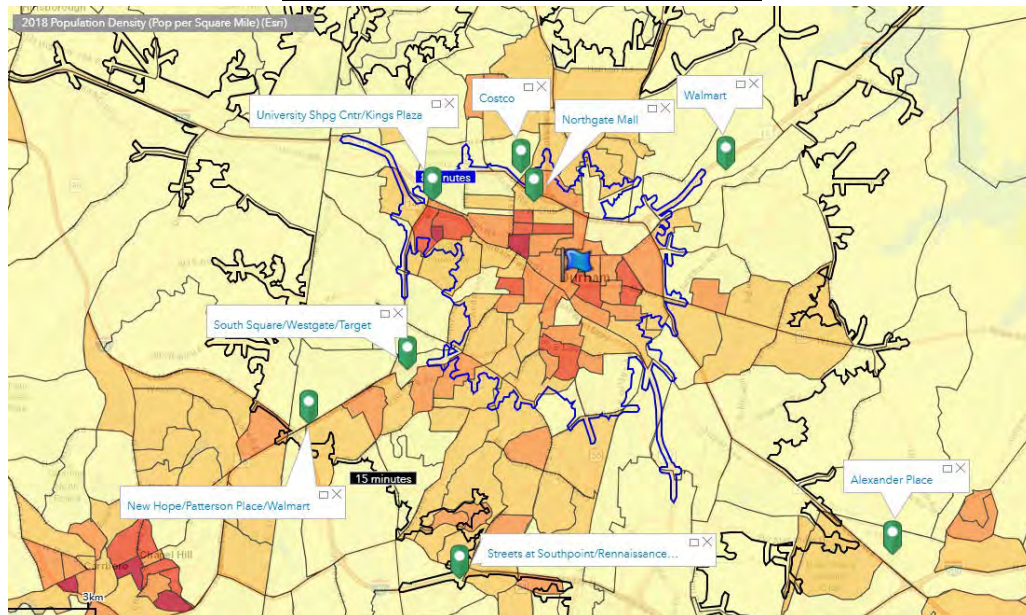
**Major Comparison Goods Nodes and Median Household Income by Census Block Group  
8- and 15-Minute Drive from Downtown**

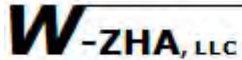


**2. Income is Relatively Low and Population Density High in the Neighborhoods East of the Downtown.**

**FIGURE 3**

**Major Comparison Goods Nodes and Median Household Income by Census Block Group  
8- and 15-Minute Drive from Downtown**





### 3. For Comparison Goods Shopping, Retail Sales are aligned with Resident Spending Potential.

Expenditure potential and retail sales for comparison goods are generally at market equilibrium in the 8-minute drive time trade area. There are surplus sales in the sporting goods, hobby, book and music stores category. Sales leakage is occurring in the miscellaneous store category which includes office supplies, stationary, florists and used merchandise stores.

**TABLE 1**

**Retail Expenditure Potential, Sales and Leakage Factor  
8-Minute Drive from Downtown Durham  
2017**

	Potential	Sales	Surplus/Leakage Factor
Furniture & Home Furnishings Stores	\$24,963,501	\$24,793,968	0%
Electronics & Appliance Stores	\$20,262,718	\$20,764,063	1%
Clothing & Clothing Accessories Stores	\$32,820,733	\$43,326,829	14%
Sporting Goods, Hobby, Book & Music Stores	\$17,686,780	\$29,799,489	26%
General Merchandise Stores	\$111,480,043	\$105,546,030	-3%
Miscellaneous Store Retailers	\$27,761,479	\$19,383,769	-18%
<b>Total</b>	<b>\$234,975,254</b>	<b>\$243,614,148</b>	

Source: ESRI; W-ZHA

\\WZHASRV\data\8000s, misc\82372 durham\[esri retail drive 8 and 15 downtown.xlsx]Sheet2

Expenditure potential and retail sales for comparison goods are generally at market equilibrium in the 10-minute drivetime trade area. Sales leakage is occurring in the clothing and clothing accessory category.

**TABLE 2**

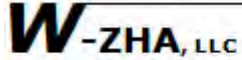
**Retail Expenditure Potential, Sales and Leakage Factor  
15-Minute Drive from Downtown Durham  
2017**

	Potential	Sales	Surplus/Leakage Factor
Furniture & Home Furnishings Stores	\$110,407,401	\$150,836,077	16%
Electronics & Appliance Stores	\$87,672,247	\$95,059,743	4%
Clothing & Clothing Accessories Stores	\$141,317,759	\$89,016,098	-23%
Sporting Goods, Hobby, Book & Music Stores	\$76,732,024	\$95,036,026	11%
General Merchandise Stores	\$478,856,732	\$603,553,108	12%
Miscellaneous Store Retailers	\$119,166,687	\$117,248,271	-1%
<b>Total</b>	<b>\$1,014,152,850</b>	<b>\$1,150,749,323</b>	

Source: ESRI; W-ZHA

\\WZHASRV\data\8000s, misc\82372 durham\[esri retail drive 8 and 15 downtown.xlsx]Sheet3

### 4. Assuming the same levels of comparison goods spending, household growth in the area within an 8-minute drive of Downtown will increase spending potential by 28% over the next 10 years.



**CONVENIENCE GOODS**

1. Today the Durham’s Downtown contains approximately 2,000 households with a daytime population of almost 20,000 people. There are not a sufficient number of households to support a full service grocery store.
2. Existing grocery stores and pharmacies within an 8-minute drive of the Downtown are satisfying resident convenience goods demand.

TABLE 3

**Convenience Goods Retail Expenditure Potential, Sales and Leakage Factor  
8-Minute Drive from Downtown Durham  
2017**

	Potential	Sales	Surplus/Leakage Factor
Food & Beverage Stores	\$117,887,661	\$141,142,702	9%
Health & Personal Care Stores	\$39,139,011	\$43,585,084	5%
<b>Total</b>	<b>\$157,026,672</b>	<b>\$184,727,786</b>	<b>Surplus</b>

Source: ESRI; W-ZHA

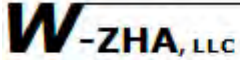
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3. Household growth within the 8-Minute Drive Time Trade Area will increase convenience goods spending potential by \$44.5 million – enough for at least two additional supermarkets.

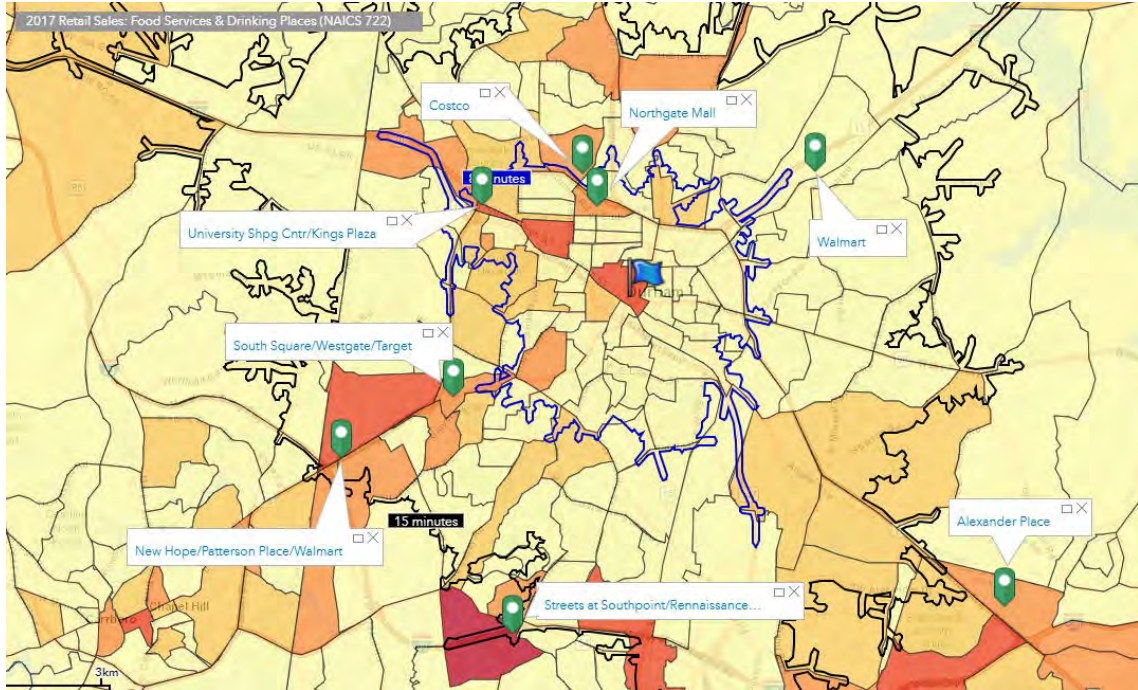
**EATING AND DRINKING**

1. Eating and drinking sales are strong around commercial nodes and in the Downtown and near Duke University.

“Eating and drinking” establishments include bars, restaurants, take-out establishments and caterers. Eating and drinking sales are low immediately east and south of Downtown where average household income is low.



**FIGURE 4**  
**Eating and Drinking Sales by Census Block Group**  
**2017**



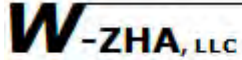
**2. As expected, eat/drink sales far outpace the eat/drink expenditure potential for those living within an 8-minute drive of Downtown.**

There is a significant inflow of eat/drink spending within the 8-mile drivetime trade area. Regional destinations like the Durham Bulls’ Ballpark, the Performing Arts Center, Duke University, Brightleaf Square and American Tobacco draw eat/drink patrons. Downtown workers also contribute to eat/drink sales.

**TABLE 4**  
**Eating and Drinking Expenditure Potential, Sales and Leakage Factor**  
**8-Minute Drive from Downtown Durham**  
**2017**

	Potential	Sales	Surplus/Leakage Factor
Eating and Drinking	\$73,027,576	\$158,678,270	37%

Source: ESRI; W-ZHA  
 \\WZHASRV\data\8000s, misc\82372 durham\esri retail drive 8 and 15 downtown.xlsx\Sheet4



## DOWNTOWN PERFORMANCE

1. **Downtown Durham captured 2.8% of the comparison goods sales occurring within an 8-minute drive of Downtown. This is a strong Downtown capture rate for comparison goods.**

Brightleaf Square, the 9<sup>th</sup> Street District and Duke University contribute to Downtown comparison goods sales. The University's impact is particularly evident in electronics, sporting goods/hobby/book/music and miscellaneous store sales. Miscellaneous stores include florist, office supplies, stationary and used merchandise stores.

**TABLE 5**

**Downtown Capture of Comparison Goods Sales by Store-Type  
15-Minute Drive from Downtown Durham  
2017**

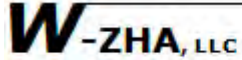
	15-Min Drive Area	Downtown	Downtown Capture Rate
Furniture & Home Furnishings Stores	\$150,836,077	\$2,838,907	1.9%
Electronics & Appliance Stores	\$95,059,743	\$6,135,981	6.5%
Clothing & Clothing Accessories Stores	\$89,016,098	\$3,462,732	3.9%
Sporting Goods, Hobby, Book & Music Stores	\$95,036,026	\$5,882,155	6.2%
General Merchandise Stores	\$603,553,108	\$8,268,414	1.4%
Miscellaneous Store Retailers	\$117,248,271	\$5,652,365	4.8%
<b>Total</b>	<b>\$1,150,749,323</b>	<b>\$32,240,554</b>	<b>2.8%</b>

Source: ESRI; W-ZHA

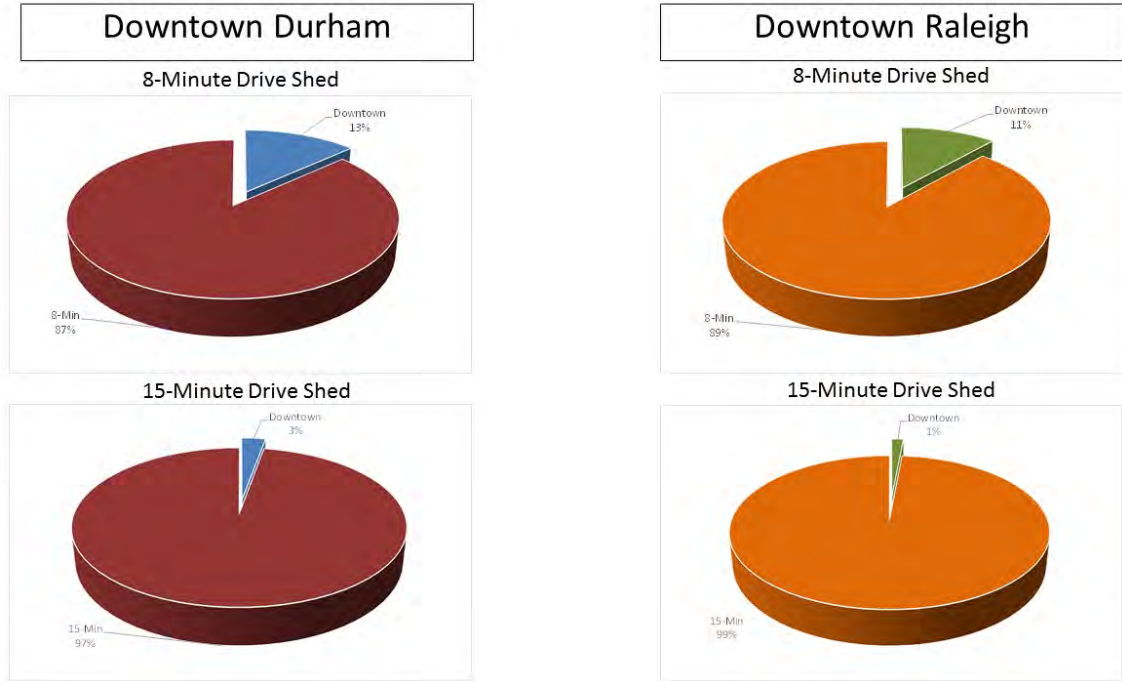
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2. **Downtown Durham captured a higher share of trade area comparison goods sales as compared to Raleigh.**

Even though the size and population of Downtown Raleigh is considerably greater than Downtown Durham, Downtown Durham captured a higher share of local comparison goods shopping sales than Raleigh.



**FIGURE 5**  
 Downtown Capture of Comparison Goods Retail Sales  
 8- and 15-Minute Drive Time Area  
 2017



3. Downtown Durham captured 22% of the eating and drinking sales occurring within an 8-minute drive of Downtown and 8.4% of the sales within a 15-minute drive time. This is a strong Downtown capture rate for eating and drinking, but other successful Downtowns can achieve 10% to 15% of 15-minute drive time sales.

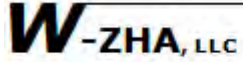
**TABLE 6**  
 Downtown Capture of Eating and Drinking Sales  
 15-Minute Drive from Downtown Durham  
 2017

	15-Min Drive Area	Downtown	Downtown Capture Rate
Eat/Drink Sales	\$417,449,448	\$35,052,545	8.4%

Source: ESRI; W-ZHA

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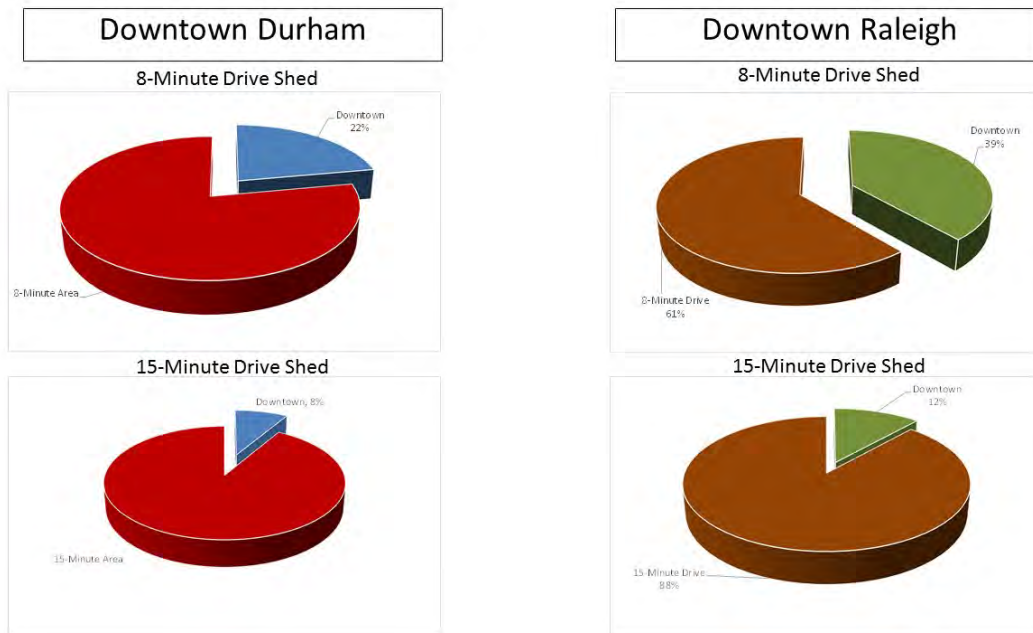


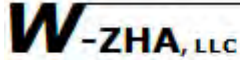


**4. Downtown Durham captured a lower share of trade area eat/drink sales as compared to Raleigh.**

Downtown Raleigh captured a higher share of local eating and drinking sales than Durham. According to ESRI, in 2018 Downtown Raleigh had a daytime population of 52,700. Downtown Durham's daytime population is estimated to be 19,700. Raleigh's Downtown workers contribute substantially to its eating and drinking sales.

**FIGURE 6**  
Downtown Capture of Eating and Drinking Sales  
8- and 15-Minute Drive Time Area  
2017





TARGET SITE ANALYSIS

TABLE 7

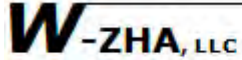
Summary of Site Evaluation Durham Sites						
	Oldham/Liberty	JJ Henderson	Forest Hill Heights	Southside Ph III	Fayette Place	Hunt Station
<b>Site</b>						
Size (Acres)	12.6	4.7	14.8	2.9	19.9	2
Density if Redev (DU's /Acre)	40	40	40	40	15	40
Potential New Hshlds w/Redev	504	188	592	116	299	80
Average Daily Traffic	Moderate	Low	Mod/High	Moderate	High	Moderate
Road Network	Moderate	Moderate	Good/Excellent	Good	Excellent	Good
Walkscore	85: Very Walkable	75: Very Walkable	77: Very Walkable	78: Very Walkable	75: Very Walkable	91: Paradise
Transitscore	55: Good	62: Good	60: Good	43: Some	Some	60: Good
<b>Demographics</b>						
<b>5-Minute Drive</b>						
2018 Households	8,427	12,802	8,024	9,196	9,272	5,578
2023 Households	10,007	14,960	9,544	10,789	10,858	6,311
5-Yr Growth Rate	30%	26%	19%	17%	30%	24%
Median Income	\$26,612	\$34,456	\$28,503	\$26,470	\$30,259	\$39,236
<b>10-Minute Walk</b>						
Daytime Population	10,638	6,107	6,407	1,753	1,886	11,071
2018 Households	1,175	1,244	690	574	676	1,439
2023 Households	1,296	1,577	1,296	1,086	1,076	1,736
5-Yr Growth Rate	32.9%	15.1%	24.6%	89.0%	15.1%	18.2%
Median Income	\$19,683	\$22,883	\$21,815	\$19,441	\$18,146	\$38,630

Source: ESRI; WalkScore; NC Department of Transportation Traffic Counts; EJP; W-ZHA  
 F:\8000s, misc\82372 durham\[summary demo.xlsx]Sheet1

The JJ Henderson and Southside Phase III are considered weak retail sites. JJ Henderson is on a one-way road (S. Duke Street) and its visibility to local traffic is not strong. Most of the daytime population is likely located north of the Freeway. The Freeway functions as a market barrier at this location. There is campus-style office space and residential neighborhoods nearby. The local road network is somewhat truncated due to the American Tobacco Trail.

The Southside Phase III site is one block off of Fayetteville Street, the north-south commercial corridor serving this neighborhood. The Southside site has the lowest daytime population and the household density within a 10-minute walk is one of the lowest among all of the sites. While strong household growth is projected in the next 5-years, retailers interested in tapping this market will likely look to invest on Fayetteville Street or Heritage Square, which have stronger locations, access, visibility, and commercial land use agglomeration.

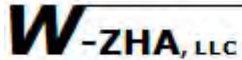
The Oldham/Liberty and Hunt Station sites have the highest daytime population among the sites. The Main Street frontage of the Oldham/Liberty site is where retail will be the most successful. Over one-third of the households within a 10-minute walk of the Oldham/Liberty site do not have a car. Convenience retail and an eating and drinking establishment oriented to breakfast and lunch have



**Site Evaluation: Advantages, Disadvantages, Conclusions  
Durham Sites**

<b>Oldham/Liberty</b>		
<b>Advantages</b>	<b>Disadvantages</b>	<b>Conclusion</b>
Very High Daytime Population  Main Street Frontage  1,300 Hshlds w/in a 5-Min Walk Very Close to Future LRT Station	Site at the Edge of Downtown Limited Retail & Eat/Drink Activity on Main Near Site	Eat/Drink and Convenience Retail 3,000 - 7,000 Sq Ft
<b>JJ Henderson</b>		
<b>Advantages</b>	<b>Disadvantages</b>	<b>Conclusion</b>
Highest # of Hshlds w/in 5-Minute Drive	S. Duke One-Way & Low ADT Low Density Surroundings Relatively Small Site	No Retail or Eat/Drink
<b>Forest Hill Heights</b>		
<b>Advantages</b>	<b>Disadvantages</b>	<b>Conclusion</b>
Easy Walking to Destinations North of Freeway Great Local and Regional Access and Visibility Large Site Strong Household Growth Projected Nearby	Neighborhood Shpg Cntr 1 Block Away Other Cntrs within Walking Distance Hshlds w/ Low Median Income Nearby	Long Term: Regional Destination Short- to Mid-Term: Negligable
<b>Southside Phase III</b>		
<b>Advantages</b>	<b>Disadvantages</b>	<b>Conclusion</b>
	In a Residential Neighborhood Roxboro St. has Low ADT and Weak Visibility	No Retail or Eat/Drink
<b>Fayette Place</b>		
<b>Advantages</b>	<b>Disadvantages</b>	<b>Conclusion</b>
2.9 Acre Parcel on Fayetteville St. Great Access & Visibility Site is Between Downtown and Central Fayetteville St Strong ADT Retail & Eat/Drink Cluster on Fayetteville St. Large Site so Redevelopment Contributes to Mkt	Very Low Daytime Population Nearby Poor Visibility on Remainder of Site Walking Market has Lowest Income	2.9 Ac: Eat/Drink or Convenience 10,000 - 20,000 Sq Ft
<b>Hunt Station</b>		
<b>Advantages</b>	<b>Disadvantages</b>	<b>Conclusion</b>
Very High Daytime Population Demographics Strong for Walk Market (Hshlds and Income) Eat/Drink Cluster North and South of Site Central Park across the Street (7-Days of Activity)	At 2 Acres, Small Site	Eat/Drink and Specialty Retail 5,000 - 7,500 Sq Ft

Source: W-ZHA



potential on the Main Street frontage. These uses can capitalize on activity generated at the new Health Department building, the Police Headquarters and the future Dillard Street LRT stop.

The Hunt Station site is strategically located across from Durham Central Park and between the evolving eat/drink and entertainment district on Geer Street and the Downtown. The demographics are strongest at this location. There is the potential for ground floor retail and restaurant uses at this location targeting the day and evening market.

The Fayette Place site totals 19.8 acres of which only the 2.9 acres fronting Fayetteville Street is well positioned for retail or eat/drink development. While adjacent to and reasonably accessible from the Durham Freeway, a regional retail/entertainment development play is unlikely at this location. The road network (Grant Street and Umstead Street) is not robust, income on the east side is below average and there are no regional anchors within walking distance to the site.

Fayette Place's Fayetteville Street parcel is strategically located. Fayetteville Street has an average daily traffic count of 19,000. The site is located between the Downtown and North Carolina Central University. Fayetteville Street already functions as a commercial corridor. A convenience retailer (food or pharmacy) and/or a fast food restaurant would make market sense on this site.

Forest Hill Heights is a large site in a strategic location immediately across the Freeway from American Tobacco and the Durham Bulls Ballpark. The site has great visibility and access from the Freeway. While the site is hilly with a number of mature trees, if a high density development scenario were contemplated, this site may be well-positioned for regional destination retail and eating and drinking as part of a mixed-use complex. This is likely a long-range scenario, realistic only after the area north of the Freeway is built-out.

Within the next 10 years, while there may be convenience retail potential the Heritage Square shopping center is a block away from Forest Hill Heights. With improvement, Heritage Square may be better positioned to capitalize on the convenience retail opportunity.

**DRAFT**

**APPENDIX: RETAIL ANALYSIS BY SITE**

August 1, 2018

# Downtown Durham Retail Landscape

# Retail Landscape – Major Comparison Goods Shopping Centers and Stores

- Brightleaf is a comparison shopping destination as is the 9<sup>th</sup> Street District near Duke University.
- Other comparison shopping centers and stores ring the Downtown. Community shopping centers are located within an 8-minute drive of Downtown and are mostly located to the north and west.
- Super-regional shopping centers like the Streets at Southpoint are located within about a 15-minute drive from Downtown.



# Retail Landscape -- Comparison Goods

## Retail Expenditure Potential, Sales, and Leakage Factor

Expenditure potential and retail sales for comparison goods are generally at market equilibrium in the 8-minute drive time trade area. There are surplus sales in the sporting goods, hobby, book and music stores category. Sales leakage is occurring in the miscellaneous store category which includes office supplies, stationary, florists and used merchandise stores.

**Retail Expenditure Potential, Sales and Leakage Factor  
8-Minute Drive from Downtown Durham  
2017**

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Furniture & Home Furnishings Stores	\$24,963,501	\$24,793,968	0%
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Clothing & Clothing Accessories Stores	\$32,820,733	\$43,326,829	14%
Sporting Goods, Hobby, Book & Music Stores	\$17,686,780	\$29,799,489	26%
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Miscellaneous Store Retailers	\$27,761,479	\$19,383,769	-18%
<b>Total</b>	<b>\$234,975,254</b>	<b>\$243,614,148</b>	

Source: ESRI; W-ZHA  
 \\WZHASRV\data\8000s, misc\82372 durham\[esri retail drive 8 and 15 downtown.xlsx]Sheet2

**Retail Expenditure Potential, Sales and Leakage Factor  
15-Minute Drive from Downtown Durham  
2017**

Expenditure potential and retail sales for comparison goods are generally at market equilibrium in the 15-minute drive time trade area. Sales leakage is occurring in the clothing and clothing accessory category.

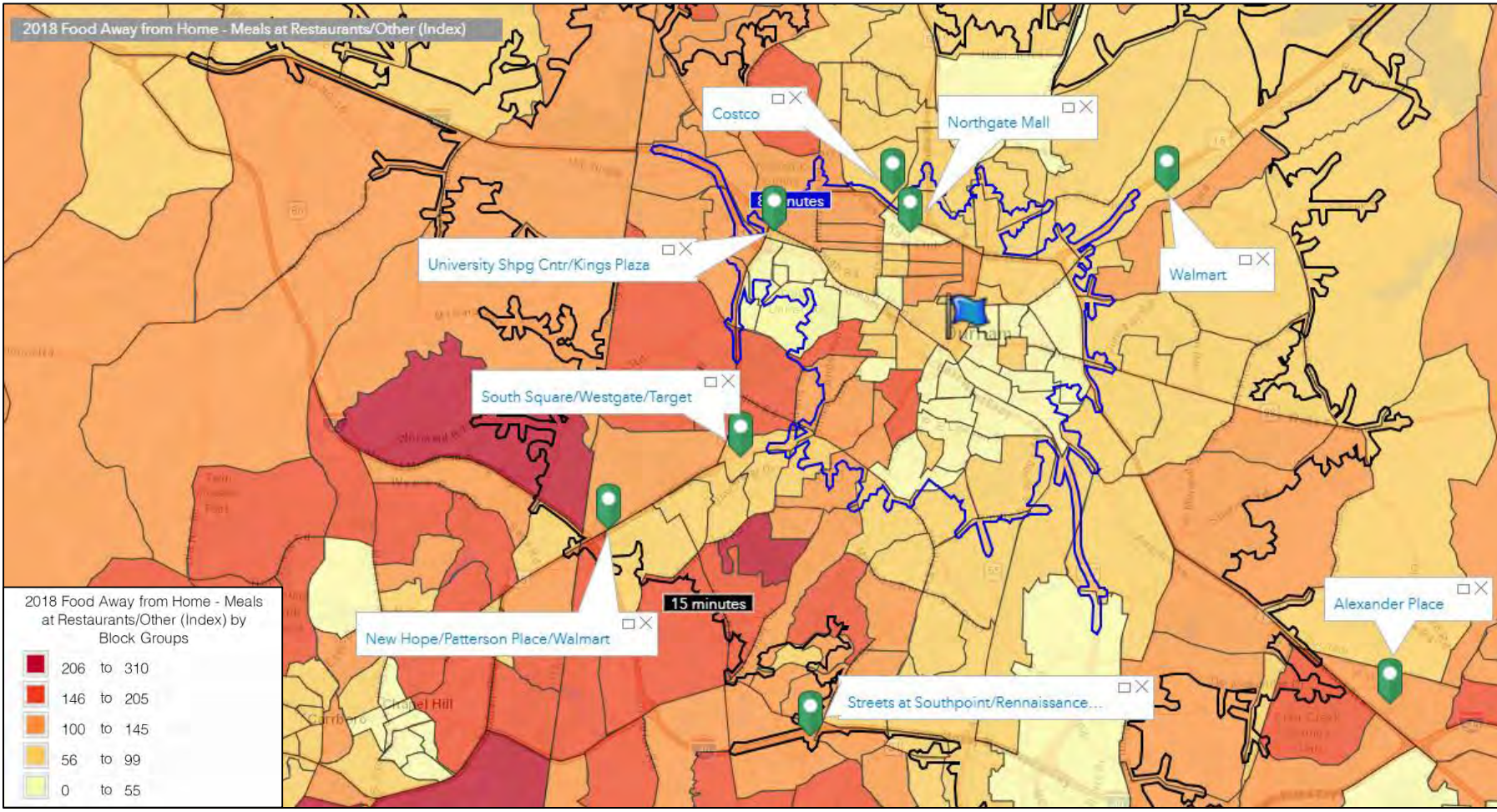
	Potential	Sales	Surplus/Leakage Factor
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<b>Total</b>	<b>\$1,014,152,850</b>	<b>\$1,150,749,323</b>	

Source: ESRI; W-ZHA  
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# Retail Landscape – Eating and Drinking Spending Index by Census Block Group

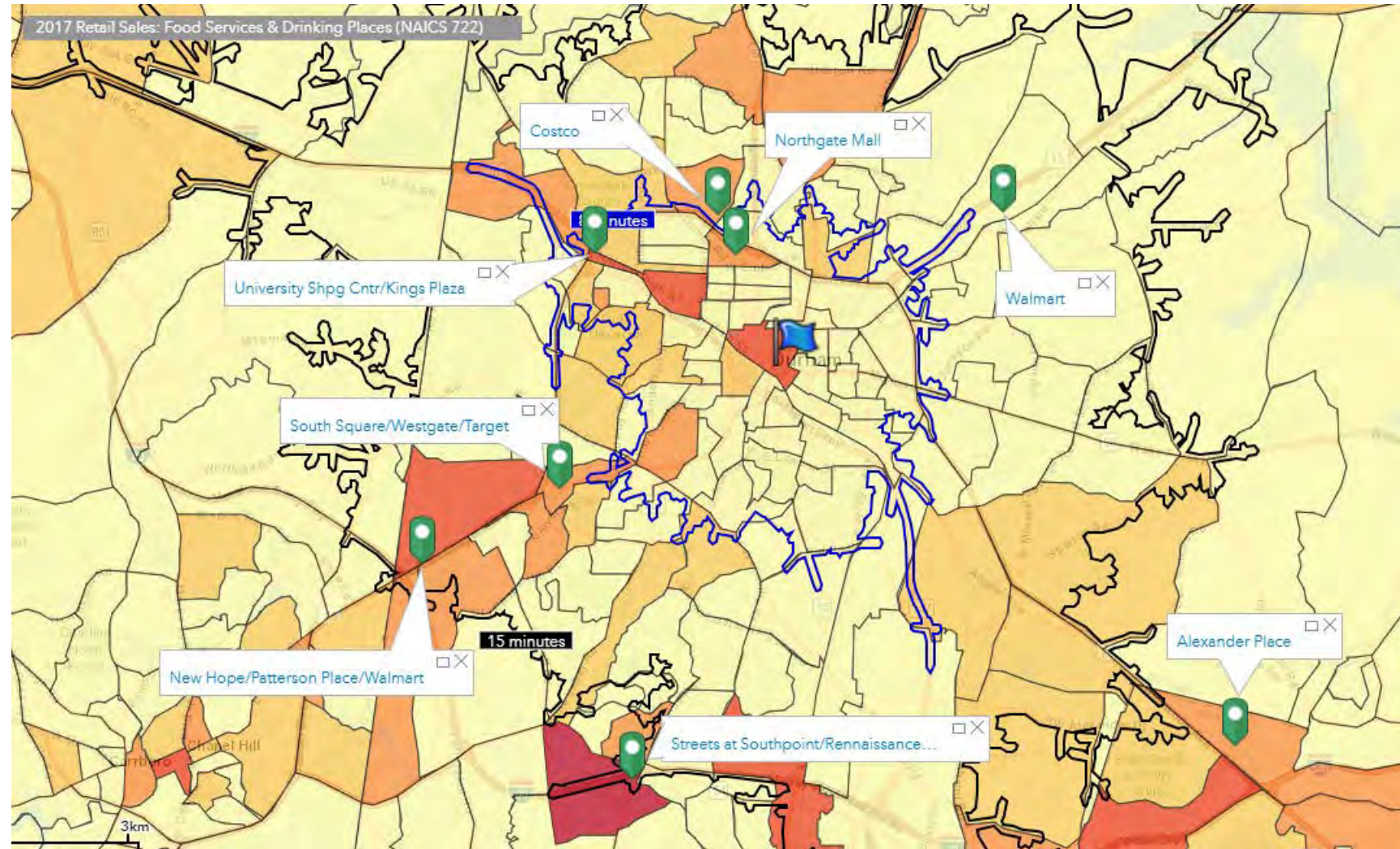
- The colors on the map illustrate 2017 eating and drinking spending index\* by Block Group.
- Households with higher eat/drink spending index are located to the west and south of Downtown.
- Households immediately east of Downtown have low spending indices.



\* The spending index is from ESRI. It indicates whether average household spending is above or below the national average. Anything above 100 is above the national average.

## Retail Landscape – Eating and Drinking Sales by Census Tract Block Group

- The map illustrates 2017 eating and drinking sales\* by block group. “Eating and drinking” includes bars, restaurants, take-out establishments and caterers.
- Eating and drinking sales are strong around the commercial nodes as well as in Downtown and near Duke University.



\* The higher the sales the darker the Block Group color.

# Retail Landscape -- Comparison Goods

## *Retail Expenditure Potential, Sales, and Leakage Factor*

There is a significant inflow of eat/drink spending within the 8-mile drivetime trade area. Regional destinations like the Durham Bulls' Ballpark, the Performing Arts Center, Duke University, Brightleaf Square and American Tobacco draw eat/drink patrons.

**Eating and Drinking Expenditure Potential, Sales and Leakage Factor  
8-Minute Drive from Downtown Durham  
2017**

	Potential	Sales	Surplus/ Leakage Factor
Eating and Drinking	\$73,027,576	\$158,678,270	37%

Source: ESRI; W-ZHA  
 \\WZHASRV\data\8000s, misc\82372 durham\esri retail drive 8 and 15 downtown.xlsx]Sheet4

There is a slight inflow of eating and drinking sales within the 15-minute drivetime trade area. A leakage factor at 10% or below is considered market equilibrium – expenditure potential is in-line with sales.

**Eating and Drinking Expenditure Potential, Sales and Leakage Factor  
15-Minute Drive from Downtown Durham  
2017**

	Potential	Sales	Surplus/ Leakage Factor
Eating and Drinking	\$316,253,563	\$417,449,448	14%

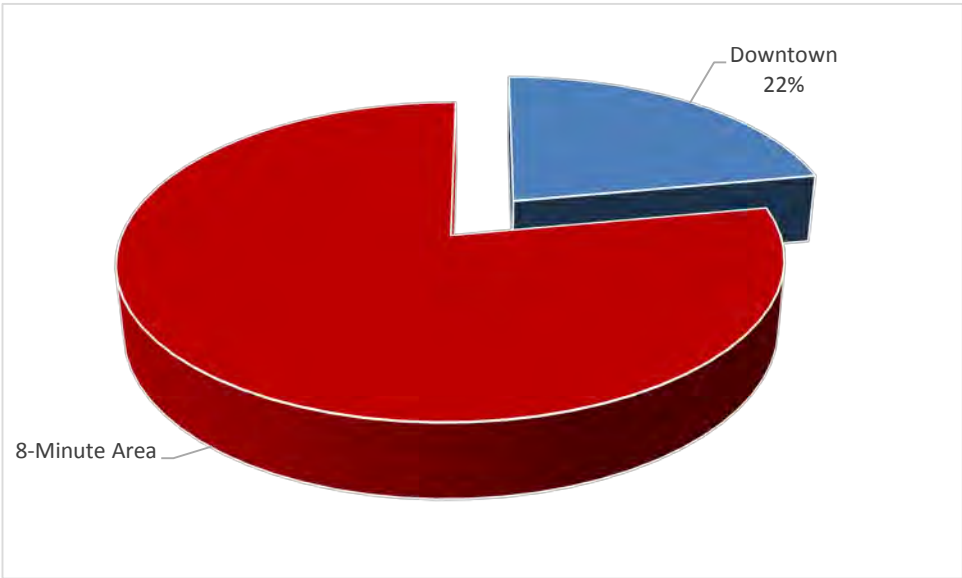
Source: ESRI; W-ZHA  
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# Retail Landscape – Eat/Drink Sales

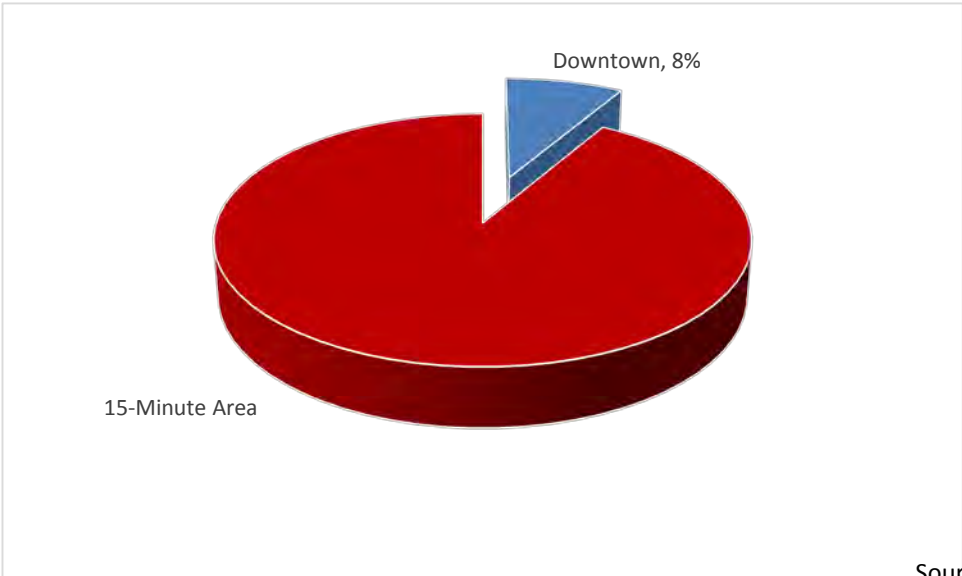
## *Downtown's Share of Eat/Drink Sales*

- Downtown captured 22% of the 2017 eat/drink sales within the 8-minute drivetime trade area.
- Downtown captured 8% of the eat/drink sales within the 15-minute drivetime trade area.
- It is not unusual for successful Downtowns to capture 10% - 15% of the 15-minute drivetime trade area sales.

8-Minute Drive



15-Minute Drive



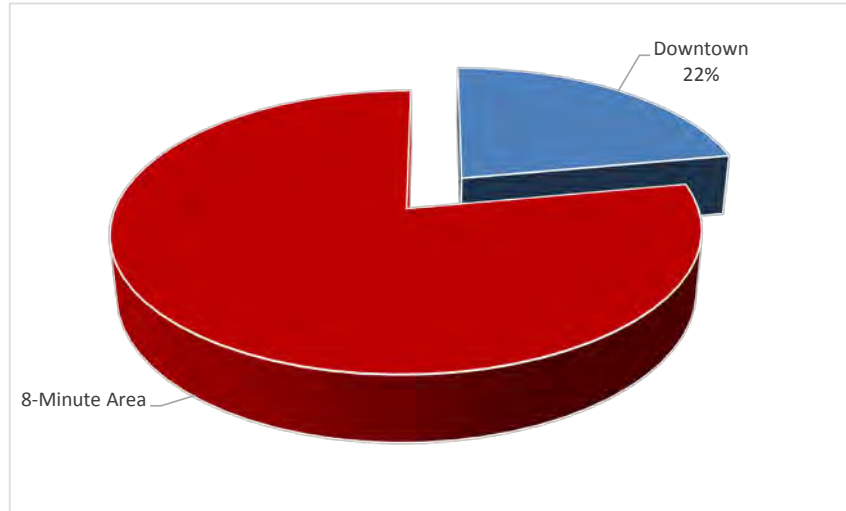
# Retail Landscape – Eat/Drink Sales Comparison

## *Downtown's Share of Eat/Drink Sales*

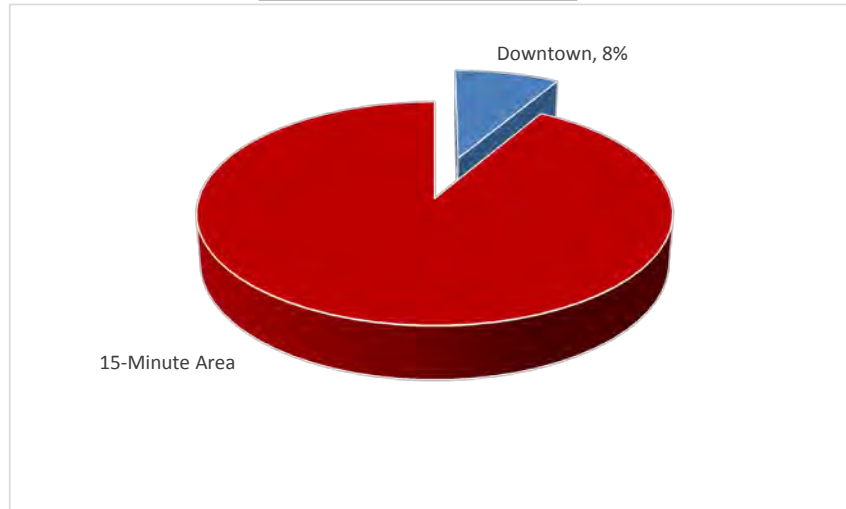
- Raleigh's Downtown captures almost 40% of the eat/drink sales within an 8 minute drive from its Downtown.
- Note that Downtown Raleigh's daytime population is – times that of Durham's,
- Raleigh's Downtown captures 12% of the eat/drink sales within a 15 minute drive from its Downtown.

### Durham

#### 8-Minute Drive

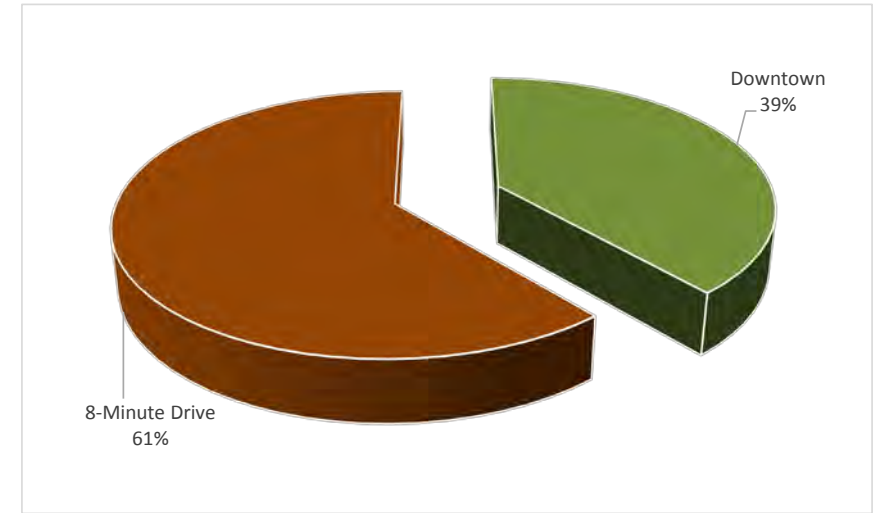


#### 15-Minute Drive

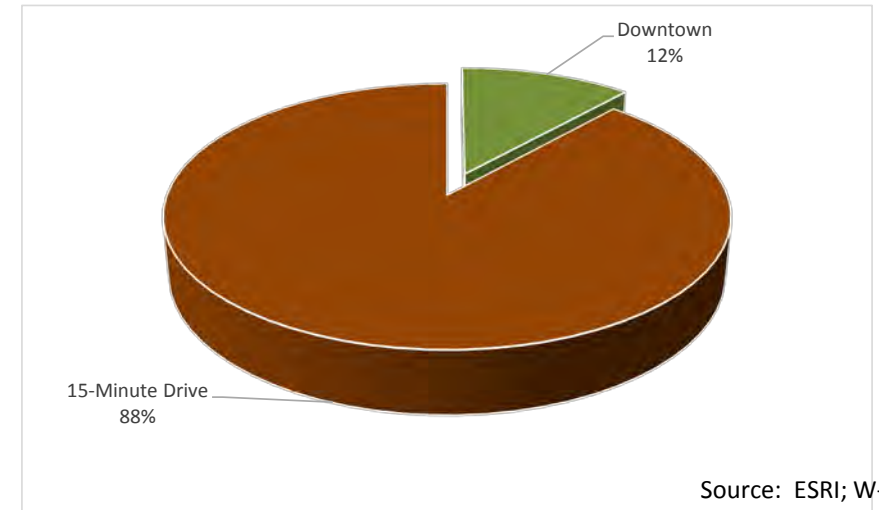


### Raleigh

#### 8-Minute Drive



#### 15-Minute Drive

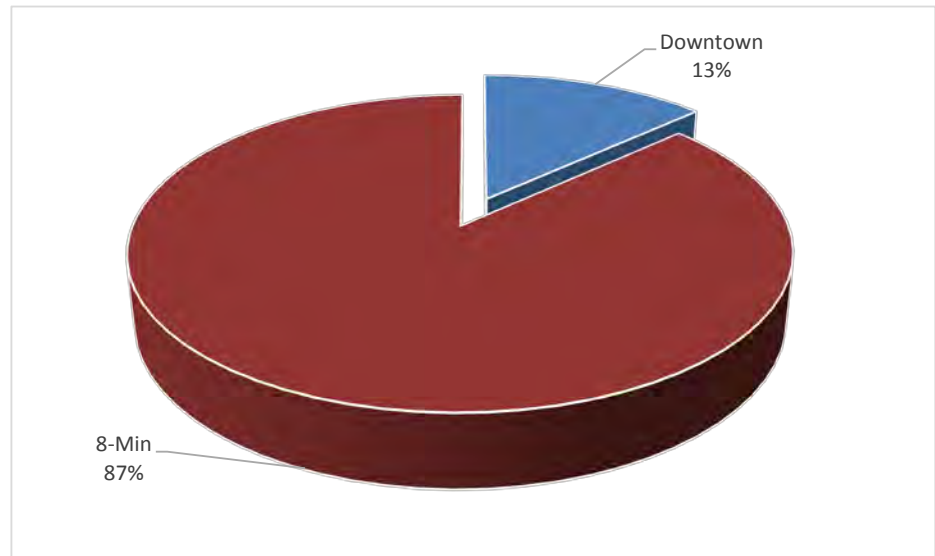


# Retail Landscape – Comparison Goods

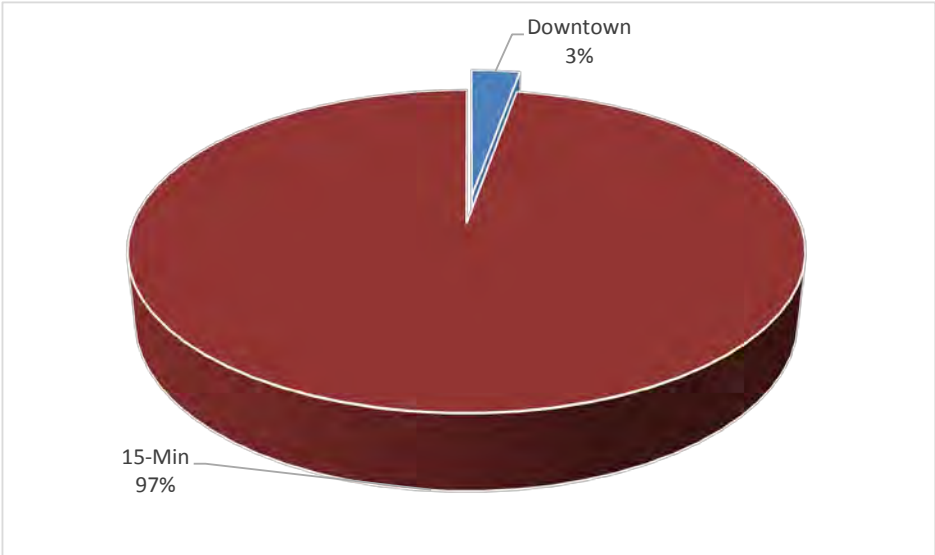
## *Downtown's Share of Retail Sales*

- Downtown captured 13% of the 2017 comparison goods retail sales within the 8-minute drivetime trade area. This is an impressive statistic as many Downtowns have weak retail sales.
- Downtown captured 2% of the retail sales within the 15-minute drivetime trade area.

8-Minute Drive



15-Minute Drive

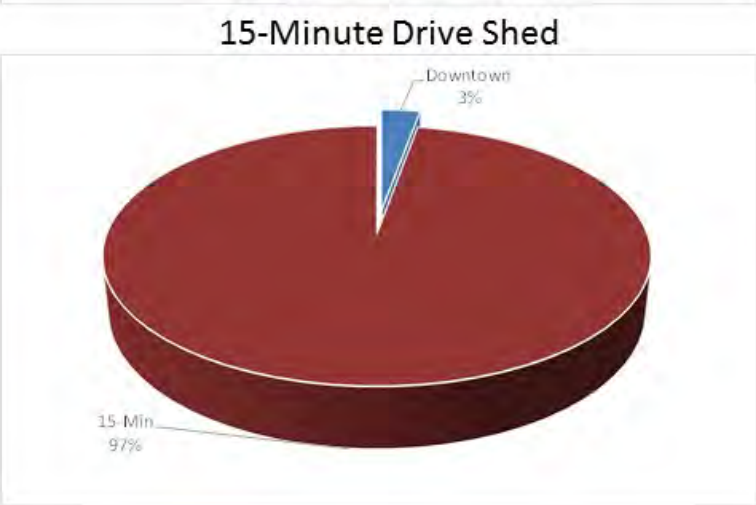
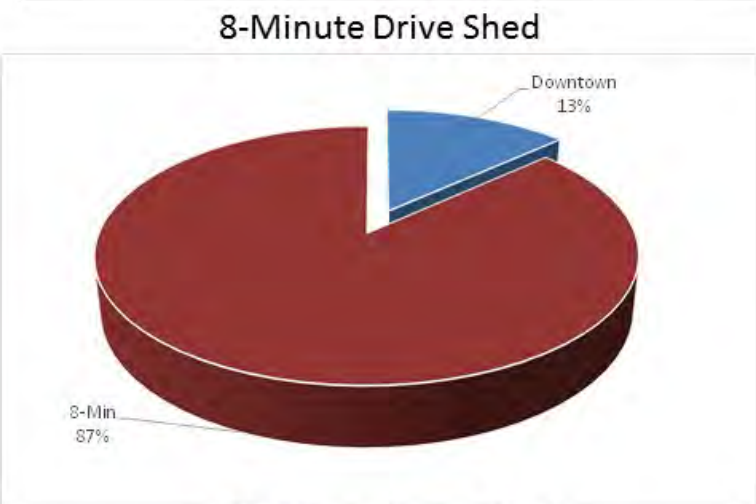


# Retail Landscape – Retail Sales Comparison

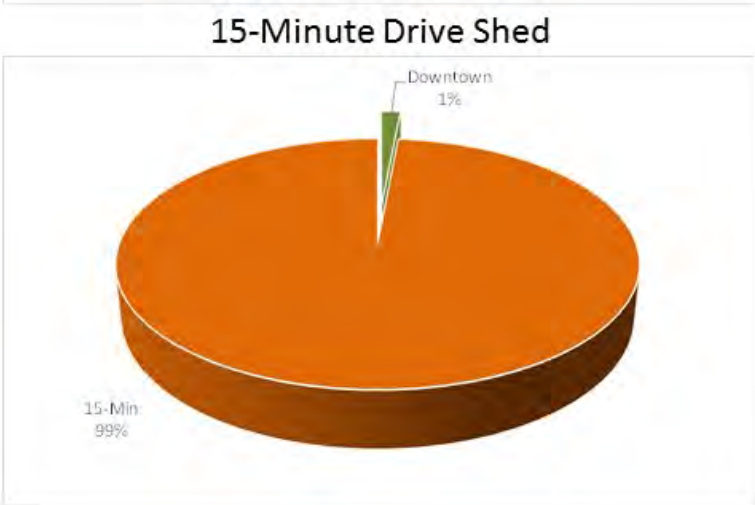
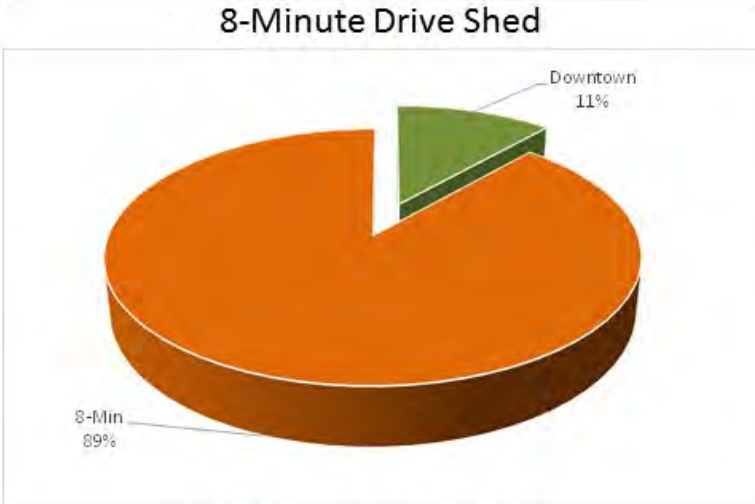
## *Downtown's Share of Retail Sales*

- Downtown Durham captures a slightly higher share of local retail sales as compared to Raleigh's Downtown.
- Brightleaf Square is a valuable retail area in Downtown Durham.

Downtown Durham



Downtown Raleigh



# Oldham/Liberty Site

519 E. Main Street



# Oldham/Liberty

## Overview

- The Oldham/Liberty sites together total 12.6 acres.
- The Oldham property on E. Main Street is zoned DD-S1. “DD” or Downtown Design District encourages bicycling, pedestrian and transit-oriented development. “S1” or Support 1 is a sub-district where moderate development intensity is expected and encouraged.
- The Liberty property is zoned DD-S2. S2 is a sub-district intended to provide a sensitive transition from more intense development to neighboring districts.



# Oldham/Liberty Surrounding Uses

- Office and community uses occupy the blocks immediately west of the Site.
- There is a limited amount of storefront space between Roxboro and Elizabeth Street due to public and church uses.
- New public office/ service buildings are south of the Site.
- The Golden Belt Mixed-Use Mill project is across Elizabeth Street from the Site. Golden Belt is not easily accessed from the Site due to the railroad track.



# Oldham/Liberty

## *Surrounding Land Uses*

The County Public Health building is approximately 278,000 square feet with a 400-car surface parking lot. The building houses County mental health, public health and social services.

This building generates significant daytime activity.



The new 156,000 square foot Police Headquarters and structured parking garage are under-construction. There are 445 parking spaces provided for staff and 80 visitor spaces.



# Oldham/Liberty Vehicle Access

- Two-way streets surround the Site. However, west of the intersection with N. Dillard Street, Liberty is one-way eastbound.
- Elizabeth/Fayetteville Street is one of the most heavily traveled north-south streets serving the Downtown. According to 2015 data from the North Carolina Department of Transportation on average 14,000 vehicles travel on Elizabeth Street between Ramseur Street and E. Main Street daily.



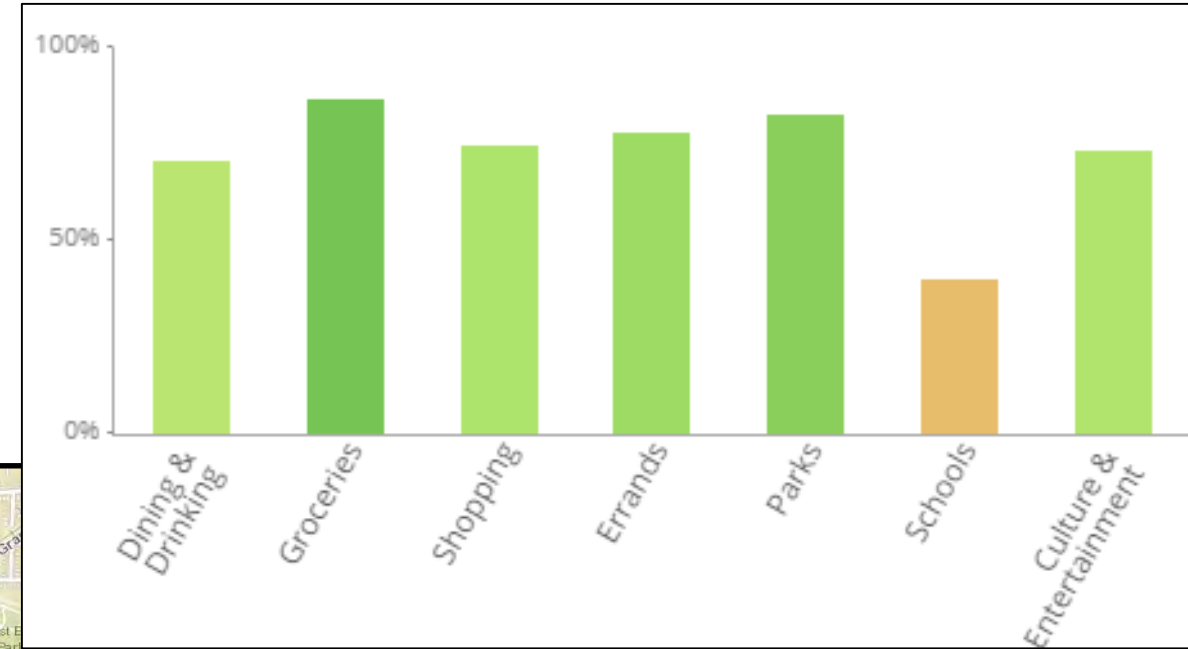
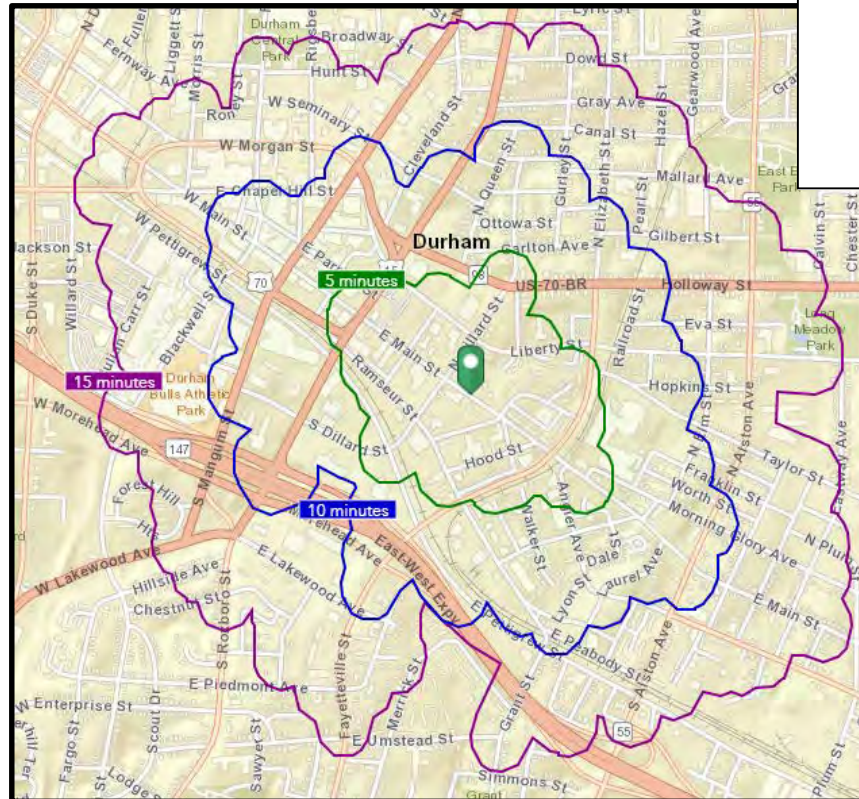
WalkScore = 85

# Oldham/Liberty WalkScore

The WalkScore for 519 E. Main Street is 85 – Very Walkable.

The location is particularly convenient to groceries and parks.

5-,10-15-Minute Walk Sheds







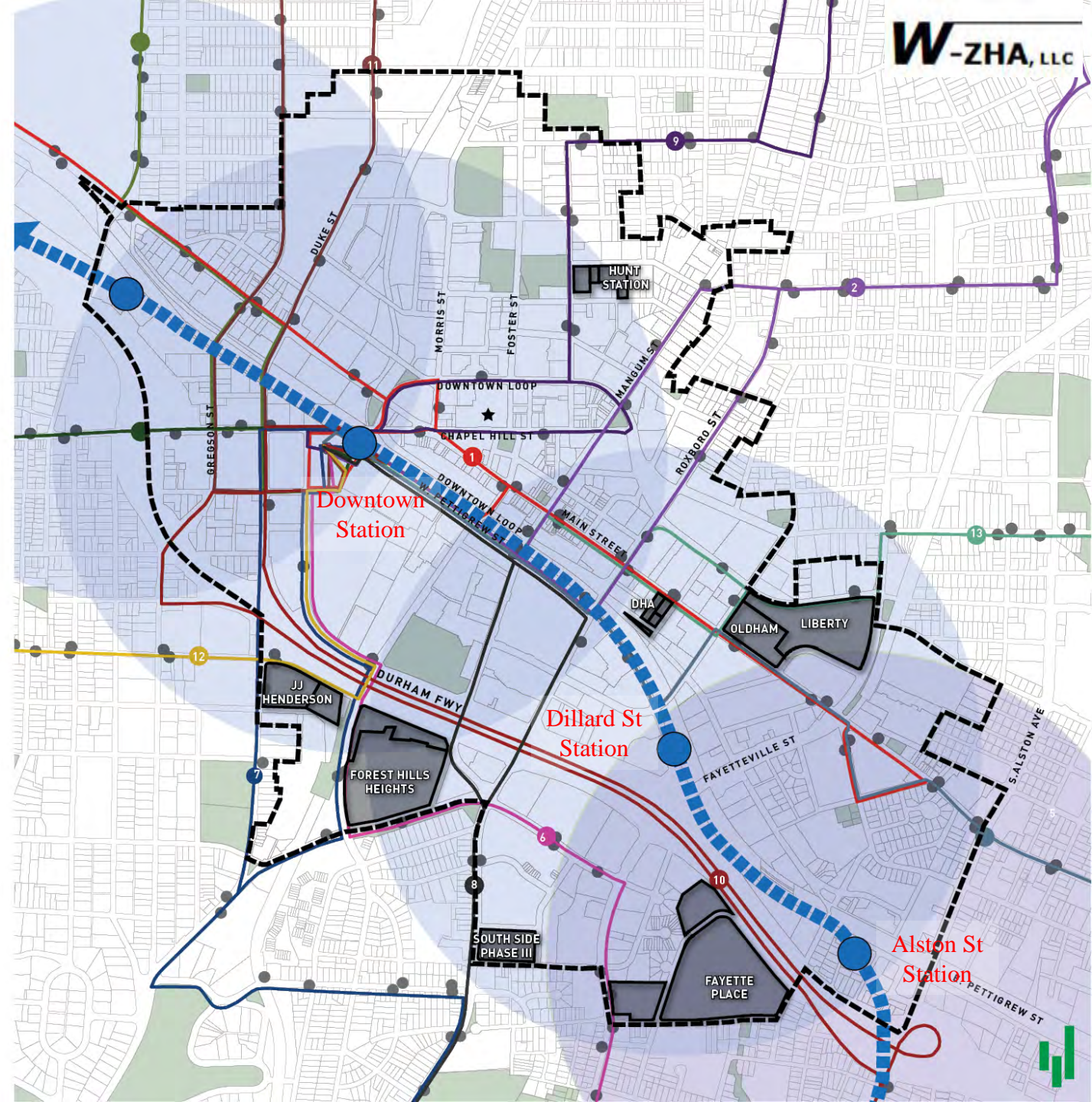
# Oldham/Liberty *WalkScore and Transit*

Today, the Site's transit score is 55 – Good Transit. There are many convenient transit options near the Site.

With the proposed LRT line the Site's transit score will increase. The Site is within a quarter-mile of the proposed Dillard Street LRT station.

## TRANSIT NETWORK

-  OPPORTUNITY SITES
-  OPEN SPACES
-  PROPOSED LRT STATION
-  PROPOSED LRT LINE
-  1/2 MILE BUFFER FROM LRT STATION
-  TRANSIT STOPS
-  1 BULL CITY CONNECTOR
-  2 DEARBORN DR/NORTH DURHAM
-  3 DUKE UNIVERSITY/HILLSBOROUGH RD
-  4 DUKE UNIVERSITY/SPARGER ST
-  5 EAST DURHAM/THE VILLAGE/ANGIER AV
-  6 FAYETTEVILLE ST/NCCU/SOUTHPOINT
-  7 FOREST HILLS/WEAVER ST/MLK PKWY
-  8 LAWSON ST/NCCU/DURHAM TECH
-  9 N ROXBORO/DURHAM REG/N DUKE CROSSIN
-  10 NCCU/HWY 54 & 55
-  11 NORTHGATE/HORTON RD
-  12 SOUTH SQUARE/NEW HOPE COMMONS
-  13 THE VILLAGE/GLENVIEW STATION/HWY 98

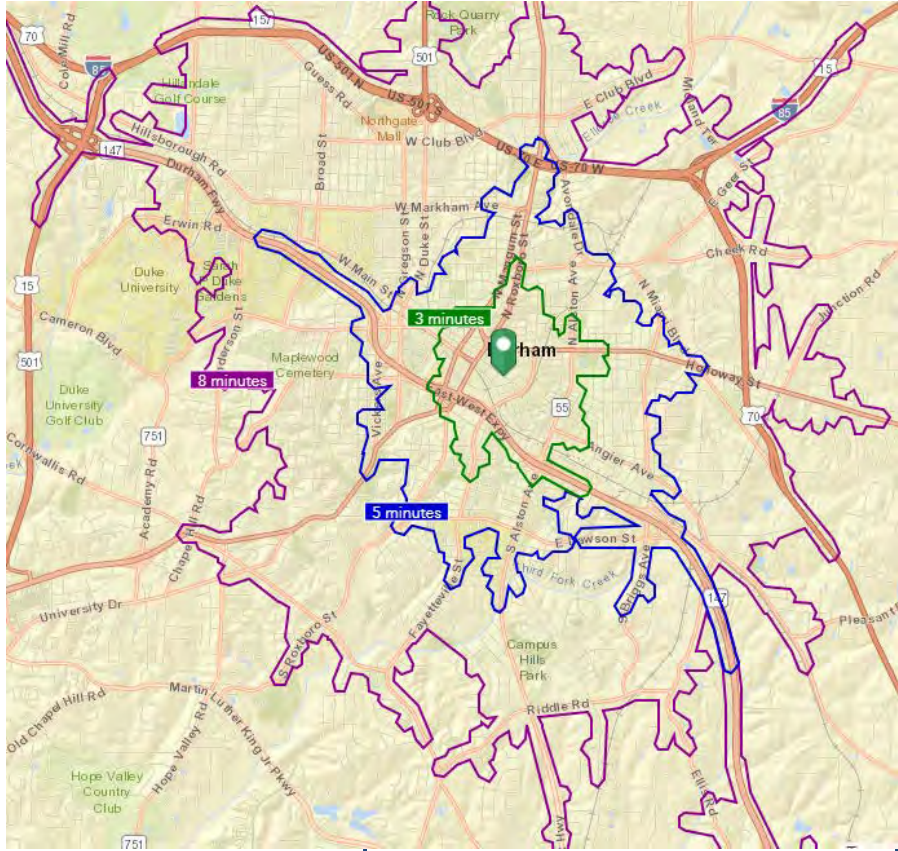


# Oldham/Liberty Demographics

The Site has a very high daytime population..

Median incomes are low for households that live within walking distance. One-third of the neighborhood households have children at home.

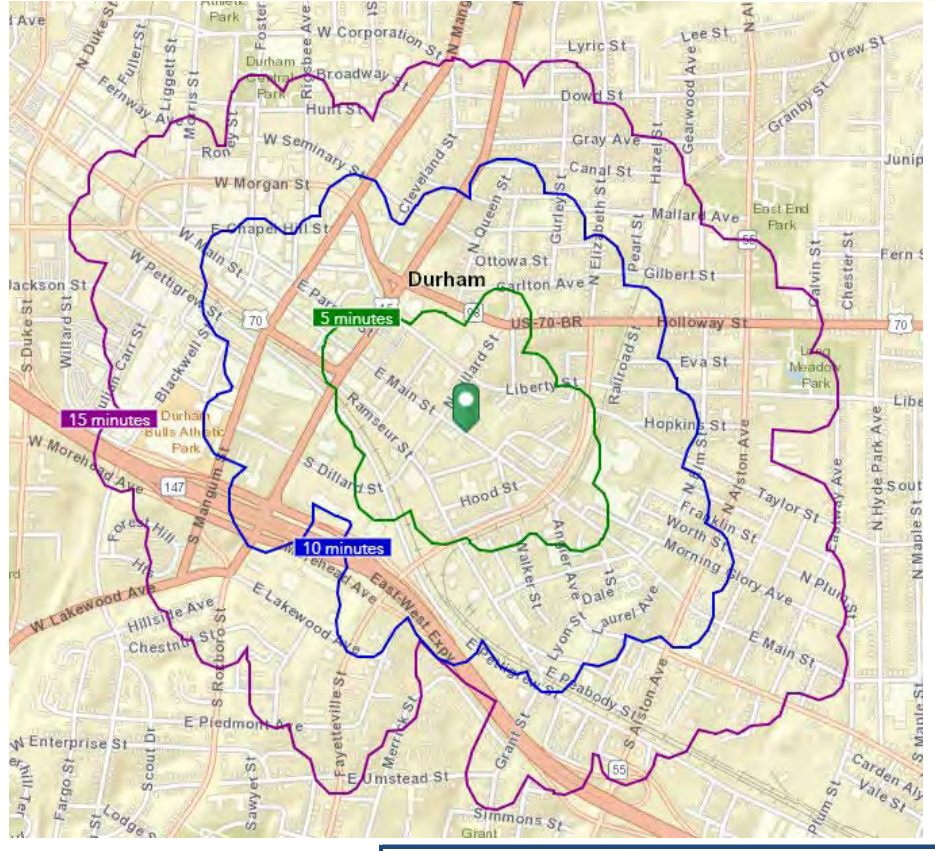
## 3-,5-,8-Minute Drive Sheds



	Drive Time		
	3-Minute	5-Minute	8-Minute

2018 Households	1,996	8,427	26,599
2023 Households	2,365	10,007	29,685
Growth	18%	19%	12%
% Hshlds w/Children	32.8%	30.3%	29.9%
Avg Household Income	\$31,115	\$43,091	\$54,245
Median Household Income	\$21,290	\$26,612	\$35,254

## 5-,10-,15-Minute Walk Sheds



	Walk Time		
	5-Minute	10-Minute	15-Minute

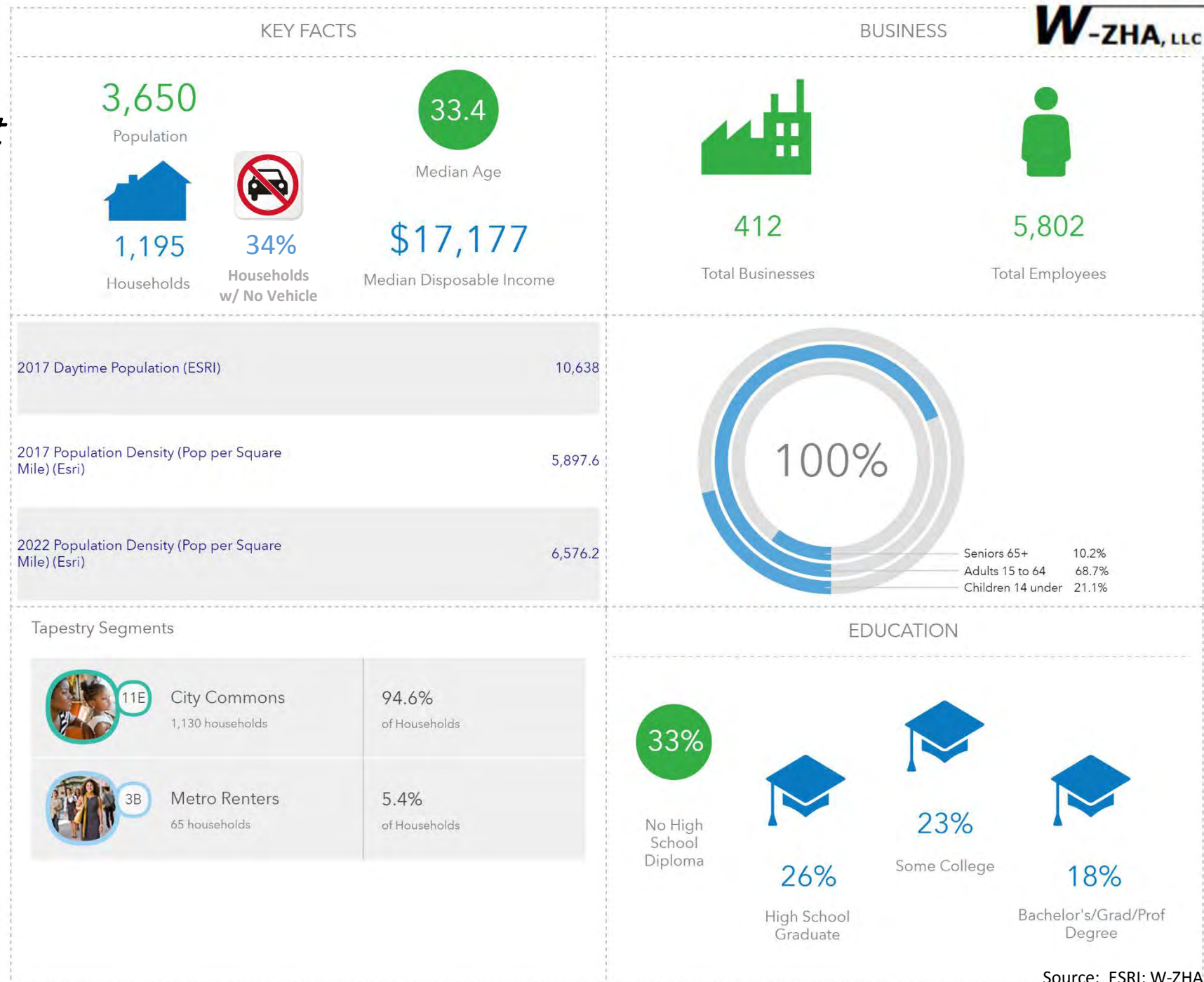
2018 Households	461	1,175	2,370
2023 Households	505	1,296	2,797
Growth	10%	10%	18%
% Hshlds w/Children	34.4%	32.9%	30.1%
Avg Household Income	\$26,086	\$28,305	\$35,194
Median Household Income	\$18,856	\$19,683	\$22,211

Source: ESRI; W-ZHA

# Oldham/Liberty

## The 10-Minute Walking Market

- ESRI estimates that there are approximately 1,200 households and approximately 5,800 employees within a 10-minute walk of the Site. With the new Police headquarters the number of employees will increase to 6,200-plus.
- Over a third of the households within a 10-minute walk of the Site do not have access to a vehicle.
- The daytime population is estimated to be approximately 10,600 people. Once again, this number will be 11,000-plus with the Police Headquarters open. This is a high daytime population.
- Local residents within a 10-minute walk are mostly from the “City Commons” Tapestry segment which consists of young, low income, single-parent households.





# Convenience Retail Potential

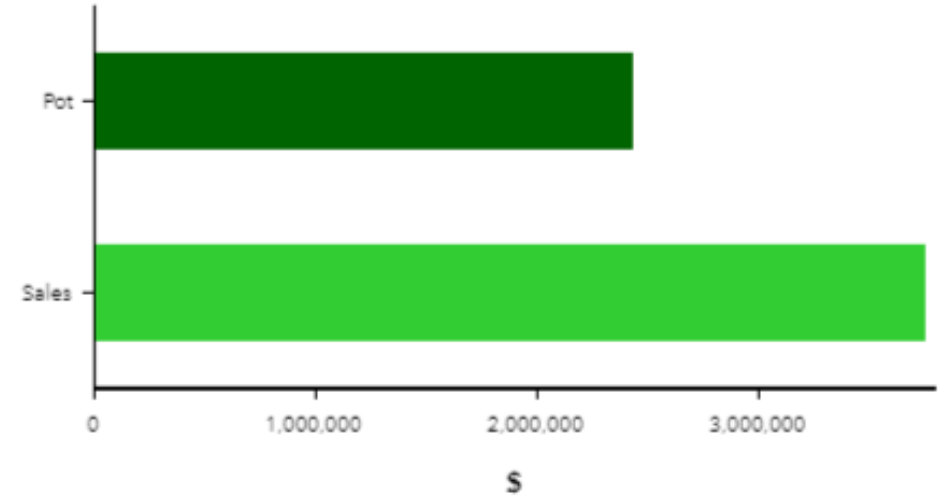
Food Store and Personal Care/Pharmacy

# Oldham/Liberty

## The Walking Market & Groceries

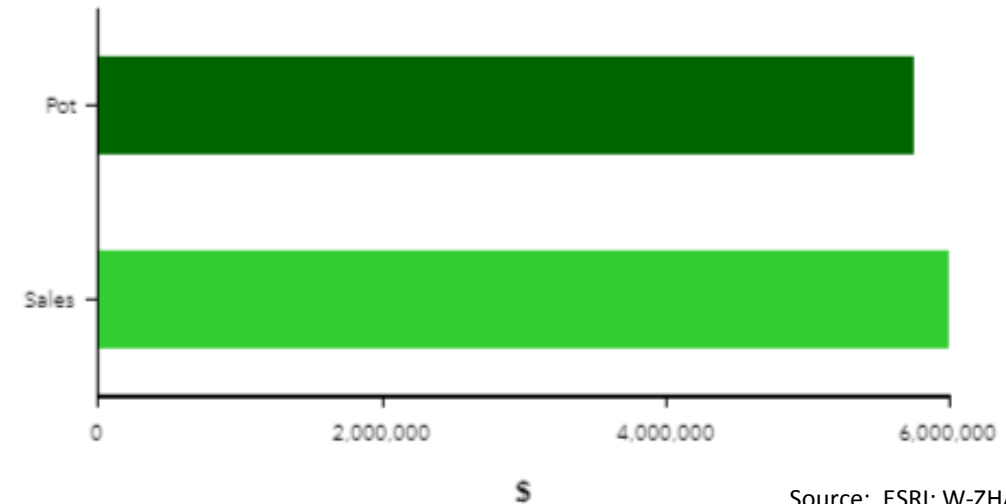
### 10-Minute Walk

2017 Food At Home Expenditure Potential and Sales

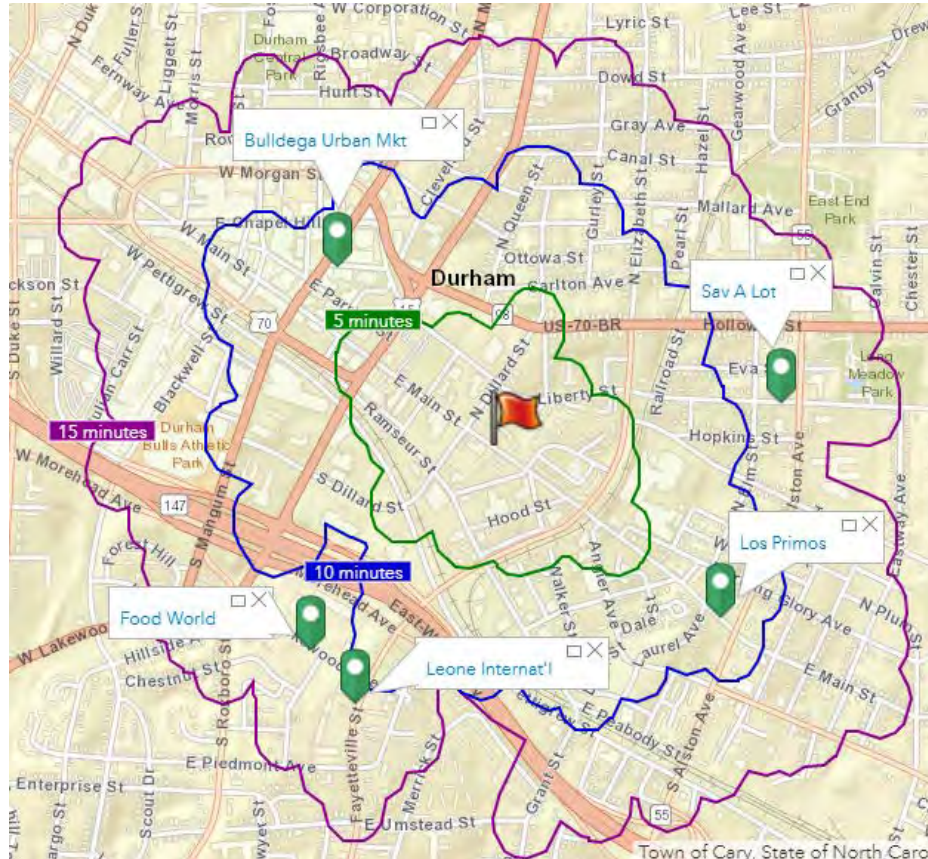


### 15-Minute Walk

2017 Food At Home Expenditure Potential and Sales



### 5-,10-,15-Minute Walk Sheds



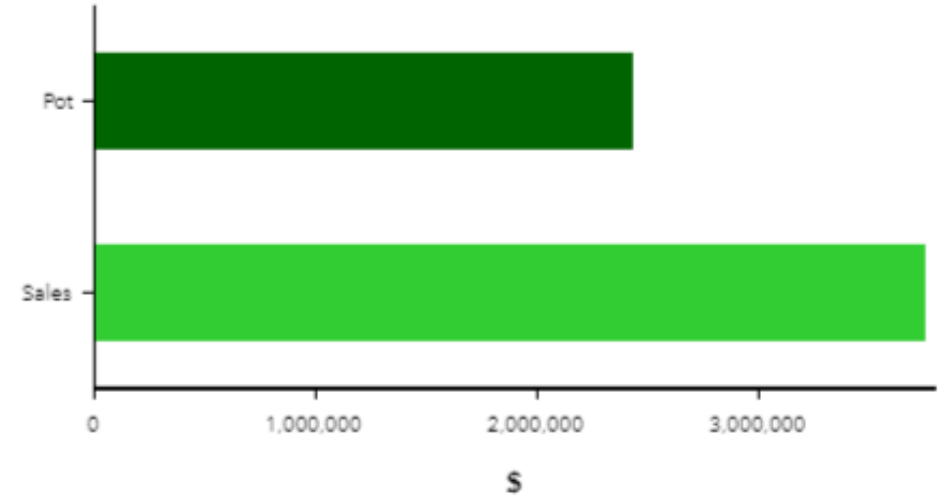
- There are no grocery stores within a 5-minute walk of the Site. There are four grocery stores within a 10- to 15-minute walk.
- There are more grocery sales than expenditure potential within both a 10- and 15-minute walk. This means that there are grocery stores serving a larger market.

# Oldham/Liberty

## The Walking Market & Groceries

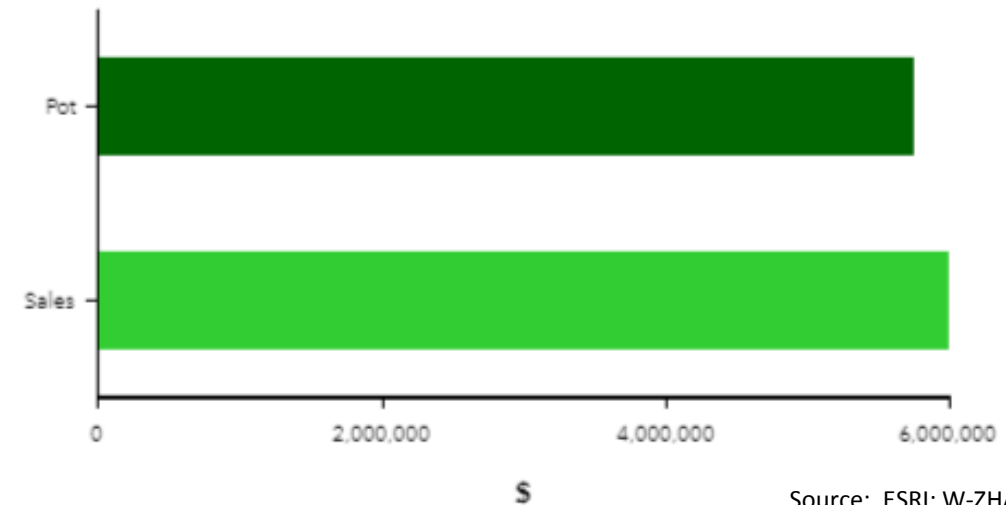
### 10-Minute Walk

2017 Food At Home Expenditure Potential and Sales

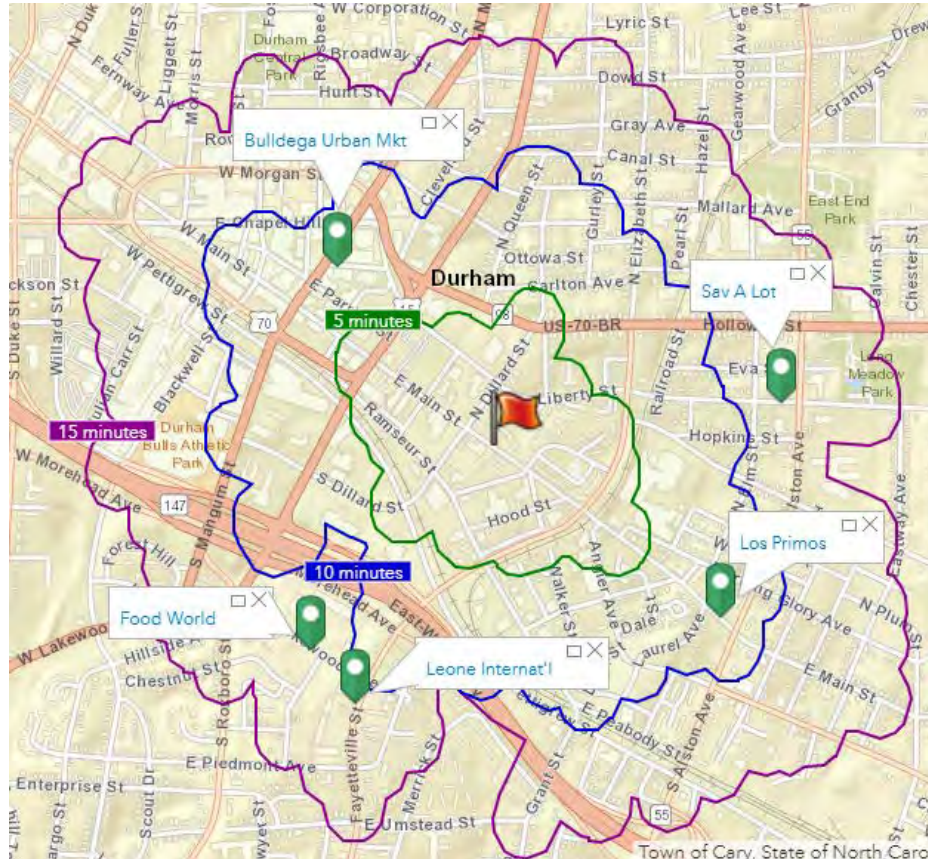


### 15-Minute Walk

2017 Food At Home Expenditure Potential and Sales



### 5-,10-,15-Minute Walk Sheds



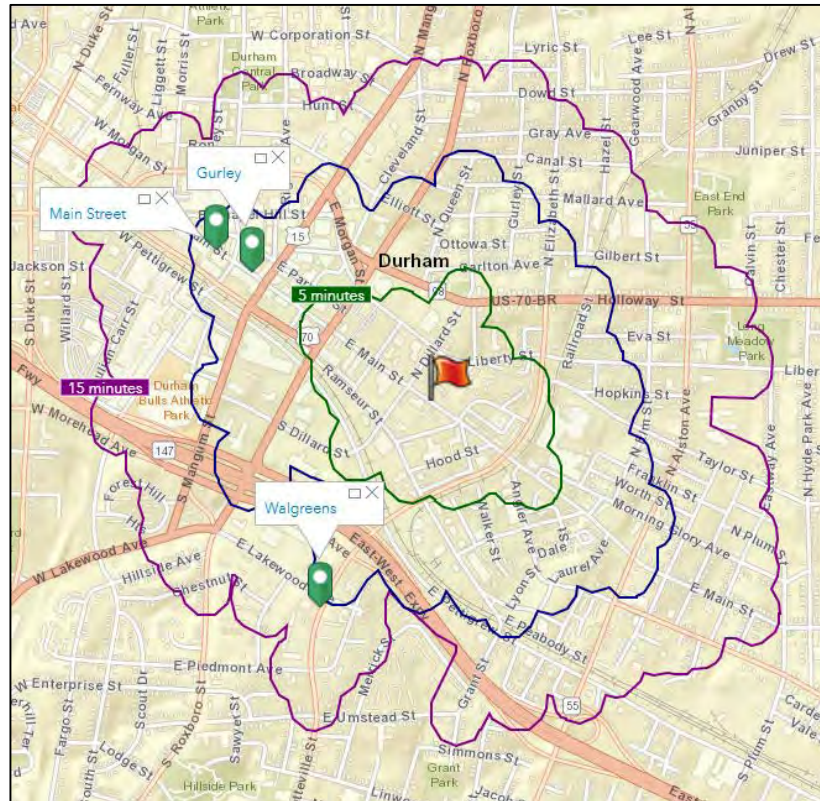
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# Oldham/Liberty

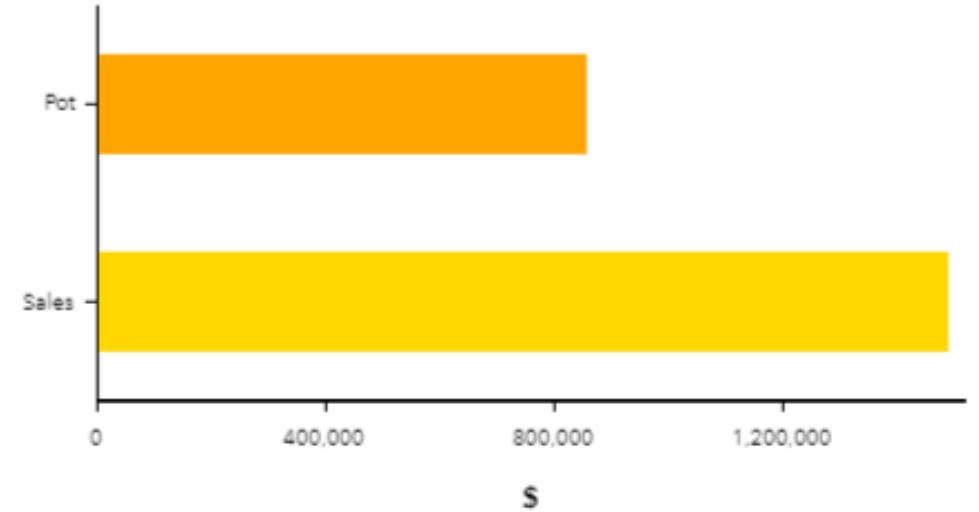
## The Walking Market & Personal Care Products

### 10-Minute Walk

5-,10-,15-Minute Walk Sheds

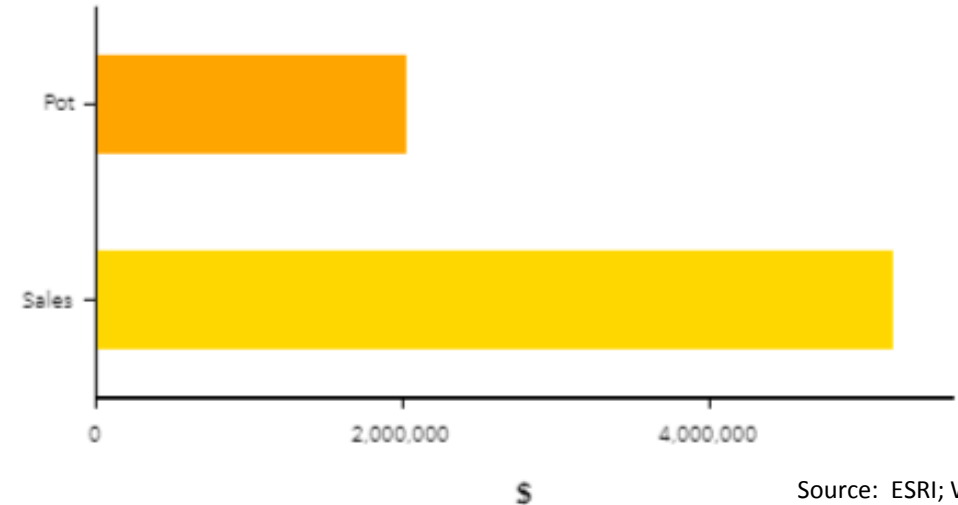


2017 Personal Care Expenditure Potential and Sales



### 15-Minute Walk

2017 Personal Care Expenditure Potential and Sales

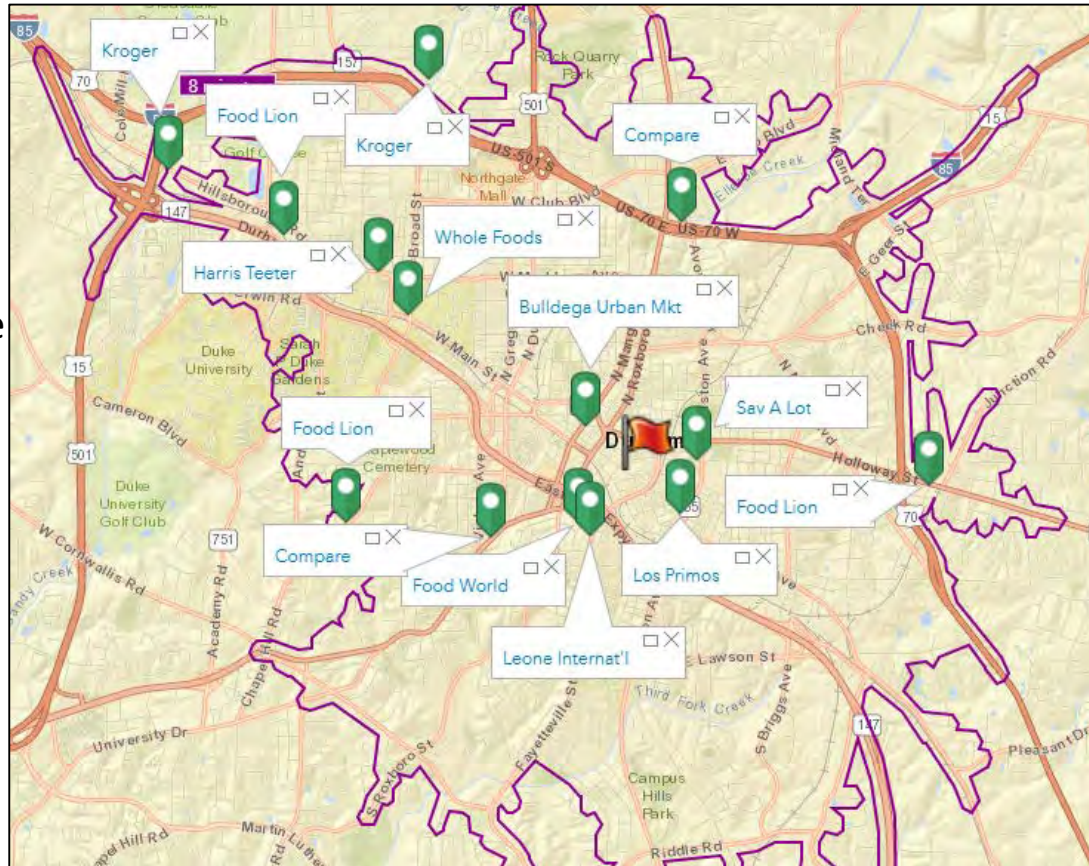


- There is a pharmacy within the County Health Services building. This pharmacy is for public health patrons. Otherwise, there are no pharmacies within a 5-minute walk of the Site. There are three pharmacies within a 10-minute walk.
- As illustrated in the graphs pharmacies are serving a much greater market than the walking market.

# Oldham/Liberty

## The Convenience Market - Driving

### 8-Minute Drive Shed



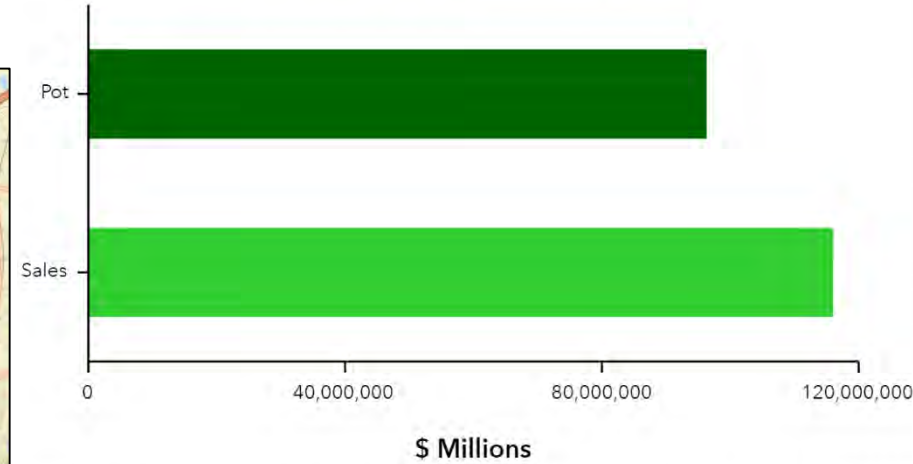
The map illustrates the 8-minute drivetime shed and major grocery stores.

As in most markets, the larger supermarkets ring the urban core. By car, these markets are convenient to the Site.

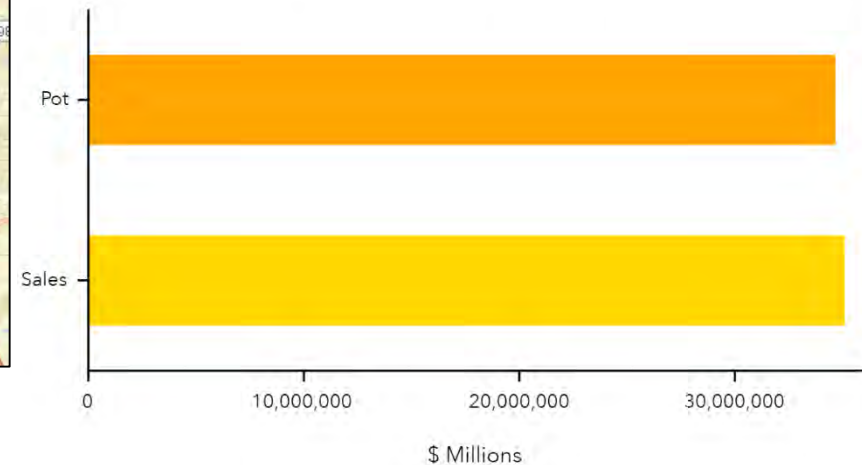
The Downtown Durham market appears to be in equilibrium in terms of convenience goods (food and personal care products).

### 8-Minute Drive

#### 2017 Food Expenditure Potential and Actual Sales



#### 2017 Personal Care Expenditure Potential and Sales



# Oldham/Liberty

## *Strengths and Weaknesses – Convenience Market*

### **Strength**

- Significant Daytime Population
- On Main Street in Downtown
- On Two-Way Street
- Large Site, Significant Number of New Households with Redevelopment
- Well located for a market where 34% of households do not have access to a vehicle

### **Weakness**

- On an Interior Corner, Lower Visibility
- Relatively Low Traffic Counts on E. Main Street
- Good Supply of Groceries and Pharmacies Nearby

# Eat/Drink Potential

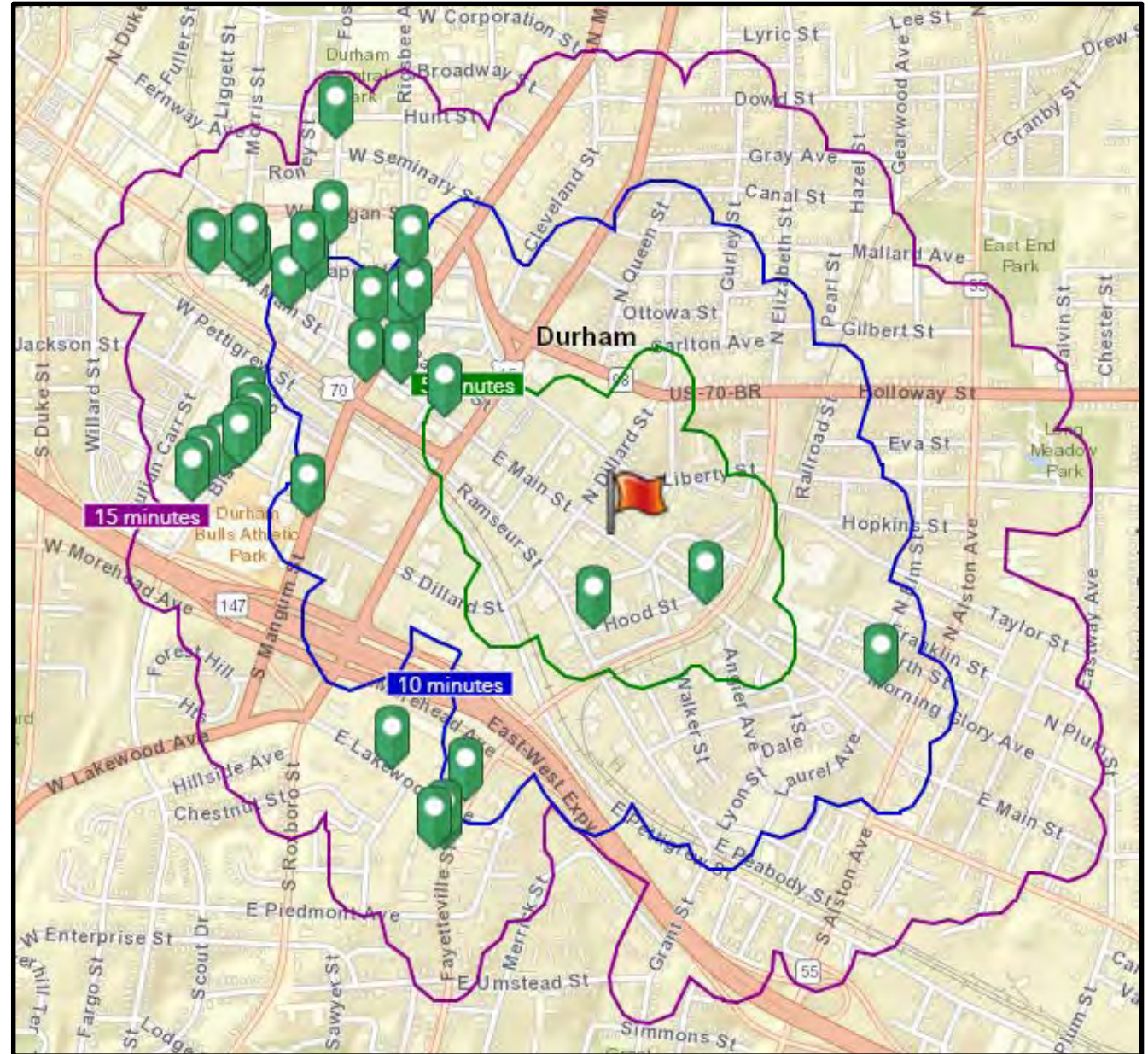
Restaurant, Café, Fast Food, Catering

Eating and Drinking Establishments  
5-, 10-, 15-Minute Walktimes from Site

# Oldham/Liberty

## *The Eat/Drink Market - Walking*

- There are very few eat/drink establishments within a 5-minute walk of the Site. The two establishments nearby are JC's Kitchen, a small soul food restaurant and the Ponysaurus Brewing Company, a local brewer.
- Many of the eat/drink establishments are within an easy walk from the Site.
- City Center and the American Tobacco District benefit from a large daytime population, entertainment anchors (the Carolina Theater, the Performing Arts Center, Durham Bulls Ballpark, etc.), hotels and a critical mass of eating and drinking establishments.
- The Site is not located within a Downtown eat/drink cluster.



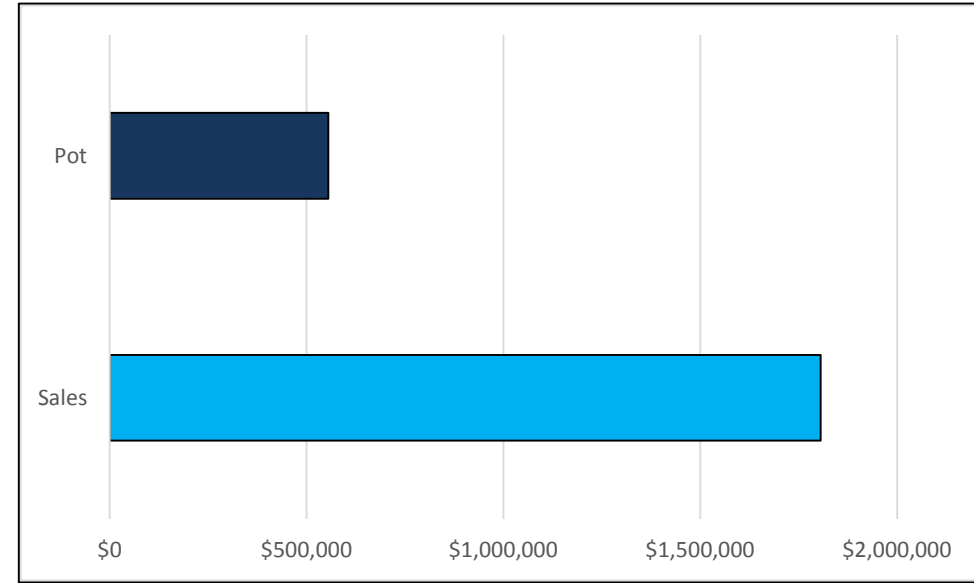


# Oldham/Liberty

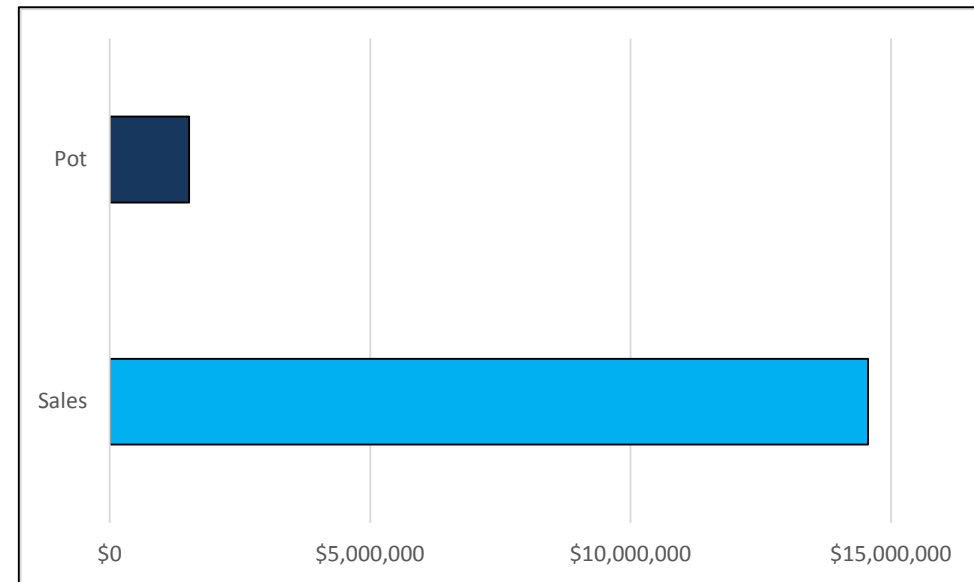
## The Eat/Drink Market - Walking

- Today because of income, the households in the immediate vicinity of the Site represent low eat/drink spending power (55 out of a national average of 100). However, the workers and visitors to the new Health Department building and Police headquarters will increase spending power particularly for the morning and lunch business. The intensification of use on the Site will also help to increase spending potential.
- The 10-minute walktime graph demonstrates Downtown's prowess as an eating and drinking destination for the region. Eat/drink sales are more than 10-times higher than resident spending potential.

5-Minute Walk



10-Minute Walk



# Oldham/Liberty

## *Strengths and Weaknesses – Eat/Drink Market*

Strength	Weakness
<ul style="list-style-type: none"><li>• Few cafés or breakfast/lunch establishments within easy walking distance.</li><li>• Significant Daytime Population</li><li>• On Main Street in Downtown</li><li>• On Two-Way Street</li><li>• Large Site, Significant Number of New Households with Redevelopment</li></ul>	<ul style="list-style-type: none"><li>• Site does not benefit from Downtown’s eat/drink clusters</li><li>• Low Household Incomes - Not a competitive location for a destination restaurant</li><li>• Office, church and public uses create “dead” blocks at night between Mangum Street and Elizabeth Street</li></ul>

## Oldham/Liberty

### *Conclusions*

- A convenience store (2,000 – 3,000 sq ft) may be feasible at this location assuming the Site is redeveloped with high density, mixed-income residential. Such a use could serve the larger Downtown's residents and nearby employees.
- There is likely potential for a café or lunch restaurant (1,000 – 4,000 sq ft) on the Main Street frontage of the Site. Such an establishment would cater to nearby employees and residents.

# JJ Henderson Site

807 S. Duke Street

# JJ Henderson

## Overview

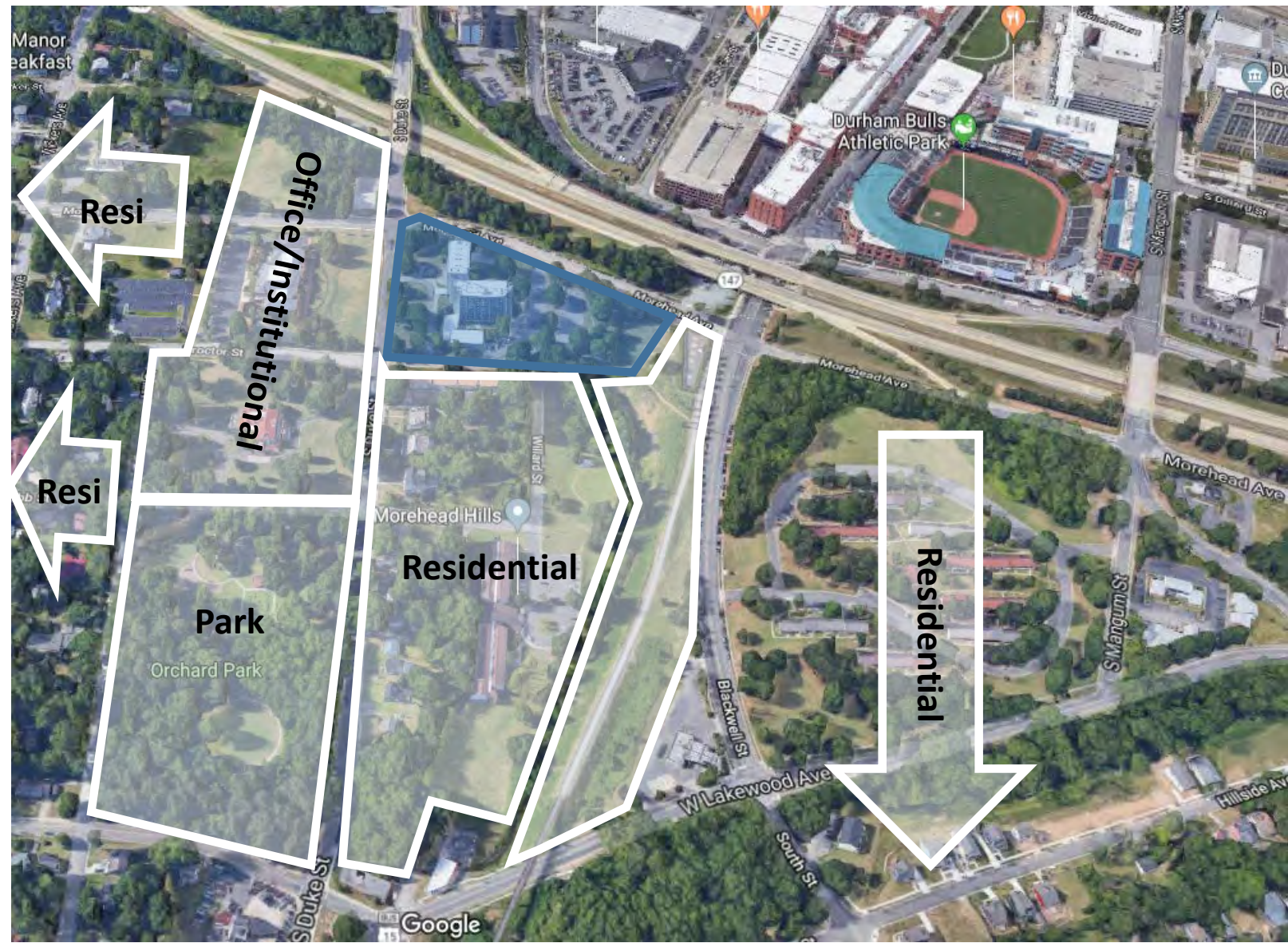
- The Site is 4.7 acres in a good Downtown location.
- The Site is zoned DD-S1. The Downtown Design District encourages bicycling, pedestrian and transit-oriented development. Support 1 Is a sub-district where moderate development intensity is expected and encouraged.
- The Freeway is a physical barrier separating the Site from the Downtown. However, it appears that employees park near the Site and walk under the Freeway to work.
- The Site abuts the American Tobacco Trail, a popular walking and biking trail.
- The Site does not have Blackwell Street frontage.



# JJ Henderson

## Surrounding Uses

- On Duke Street north of the Site, across the Freeway are mostly office uses. While there are sidewalks on Duke Street there are very few active storefronts.
- Across Duke Street from the Site are professional office uses. Two of these uses (Duke's Physicians Assistance Program and the Jr. League) are housed in stately historic buildings sited in a park-like setting.
- Orchard Park is approximately one-block from the Site across Duke Street.
- To the south of the Site are single family and multi-family residential land uses.
- The American Tobacco Trail, a popular walking and biking trail, abuts the Site to the West.
- To the east along Morehead Avenue is the Forest Hill Heights site.



# JJ Henderson

## *Surrounding Uses*

Duke Physicians Assistance Program is nearby across S. Duke Street.



The Junior League offices neighbor the Duke Physicians Assistance Program to the south.



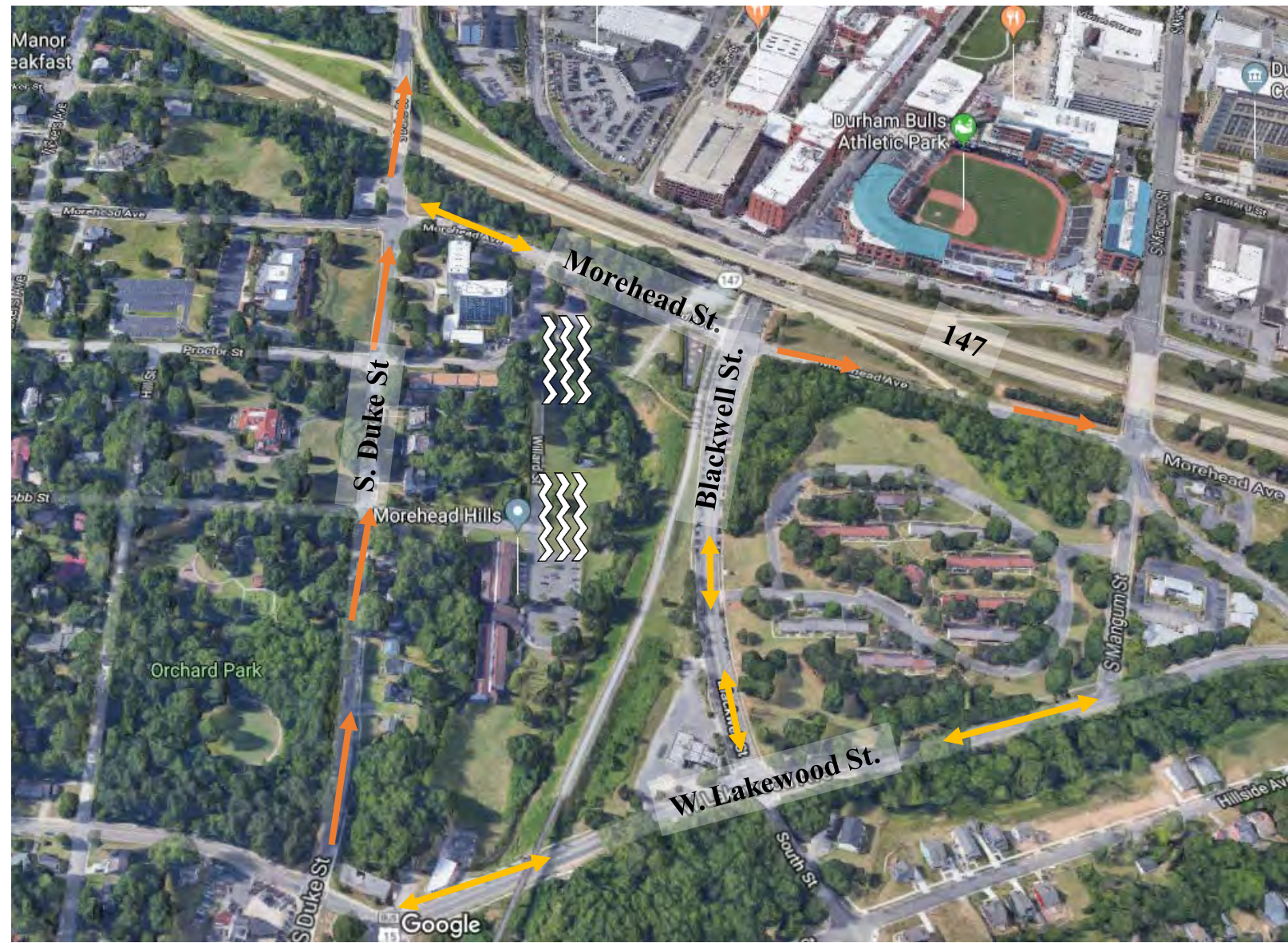
The American Tobacco Trail is a 22-mile rails-to-trails that runs from Durham to New Hill, NC. The Trail is part of the East Coast Greenway.



# JJ Henderson

## Vehicle Access

- The Site is visible from the Durham Parkway eastbound and westbound. However, the way to access the Site from the Freeway is to exit at Mangum/Roxboro Streets via Morehead Avenue, go south on Mangum Street to Lakewood Avenue and then north on Blackwell to Morehead Avenue. Freeway access is not optimal for regional retail.
- The road network around the Site is truncated due to the American Tobacco Trail (old railroad right-of-way). East/west movements near the site are limited to Lakewood Avenue and Morehead Avenue.
- Duke Street is one-way north at the Site. The average daily traffic volume on S. Duke Street at Morehead Avenue was 4,000 in 2015.
- Average daily traffic on Morehead Avenue at the Site was 2,000 in 2015.
- The road network is not optimal for either convenience or regional retail.





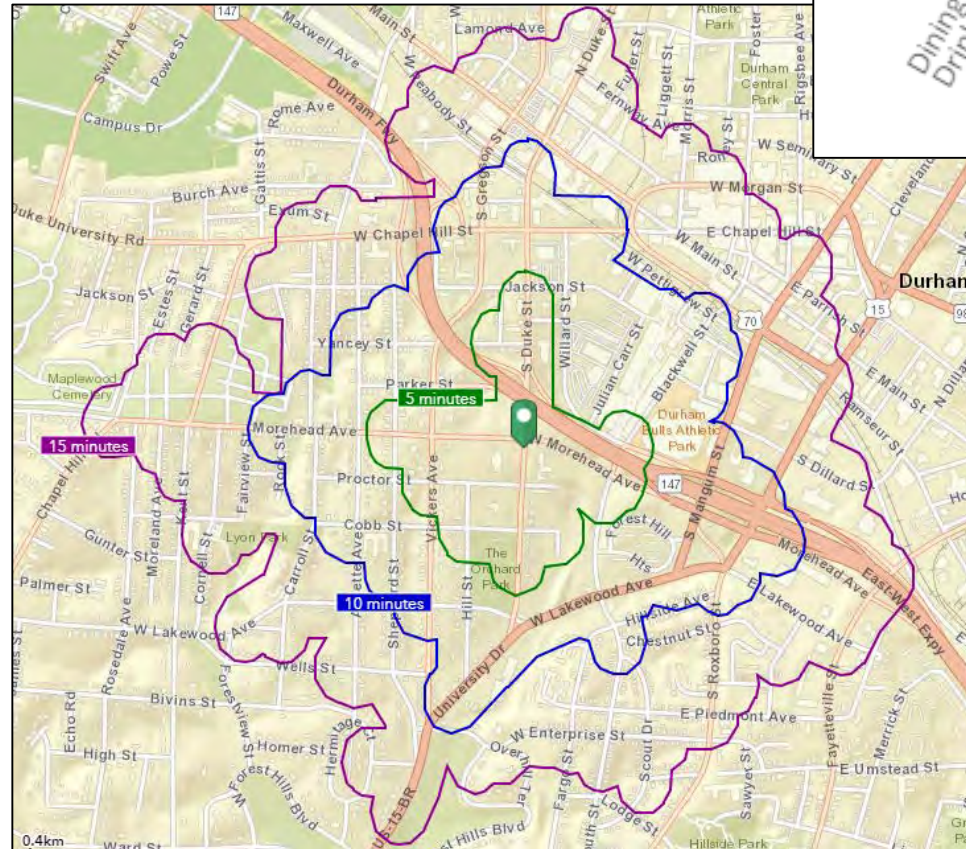
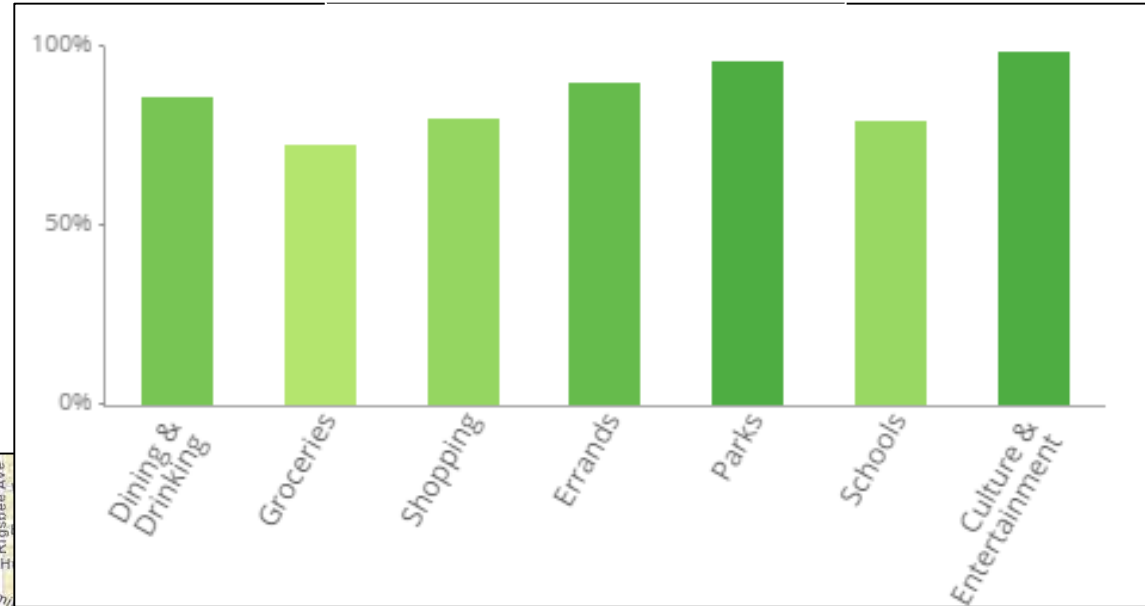
# JJ Henderson *Pedestrian Access*

The WalkScore for 807 S. Duke Street is 75 – Very Walkable. The walk is much more interesting to the Downtown via Blackwell as opposed to S. Duke St.

The location is convenient to culture and entertainment anchors and parks. The Site is within a 5-minute walk to the American Tobacco mixed-use project, the Bulls’ ballfield and the Performing Arts Center. It is a 10- to 12-minute walk to Five Points.

The Site abuts the street for the American Tobacco Trail, a 22+-mile rail-trail.

5-,10-15-Minute Walk Sheds







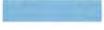














# JJ Henderson Transit

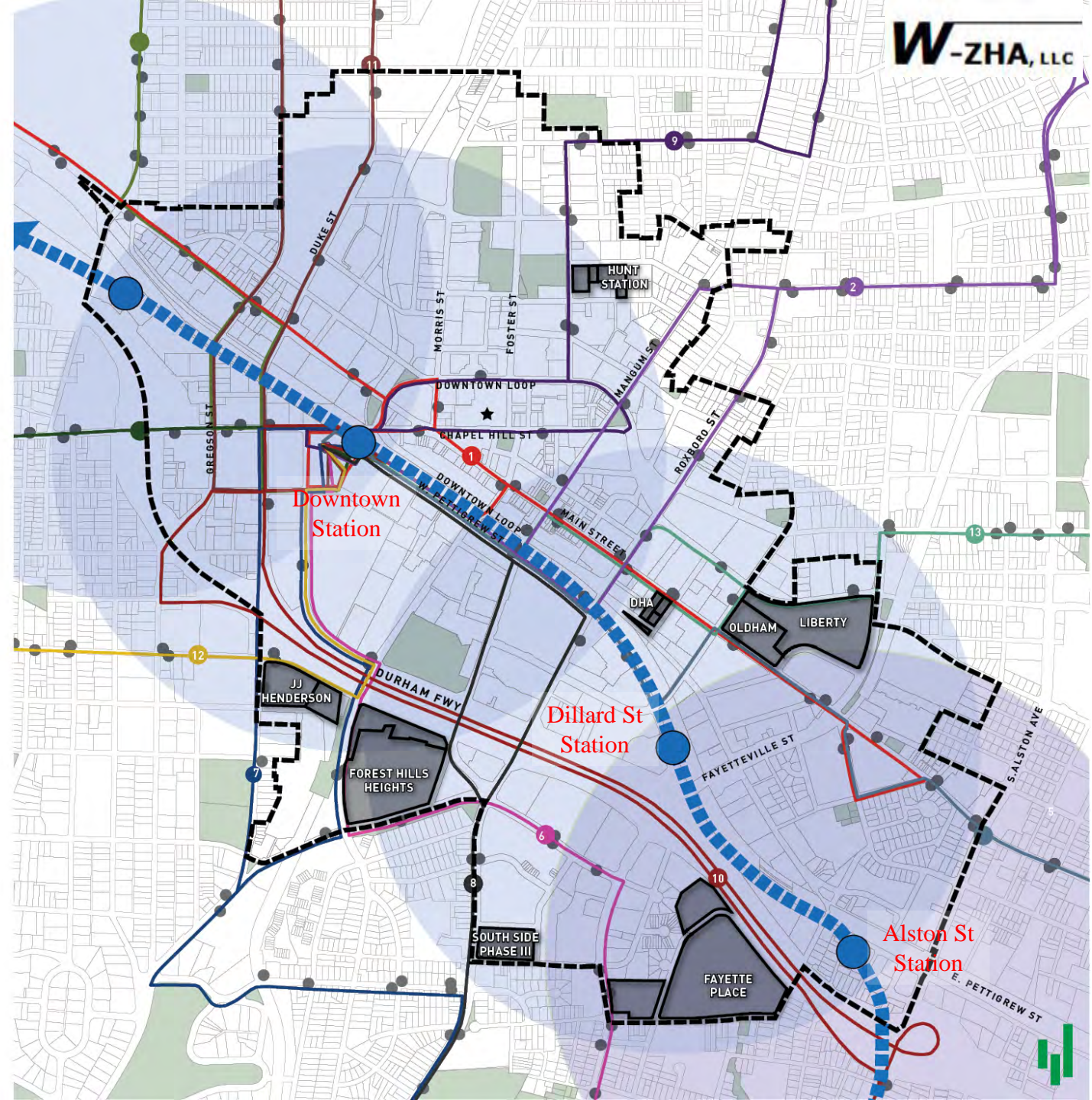
Today, the Site's transit score is 62 – Good Transit. There are many convenient transit options near the Site.

The Site is within a half-mile of the proposed Downtown LRT stations. The half mile is about a 15-minute walk.

The Site's transit score will increase with LRT.

## TRANSIT NETWORK

-  OPPORTUNITY SITES
-  OPEN SPACES
-  PROPOSED LRT STATION
-  PROPOSED LRT LINE
-  1/2 MILE BUFFER FROM LRT STATION
-  TRANSIT STOPS
-  1 BULL CITY CONNECTOR
-  2 DEARBORN DR/NORTH DURHAM
-  3 DUKE UNIVERSITY/HILLSBOROUGH RD
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-  6 FAYETTEVILLE ST/NCCU/SOUTHPOINT
-  7 FOREST HILLS/WEAVER ST/MLK PKWY
-  8 LAWSON ST/NCCU/DURHAM TECH
-  9 N ROXBORO/DURHAM REG/N DUKE CROSSIN
-  10 NCCU/HWY 54 & 55
-  11 NORTHGATE/HORTON RD
-  12 SOUTH SQUARE/NEW HOPE COMMONS
-  13 THE VILLAGE/GLENVIEW STATION/HWY 98



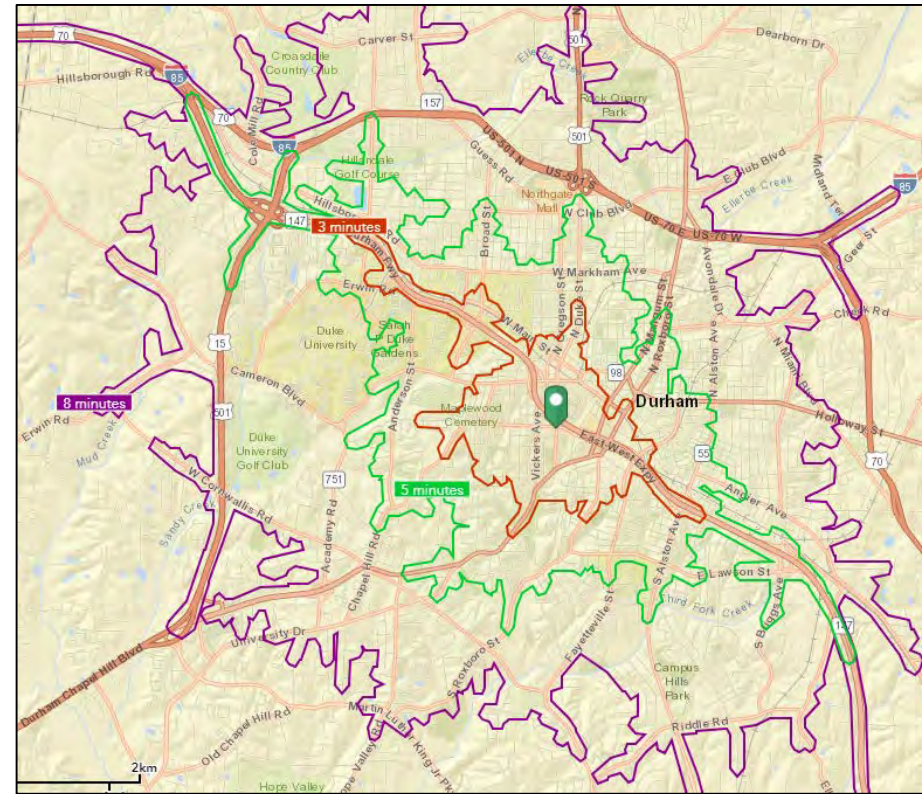
# JJ Henderson Demographics

Nearby neighborhoods northwest of the Site contain older households.

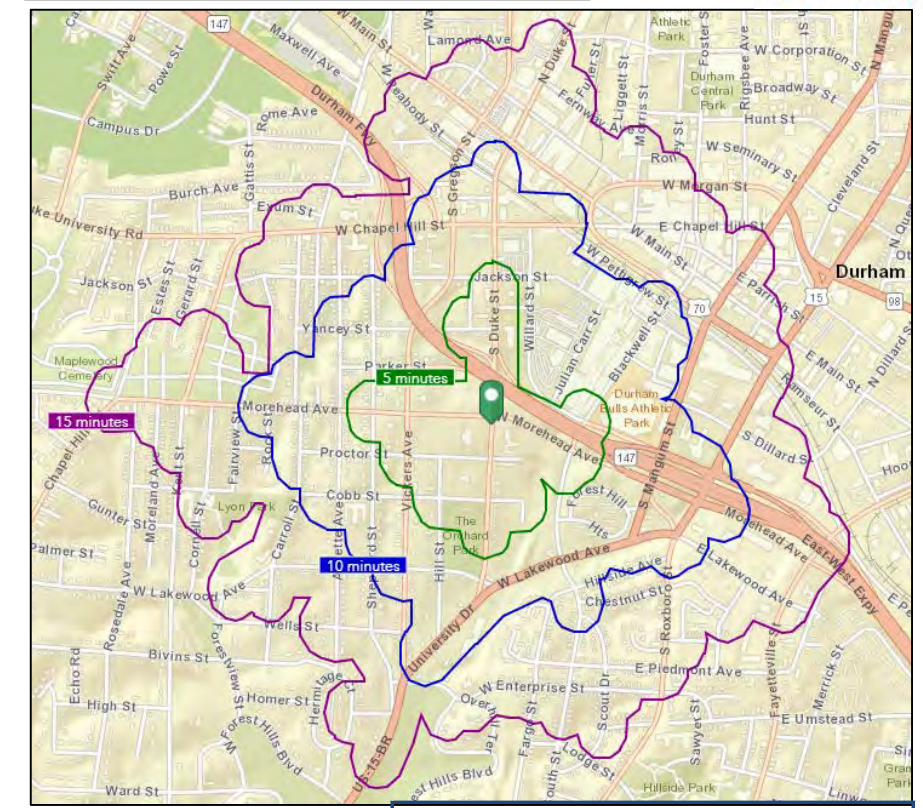
Relatively few households within the walking market have children at home.

Nearby neighborhoods to the east of the Site contain higher income households.

## 3-,5-,8-Minute Drive Sheds



## 5-,10-,15-Minute Walk Sheds



	Drive Time		
	3-Minute	5-Minute	8-Minute
2018 Households	3,559	12,802	33,952
2023 Households	4,609	14,960	38,056
Growth	30%	17%	12%
% Hshlds w/Children	22.1%	25.7%	28.0%
Avg Household Income	\$53,821	\$58,317	\$57,453
Median Household Income	\$30,322	\$34,456	\$36,135

	Walk Time		
	5-Minute	10-Minute	15-Minute
2018 Households	412	1,244	2,667
2023 Households	506	1,577	3,529
Growth	23%	27%	32%
% Hshlds w/Children	6.8%	15.1%	20.3%
Avg Household Income	\$50,582	\$53,322	\$55,286
Median Household Income	\$20,501	\$22,883	\$30,304

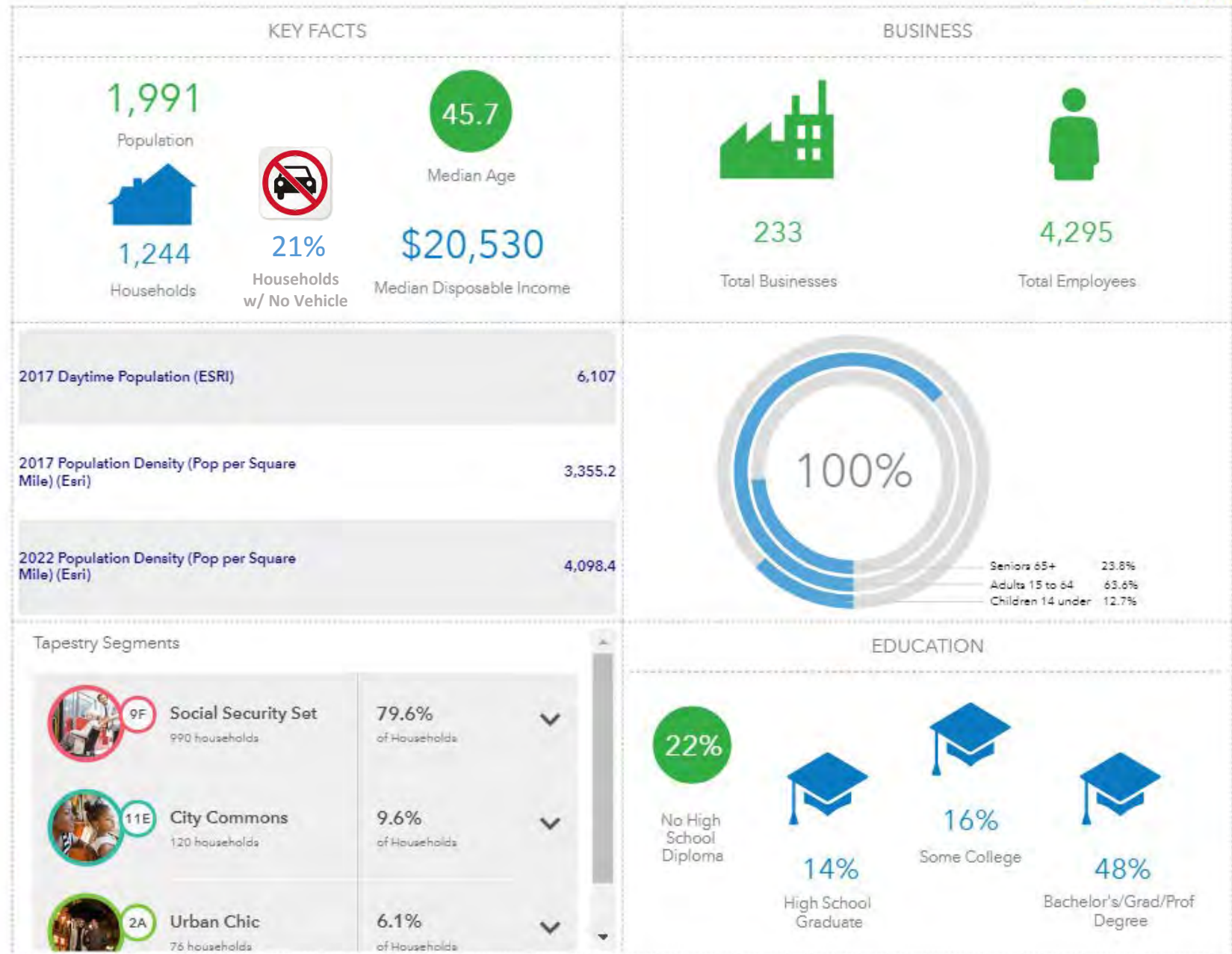
Source: ESRI; W-ZHA

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# JJ Henderson

## The 10-Minute Walking Market

- ESRI estimates that there are approximately 1,244 households and approximately 4,300 employees within a 10-minute walk of the Site. This is double the number of households within a 10-minute walk of Forest Hill Heights.
- The daytime population is estimated to be approximately 6,100 people. Note that the daytime population is most likely concentrated north of the Freeway.
- Local households within a 10-minute walk are predominantly from the “Social Security Set” or “City Commons” Tapestry segments. Both of these segments are lower income.
- One-of-five households within a 10-minute walk of the Site do not have access to a vehicle.



# JJ Henderson

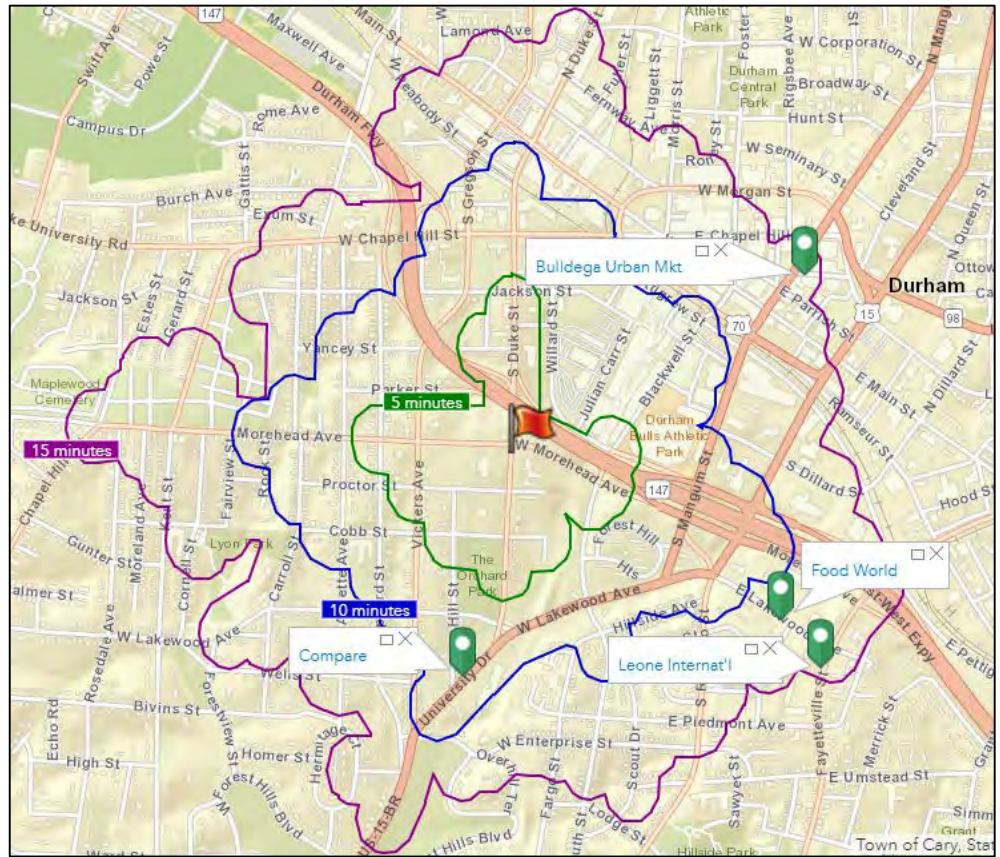
## The Walking Market & Groceries

The walking market from the Site is best served by Compare Foods in the Forest Hills shopping center.

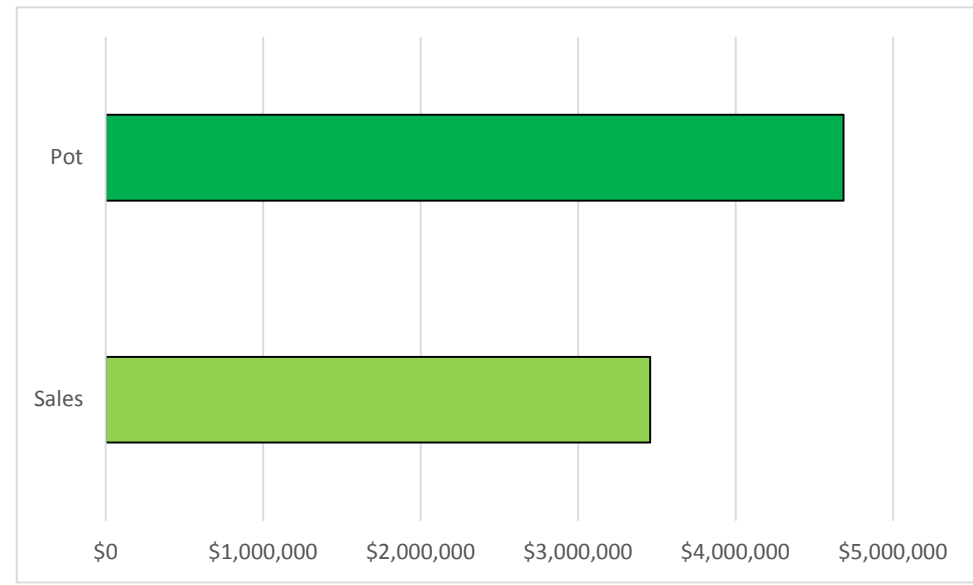
Other food markets are within a 15-minute walk.

While there appears to be a market opportunity, there are a number of supermarkets located slightly beyond the 15-minute walkshed.

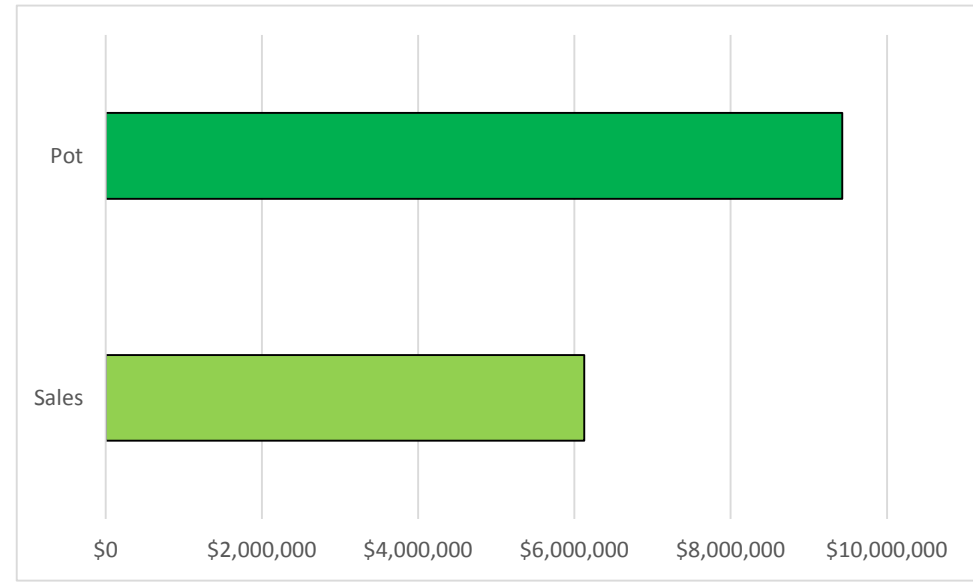
5-,10-,15-Minute Walk Sheds



10-Minute Walk



15-Minute Walk



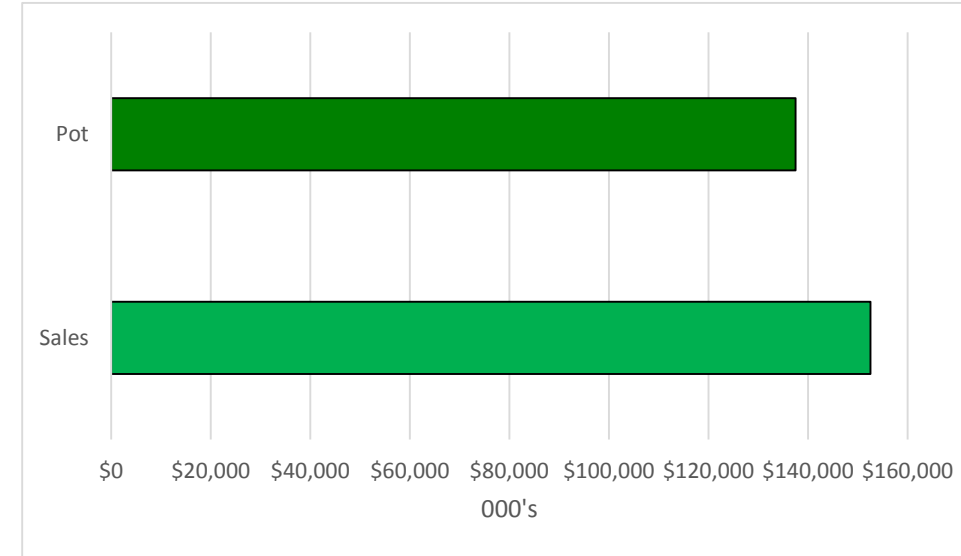
# JJ Henderson

## The Convenience Market - Driving

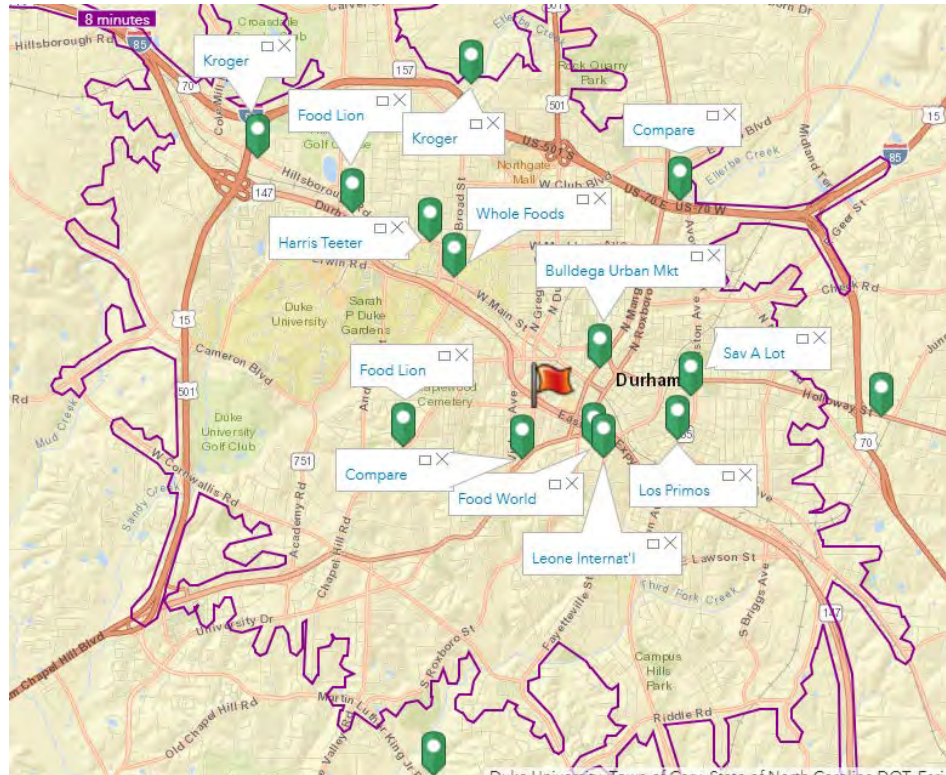
Like Forest Hill Heights the driving market is well served for grocery.

There is slightly more pharmacy spending potential than there are sales.

### 8-Minute Drive



### Grocery Stores within an 8-Minute Drive



### 2017 Personal Care Expenditure Potential and Sales



**JJ Henderson*****Strengths and Weaknesses – Convenience Market*****Strengths**

- Site is convenient to the Downtown.
- Good population density and household growth.

**Weakness**

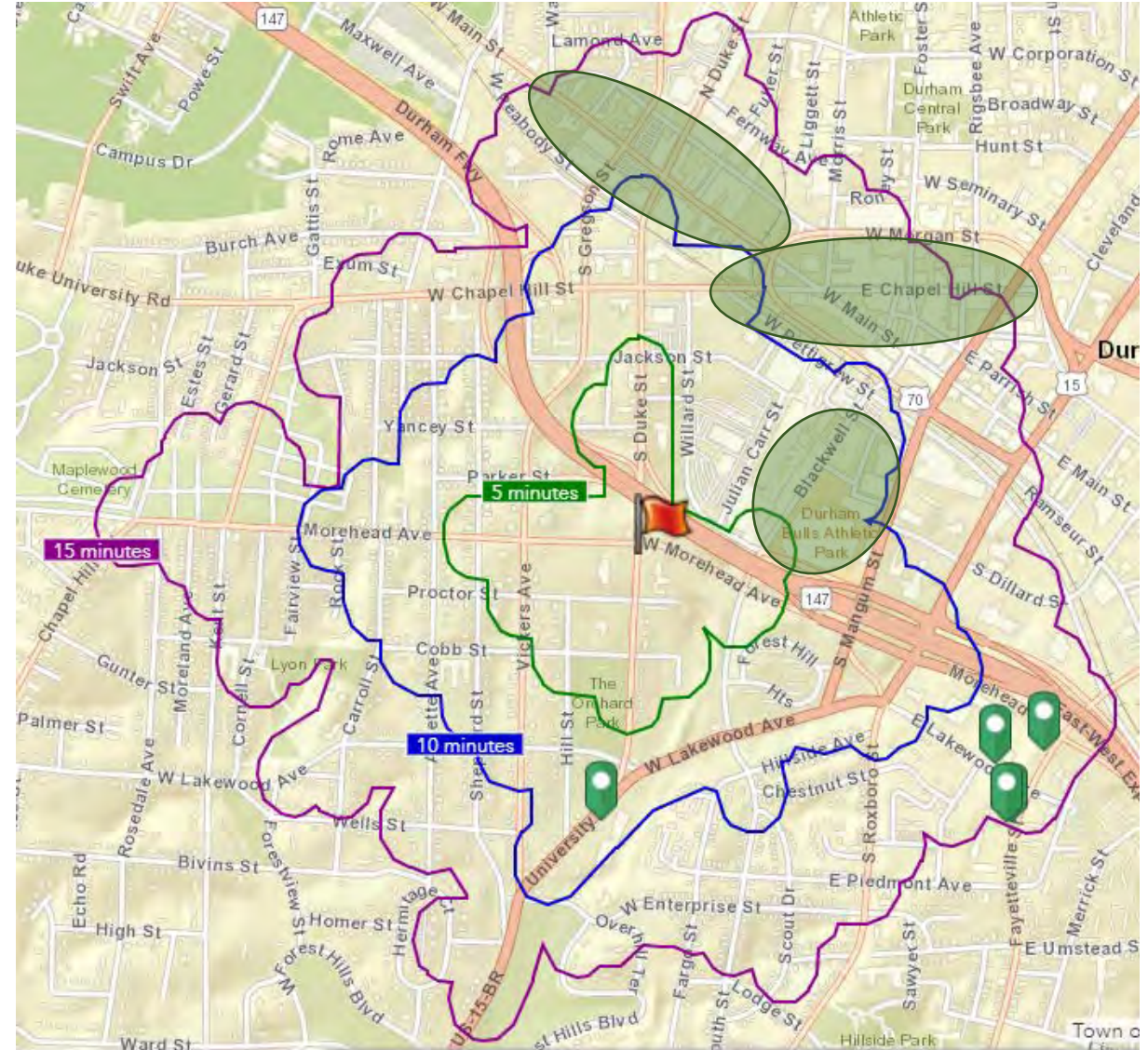
- From an access perspective the Site is not good for retail. The Site is on a one-way street into Downtown and the road grid is compromised around the Site.
- Traffic counts are low.


Eating and Drinking Establishments  
5-, 10-, 15-Minute Walktimes from Site

**JJ Henderson**

***The Eat/Drink Market - Walking***

- Like Forest Hill Heights, the Site is within easy walking distance to the American Tobacco Campus. American Tobacco is a regional eat/drink destination.
- The Site is just over a 10-minute walk from Durham City Center and Brightleaf Square where bars and restaurants are concentrated.
- Eating and drinking options south of the Freeway are mostly convenience/take out, not destination, oriented.
- Like retail, the Site is not sufficiently visible or accessible to attract eating and drinking establishments.



 = Bar and restaurant cluster



*Strengths and Weaknesses – Eating and Drinking Market*

Strengths

- Site is convenient to the Downtown.
- Good population density and household growth.

Weakness

- At 4.75 acres the Site is not large enough to develop a major mixed-use project.
- From an access perspective the Site is not good for eat/drink. The Site is on a one-way road into Downtown and the road grid is compromised around the Site. Traffic counts are low.
- Near-In Household have Lower Incomes, so Eat/Drink Potential is Limited without a Regional Draw

## JJ Henderson

### *Retail and Eat/Drink Conclusions*

- The JJ Henderson site is not a particularly strong site for destination retail, convenience retail of eating and drinking. There are other sites with better access, visibility and location advantages.

# Forest Hill Heights Site

700 S. Mangum Street

# Forest Hill Heights

## Overview

- The Site is 14.8 acres in a prime Downtown location.
- The Site is zoned DD-S1. The Downtown Design District encourages bicycling, pedestrian and transit-oriented development. Support 1 Is a sub-district where moderate development intensity is expected and encouraged.
- The Freeway is a physical barrier separating the Site from the Downtown. However, it appears that employees park near the Site and walk under the Freeway to work.



# Forest Hill Heights

## *Surrounding Uses*

- One block north of the Site is the American Tobacco project and the Durham Bulls ballfield. Two blocks north of the Site is the Durham Performing Arts Center and the County courthouse.
- To the west of the Site is the American Tobacco Trail. Neighborhoods are further west and immediately south of the Site. The Heritage Square shopping center is about two blocks east of the Site on West Lakewood.



# Forest Hill Heights

## *Surrounding Uses*

Heritage Square is a 60,000 square foot neighborhood shopping center one block west of the Site on E. Lakewood Ave. The center is anchored by Food World and Family Dollar. Loopnet advertises lease rates at \$36 - \$50 per square foot. Heritage Square abuts Fayetteville Street, but the center is well below the street level. There have been proposals to redevelop this 9-acre site as a mixed-use project.



There has been considerable redevelopment across from Heritage Square on either side of S. Roxboro St. The Southside project is ongoing with 85 single family units and 132 loft units built with 85 more apartments underway.



# Forest Hill Heights

## Vehicle Access

- The Site is visible from the Durham Parkway east and westbound. There is a Freeway exit leading to Mangum/Roxboro Streets via Morehead Avenue. This exit is marked as the Downtown exit and the exit for Visitor Information.
- According to NC Department of Transportation data, an average of over 60,000 vehicles travel the Freeway daily.
- The Site's regional access and visibility is excellent.



# Forest Hill Heights

## Vehicle Access

- Morehead Avenue is one-way eastbound and borders the Site to the north. Employees park on Morehead and walk to work. Morehead is two-way west of Blackwell Street.
- West Lakewood Avenue borders the Site to the south. W. Lakewood is two-way with an average daily traffic volume of 11,000.
- Mangum and Blackwell Street are the north-south streets accessing the Site. Mangum is one-way southbound, Blackwell is two-way.



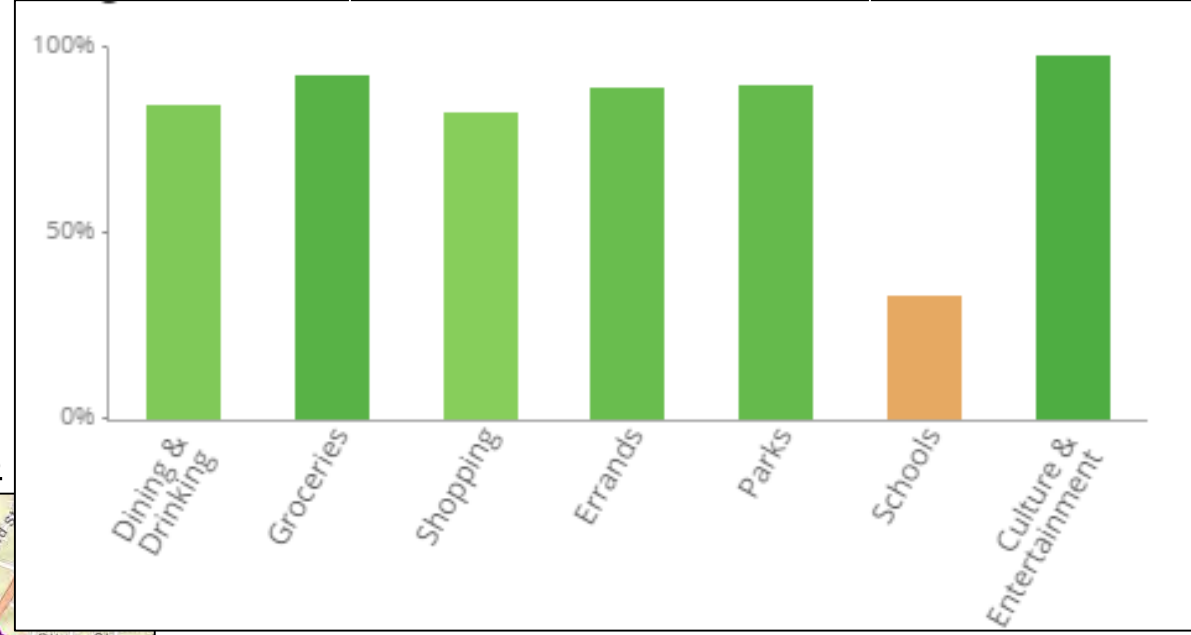


# Forest Hill Heights *Pedestrian Access*

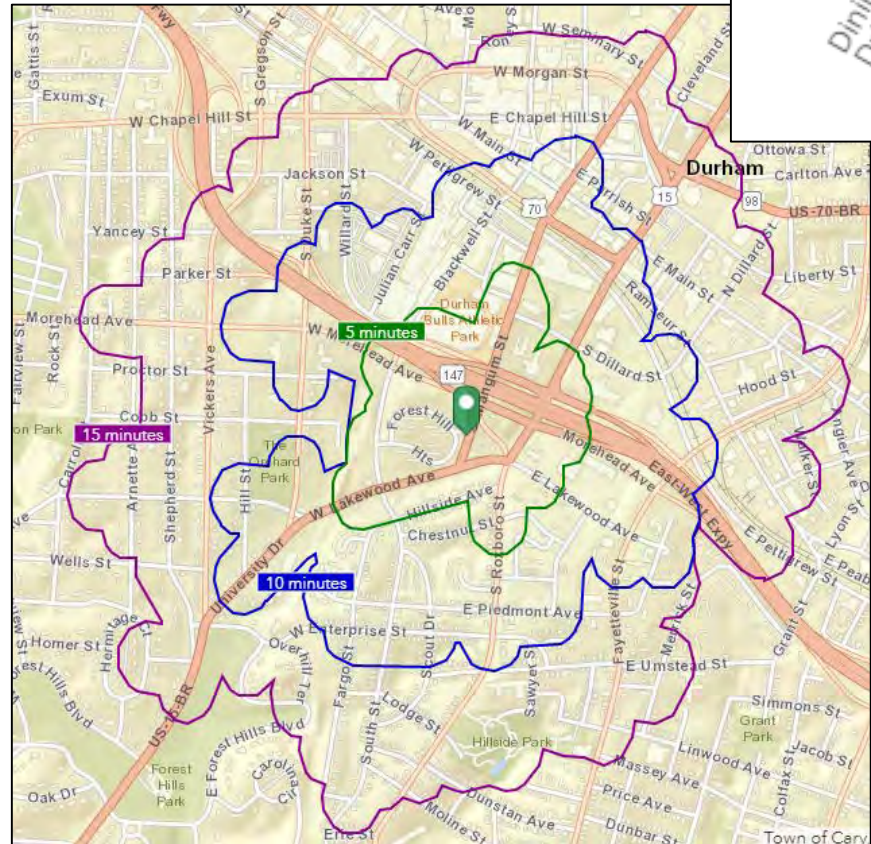
The WalkScore for 700 S. Mangum Street is 77 – Very Walkable.

The location is particularly convenient to culture and entertainment anchors and groceries. The Site is within a 5-minute walk to the American Tobacco mixed-use project, the Bulls’ ballfield and the Performing Arts Center. It is a 10- to 12-minute walk to Five Points.

The Site is across the street for the American Tobacco Trail, a 22+-mile rail-trail.



5-,10-15-Minute Walk Sheds



# Forest Hills Heights *WalkScore and Transit*

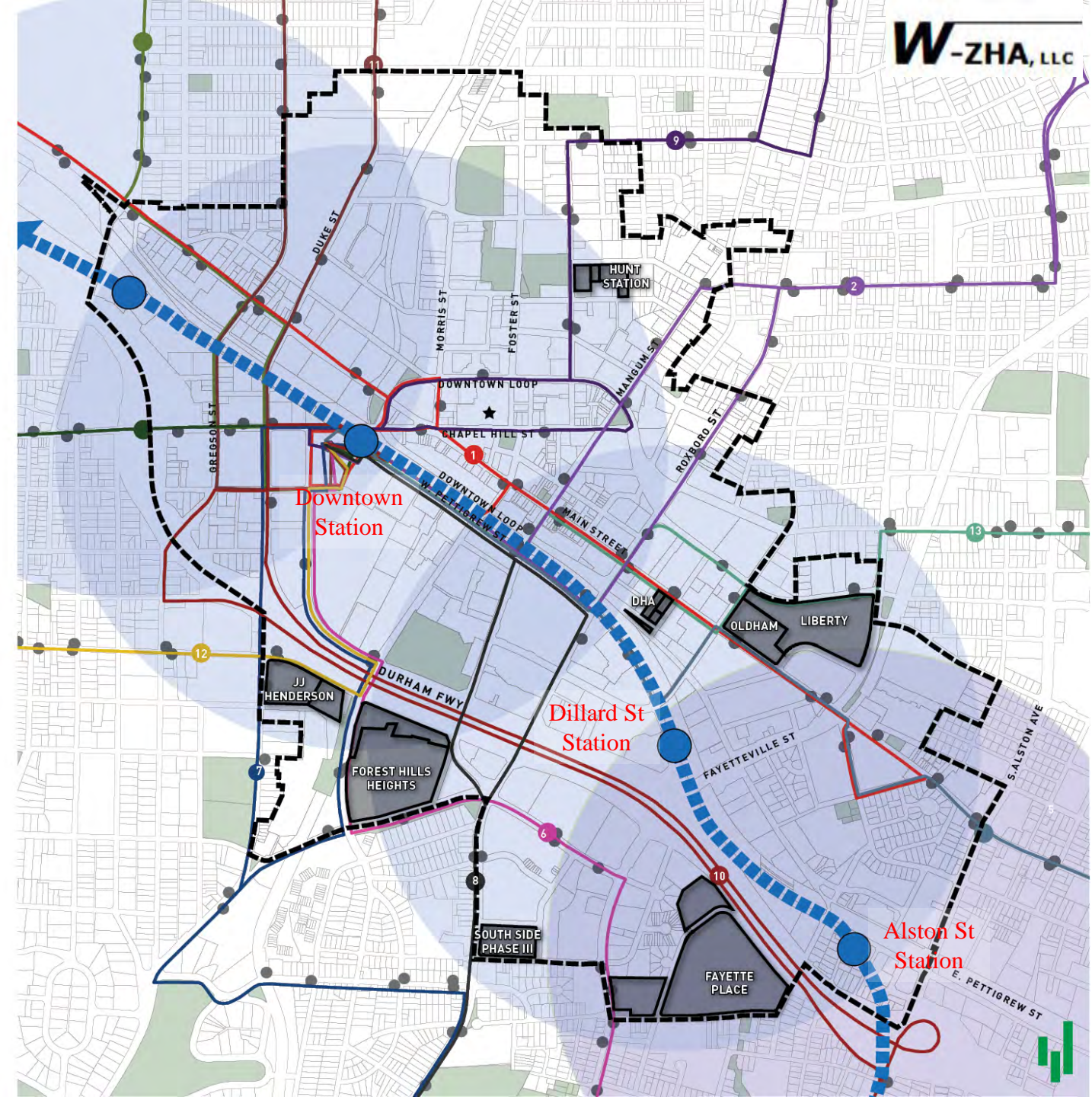
Today, the Site's transit score is 60 – Good Transit. There are many convenient transit options near the Site.

The Site is within a half-mile of the proposed Downtown and Dillard Street LRT stations. A half mile is about a 15-minute walk.

The Site's transit score will increase with LRT.

## TRANSIT NETWORK

- OPPORTUNITY SITES
- OPEN SPACES
- PROPOSED LRT STATION
- PROPOSED LRT LINE
- 1/2 MILE BUFFER FROM LRT STATION
- TRANSIT STOPS
- 1 BULL CITY CONNECTOR
- 2 DEARBORN DR/NORTH DURHAM
- 3 DUKE UNIVERSITY/HILLSBOROUGH RD
- 4 DUKE UNIVERSITY/SPARGER ST
- 5 EAST DURHAM/THE VILLAGE/ANGIER AV
- 6 FAYETTEVILLE ST/NCCU/SOUTHPOINT
- 7 FOREST HILLS/WEAVER ST/MLK PKWY
- 8 LAWSON ST/NCCU/DURHAM TECH
- 9 N ROXBORO/DURHAM REG/N DUKE CROSSIN
- 10 NCCU/HWY 54 & 55
- 11 NORTHGATE/HORTON RD
- 12 SOUTH SQUARE/NEW HOPE COMMONS
- 13 THE VILLAGE/GLENVIEW STATION/HWY 98



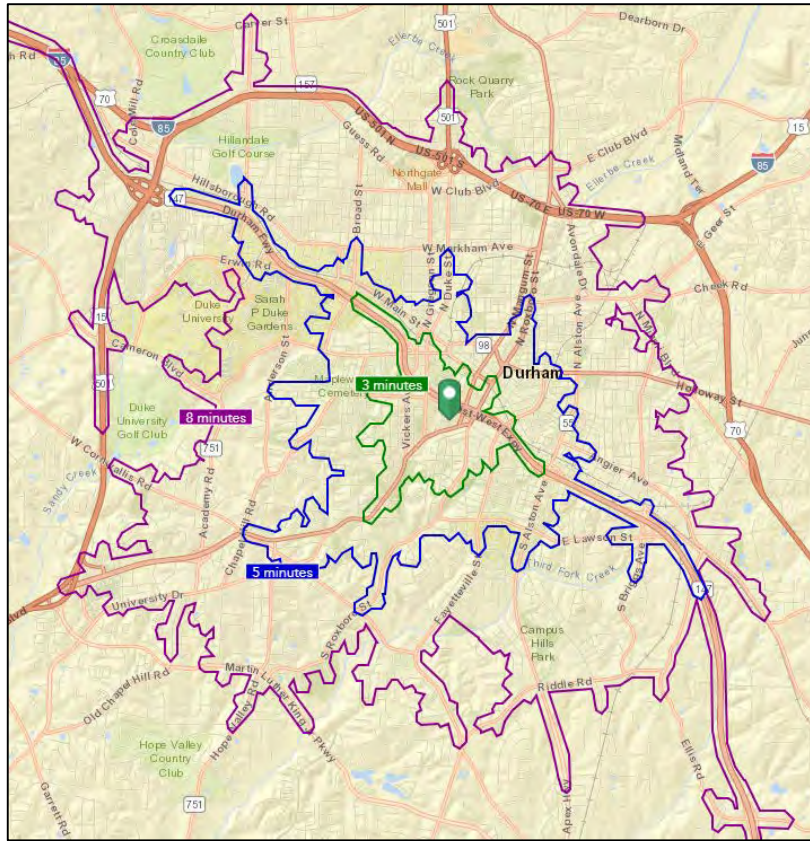
### 3-,5-,8-Minute Drive Sheds

## Forest Hill Heights Demographics

Sufficient near-in household density to support a grocery anchored shopping district.

Strong household growth is projected over the next 5 years within a 10-minute walk from the Site. This projection does not contemplate DHA site redevelopment.

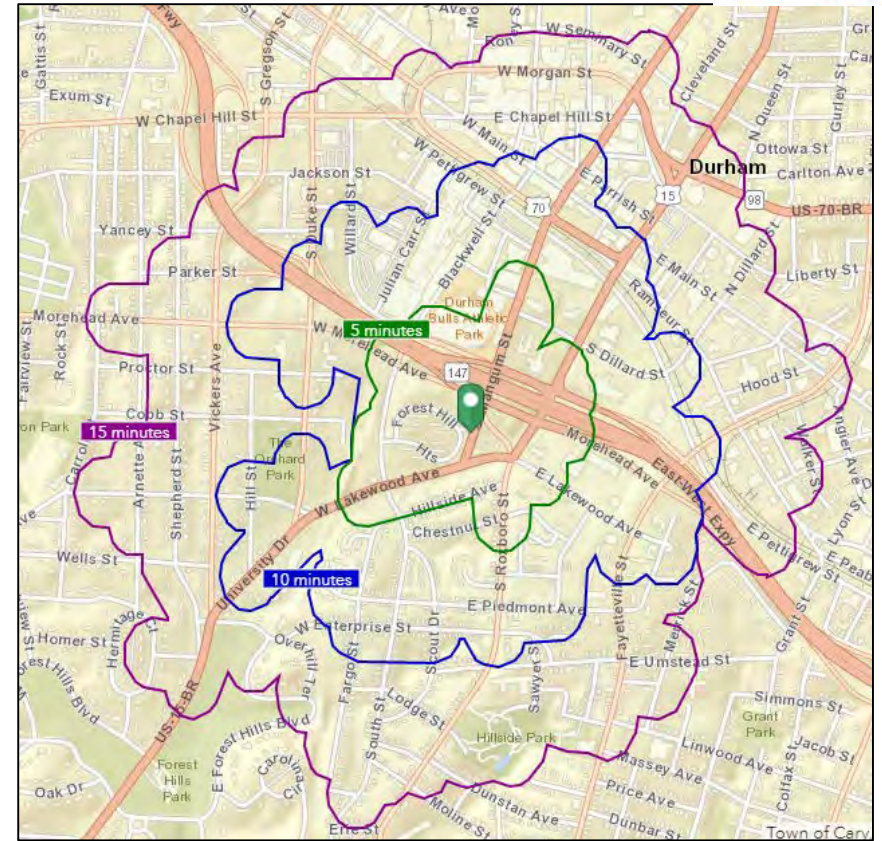
Household income is low among near-in households.



	Drive Time		
	3-Minute	5-Minute	8-Minute
2018 Households	1,740	8,024	31,194
2023 Households	2,484	9,544	35,024
Growth	43%	19%	12%
% Hshlds w/Children	20.8%	27.3%	27.8%
Avg Household Income	\$56,697	\$50,853	\$56,537
Median Household Income	\$24,726	\$28,503	\$35,985

Source: ESRI; W-ZHA  
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### 5-,10-,15-Minute Walk Sheds

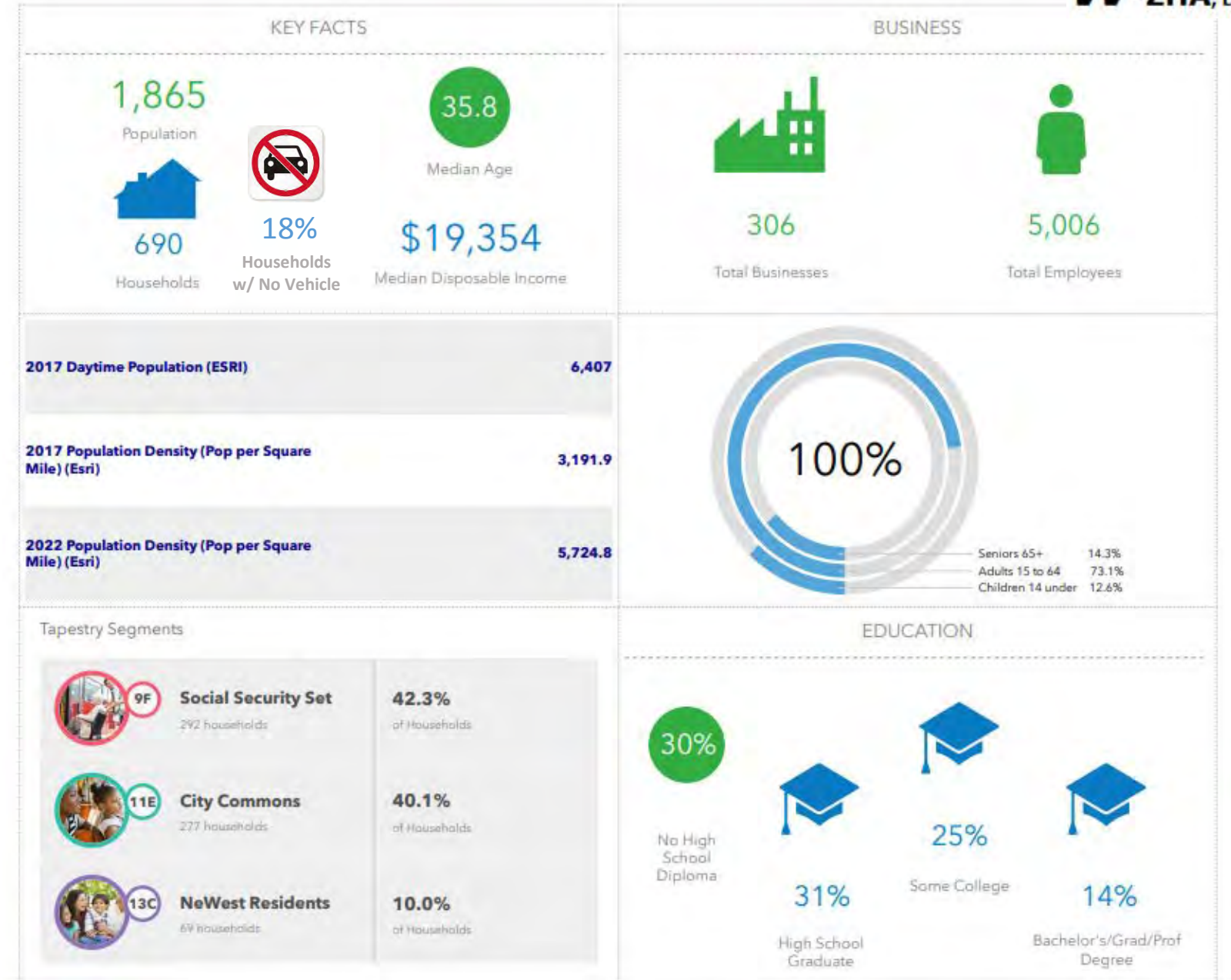


	Walk Time		
	5-Minute	10-Minute	15-Minute
2018 Households	73	690	1,849
2023 Households	170	1,296	2,674
Growth	133%	88%	45%
% Hshlds w/Children	27.7%	24.6%	22.2%
Avg Household Income	\$26,773	\$41,305	\$50,271
Median Household Income	\$18,519	\$21,815	\$23,794

# Forest Hill Heights

## The 10-Minute Walking Market

- ESRI estimates that there are approximately 690 households and approximately 5,000 employees within a 10-minute walk of the Site.
- The daytime population is estimated to be approximately 6,500 people. Note that the daytime population is most likely concentrated north of the Freeway at the American Tobacco campus.
- Local households within a 10-minute walk are mostly from the “Social Security Set” or “City Commons” Tapestry segments. Both of these segments are lower income. 10% of households are from the “NeWest” segment which consists of Hispanic families with children at home of modest means.
- 18% of the households within a 10-minute walk of the Site do not have access to a vehicle.



# Forest Hill Heights

## The Walking Market & Groceries

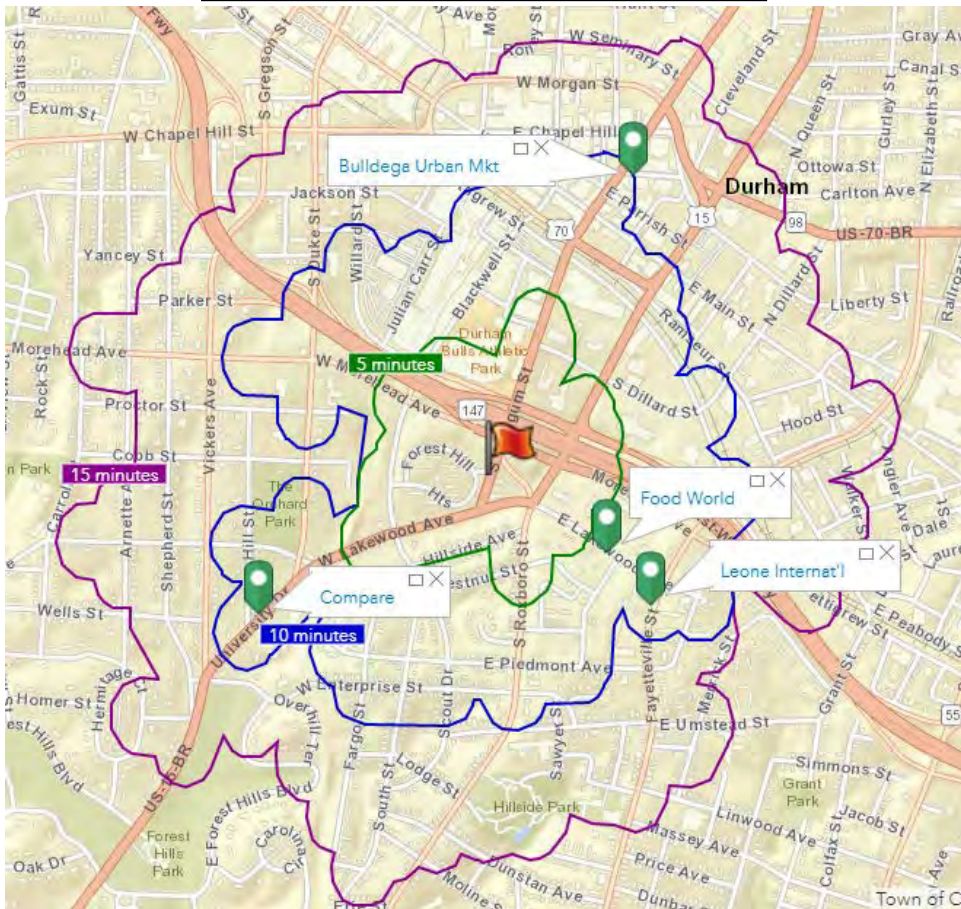
The walking market is served by smaller grocery stores specializing in international foods.

The Food World is in Heritage Square. The Food World is a small grocery with good selection of Hispanic and Asian food. Heritage Square is an older center in need of rehabilitation.

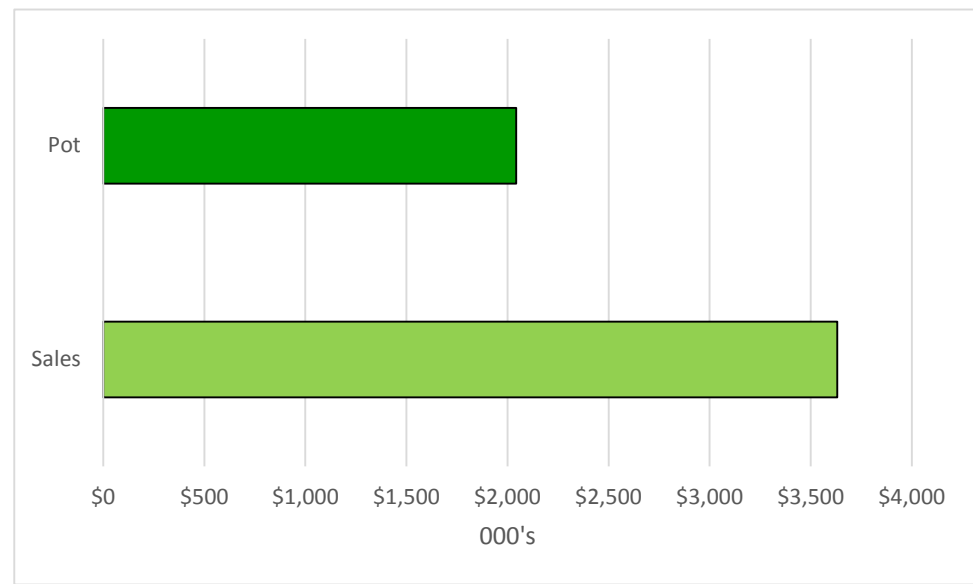
Compare food store at Forest Hills shopping center is within a 10-minute walk of the Site. Compare also has a good selection of international food.

Leone International Food is a small international grocery in the Phoenix Crossing shopping center on Fayetteville Street.

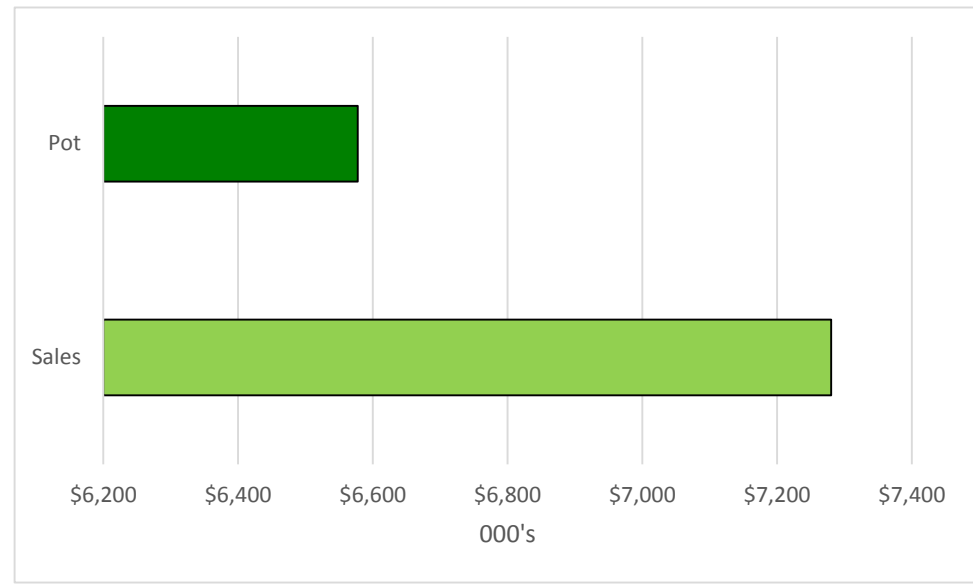
5-,10-,15-Minute Walk Sheds



10-Minute Walk



15-Minute Walk



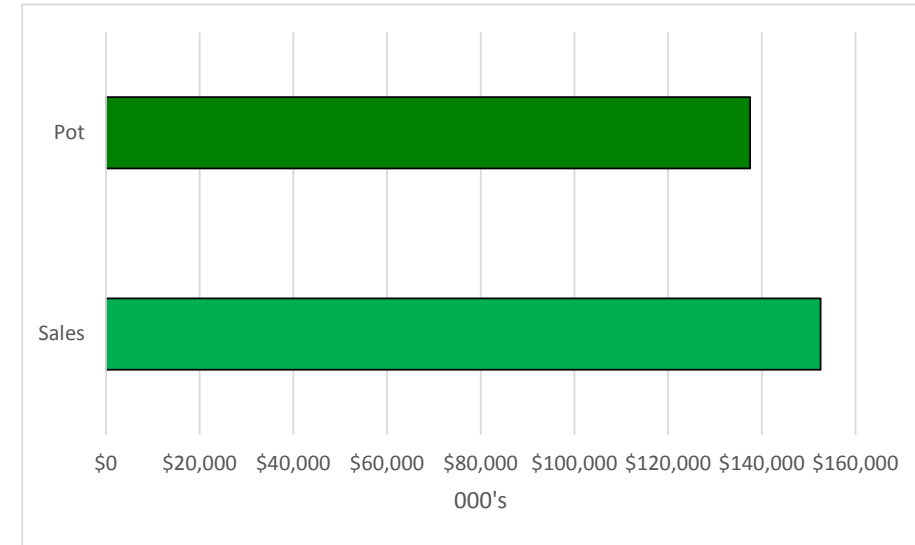
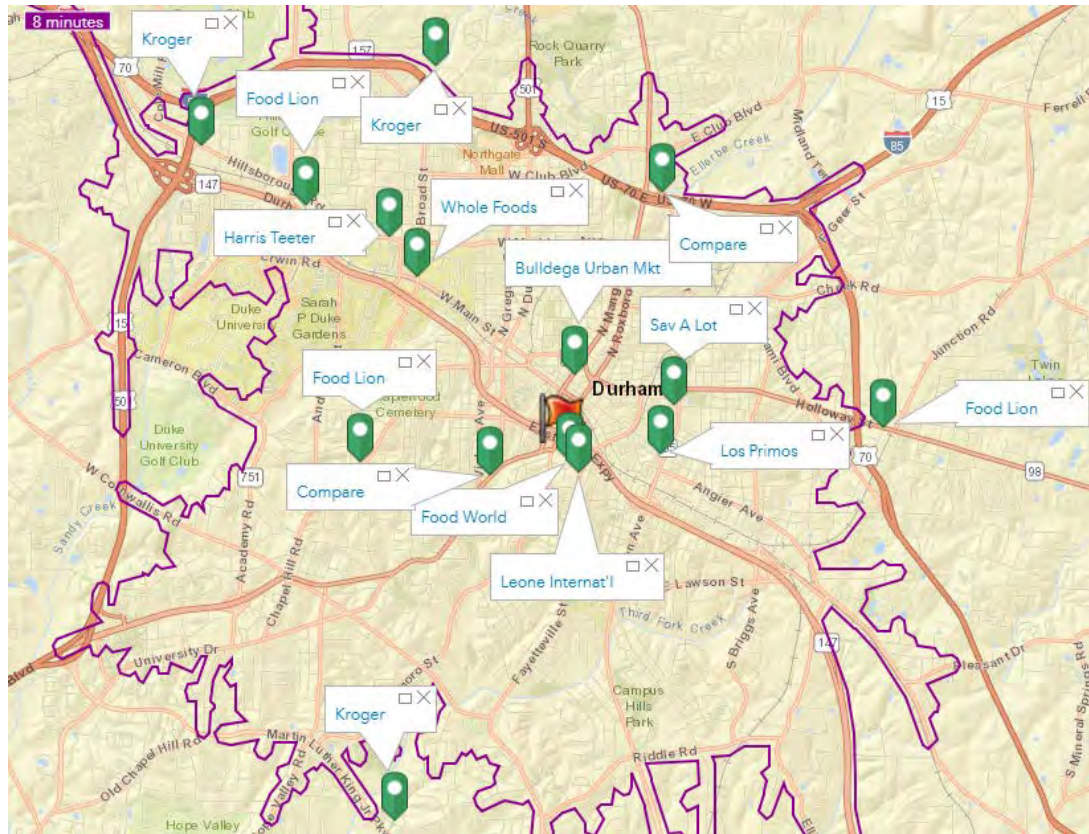
# Forest Hill Heights

## The Convenience Market - Driving

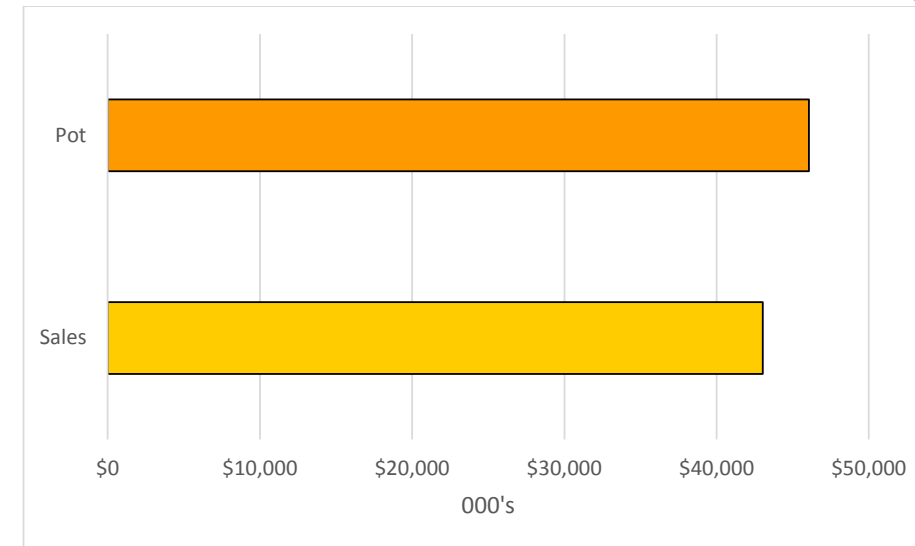
### 8-Minute Drive

There are a range of supermarket and grocery outlets available within an easy drive from the Forest Hills Heights Site.

### Grocery Stores within an 8-Minute Drive



### 2017 Personal Care Expenditure Potential and Sales



# Forest Hill Heights

## *Strengths and Weaknesses – Convenience Market*

### Strengths

- Strategic Site immediately south of American Tobacco, Bulls' Ballpark and Performing Arts Center
- Good household density and growth
- Reinvestment in neighborhood
- Excellent local and regional access
- Excellent Freeway visibility
- Large Site, Significant Number of New Households Potential
- Near-In Competitive Supply Weak

### Weakness

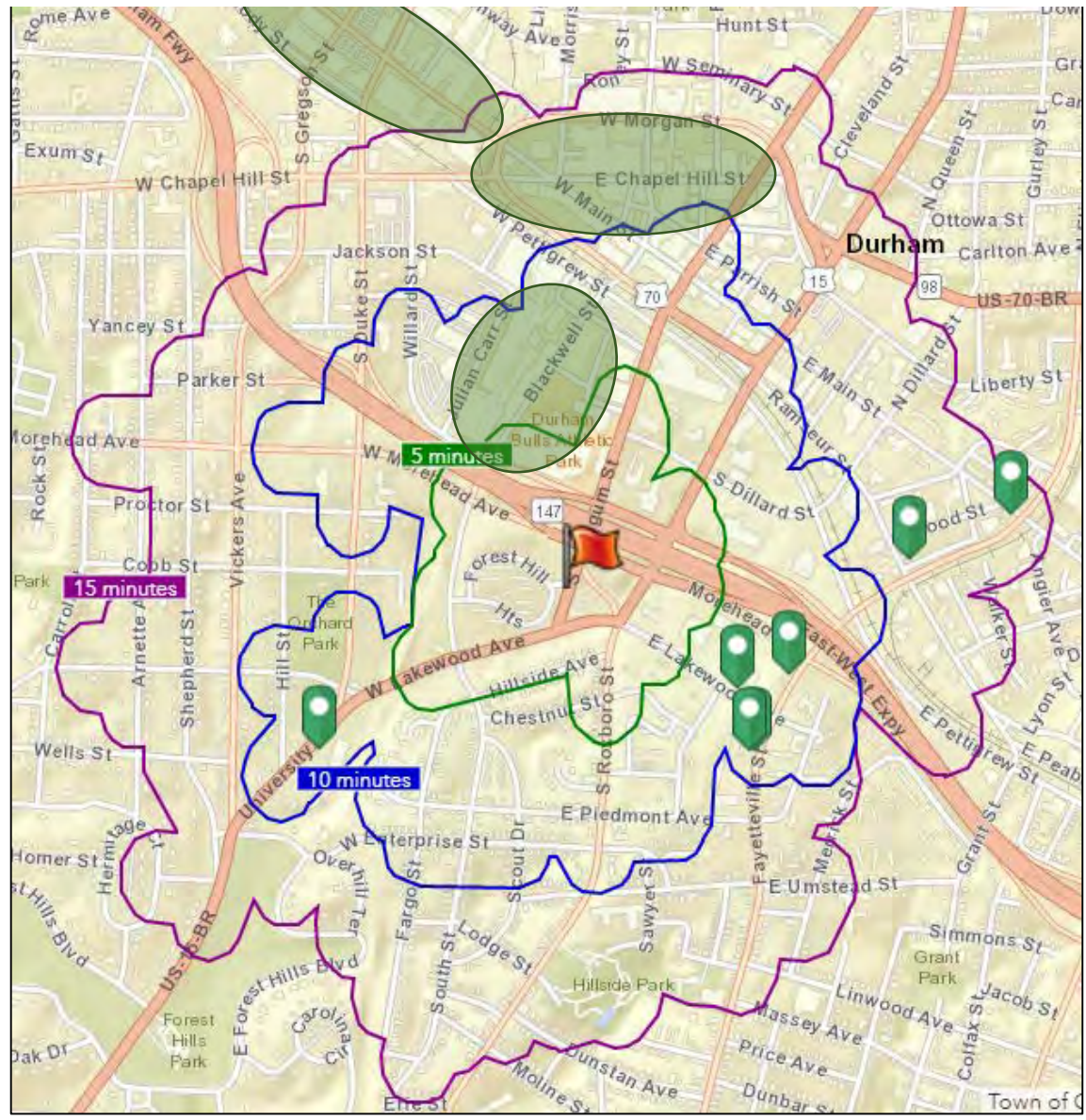
- There is a good supply of grocery and drug stores within a reasonable drive from the Site.
- Redevelopment or Renovation of Heritage Square would capture convenience market opportunity.


Eating and Drinking Establishments  
5-, 10-, 15-Minute Walktimes from Site

# Forest Hills Heights

## *The Eat/Drink Market - Walking*

- The Site is within easy walking distance to the American Tobacco Campus. American Tobacco is a regional eat/drink destination.
- The Site is just over a 10-minute walk from Durham City Center where there is a concentration of bars and restaurants.
- Eating and drinking options south of the Freeway are mostly convenience/take out, not destination, oriented.
- The Freeway acts as a barrier and, as such, there is little potential to expand the eat/drink cluster south, unless a project is conceived that is a destination in and of itself.



 = Bar and restaurant cluster



# Forest Hills Heights

## *Strengths and Weaknesses – Eat/Drink Market*

Strength	Weakness
<ul style="list-style-type: none"><li>• Easily Accessed Site</li><li>• A Site Big Enough for a Major Mixed-Use Project</li><li>• The American Tobacco Trailhead is a Potential Front door to a Mixed-Use Project</li></ul>	<ul style="list-style-type: none"><li>• The Near-Term Capacity of the Downtown Market to Support An Additional Entertainment-Oriented Project Unclear</li><li>• Near-In Household have Lower Incomes, so Eat/Drink Potential is Limited without a Regional Draw</li></ul>

## Forest Hills Heights

### *Conclusions*

- Given the location of the Site and the competitive landscape, the Forest Hills Heights Site may be an acceptable location for neighborhood shopping center. If developed it would likely put Heritage Square out of business. A better market solution may be to redevelop as a mixed-use center and/or renovate the Heritage Square shopping center.
- Forest Hills Heights is the best located site from a regional perspective with Freeway access and visibility and proximity to American Tobacco, Durham Bulls ballfield and the Performing Arts Center. Given the Site's size, over the long-term it could potentially be redeveloped as a major mixed-use project with residential, office, and destination retail and eating/drinking.
- It is only through critical mass with a regional draw that the Site makes sense for retail and/or eating and drinking. Without this critical mass and draw, the Site is not strong for eating and drinking or destination retail.

# Southside Phase III Site

998 S. Roxboro St.

# Southside Phase III

## Overview

- The Site is 2.9 acres in a prime Downtown location.
- The Site is zoned Residential Urban Multi-Family.
- The Site is identified as Phase III of the Southside Revitalization Plan.
- The Site is surrounded by residential neighborhoods except to the east where commercial uses front Fayetteville Street.



## Southside Phase III

### *Surrounding Uses*

There has been considerable redevelopment across from Heritage Square on either side of S. Roxboro St. The Southside project is ongoing with 85 single family units and 132 loft units built with 85 more apartments underway.



# Southside Phase III

## Vehicle Access

- Both S. Roxboro and E. Piedmont Streets are two-way.
- Traffic volume is high (19,000 ADT) on Fayetteville Street.
- S. Roxboro Street averages 8,500 vehicles daily south of the W. Lakewood intersection.

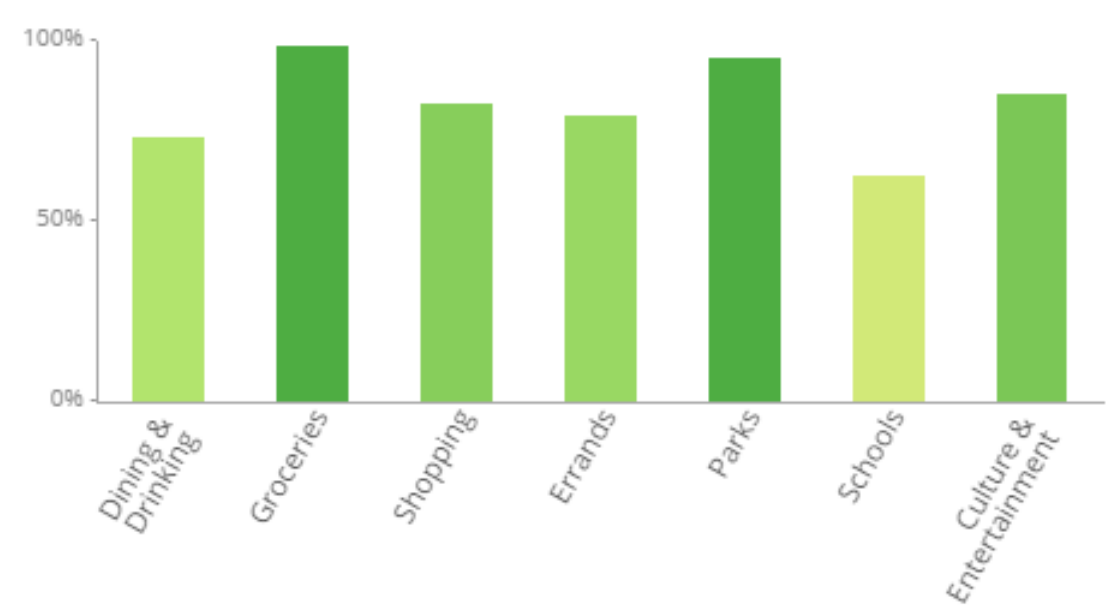


WalkScore = 78

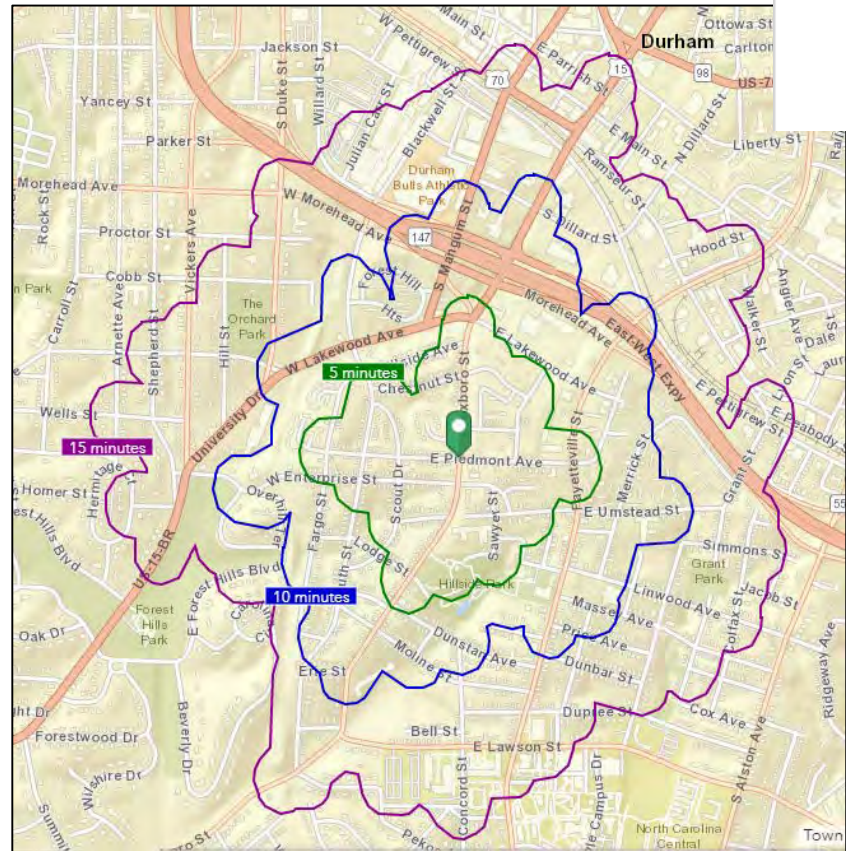
# Southside Phase III Pedestrian Access

The WalkScore for 998 S. Roxboro Street is 78 – Very Walkable.

The location is particularly convenient to groceries and parks.



5-,10-15-Minute Walk Sheds





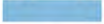
















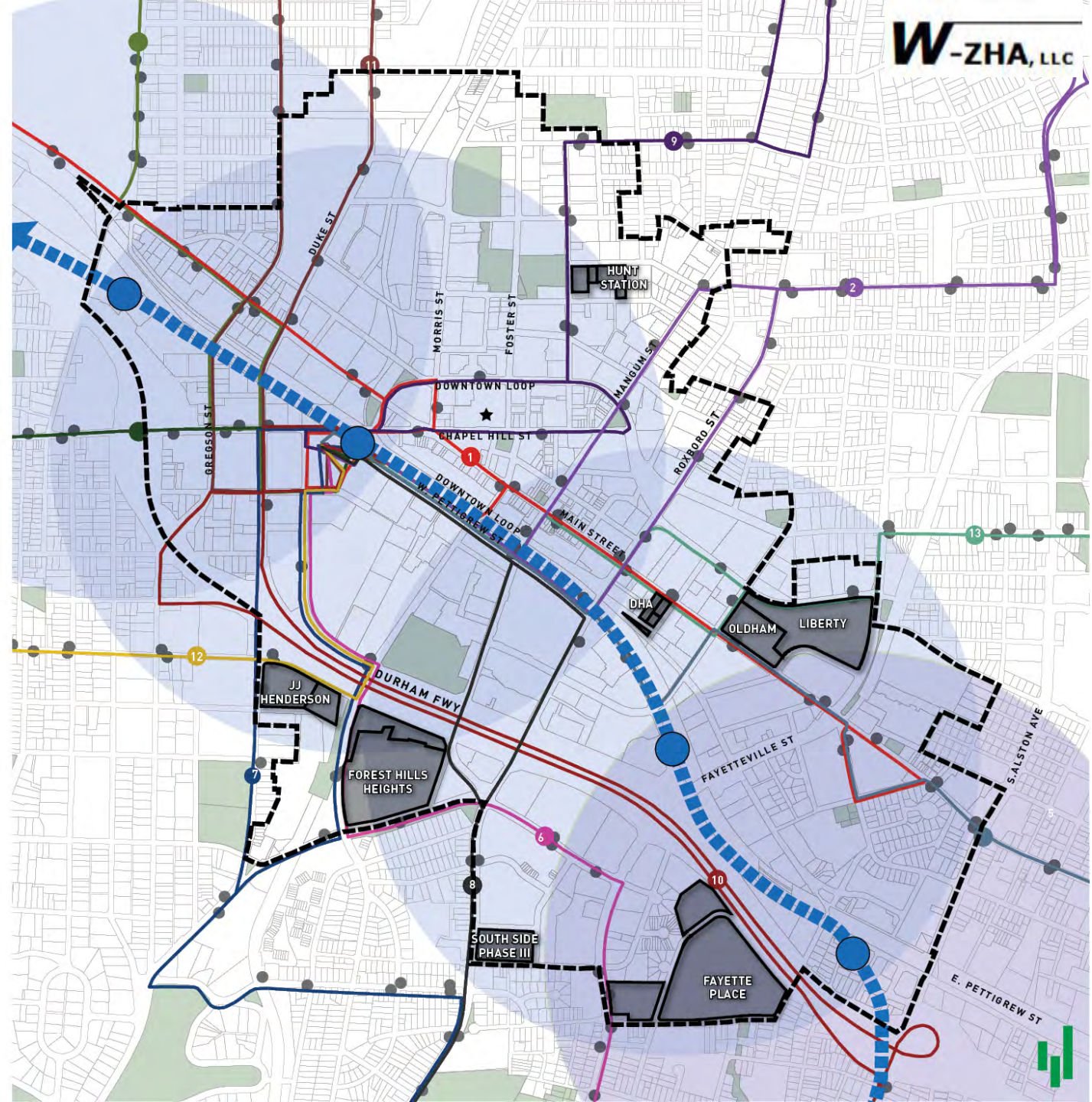
# Southside Transit

Today, the Site's transit score is 43 – Some Transit. There are only a few convenient transit options near the Site.

The Site is within a half-mile of the proposed Dillard St. LRT stations. The Dillard St. station would be about a 15-minute walk from the Site.

## TRANSIT NETWORK

-  OPPORTUNITY SITES
-  OPEN SPACES
-  PROPOSED LRT STATION
-  PROPOSED LRT LINE
-  1/2 MILE BUFFER FROM LRT STATION
-  TRANSIT STOPS
-  1 BULL CITY CONNECTOR
-  2 DEARBORN DR/NORTH DURHAM
-  3 DUKE UNIVERSITY/HILLSBOROUGH RD
-  4 DUKE UNIVERSITY/SPARGER ST
-  5 EAST DURHAM/THE VILLAGE/ANGIER AV
-  6 FAYETTEVILLE ST/NCCU/SOUTHPOINT
-  7 FOREST HILLS/WEAVER ST/MLK PKWY
-  8 LAWSON ST/NCCU/DURHAM TECH
-  9 N ROXBORO/DURHAM REG/N DUKE CROSSIN
-  10 NCCU/HWY 54 & 55
-  11 NORTHGATE/HORTON RD
-  12 SOUTH SQUARE/NEW HOPE COMMONS
-  13 THE VILLAGE/GLENVIEW STATION/HWY 98

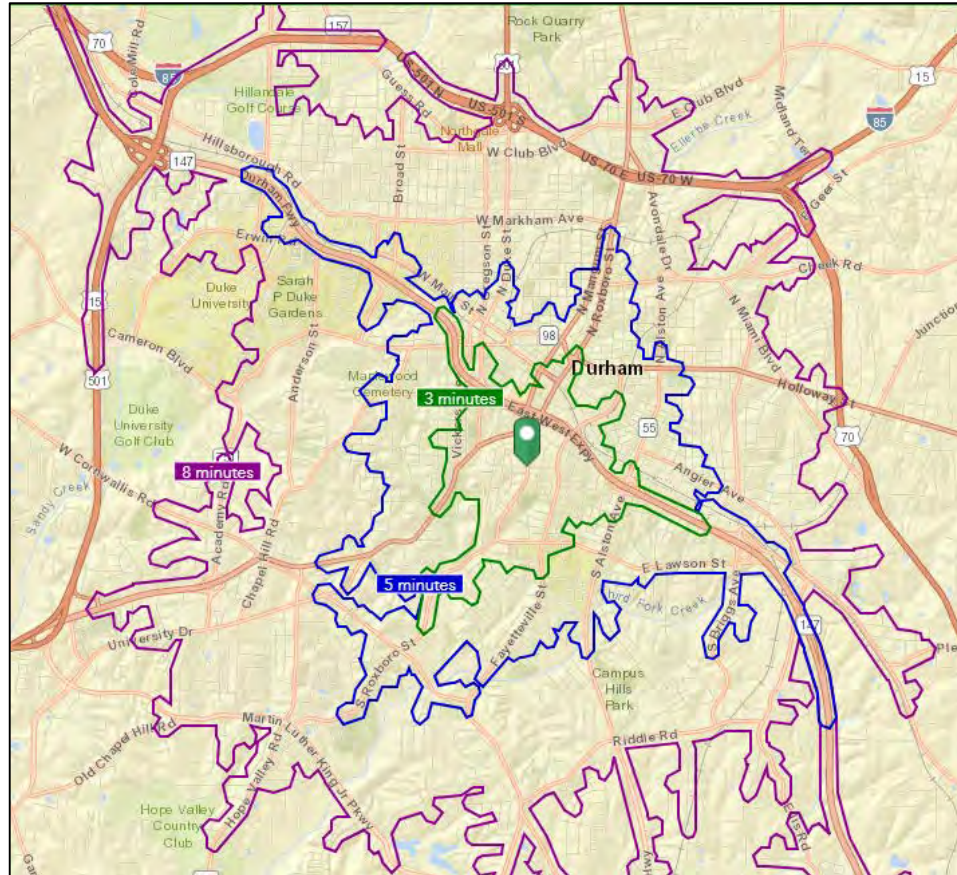




# Southside Phs III Demographics

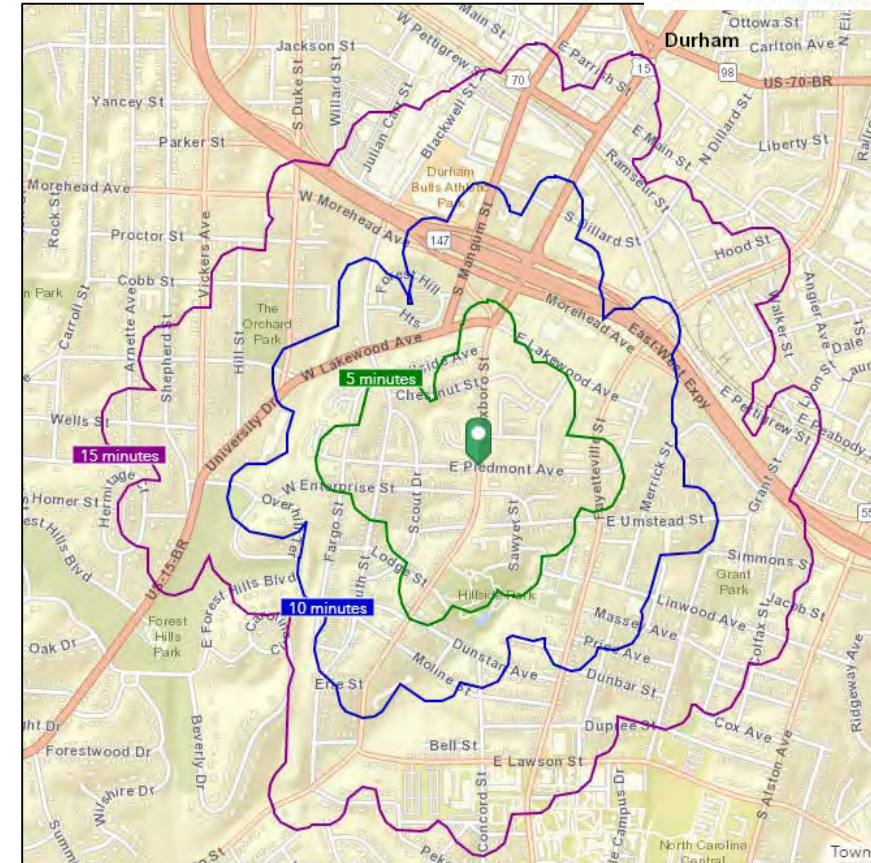
- The Site is in a relatively low density area as compared to the other Sites.

## 3-,5-,8-Minute Drive Sheds



	Drive Time		
	3-Minute	5-Minute	8-Minute
2018 Households	2,111	9,196	30,871
2023 Households	2,890	10,789	34,596
Growth	37%	17%	12%
% Hshlds w/Children	26.5%	29.2%	28.6%
Avg Household Income	\$42,436	\$46,644	\$56,511
Median Household Income	\$21,452	\$26,470	\$36,608

## 5-,10-,15-Minute Walk Sheds



	Walk Time		
	5-Minute	10-Minute	15-Minute
2018 Households	262	574	1,671
2023 Households	536	1,086	2,416
Growth	105%	89%	45%
% Hshlds w/Children	28.7%	28.4%	23.7%
Avg Household Income	\$29,574	\$32,840	\$48,663
Median Household Income	\$18,916	\$19,441	\$22,789

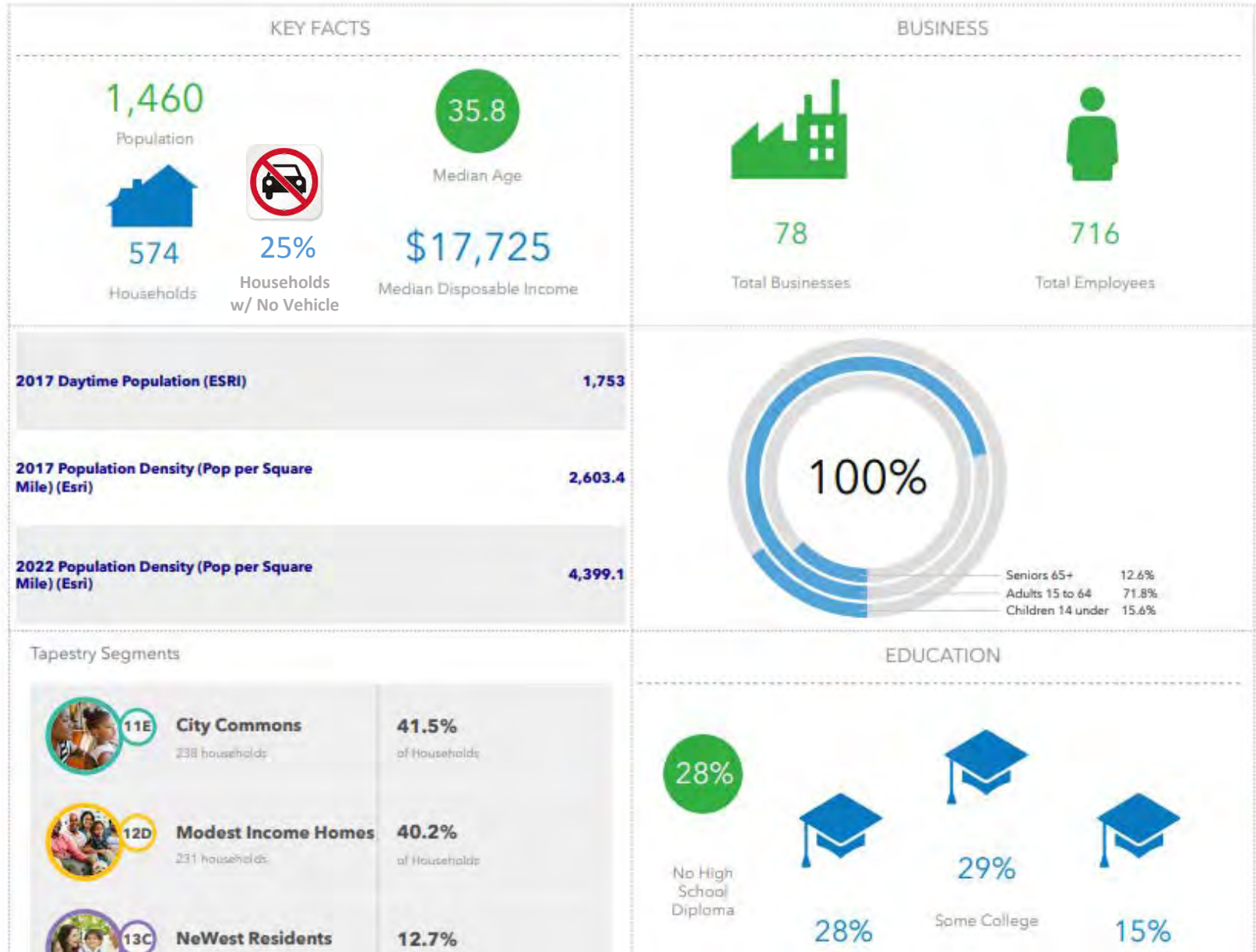
Source: ESRI; W-ZHA

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# Southside Phase III

## The 10-Minute Walking Market

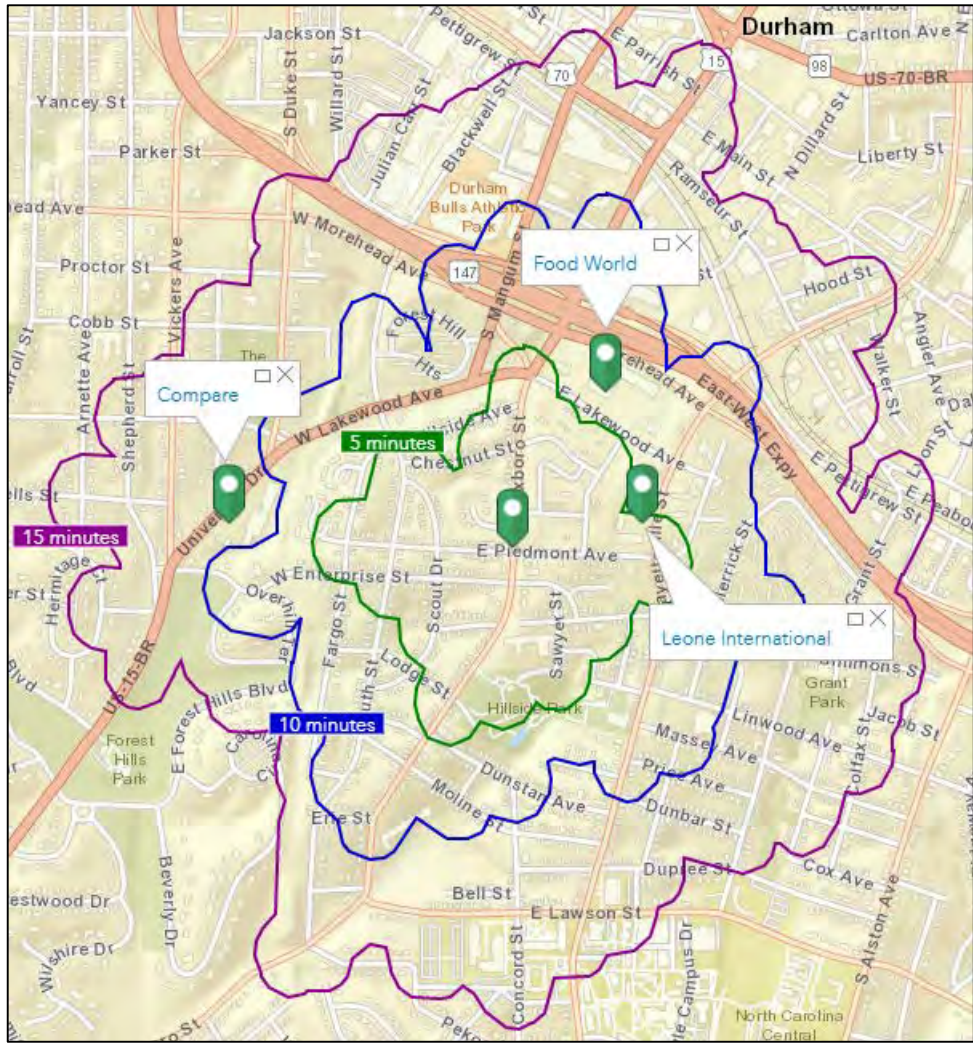
- ESRI estimates that there are approximately 574 households and approximately 718 employees within a 10-minute walk of the Site. The walking market density is low.
- The daytime population is very low at 1,753.
- Local households within a 10-minute walk are predominantly from the “City Commons” and “Modest Income Homes” Tapestry segments. Both of these segments are mostly single parent households with children or retirees with modest incomes.
- One-of-four households within a 10-minute walk of the Site do not have access to a vehicle.



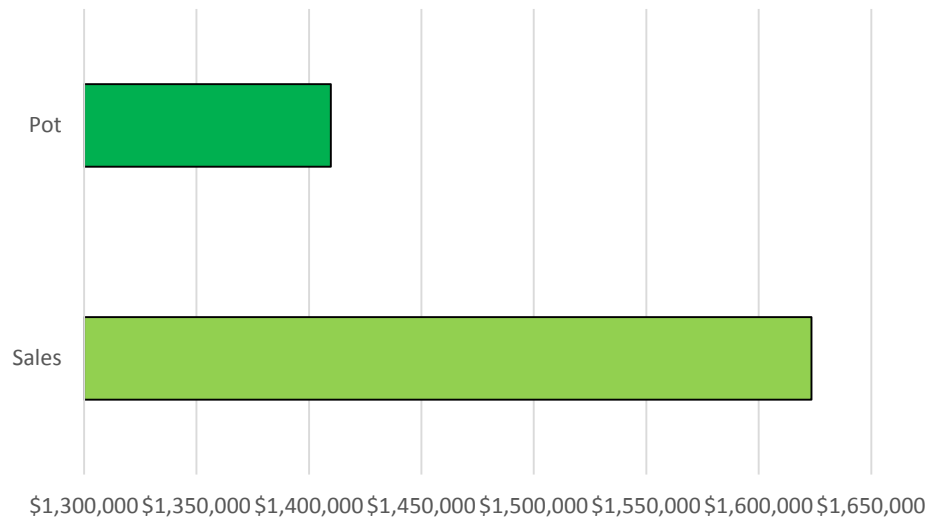
# Southside Phase III

## The Walking Market & Groceries

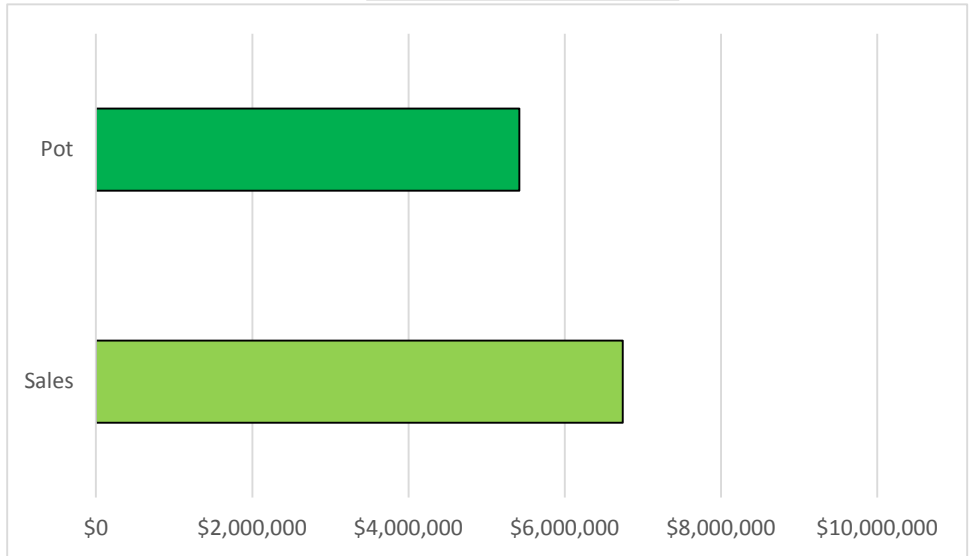
- There are food options within an easy walk from the Site.
- Food sales are considerably higher than food expenditure potential for both the 10- and 15-minute walktime.



10-Minute Walk



15-Minute Walk



## Southside Phase III

### *The Driving Market*

- As with the other Sites, the driving market is served by existing food and pharmacy stores.

## Southside Phase III

### *Strengths and Weaknesses – Convenience Market*

#### Strengths

- No competitive strengths from a retail perspective.

#### Weakness

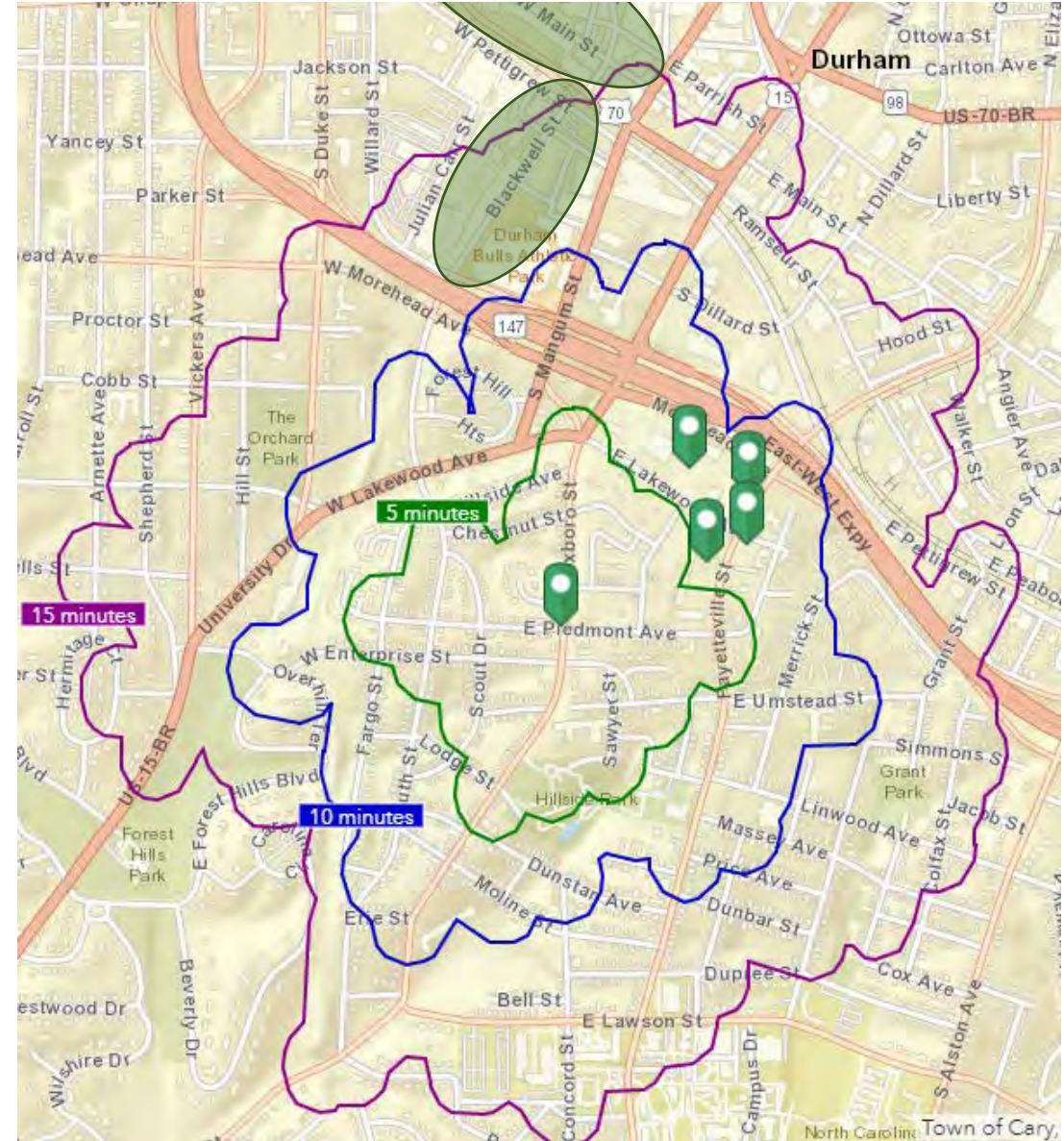
- Low density surroundings.
- Very low daytime population.
- Not on a commercial corridor.
- More competitive sites convenience retail sites nearby.


# Southside Phase III

## The Eat/Drink Market - Walking

- The Site is within a 10- to 15-minute walk to the American Tobacco Campus. American Tobacco is a regional eat/drink destination.
- The Site is within a 5- to 10-minute walk of other eat/drink establishments at Heritage Square and on Fayetteville Street. Eating and drinking options south of the Freeway are mostly convenience/take out, not destination, oriented.
- Like retail, the Site is not sufficiently visible or accessible to attract eating and drinking establishments.

### Eating and Drinking Establishments 5-, 10-, 15-Minute Walktimes from Site



 = Bar and restaurant cluster

## Southside Phase III

### *Strengths and Weaknesses – Eat/Drink Market*

#### Strengths

- No competitive strengths from a retail perspective.

#### Weakness

- Low density surroundings.
- Very low daytime population.
- Not on a commercial corridor.
- More competitive sites convenience retail sites nearby.

## Southside Phase III *Conclusion*

- The Southside Phase III site is not a strong retail or restaurant site, therefore, these uses are not recommended for this location.



# Fayette Place Site

# Fayette Place

## Overview

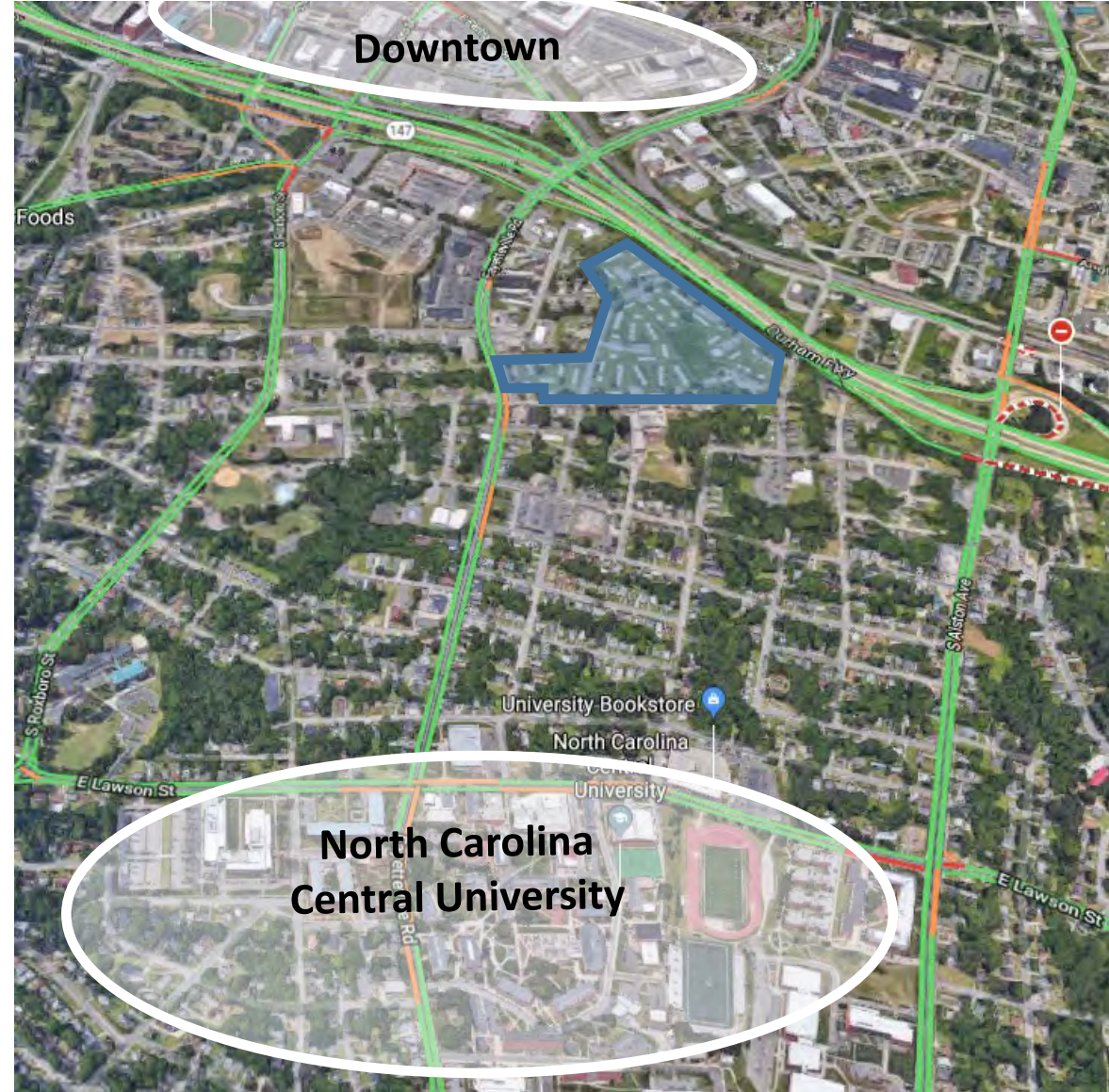
- The Site is 19.9 acres.
- The Site is mostly flat and the building structures have been demolished (foundations remain).
- The 2.9 acres portion of the Site between Merrick St and Fayetteville St is zoned CG (D), which allows for vehicle-oriented commercial development.
- The remainder of the Site is zoned Residential Suburban Multi-Family which allows for a wide range of residential types and limited commercial use.
- Fayetteville Street and Grant Street provide connections to neighborhoods to the north. The Freeway functions as a barrier to the north.



# Fayette Place

## Overview

- Fayette Place is within a 10-minute walk of the Downtown and a 15-minute walk from North Carolina State University (“Central”).
- Central is an historically African American college that has an enrollment of approximately 8,900 students.



# Fayette Place

## Surrounding Uses

- Fayetteville Street is a commercial corridor with a mix of retail, service, and civic uses.
- Outside of the Fayetteville Street commercial corridor are residential neighborhoods.
- Grant Street passes under the Freeway where there is a mix of civic and light industrial uses along the railroad tracks and on Ramseur/Lyon Streets. Neighborhoods are north of this area.



# Fayette Place

## *Surrounding Uses*

National credit tenants (KFC, Walgreens) occupy sites along Fayetteville Street in the vicinity of the Site.



The WG Pearson Center is a publicly-owned building where like-minded organization reside to combat systemic racism and structural inequalities in Durham.



# Fayette Place

## *Vehicular Access*

- Fayetteville Street is a major commercial corridor with an average of 19,000 vehicles traveling on it daily.
- Umstead, Merrick and Grant Streets carry local, neighborhood traffic.
- Two-way streets surround the Site.



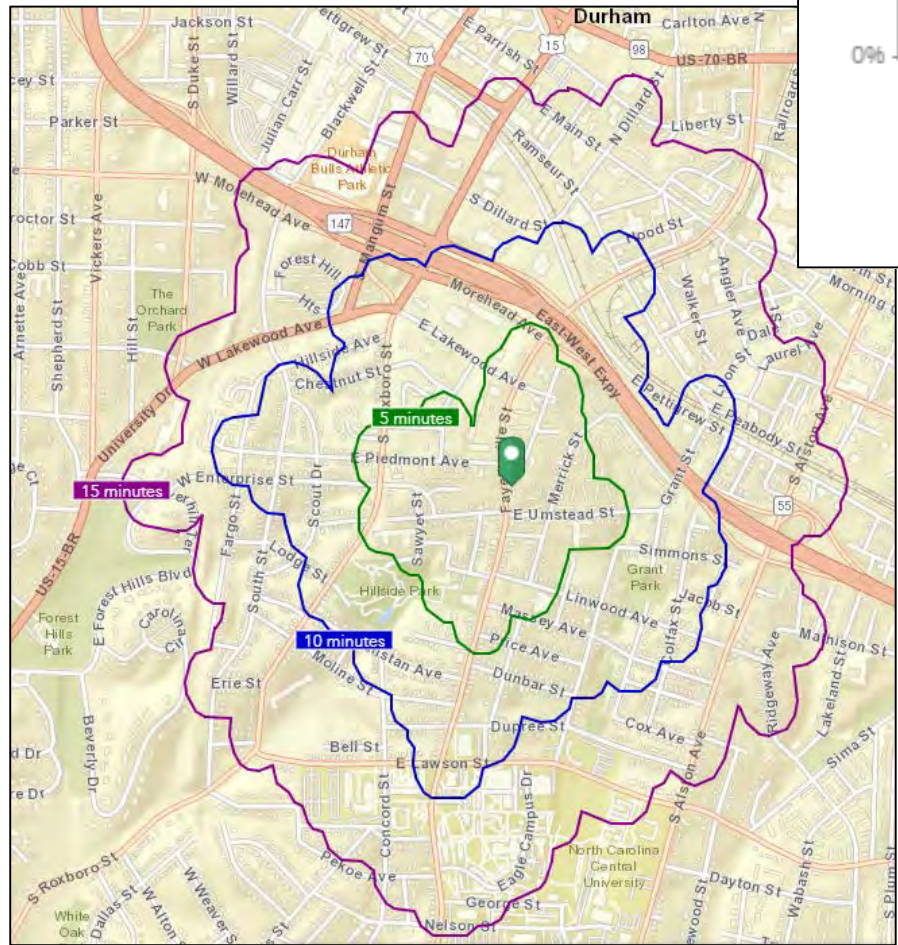
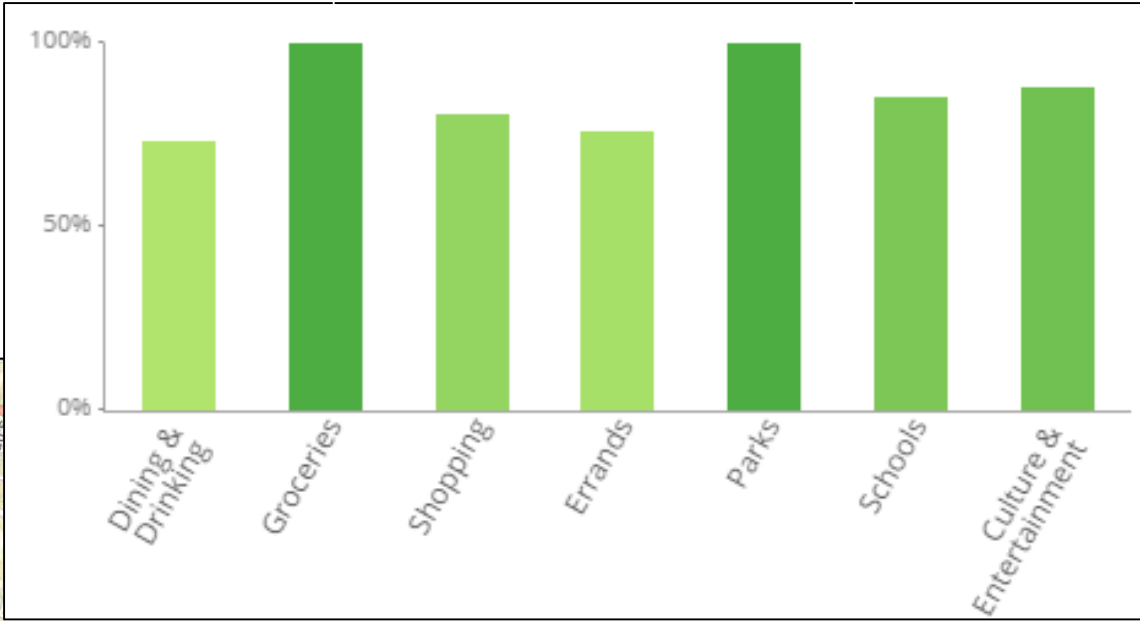
WalkScore = 75

# Fayette Place

## *Pedestrian Access*

The WalkScore where the Site abuts Fayetteville Street is 75 – Very Walkable.

The location is convenient to a variety of shopping centers, civic uses and culture and entertainment as well as Central University.






















# Fayette Place Transit

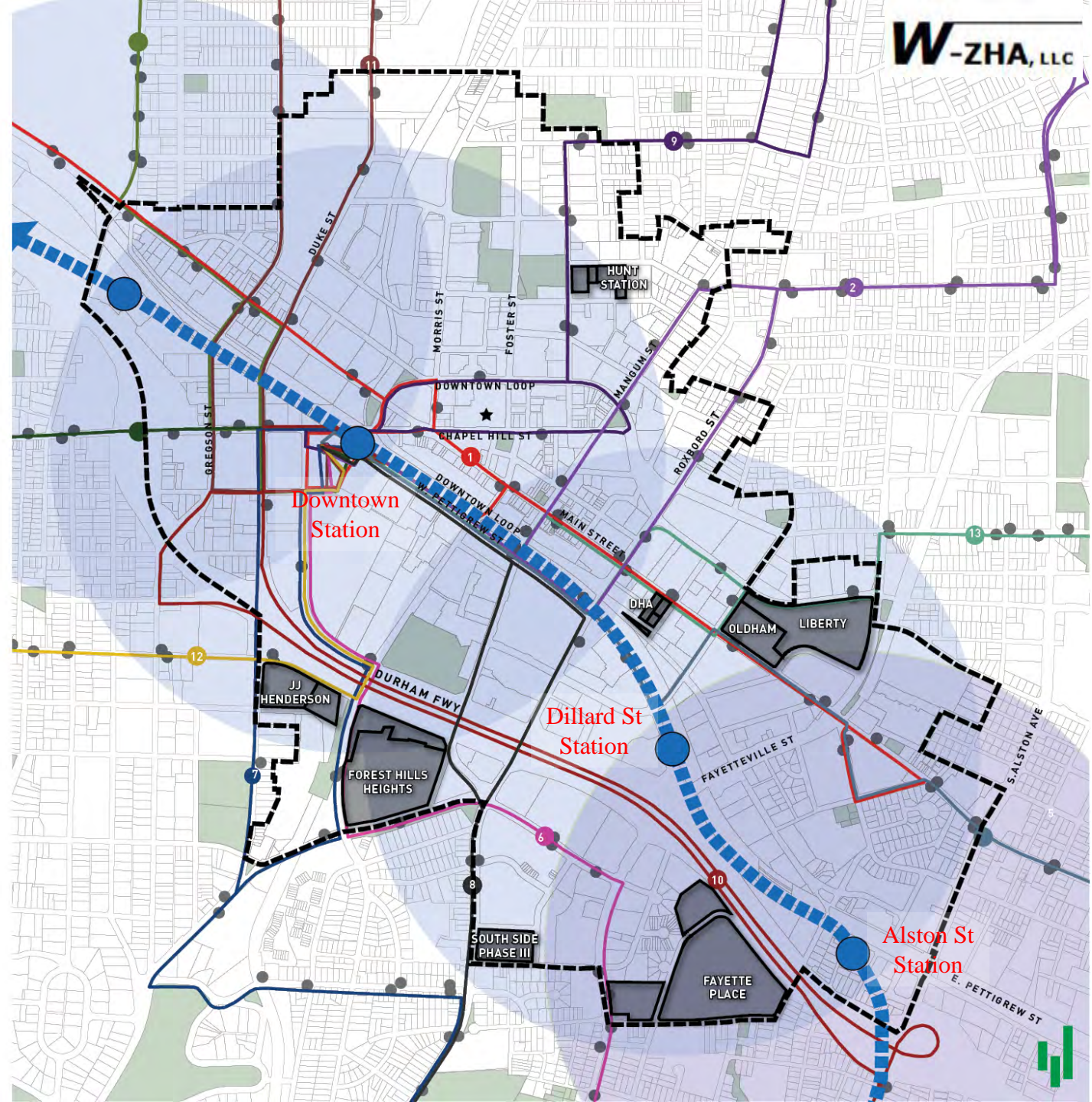
Today, the Site's transit score is 44 – Some Transit. Fayette Place has the lowest transit score of all the sites.

The Site is within a quarter-mile of the proposed Alston Street LRT station and a half-mile from the proposed Dillard Street LRT Station.

The Site's transit score will improve considerably with LRT.

## TRANSIT NETWORK

-  OPPORTUNITY SITES
-  OPEN SPACES
-  PROPOSED LRT STATION
-  PROPOSED LRT LINE
-  1/2 MILE BUFFER FROM LRT STATION
-  TRANSIT STOPS
-  1 BULL CITY CONNECTOR
-  2 DEARBORN DR/NORTH DURHAM
-  3 DUKE UNIVERSITY/HILLSBOROUGH RD
-  4 DUKE UNIVERSITY/SPARGER ST
-  5 EAST DURHAM/THE VILLAGE/ANGIER AV
-  6 FAYETTEVILLE ST/NCCU/SOUTHPOINT
-  7 FOREST HILLS/WEAVER ST/MLK PKWY
-  8 LAWSON ST/NCCU/DURHAM TECH
-  9 N ROXBORO/DURHAM REG/N DUKE CROSSIN
-  10 NCCU/HWY 54 & 55
-  11 NORTHGATE/HORTON RD
-  12 SOUTH SQUARE/NEW HOPE COMMONS
-  13 THE VILLAGE/GLENVIEW STATION/HWY 98



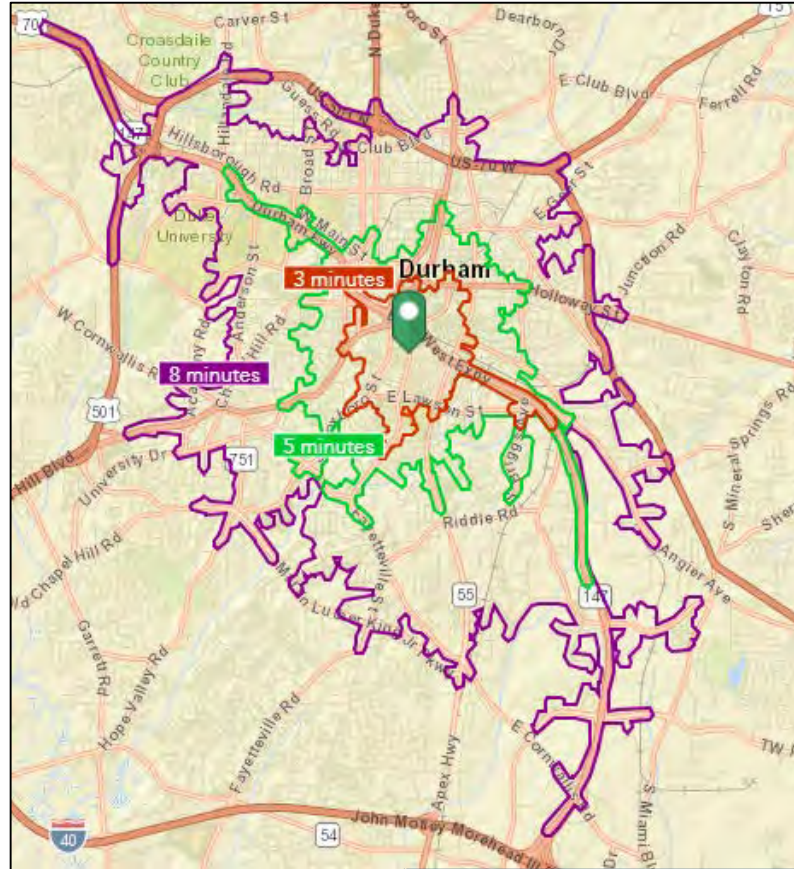


# Fayette Place Demographics

Because the Fayette Place site is vacant, the household density near the Site is very low compared to the other sites. Households within easy walking distance to the Site have the lowest median income among all the Sites.

Within a 5-minute drive of the Site there are 10,900 households.

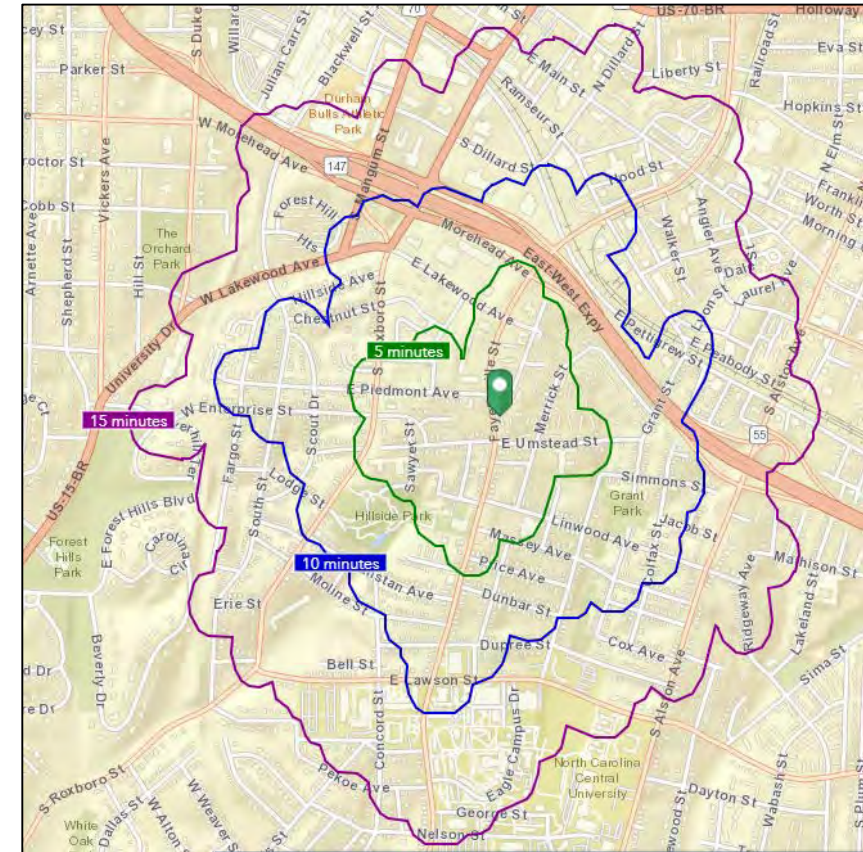
### 3-,5-,8-Minute Drive Sheds



	Drive Time		
	3-Minute	5-Minute	8-Minute

2018 Households	2,578	9,272	32,163
2023 Households	3,362	10,858	36,098
Growth	30%	17%	12%
% Hshlds w/Children	30.7%	29.7%	28.9%
Avg Household Income	\$31,733	\$45,228	\$55,591
Median Household Income	\$23,748	\$30,259	\$41,869

### 5-,10-,15-Minute Walk Sheds



	Walk Time		
	5-Minute	10-Minute	15-Minute

2018 Households	114	676	1,902
2023 Households	283	1,076	2,622
Growth	148%	59%	38%
% Hshlds w/Children	33.0%	15.1%	30.2%
Avg Household Income	\$35,870	\$30,618	\$30,408
Median Household Inc	\$25,289	\$18,146	\$18,881

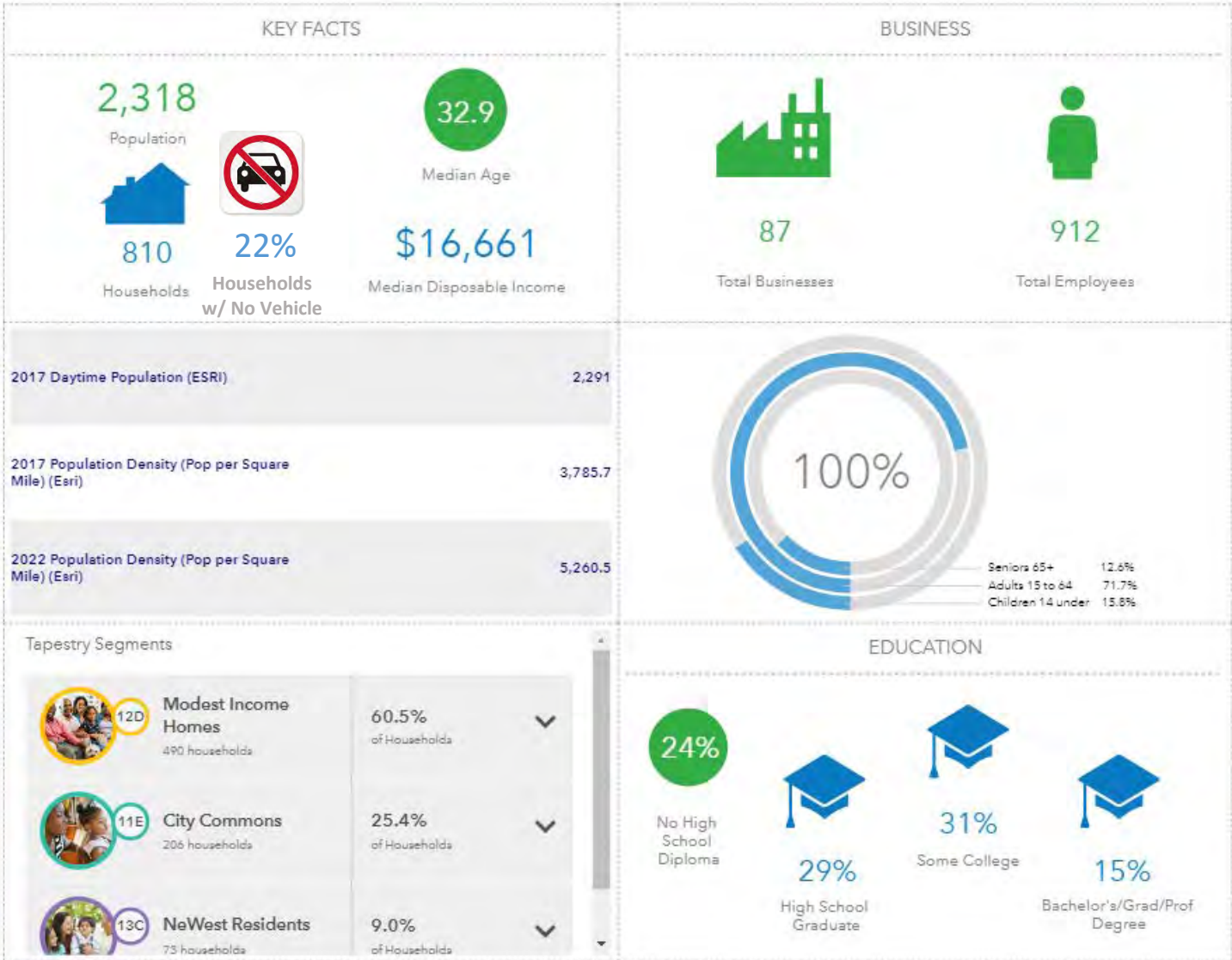
Source: ESRI; W-ZHA

\\WZHASRV\data\8000s, misc\82372 durham\esri market drive fayette.xlsx]Sheet2

# Fayette Place

## The 10-Minute Walking Market

- ESRI estimates that there are approximately 810 households and approximately 910 employees within a 10-minute walk of the Site. The walking market density is low because Fayette Place is vacant. Fayette Place redevelopment will add hundreds of households to the walking market.
- The daytime population is very low at 2,300.
- Local households within a 10-minute walk are predominantly from the “Modest Income Homes” with just over a quarter of the households classified as the “City Commons” Tapestry segment. Both of these segments are often single parent households with children or retirees with modest incomes.
- One-of-five households within a 10-minute walk of the Site do not have access to a vehicle.



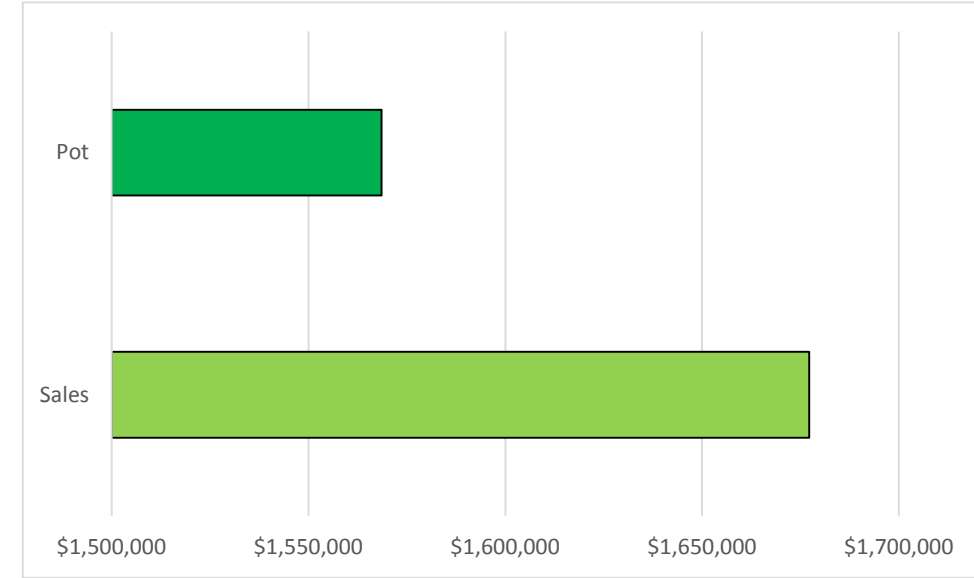
# Fayette Place

## *The Walking Market & Groceries*

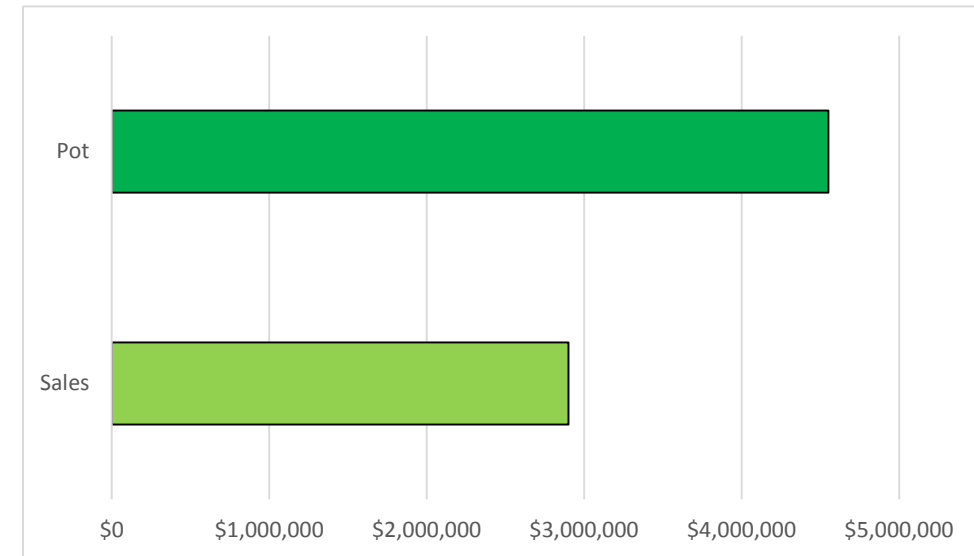
- There are small grocery stores within a 10-minute walk from the Site.
- There are not many convenient grocery stores to households immediately south of the Site.



10-Minute Walk



15-Minute Walk

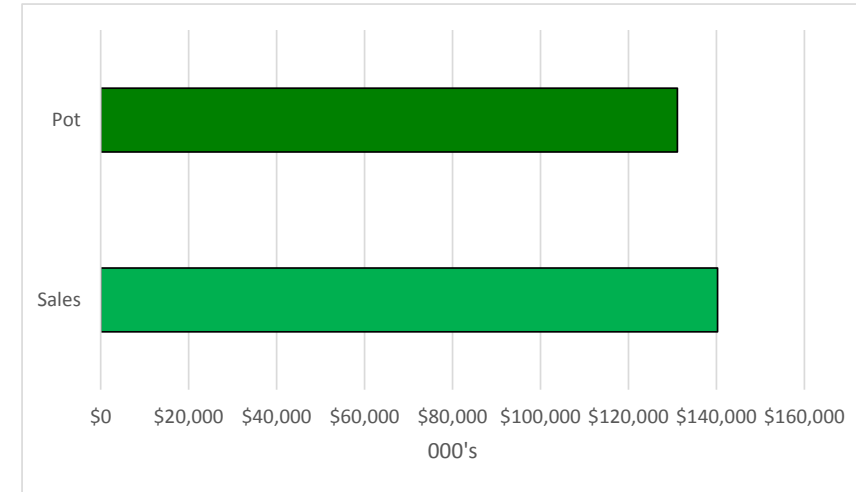
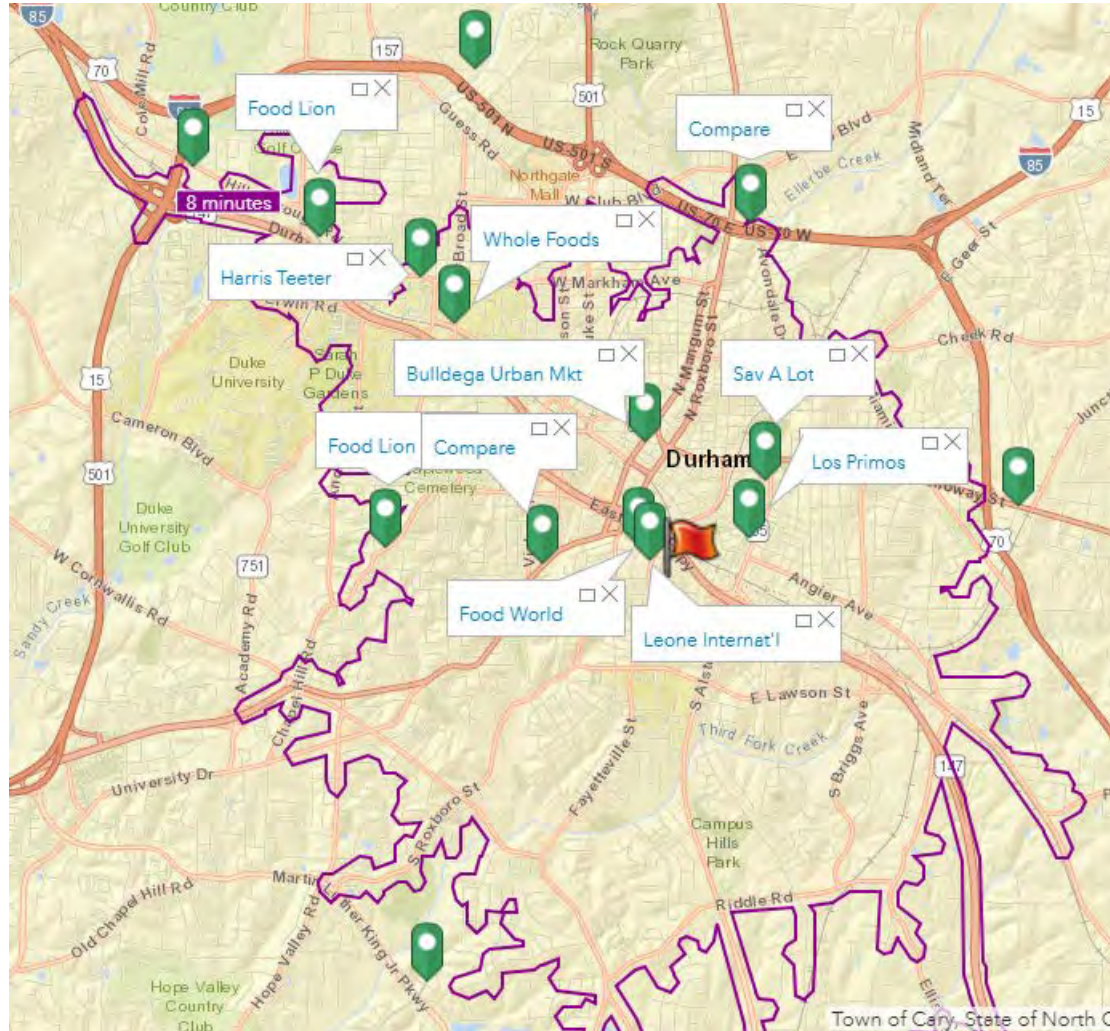


# Fayette Place

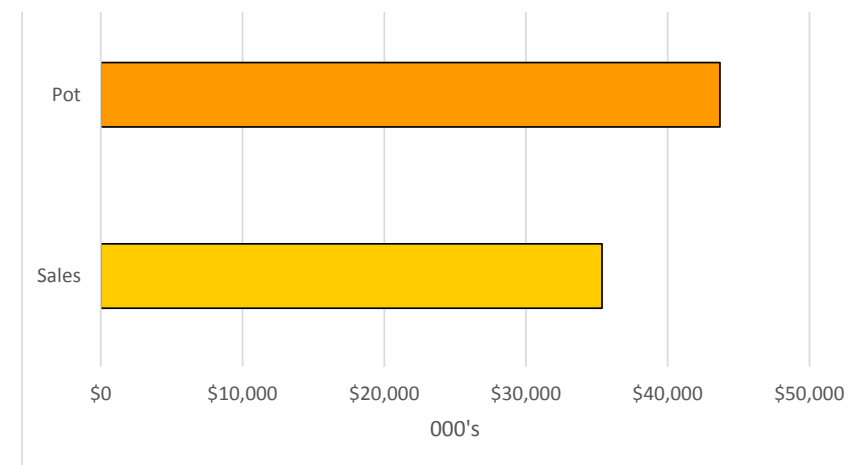
## *The Convenience Market - Driving*

### 8-Minute Drive

- The supply of food and pharmacies within an 8-minute drive is mostly located to the north and west.
- The southeast has very few options.
- There is more expenditure potential than actual sales in the personal health/pharmacy category.



### 2017 Personal Care Expenditure Potential and Sales



# Fayette Place

## *Strengths and Weaknesses – Convenience Market*

### Strengths

- Fayetteville Street has strong traffic volume and commercial uses.
- 2.9 acres with excellent Fayetteville Street frontage and access.
- Redevelopment of Fayette Place will introduce hundreds of new households.
- University within walking distance.
- Site is convenient to the Downtown.
- Not a lot of state-of-the-art product in the vicinity except Walgreens.

### Weakness

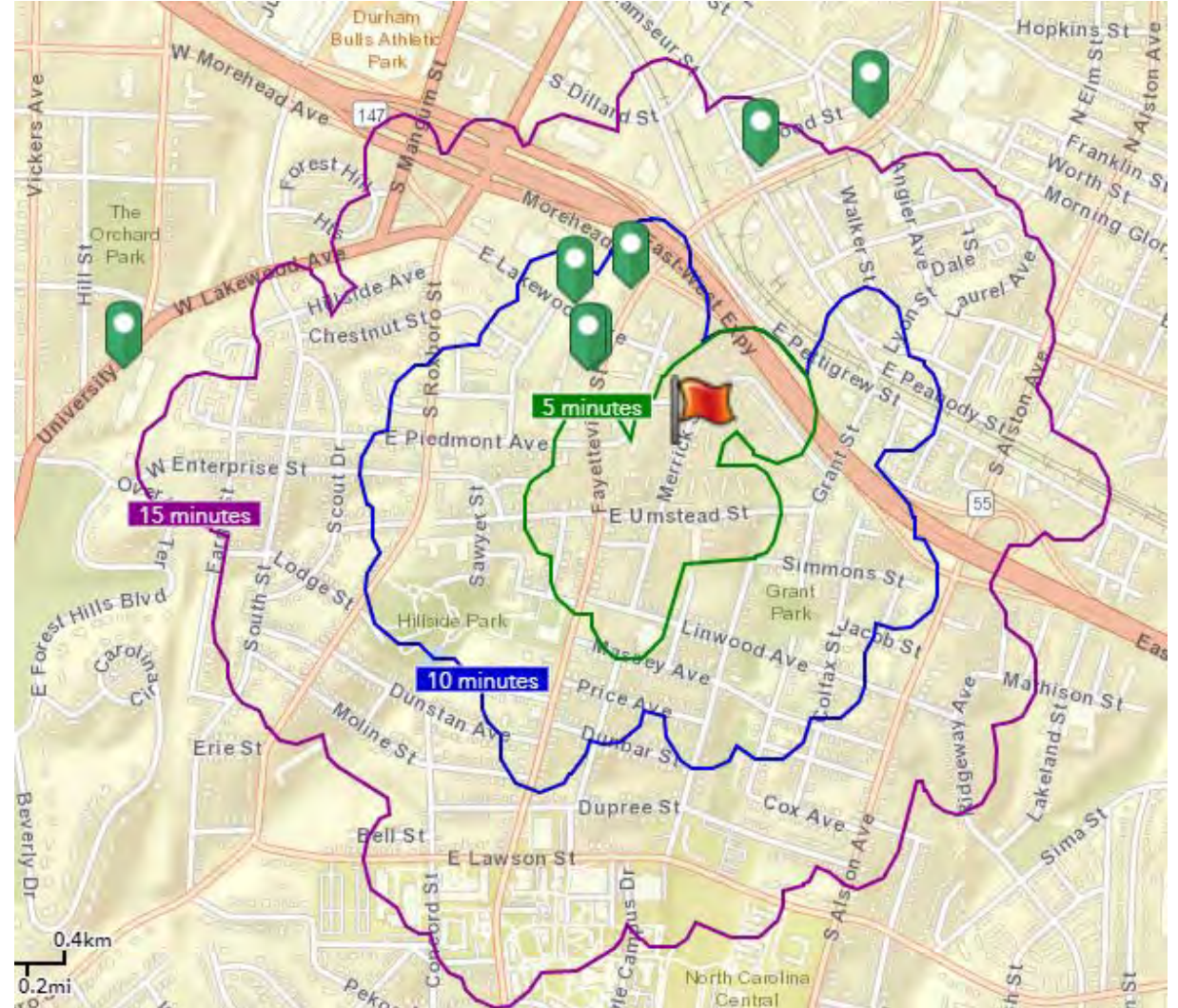
- Household income is low.
- Site size is too small for a shopping center.

Eating and Drinking Establishments  
5-, 10-, 15-Minute Walktimes from Site

# Fayette Place

## The Eat/Drink Market - Walking

- The Site is within easy walking distance to the eat/drink establishments on Fayetteville Street.
- There are limited options on Fayetteville Street and very few beyond the near-in cluster.



## Fayette Place

### *Strengths and Weaknesses – Eating and Drinking Market*

#### Strengths

- Fayetteville Street has strong traffic volume and commercial uses.
- 2.9 acres with excellent Fayetteville Street frontage and access.
- Redevelopment of Fayette Place will introduce hundreds of new households.
- University within walking distance.
- Site is convenient to the Downtown.

#### Weakness

- Household income is low in neighborhoods immediately surrounding the Site.

## **Fayette Place**

### ***Conclusions***

- The 2.9 acres of the Site on Fayetteville Street is a competitive location for highway-oriented commercial uses.
- Assuming surface parking the Site can accommodate approximately 10,000 to 20,000 square feet of retail or eat/drink.



# **Hunt Station Site**

516 Rigsbee Avenue

# Hunt Station Overview

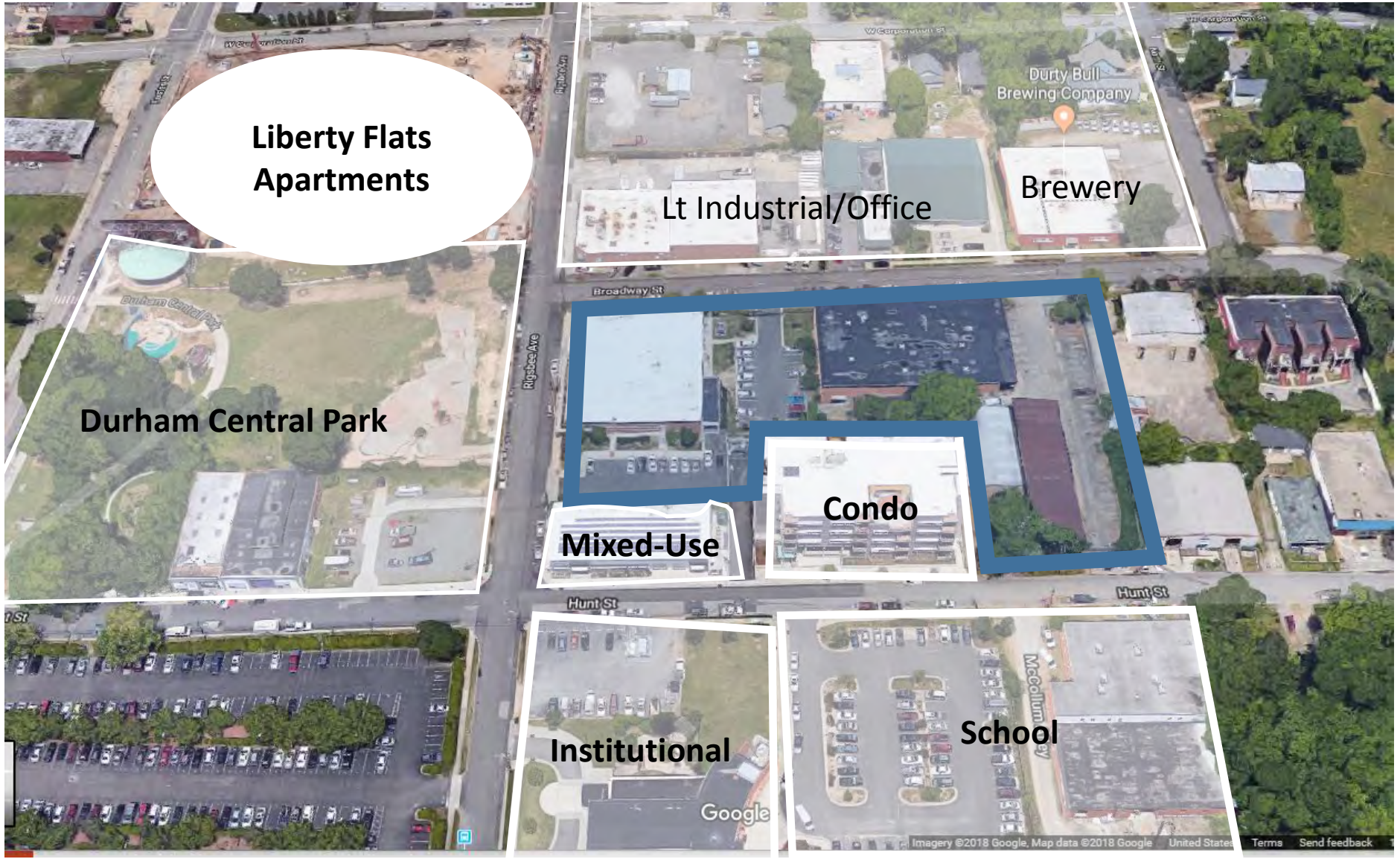
- The Site is 2 acres in a prime Downtown location.
- The Site is currently occupied by the Durham Police Department and other City functions.
- The Site is in the Downtown Development Tier.



# Forest Hill Heights

## Surrounding Uses

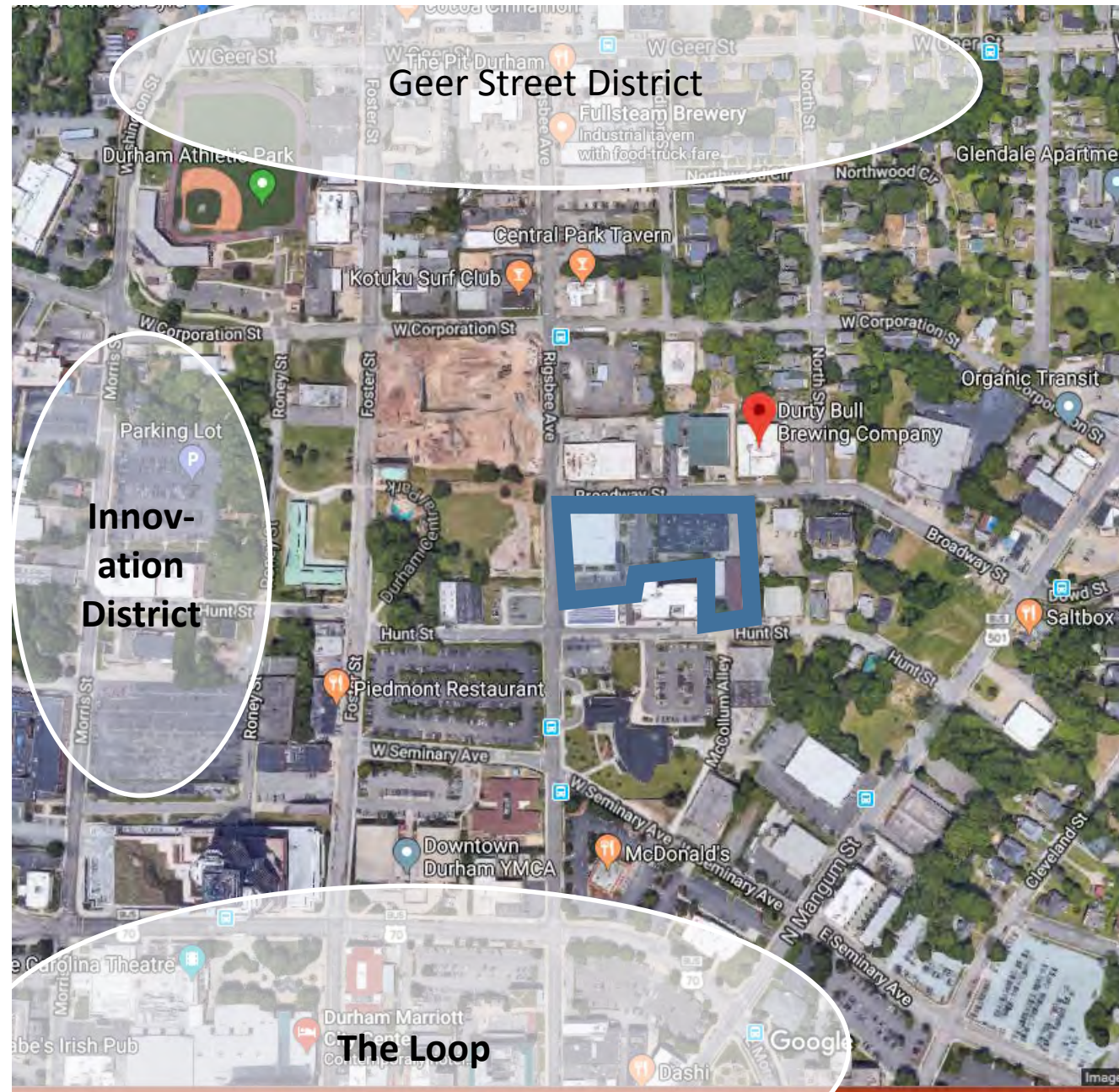
- The Site is across Rigsbee Avenue from Central Park and the Liberty Warehouse apartments.
- Single-story commercial uses are on the north side of Broadway.
- Immediately south of the Site on Rigsbee is a commercial building with retail on the ground floor.
- A condominium building occupies a portion of the Site's block on Hunt Street.
- Commercial uses occupy parcels to the east and south of the Site.



# Forest Hill Heights

## Site Context

- The Site is 2 blocks north of the Downtown Loop.
- The Site is 2 blocks south of the W Geer St entertainment and eat/drink hub.
- The Site is about 2 blocks east of Durham's Innovation District – a major office/tech hub.
- Across the street is Durham Central Park where there is a skate park, children's play area, weekend Farmers Market and other activities.



# Oldham/Liberty

## Surrounding Land Uses

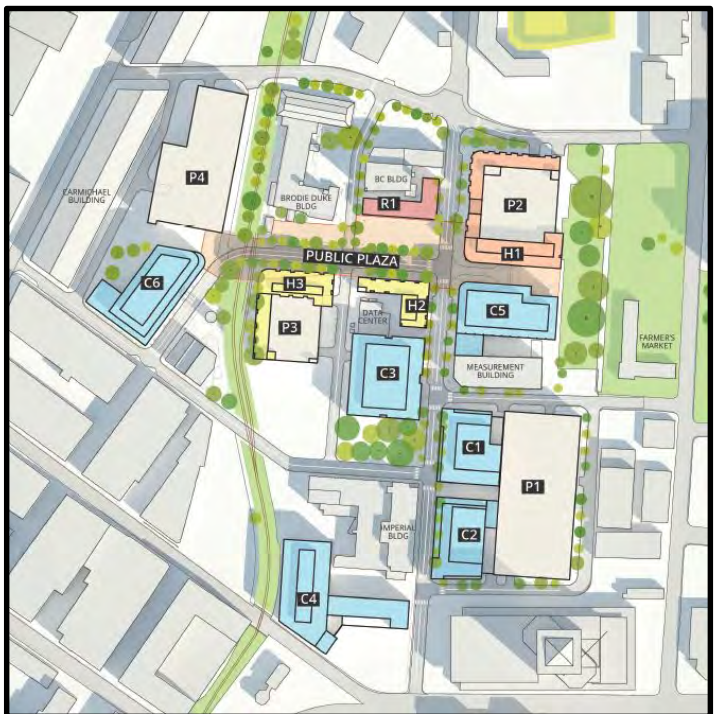
Liberty Warehouse



W Geer Street



Innovation District



# Hunt Station

## Vehicle Access

- The Site is in the urban core. It is easily accessed via a two-way grid of streets.
- There is on-street parking on Rigsbee Avenue.
- The Site's regional access is not particularly strong.

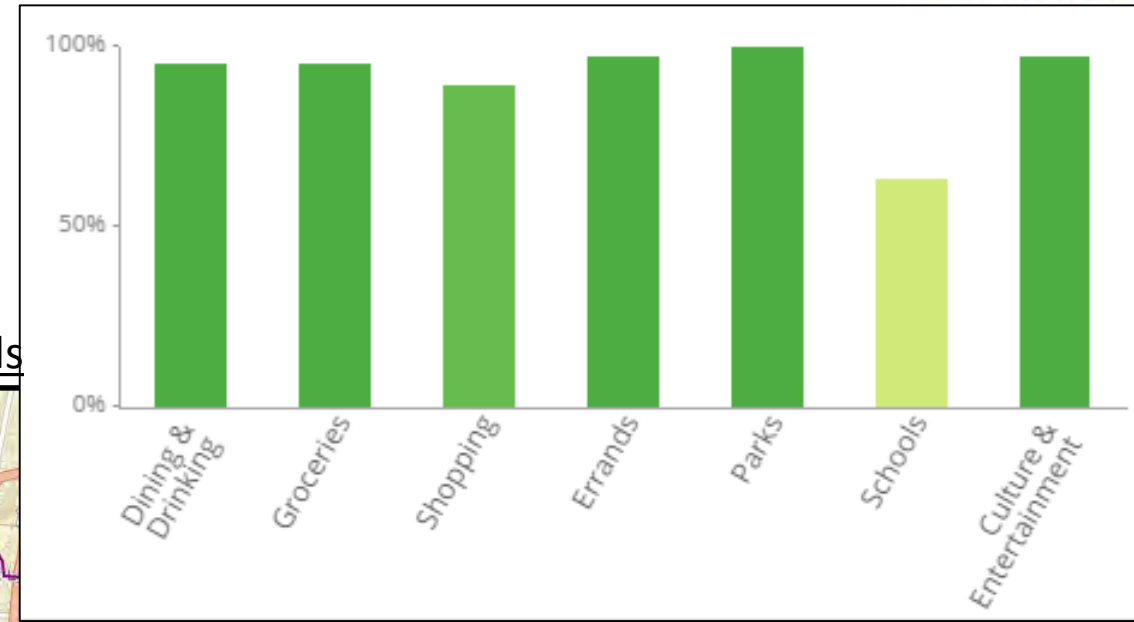
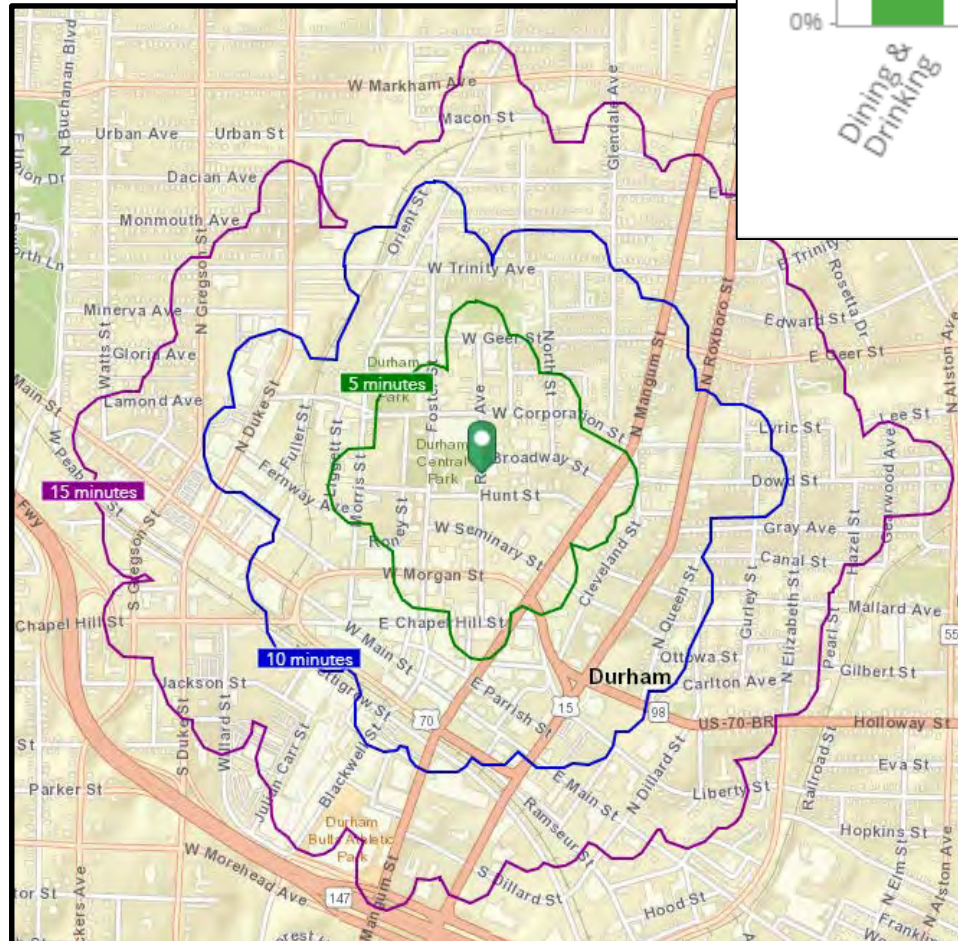


# Hunt Station *Pedestrian Access*

The WalkScore for 516 Rigsbee Avenue is 93 – Walkers Paradise.

The location is convenient to parks, entertainment and goods and services.

5-,10-,15-Minute Walk Sheds







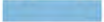













# JJ Henderson Transit

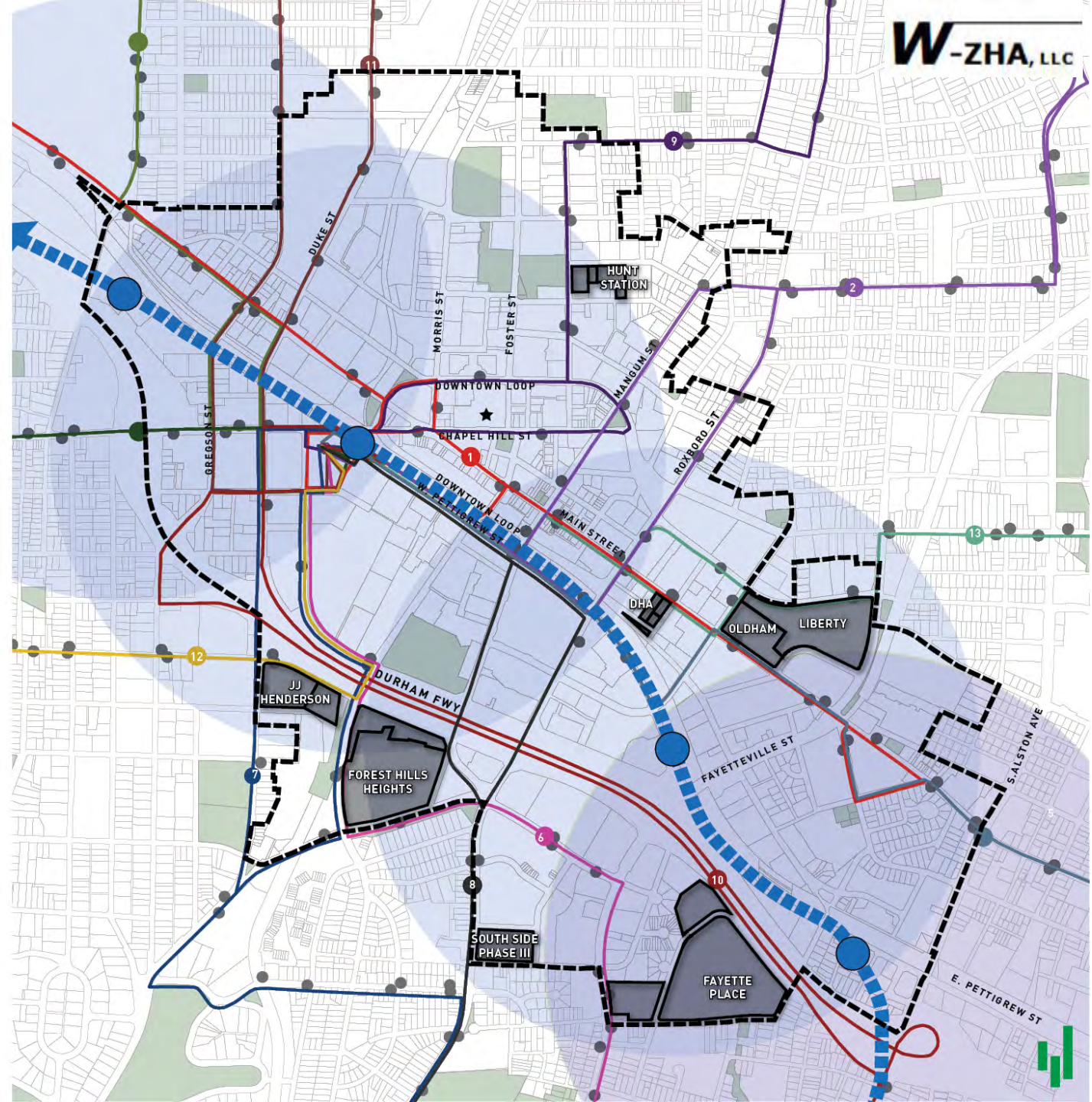
Today, the Site's transit score is 60 – Good Transit. There are many convenient transit options near the Site.

The Site is within a half-mile of the proposed Downtown LRT stations. The half mile is about a 15-minute walk.

The Site's transit score will increase with LRT.

## TRANSIT NETWORK

-  OPPORTUNITY SITES
-  OPEN SPACES
-  PROPOSED LRT STATION
-  PROPOSED LRT LINE
-  1/2 MILE BUFFER FROM LRT STATION
-  TRANSIT STOPS
-  1 BULL CITY CONNECTOR
-  2 DEARBORN DR/NORTH DURHAM
-  3 DUKE UNIVERSITY/HILLSBOROUGH RD
-  4 DUKE UNIVERSITY/SPARGER ST
-  5 EAST DURHAM/THE VILLAGE/ANGIER AV
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-  9 N ROXBORO/DURHAM REG/N DUKE CROSSIN
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-  11 NORTHGATE/HORTON RD
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-  13 THE VILLAGE/GLENVIEW STATION/HWY 98



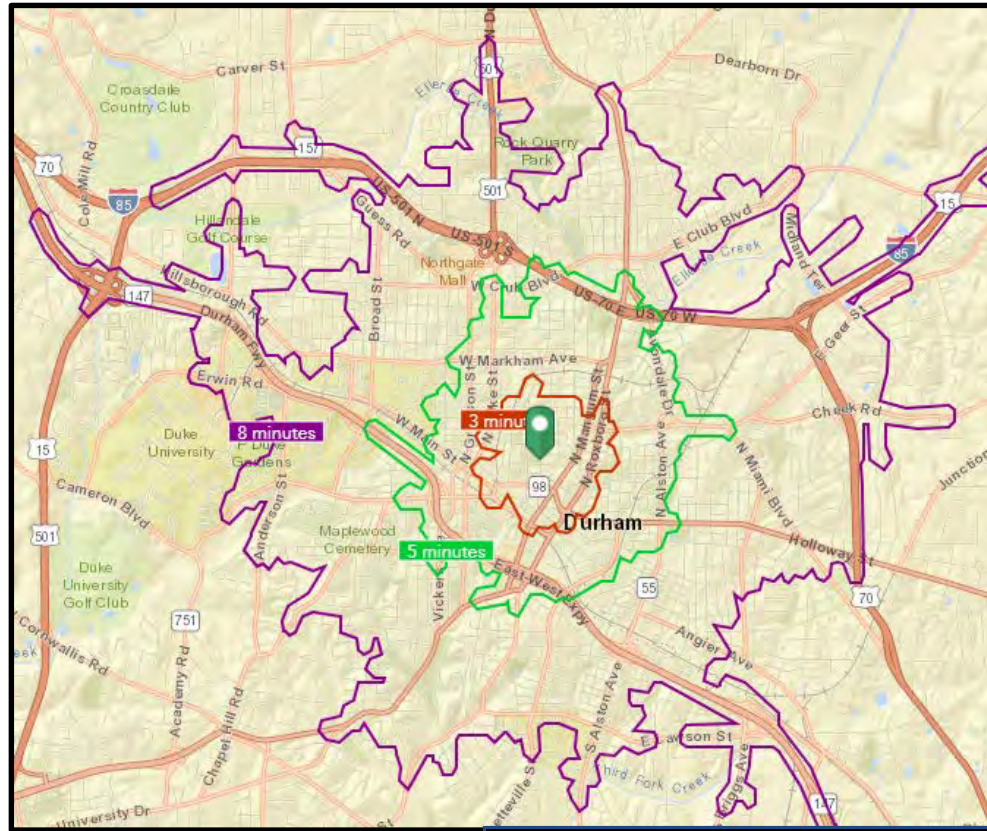


### 3-,5-,8-Minute Drive Sheds

## Hunt Station Demographics

Hunt Station has 1,700 households within a 10-minute walking distance.

These households have higher incomes and most of these households are childless.



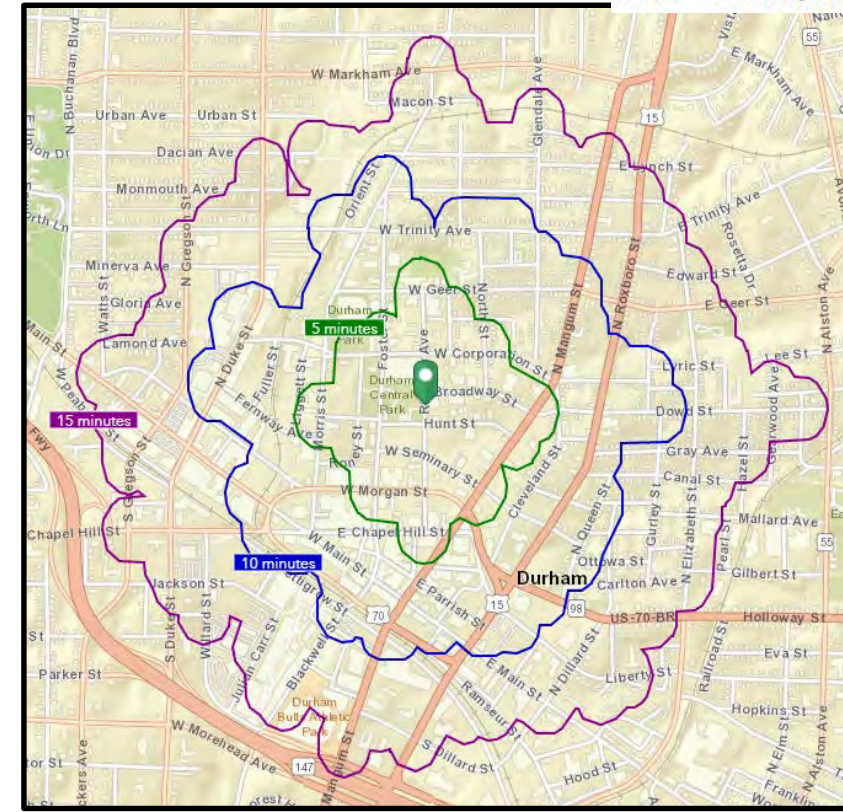
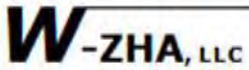
Drive Time  
3-Minute 5-Minute 8-Minute

2018 Households	1,497	5,578	19,751
2023 Households	1,796	6,311	22,298
Growth	20%	13%	13%
% Hshlds w/Children	19.0%	24.4%	29.2%
Avg Household Income	\$57,315	\$62,618	\$53,572
Median Household Income	\$38,560	\$39,236	\$33,634

Source: ESRI; W-ZHA

\\WZHASRV\data\8000s, misc\82372 durham[esri market drive rigsbee.xlsx]Sheet2

### 5-,10-,15-Minute Walk Sheds



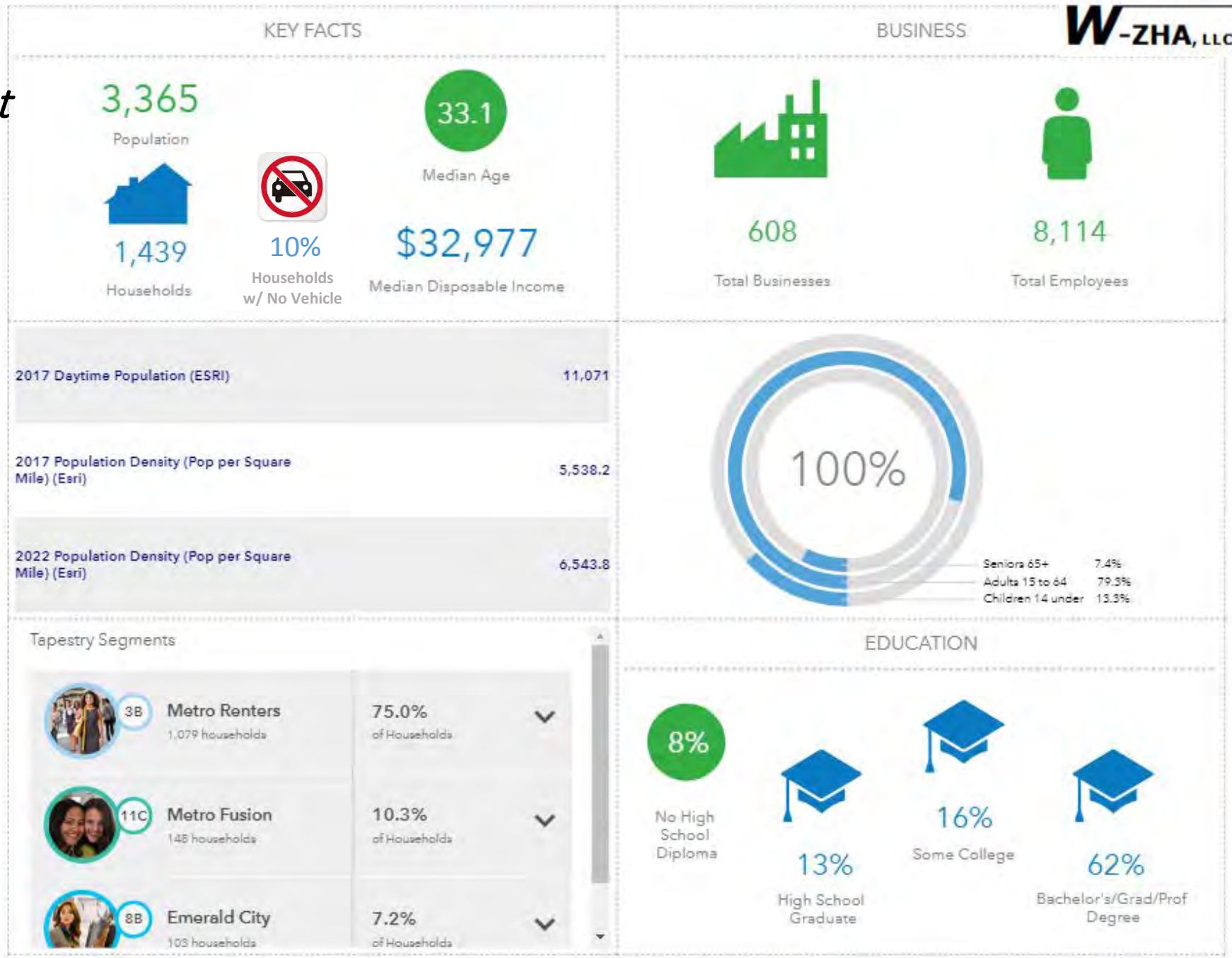
Walk Time  
5-Minute 10-Minute 15-Minute

2018 Households	175	1,439	2,969
2023 Households	219	1,736	3,454
Growth	25%	21%	16%
% Hshlds w/Children	13.3%	18.2%	22.5%
Avg Household Income	\$55,554	\$57,402	\$56,800
Median Household Income	\$38,613	\$38,630	\$35,425

# Hunt Station

## The 10-Minute Walking Market

- ESRI estimates that there are approximately 1,439 households and approximately 8,100 employees within a 10-minute walk of the Site.
- The daytime population is estimated to be approximately 11,000 people- the highest among all of the sites.
- Three-quarters of local households within a 10-minute walk are from the “Metro Renter” tapestry segment. The median age of the Metro Renter household is 32. This group is comprised of single-person households in management positions.
- Another 17% of households within the 10-minute walk are also predominantly single-person households.
- Over 60% of the households within a 10-minute walk have a bachelors degree.

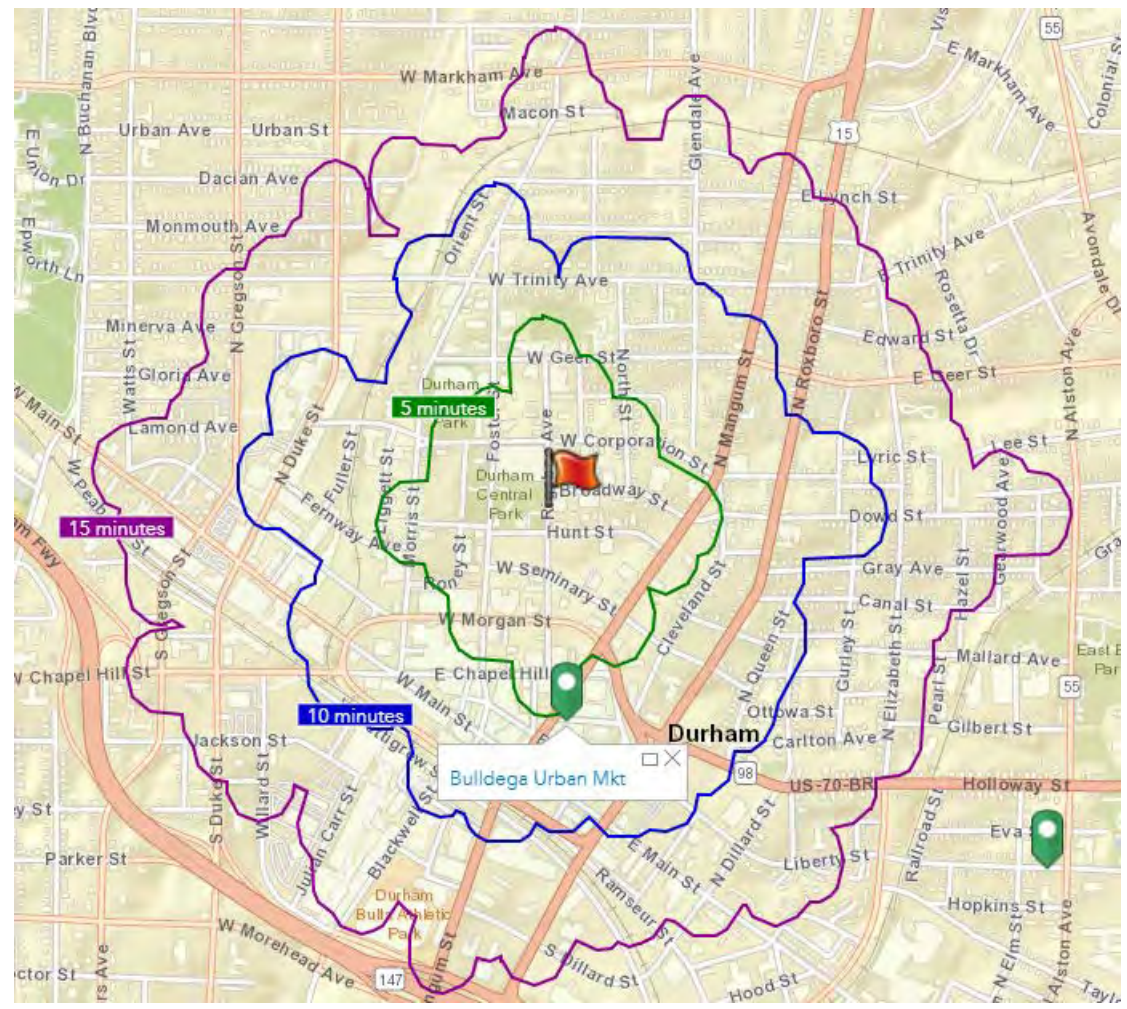


# Hunt Station

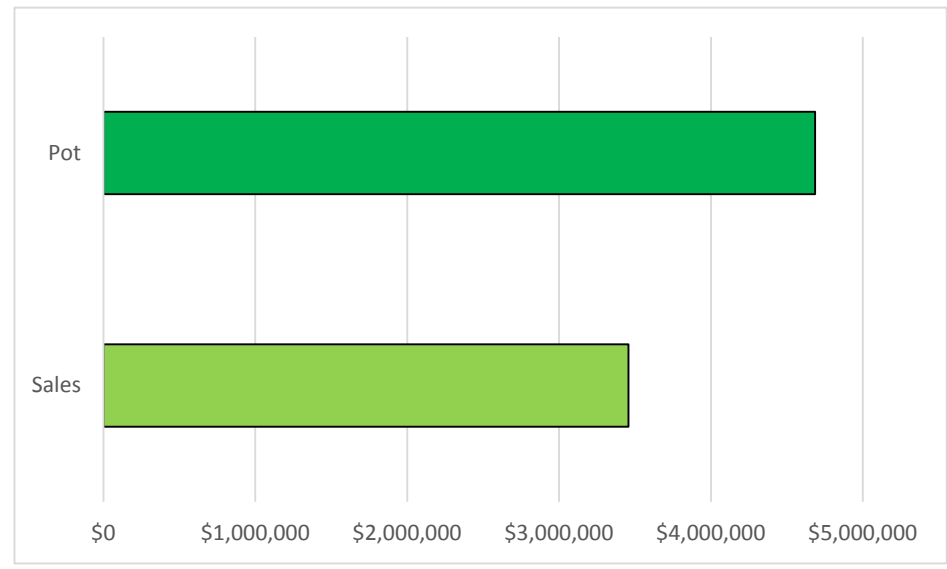
## *The Walking Market & Groceries*

- There are very few food options within a 10-minute walk of the Site.
- Food spending potential is considerable higher than food sales for both the 10- and 15-minute walk time. There are between 1,700 and 3,500 households in the 10- to 15-minute walk trade area. There are enough households to support a small grocery store.

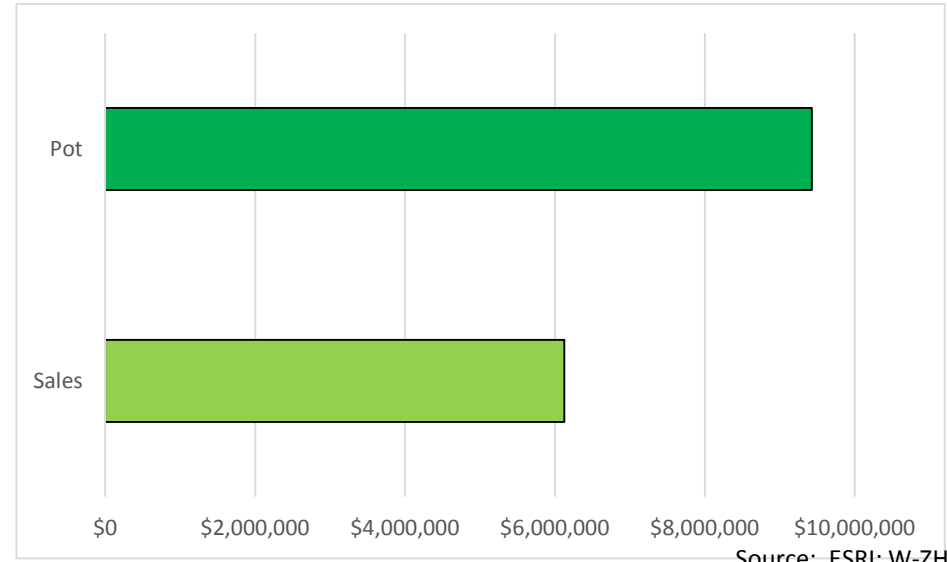
5-,10-,15-Minute Walk Sheds



10-Minute Walk



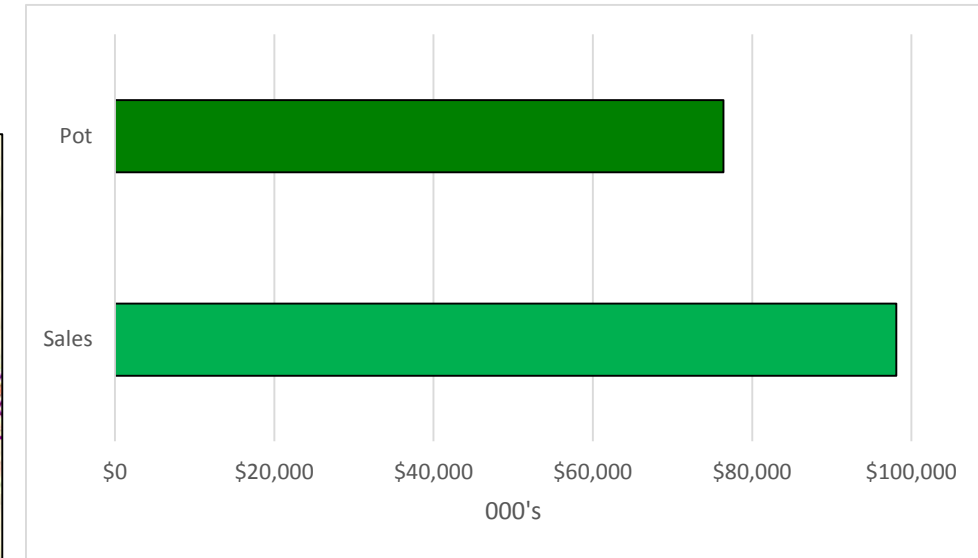
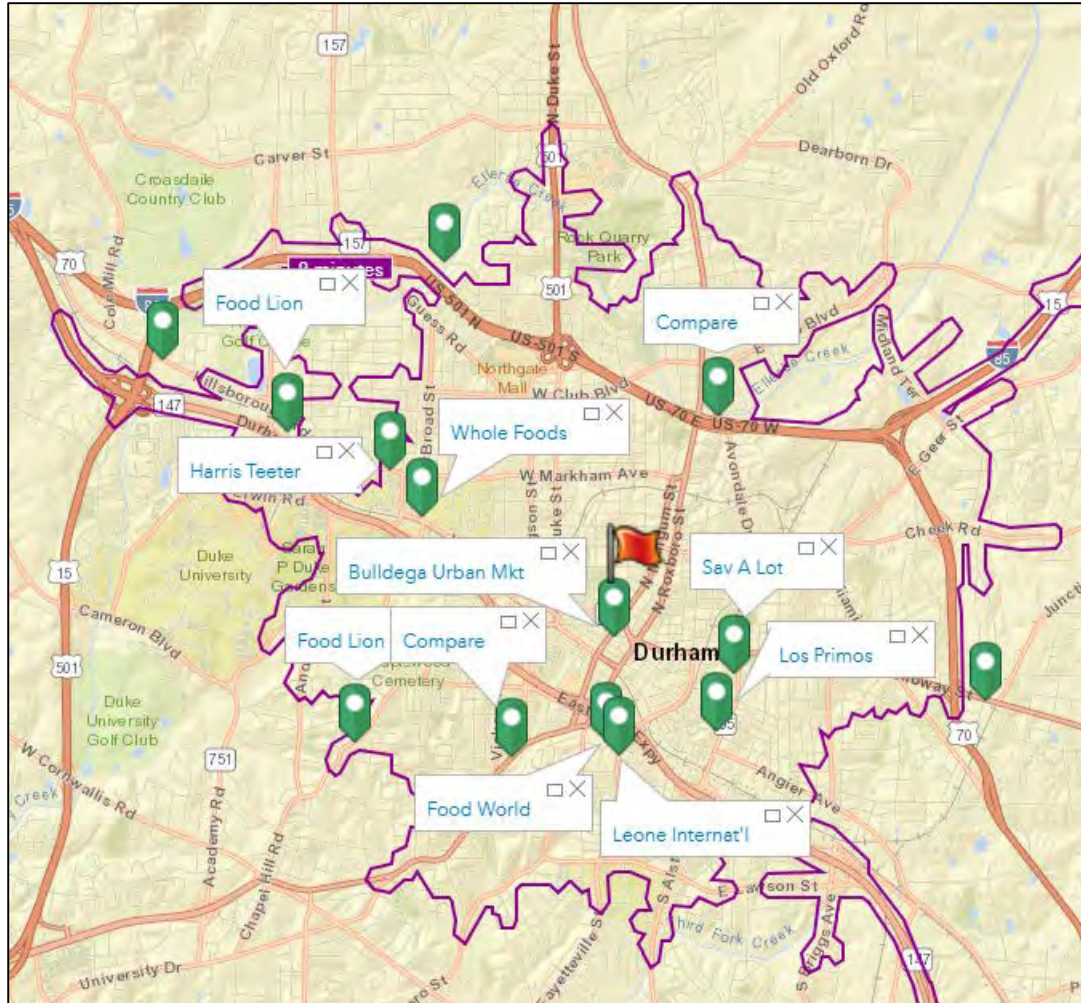
15-Minute Walk



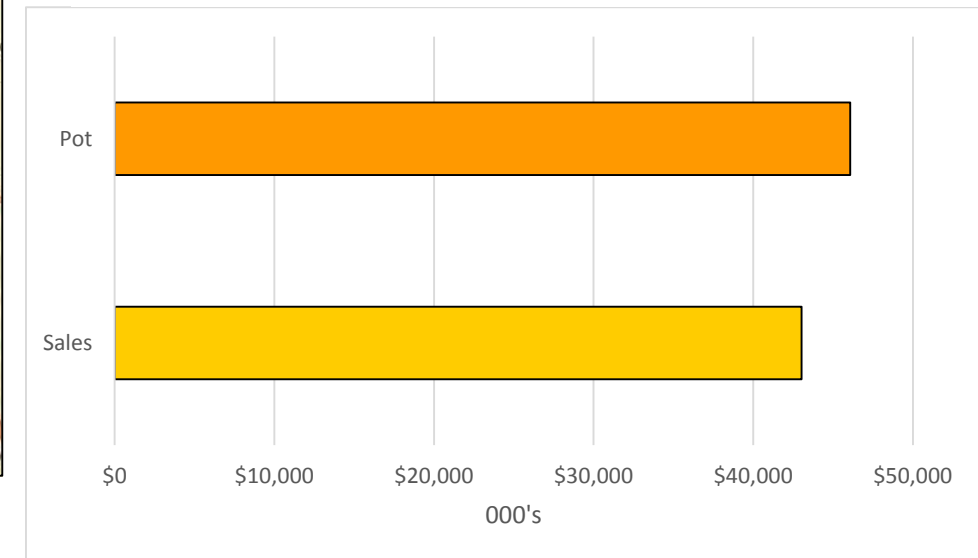
# Hunt Station

## The Convenience Market - Driving

- As with the other sites, surrounding food establishments are serving the convenience drive shed.
- There is more spending potential than sales in the pharmacy category.



2017 Personal Care Expenditure Potential and Sales



# Hunt Stations

## *Strengths and Weaknesses – Convenience Market*

### Strengths

- Central location with day and night activity hubs nearby
- Strong daytime population and with Durham Central Park good 7-day per week activity
- Strong demographics and population density
- Good north/south street

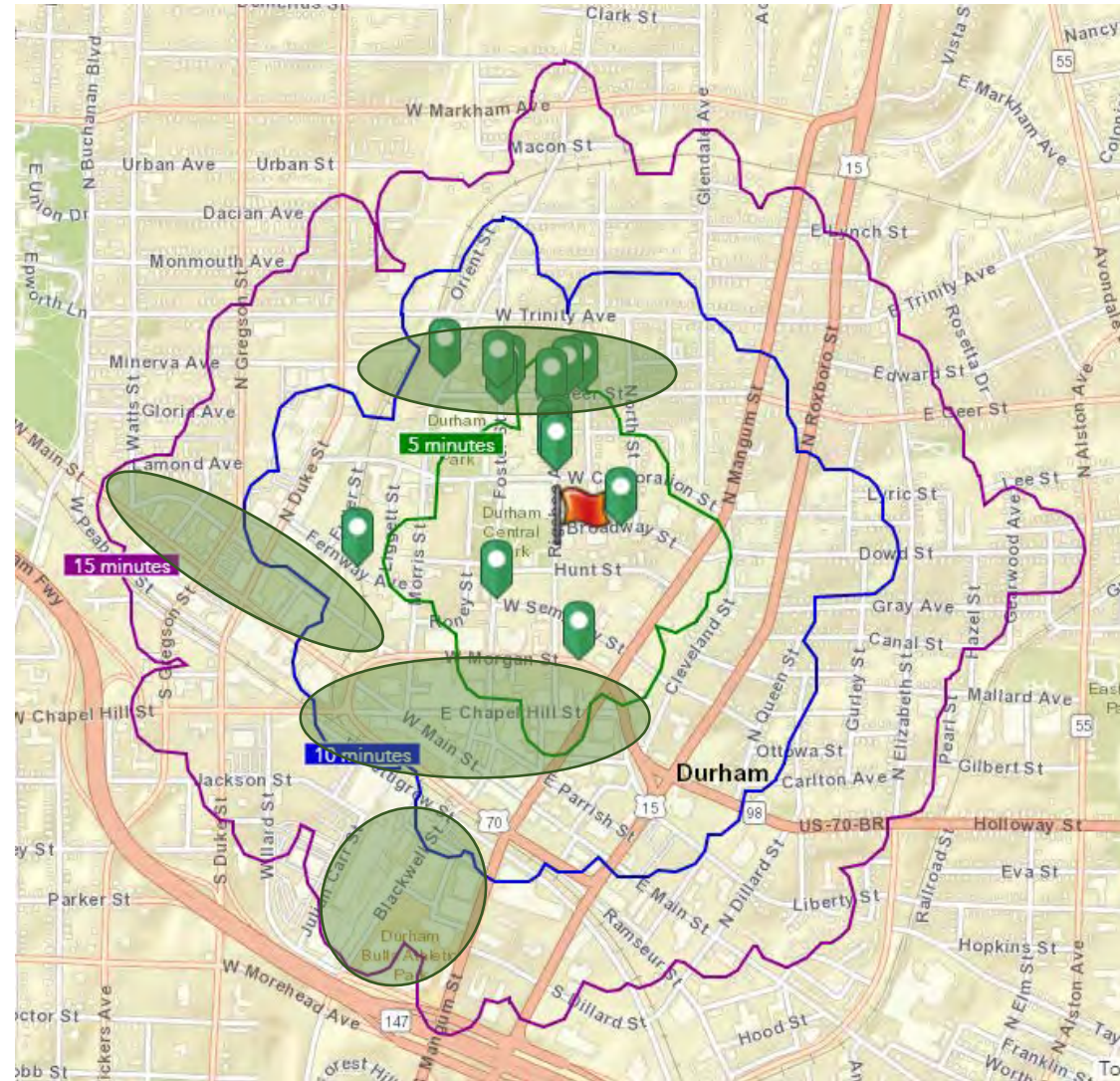
### Weakness

- Not at a 4-way intersection.
- The site is not particularly large making the amount of retail contingent on upper level uses, parking demand, and the area available for on-site parking.

# Hunt Station

## *The Eat/Drink Market - Walking*

- Within a 5-minute walk of the Site is the Downtown and the Geer Street eat/drink clusters.
- The Site is adjacent to Central Park.
- The Site is within an easy and pleasant walk to the Innovation District, a job hub.
- The Site's location is very competitive for eating and drinking.



 = Bar and restaurant cluster

## Hunt Station

### *Strengths and Weaknesses – Eating and Drinking Market*

Strengths	Weakness
<ul style="list-style-type: none"><li>• Central location with day and night activity hubs nearby.</li><li>• Strong daytime population and with Durham Central Park good 7-day per week activity.</li><li>• Strong demographics and population density.</li><li>• Good north/south street.</li></ul>	

## Hunt Station

### *Conclusions*

- Hunt Station is a strong location for specialty retail or eating and drinking establishment.
- The amount of retail and/or eat/drink will depend on the mix of uses and parking on the site. The site can likely accommodate 5,000 to 7,000 square feet of ground floor retail and/or eat/drink space.



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AN ANALYSIS  
of  
RESIDENTIAL MARKET POTENTIAL

for  
Mixed-Income Redevelopment  
Downtown Durham

The City of Durham,  
Durham County, North Carolina

November, 2018

Conducted by  
ZIMMERMAN/VOLK ASSOCIATES, INC.  
P.O. Box 4907  
Clinton, New Jersey 08809





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Residential Market Analysis Across the Urban-to-Rural Transect

## AN ANALYSIS OF RESIDENTIAL MARKET POTENTIAL

Mixed-Income Redevelopment  
Downtown Durham  
*City of Durham, Durham County, North Carolina*

November, 2018

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### INTRODUCTION

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The purpose of this study is to determine the optimum residential mix for new mixed-income rental dwelling units and the optimum market position for the market-rate component within several public housing properties and redevelopment sites located in or adjacent to Downtown Durham, North Carolina. The optimum residential mix is derived from the housing preferences, financial capacities, and lifestyle characteristics of the target households. The optimum market position for the market-rate component is also predicated on: the location, visibility and physical attributes of each site; the rental housing market context in the Durham market area; and Zimmerman/Volk Associates' extensive experience with mixed-income urban development and redevelopment.

### SUMMARY OF FINDINGS

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Several public housing and other redevelopment properties are included in this analysis: the J.J. Henderson seniors tower, Forest Hills Heights, Fayette Place, and South Side Phase III properties situated south of the Durham Freeway; the Oldham/Liberty and DHA/Criminal Justice properties located on Main Street; and the Rigsbee Station site on Rigsbee Avenue. All of these properties are in close proximity to the core of Downtown Durham (the Downtown Durham Study Area), which has been experiencing significant redevelopment in recent years. However, households with incomes below 80 percent of the area median income are unable to afford any of the newly-constructed units in the Study Area due to their high rents and prices. The mixed-income redevelopment of the properties that are the focus of this analysis will provide new housing within the financial capabilities of these households.

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—DRAW AREAS AND MARKET POTENTIAL—

Target market analysis determined the specific target markets for the various redevelopment sites by filtering the overall market as follows:

1. Identifying the annual market potential for the City of Durham;
2. Narrowing the focus to market segments that prefer downtown or in-town neighborhoods (filtering out housing consumers who would prefer other Durham or Durham County neighborhoods, in particular those that are more suburban in character);
3. Concentrating on renter households (filtering out housing consumers who would prefer to own rather than rent); and
4. Including the full economic range of renter households—from public housing residents to households that can afford market-rate units.

*Where are the potential renters and buyers of new and existing housing units in the City of Durham likely to move from?*

The most recent Durham County migration and mobility data—as derived from taxpayer records compiled by the Internal Revenue Service from 2011 through 2015 and from the 2016 American Community Survey for the City of Durham and for Durham County—shows that the draw areas for new housing units located in the City of Durham would include the following:

- The local draw area, covering households living within the Durham city limits.
- The county draw area, covering households living elsewhere in Durham County.
- The regional draw area, covering households with the potential to move to the City of Durham from Wake and Orange Counties.
- The national draw area, covering households with the potential to move to the City of Durham from all other U.S. counties.

As derived from the migration, mobility and target market analyses, then, the draw area distribution of market potential (those households with the potential to move within or to the City of Durham each year over the next five years) is shown on the table following this page:

Mixed-Income Redevelopment, Downtown Durham  
City of Durham, Durham County, North Carolina

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Annual Average Market Potential by Draw Area  
*City of Durham, Durham County, North Carolina*

City of Durham:	54.2%
Balance of Durham County:	3.4%
Wake and Orange Counties:	14.4%
Balance of the U.S.:	<u>28.0%</u>
Total:	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2018.

*How many households have the potential to move within  
and to Durham each year over the next five years?*

As determined by the target market methodology, which accounts for household mobility within the City of Durham, as well as migration and mobility patterns for households currently living in all other counties, an annual average of 24,320 households represent the potential market for new and existing housing units within Durham each year over the next five years. Approximately 46 percent of the annual potential market will be moving to Durham from outside the city limits.

*Where are the potential renters of new housing units  
within the Downtown Durham Study Area likely to move from?*

The target market methodology identifies those households with a preference for living in downtown and in-town neighborhoods. After discounting for those segments of the potential market that have preferences for existing, rather than new housing units, or for new or existing housing in more suburban neighborhoods, the distribution of draw area market potential for new units that could be developed within the Downtown Durham Study Area is summarized on the table following this page:

Annual Average Market Potential by Draw Area  
The Downtown Durham Study Area  
*City of Durham, Durham County, North Carolina*

City of Durham:	38.7%
Balance of Durham County:	2.3%
Wake and Orange Counties:	21.2%
Balance of the U.S.:	<u>37.8%</u>
Total:	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2018.

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*How many households have the potential to move  
to the Downtown Durham Study Area each year over the next five years?*

Based on the analysis, which accounts for household mobility within the City of Durham and the balance of Durham County, as well as migration and mobility patterns for households currently living in all other cities and counties across the country, an annual average of 4,860 younger singles and couples, empty nesters and retirees, and traditional and non-traditional families represent the potential market for new housing units of any type or tenure, rental or for-sale, located in the Downtown Durham Study Area each year over the next five years.

*What are their housing preferences in aggregate?*

The tenure and housing preferences of the draw area households are outlined on the following table (*see also* Table 1 *following the text*):

Average Annual Potential Market for New and Existing Housing Units  
The Downtown Durham Study Area  
*City of Durham, Durham County, North Carolina*

HOUSING TYPE	NUMBER OF HOUSEHOLDS	PERCENT OF TOTAL
Multi-family for-rent (lofts/apartments, leaseholder)	2,967	61.0%
Multi-family for-sale (lofts/apartments, condo/co-op ownership)	388	8.0%
Single-family attached for-sale (townhouses/live-work, fee-simple/ condominium ownership)	508	10.5%
Single-family detached for-sale (houses, fee-simple ownership)	<u>997</u>	<u>20.5%</u>
Total	4,860	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2018.

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—TARGET MARKETS—

*Who are the households that represent the potential market  
for new rental units within the Downtown Durham Study Area?*

As determined by the target market analysis, then, the general market segments, by lifestage, that represent the potential market for new rental units in the Downtown Durham Study Area include (see also Table 2 following the text):

- Younger singles and childless couples—55.4 percent;
- Empty nesters and retirees—25.4 percent); and
- Traditional and non-traditional family households—19.2 percent.

In this case, the younger singles and couples are those who prefer to live in downtowns and walkable neighborhoods for their diversity, and for the availability of employment, entertainment, and cultural opportunities within walking distance of their residences. Approximately 22 percent of the younger households have incomes below 30 percent AMI, 17 percent have incomes ranging between 30 and 60 percent AMI, over 18 percent earn between 60 and 80 percent of the AMI, and the remaining 43 percent have annual incomes of 80 percent of the AMI and up.

Empty nesters and retirees comprise the second largest share of the potential market for the site. These older singles and couples are enthusiastic participants in community life. Some are retired or have never worked, and many are still actively involved in jobs in the medical, legal and financial fields as well as in academia. In general, the older singles and couples have higher annual incomes than the younger singles and couples: 15 percent fall below 30 percent AMI, 14 percent between 30 and 60 percent AMI, 15 percent between 60 and 80 percent AMI, and over 55 percent earn more than 80 percent of the AMI.

The family-oriented households that represent the potential market are a mix of smaller, compact families and non-traditional families. Some of these households are headed by single parents, with one to four children. Their income ranges are more comparable to the younger households than to the empty nesters and retirees. Over 21 percent have incomes below 30 percent AMI, 19.5 percent between 30 and 60 percent AMI, just under 17 percent between 60 and 80 percent AMI, and 42.5 percent at 80 percent AMI and higher.

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—THE MARKET CONTEXT—

*What are their current residential alternatives?*

In July 2018, Zimmerman/Volk Associates compiled data from a variety of sources, including telephone interviews and individual property and rental websites, on 14 selected rental properties constructed since 2013, representing more than 4,000 rental apartments in the Durham market area. The asking rents at all of these properties are out of reach for any of the target households with incomes below 80 percent of the AMI, who represent just under 59 percent of the annual potential market for downtown rental housing. Four properties are actively marketing condominiums and townhouses and two condominium properties have resales, in aggregate representing more than 200 for-sale units. The least expensive condominium listed for sale at \$288,000 is beyond the financial capabilities of nearly two-thirds of the annual potential market for downtown for-sale housing (*See Tables 3 and 4 following the text.*)

Walk Score, a number between 0 and 100 denoting the walkability of a specific address or neighborhood, has grown in importance as a value criterion. Walk Scores above 90 indicate a “Walker’s Paradise,” where daily errands do not require a car. Walk Scores between 70 and 90 are considered to be very walkable, where most errands can be accomplished on foot. Walk Scores below 50 indicate that most or almost all errands require an automobile.

With the exception of The Lofts at Southside, all of the rental and for-sale properties located in the Downtown Study Area have Walk Scores of 70 or more, indicating a very walkable environment. Nationally, Walk Scores above 70 typically add a premium to housing costs, contributing to housing affordability concerns in many urban neighborhoods.



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—OPTIMUM MARKET POSITION—

*What is the market currently able to pay to rent new dwelling units  
in the Downtown Durham Study Area in general and the redevelopment sites in particular?*

The properties that are the focus of this analysis—the J.J. Henderson seniors tower, Forest Hills Heights, Oldham/Liberty, South Side Phase III, Fayette Place, the Rigsbee Station site, and the DHA/Criminal Justice properties—are intended to be redeveloped as mixed-income neighborhoods, serving a range of households from public housing residents to households who can afford market-rate rents. The strength of the market-rate component will be critical to the redevelopments because of high development and construction costs and diminishing housing assistance from the federal government.

—*Rental Distribution*—

The income ranges of the annual potential rental market are summarized as follows, excluding those households with incomes between 81 and 100 percent of AMI, which are too low to qualify as market-rate based on current new unit rental rates:

Target Household Distribution by AMI  
Average Annual Market Potential for New Rental Units  
The Downtown Durham Study Area  
*City of Durham, Durham County, North Carolina*

AMI RANGE	NUMBER OF HOUSEHOLDS	PERCENTAGE
Below 30% (public housing replacement units)	699	25.8%
31% to 60% (affordable units)	525	19.4%
61% to 80% (workforce units)	515	19.1%
100% and up (market-rate units)	<u>967</u>	<u>35.7%</u>
Total:	2,706	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2018.

Just over 64 percent of the target households have incomes below 80 percent AMI. Based on the incomes and financial capabilities of the 35.7 percent (967 households) with incomes above 100 percent of the AMI and who represent the target markets for new market-rate rental units in the

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Downtown Durham Study Area (*as shown on Table 5 following the text*), the distribution of annual market potential by rent range is summarized on the following table:

Target Group Distribution by Rent Range  
Average Annual Market Potential for Market-Rate Units  
The Downtown Durham Study Area  
*City of Durham, Durham County, North Carolina*

MONTHLY RENT RANGE	UNITS PER YEAR	PERCENTAGE
\$750–\$1,000	295	30.5%
\$1,000–\$1,250	245	25.3%
\$1,250–\$1,500	124	12.8%
\$1,500–\$1,750	122	12.6%
\$1,750–\$2,000	106	11.0%
\$2,000 and up	<u>75</u>	<u>7.8%</u>
Total:	967	100.0%

SOURCE: Zimmerman/Volk Associates, Inc., 2018.

The optimum market position for new mixed-income rental units that could potentially be developed within the redevelopment sites has been derived from a variety of factors, including but not limited to:

- The sites' locations within or in close proximity to the core of Downtown Durham;
- The proposed 17.7-mile Durham-Orange Light Rail Transit line, projected to open in 2028, which will run from the UNC Hospitals in Chapel Hill to Alston Avenue in Durham, with stations adjacent to both the Oldham/Liberty and Fayette Place redevelopments;
- The new unit rental propensities and incomes and assets of the target draw area households; and
- Current rental market dynamics in the Durham market area.

The optimum market position for new rental development within the various sites is shown on the table following this page (*reference also Table 6 following the text*):

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**Optimum Market Position: Market Rate Rents**

Mixed-Income Redevelopments  
 Households With Incomes Above 100 Percent AMI  
 The Downtown Durham Study Area  
*City of Durham, Durham County, North Carolina*

PERCENT MIX	UNIT CONFIGURATION	BASE RENT PER MONTH	UNIT SIZE	BASE RENT PER SQ. FT.
. . . . . J.J. Henderson. . . . .				
75%	Studio/1ba	\$950 to \$1,000	425 to 500 sf	\$2.00 to \$2.24
25%	1br/1ba	\$1,100 to \$1,175	550 to 600 sf	\$1.96 to \$2.00
. . . . . Oldham/Liberty. . . . .				
35%	Studio/1ba	\$1,150 to \$1,350	450 to 600 sf	\$2.25 to \$2.56
45%	1br/1ba	\$1,450 to \$1,650	650 to 800 sf	\$2.06 to \$2.23
20%	2br/2ba	\$2,000 to \$2,200	950 to 1,100 sf	\$2.00 to \$2.11
. . . . . Office/County Criminal Justice. . . . .				
75%	1br/1ba	\$1,425 to \$1,725	700 to 850 sf	\$2.03 to \$2.04
25%	2br/2ba	\$1,875 to \$2,075	1,000 to 1,150 sf	\$1.80 to \$1.88
. . . . . Forest Hills Heights. . . . .				
30%	Studio/1ba	\$1,000 to \$1,250	500 to 650 sf	\$1.92 to \$2.00
45%	1br/1ba	\$1,350 to \$1,600	700 to 850 sf	\$1.88 to \$1.93
25%	2br/2ba	\$1,850 to \$2,050	1,000 to 1,150 sf	\$1.78 to \$1.85
. . . . . Southside Phase III. . . . .				
30%	Studio/1ba	\$950 to \$1,000	500 to 550 sf	\$1.82 to \$1.90
40%	1br/1ba	\$1,100 to \$1,350	600 to 750 sf	\$1.80 to \$1.83
30%	2br/1ba	\$1,550 to \$1,750	950 to 1,100 sf	\$1.59 to \$1.63

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		. . . . . Fayette Place. . . . .			
40%	1br /1ba	\$1,050 to	600 to	\$1.71 to	
		\$1,200	700 sf	\$1.75	
35%	2br/1ba	\$1,450 to	850 to	\$1.68 to	
		\$1,600	950 sf	\$1.71	
25%	3br/1.5ba TH	\$2,050 to	1,200 to	\$1.65 to	
		\$2,150	1,300 sf	\$1.71	
		. . . . . Rigsbee Station. . . . .			
60%	1br/1ba	\$1,500 to	650 to	\$2.13 to	
		\$1,700	800 sf	\$2.31	
40%	2br/1ba	\$2,050 to	950 to	\$2.05 to	
		\$2,250	1,100 sf	\$2.16	

SOURCE: Zimmerman/Volk Associates, Inc., 2018.

—MARKET CAPTURE—

*How fast will new units lease up?*

Based on 30 years' experience employing the target market methodology in urban locations at every scale in 47 states, and given current economic conditions, Zimmerman/Volk Associates has determined that a capture of eight to 15 percent of the annual potential market for new mixed-income rental housing units could be achievable at the various redevelopment sites in the Downtown Durham Study Area over the next five to seven years. It is likely that a recession could occur at some point over that time period; however, the impact on rental absorption would not likely be severe as the strength of the Durham market is derived from the significant educational/medical component of its economy, which is likely to remain strong over the near- and long-term.

Based on the market capture rates ranging between eight and 15 percent, annual average absorption of new mixed-income rental housing units over the next five years is forecast for each property as shown on the following table (*see again* Table 6):

Annual Forecast Absorption  
 Mixed-Income Redevelopments  
 The Downtown Durham Study Area  
*City of Durham, Durham County, North Carolina*

PROPERTY	NUMBER OF UNITS	ANNUAL UNITS ABSORBED	CAPTURE RATES
<b>Years 1 and 2</b>			
J.J. Henderson <30% AMI	258 du (seniors)	<u>60 - 75</u> 15 - 19	12 - 15%
31% to 60% AMI		12 - 15	
61% to 80% AMI		10 - 12	
>100% AMI		24 - 29	
Oldham/Liberty <30% AMI	550 du	<u>325 - 406</u> 84 - 105	12 - 15%
31% to 60% AMI		63 - 79	
61% to 80% AMI		62 - 77	
>100% AMI		116 - 145	
<b>Year 3</b>			
Office/County Criminal Justice <30% AMI	290 du	<u>271 - 325</u> 70 - 84	10 - 12%
31% to 60% AMI		53 - 63	
61% to 80% AMI		52 - 62	
>100% AMI		97 - 116	

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<b>Years 3 and 4</b>			
Forest Hill Heights	830 du	<u>271 - 325</u>	10 – 12%
<30% AMI		70 - 84	
31% to 60% AMI		53 - 63	
61% to 80% AMI		52 - 62	
>100% AMI		97 - 116	
<b>Year 4</b>			
Southside Phase III	152 du	<u>139 - 174</u>	8 – 10%
<30% AMI		56 - 70	
31% to 60% AMI		42 - 53	
61% to 80% AMI		41 - 52	
>100% AMI		77 - 97	
<b>Years 5 to 7</b>			
Fayette Place	550 du	<u>139 - 174</u>	8 – 10%
<30% AMI		56 - 70	
31% to 60% AMI		42 - 53	
61% to 80% AMI		41 - 52	
>100% AMI		77 - 97	
<b>Year 6</b>			
Rigsbee Station	140 du	<u>139 - 174</u>	8 – 10%
<30% AMI		56 - 70	
31% to 60% AMI		42 - 53	
61% to 80% AMI		41 - 52	
>100% AMI		77 - 97	

SOURCE: Zimmerman/Volk Associates, Inc., 2018.

These capture rates are well within the target market methodology’s parameters of feasibility for urban rentals, where capture rates can often exceed 30 percent depending on the optimum market position. Based on these afore-mentioned capture rates, absorption of all new mixed-income units should be absorbed over a seven-year timeframe.

Please note that the target market capture rates of the potential renter pool are a unique and highly-refined measure of market feasibility. Target market capture rates are not equivalent to—and should not be confused with—penetration rates or traffic conversion rates.

The **target market capture rate** is derived by dividing the annual forecast absorption by the number of households that have the potential to move to the site in a given year.

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

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

Because the prospective market for a property is more precisely defined using target market methodology, a substantially smaller number of households are qualified; as a result, target market capture rates are higher than the more grossly-derived penetration rates. The resulting higher capture rates remain well within the range of feasibility.



Table 1

**Average Annual Market Potential For New And Existing Housing Units**  
 Distribution Of Annual Average Number Of Draw Area Households With The Potential  
 To Move Within/ To The Downtown Durham Study Area Each Year Over The Next Five Years  
 Based On Housing Preferences And Income Levels  
***The Downtown Durham Study Area***  
*City of Durham, Durham County, North Carolina*

*City of Durham; Balance of Durham County;  
 Wake and Orange Counties, North Carolina; Balance of U.S.  
 Draw Areas*

Annual Number Of Households  
 With The Potential To Rent/Purchase Within  
 The City of Durham 24,320

Annual Number Of Households  
 With Potential To Rent/Purchase Within  
 The Downtown Durham Study Area 4,860

**Average Annual Market Potential**

	<i>Below 30% AMI</i>	<i>30% to 60% AMI</i>	<i>60% to 80% AMI</i>	<i>80% to 100% AMI</i>	<i>Above 100% AMI</i>	<i>Subtotal</i>
<i>Multi-Family For-Rent:</i>	699	525	515	261	967	<b>2,967</b>
<i>Multi-Family For-Sale:</i>	66	73	65	69	115	<b>388</b>
<i>Single-Family Attached For-Sale:</i>	89	90	91	89	149	<b>508</b>
<i>Single-Family Detached For-Sale:</i>	114	117	163	202	401	<b>997</b>
<i>Total:</i>	<b>968</b>	<b>805</b>	<b>834</b>	<b>621</b>	<b>1,632</b>	<b>4,860</b>
<i>Percent:</i>	<b>19.9%</b>	<b>16.6%</b>	<b>17.2%</b>	<b>12.8%</b>	<b>33.6%</b>	<b>100.0%</b>

Note: For fiscal year 2018, the Durham-Chapel Hill, NC HUD Metro MFR Median Family Income for a family of four is \$80,600.

SOURCE: Claritas, Inc.;  
 Zimmerman/Volk Associates, Inc.



Table 2

**Average Annual Market Potential By Lifestage And Income Range**  
 Derived From Purchase And Rental Propensities Of Draw Area Households With The Potential  
 To Move Within/To The Downtown Durham Study Area Each Year Over The Next Five Years  
 Based On Housing Preferences And Income Levels  
***The Downtown Durham Study Area***  
*City of Durham, Durham County, North Carolina*

Number of Households:	Total	<i>Below 30% AMI</i>	<i>30% to 60% AMI</i>	<i>60% to 80% AMI</i>	<i>80% to 100% AMI</i>	<i>Above 100% AMI</i>
	<b>4,860</b>	<b>968</b>	<b>805</b>	<b>834</b>	<b>621</b>	<b>1,632</b>
<b>Empty Nesters &amp; Retirees</b>	25.4%	19.8%	22.0%	22.1%	27.1%	31.5%
<b>Traditional &amp; Non-Traditional Families</b>	19.2%	20.4%	22.6%	18.9%	18.8%	17.2%
<b>Younger Singles &amp; Couples</b>	55.4%	59.8%	55.4%	59.0%	54.1%	51.3%
	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Note: For fiscal year 2018, the Durham-Chapel Hill, NC HUD Metro MFR Median Family Income for a family of four is \$80,600.

SOURCE: Claritas, Inc.;  
 Zimmerman/Volk Associates, Inc.

**Summary Of Selected Rental Properties***City of Durham, Durham County, North Carolina***July, 2018**

<u>Property (Date Opened)</u> <u>Address</u>	<u>Number</u> <u>of Units</u>	<u>Unit</u> <u>Type</u>	<u>Reported</u> <u>Base Rent</u>		<u>Reported</u> <u>Unit Size</u>	<u>Rent per</u> <u>Sq. Ft.</u>	<u>Additional Information</u>
. . . . . Downtown . . . . .							
<b>Whetstone Apartments</b> <b>(2015)</b> 501 Willard Street	<b>204</b>	Studio/1ba	\$947 to \$1,120	to	511 to 531	\$1.85 to \$2.11	<b>98% occupancy</b> Pool, grills, lounge, fitness center, fireplace, controlled access and pet park.
82 Walk score		1br/1ba	\$1,130 to \$1,605	to	538 to 789	\$2.03 to \$2.10	
		2br/2ba	\$1,435 to \$2,050	to	832 to 1,103	\$1.72 to \$1.86	
<b>The Lofts at Southside</b> <b>(2015)</b> 703 South Roxboro Street	<b>220</b>	1br/1ba	\$978 to \$1,578	to	581 to 807	\$1.68 to \$1.96	<b>97% occupancy</b> Fitness center, pool, playground, grilling area, clubhouse, business center and pet friendly.
28 Walk score		2br/1ba	\$1,171 to \$1,979	to	977 to 1,145	\$1.20 to \$1.73	
		3br/2ba	n/a		1,381	n/a	
<b>Bell West End</b> <b>(2014)</b> 605 West Chapel Hill Street	<b>342</b>	Studio/1ba	\$1,035 to \$1,557	to	443	\$2.34 to \$3.51	<b>98% occupancy</b> Pool, gym, clubhouse, grilling & picnic area, lounge, fitness center, yoga studio and pet park.
84 Walk score		1br/1ba	\$1,182 to \$1,971	to	600 to 873	\$1.97 to \$2.26	
		2br/2ba	\$1,845 to \$2,722	to	908 to 1,168	\$2.03 to \$2.33	
<b>West Village</b> <b>(2015)</b> 600 West Main Street	<b>609</b>	1br/1ba	\$1,249 to \$1,679	to	724 to 819	\$1.73 to \$2.05	<b>n/a</b> Pool, cabanas, courtyards, rooftop pool, sundeck, business center, fitness center, clubhouse, gameroom, grilling stations and bark parks.
84 Walk score		2br/1.5ba	\$1,399 to \$1,699	to	866 to 1,020	\$1.62 to \$1.67	
		2br/2ba	\$2,049 to \$2,399		1,042 to 1,372	\$1.97 to \$1.75	
		3br/2ba	\$2,499 to \$2,699	to	1,312	\$1.90 to \$2.06	
<b>BullHouse Apartments</b> <b>(2017)</b> 504 East Pettigrew Street	<b>305</b>	Studio/1ba	\$1,210 to \$1,374	to	661 to 761	\$1.81 to \$1.83	<b>100% occupancy</b> Yoga room, pool, spa room, bike shop, gather & huddle rooms, rooftop terrace and doggie spa.
80 Walk score		1br/1ba	\$1,325 to \$1,775	to	747 to 866	\$1.77 to \$2.05	
		2br/2ba	\$2,025 to \$2,810	to	1,134 to 1,390	\$1.79 to \$2.02	
		3br/2ba	\$2,770 to \$2,970	to	1,383 to 1,523	\$1.95 to \$2.00	

SOURCE: Zimmerman/Volk Associates, Inc.

**Summary Of Selected Rental Properties***City of Durham, Durham County, North Carolina***July, 2018**

<u>Property (Date Opened)</u> <u>Address</u>	<u>Number of Units</u>	<u>Unit Type</u>	<u>Reported Base Rent</u>	<u>Reported Unit Size</u>	<u>Rent per Sq. Ft.</u>	<u>Additional Information</u>
. . . . . Downtown (continued) . . . . .						
<b>Liberty Warehouse (2017)</b> 530 Foster Street	<b>274</b>	Studio/1ba	\$1,428 to \$2,055	568 to 656	\$2.51 to \$3.13	<b>97% occupancy</b> Clubroom, pool, multimedia center, lounge, fitness center & terrace, yoga room and dog wash.
91 Walk score		1br/1ba	\$1,409 to \$2,735	576 to 998	\$2.45 to \$2.74	
		2br/2ba	\$2,078 to \$3,573	1,039 to 1,278	\$2.00 to \$2.80	
. . . . . West Durham . . . . .						
<b>Clairmont at Hillandale North (2017)</b> 2901 Bertland Avenue	<b>38</b>	1br/1ba	\$1,020 to \$1,050	784	\$1.30 to \$1.34	<b>76% occupancy</b> Pool, fitness center, picnic area, business center, playground, and pet friendly.
37 Walk score		2br/2ba	\$1,250 to \$1,290	1,166 to 1,174	\$1.07 to \$1.10	
<b>Heights South LaSalle (2013)</b> 500 South Lasalle Street	<b>577</b>	1br/1ba	\$1,235 to \$5,071	639 to 819	\$1.93 to \$6.19	<b>98% occupancy</b> Breakfast & coffee bar, pool, fitness center, clubhouse, lounge and pet friendly.
58 Walk score		2br/2ba	\$1,501 to \$4,468	929 to 1,113	\$1.62 to \$4.01	
<b>810 Ninth (2015)</b> 810 9th Street	<b>229</b>	Studio/1ba	\$1,280	549	\$2.33	<b>96% occupancy</b> Yoga studio, outdoor lounge, fitness center, controlled access, coffee bar and pet spa.
81 Walk score		1br/1ba	\$1,335 to \$1,485	719 to 798	\$1.86	
		2br/2ba	\$2,020 to \$2,360	1,123 to 1,163	\$1.80 to \$2.03	
<b>Exchange on Erwin (2017)</b> 2610 Erwin Road	<b>269</b>	Studio/1ba	\$1,365 to \$1,470	620 to 724	\$2.03 to \$2.20	<b>77% occupancy</b> Clubroom, coffee bar, fitness center, pool, sundeck, courtyard and fire pit.
66 Walk score		1br/1ba	\$1,425 to \$1,580	735 to 865	\$1.83 to \$1.94	
		2br/2ba	\$1,990 to \$2,025	1,093 to 1,100	\$1.82 to \$1.84	

**Summary Of Selected Rental Properties***City of Durham, Durham County, North Carolina***July, 2018**

<u>Property (Date Opened)</u> <u>Address</u>	<u>Number of Units</u>	<u>Unit Type</u>	<u>Reported Base Rent</u>	<u>Reported Unit Size</u>	<u>Rent per Sq. Ft.</u>	<u>Additional Information</u>
. . . . . South Durham . . . . .						
<b>The Reserve at Ellis Crossing (2016)</b> 400 Advancement Avenue	336	1br/1ba	\$989 to \$1,145	687 to 937	\$1.22 to \$1.44	<b>98% occupancy</b> <i>Indoor &amp; outdoor pools, deck, fireplace, grilling area, clubroom, barista</i>
90 Walk score		2br/2ba	\$1,299 to \$1,389	1,178 to 1,238	\$1.10 to \$1.12	
		3br/2ba	\$1,525 to \$1,615	1,420	\$1.07 to \$1.14	
<b>Waterstone at Brier Creek (2013)</b> 10022 Meadow Chase Drive	232	1br/1ba	\$1,020 to \$1,400	890	\$1.15 to \$1.57	<b>93% occupancy</b> <i>Clubhouse, business center, grills, athletic club, retreat, pool, sundeck, recreation room, car care center, paw park and pet washing station.</i>
6 Walk score		2br/2ba	\$1,200 to \$1,745	1,186 to 1,324	\$1.01 to \$1.32	
		3br/2ba	\$1,395 to \$1,810	1,489	\$0.94 to \$1.22	
<b>Sorrel Perimeter Park (2017)</b> 3055 Carrington Mill Blvd	262	1br/1ba	\$1,059 to \$1,374	661 to 984	\$1.40 to \$1.60	<b>96% occupancy</b> <i>Fitness center, pool, lounge, indoor &amp; outdoor kitchens and yoga room.</i>
8 Walk score		2br/2ba	\$1,395 to \$1,664	1,105 to 1,279	\$1.26 to \$1.30	
		3br/2ba	\$1,819 to \$1,969	1,420 to 1,471	\$1.28 to \$1.34	
<b>54 Station (2016)</b> 1415 East NC Highway 54	144	1br/1ba	\$1,074	731	\$1.47	<b>n/a</b> <i>Pool, kool deck, outdoor kitchen, fitness center, yoga, organic garden plots and dog park &amp; wash.</i>
29 Walk score		1br/1.5ba	\$1,204	888	\$1.36	
		2br/2ba	\$1,334 to \$1,399	1,084 to 1,193	\$1.17 to \$1.23	

Table 4

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

*Downtown Durham, Durham County, North Carolina*

**July, 2018**

<u>Development (Date Opened)</u> <u>Address</u>	<u>Unit</u> <u>Type</u>	<u>Base Price</u> <u>Range</u>	<u>Unit Size</u> <u>Range</u>	<u>Base</u> <u>Price Per</u> <u>Sq. Ft.</u>	<u>Total</u> <u>Units</u>	<u>Walk</u> <u>Score</u>	
<b>...New Construction...</b>							
<b>The Bartlett (2019)</b>	<b>...Condominiums...</b>					<b>34</b>	<b>91</b>
1105 West Main Street	1br/1.5ba	\$349,900 to	985	\$355 to			
	1br/1ba	\$389,900	870	\$448			
	2br/2ba	\$515,000 to	1,285 to	\$401 to			
	2br/2ba	\$1,050,000	2,020	\$520			
	3br/2.5ba	\$1,131,900	2,225	\$509			
	<b>...Penthouses...</b>						
	2br/2.5ba	\$1,065,000	2,010	\$530			
	3br/2.5ba	\$1,295,000	2,440	\$531			
<b>Mangum Flats (2018)</b>	<b>...Condominiums...</b>					<b>27</b>	<b>86</b>
515 North Mangum Street	1br/1.5ba	\$352,900	853	\$414			
	1br/1ba	\$352,900	890	\$397			
	2br/2ba	\$495,900	1,343	\$369			
	3br/3ba	\$709,900	1,788	\$397			
	3br/2ba	\$799,900	1,750	\$457			
<b>One City Center (2018)</b>	<b>...Condominiums...</b>					<b>109</b>	<b>92</b>
110 North Corcoran Street	1br/1ba	\$399,900	735	\$544			
	1br/1ba	\$459,900	834	\$551			
	2br/2ba	\$989,000	1,907	\$519			
<b>ELEVEN (2019)</b>	<b>...Townhouses...</b>					<b>11</b>	<b>86</b>
524 North Mangum Street	3br/3ba	\$559,900 to	1,752 to	\$320 to			
	4br/4ba	\$1,199,900	3,463	\$346			
<b>...Resale Listings...</b>							
<b>Bullington Warehouse (1984)</b>	<b>...Condominiums...</b>					<b>70</b>	
500 N. Duke Street	1br/1ba	\$288,000	800	\$360			
	1br/1ba	\$295,000	780	\$378			
	2br/1ba	\$409,000	1,205	\$339			
<b>Durham Central Park CoHo (2014)</b>	<b>...Condominiums...</b>					<b>24</b>	<b>71</b>
130 Hunt Street	3br/2ba	\$567,000	1,416	\$400			

SOURCE: Multiple Listing Service;  
Zimmerman/Volk Associates, Inc.

**Target Groups For New Multi-Family For Rent**  
***The Downtown Durham Study Area***  
*City of Durham, Durham County, North Carolina*

. . . . . Number of Households . . . . .

<b>Empty Nesters &amp; Retirees**</b>	<i>Below 30% AMI†</i>	<i>31% to 60% AMI†</i>	<i>61% to 80% AMI†</i>	<i>Above 100% AMI†</i>	<i>Total</i>	<i>Percent of Total</i>
The One Percenters	0	0	0	7	7	0.3%
Old Money	0	0	0	5	5	0.2%
The Social Register	0	0	0	3	3	0.1%
Affluent Empty Nesters	0	0	1	5	6	0.2%
Urban Establishment	6	5	5	29	45	1.7%
Second City Establishment	1	1	1	4	7	0.3%
Mainstream Empty Nesters	5	8	7	25	45	1.7%
Middle-American Retirees	4	6	4	16	30	1.1%
Multi-Ethnic Empty Nesters	2	2	2	5	11	0.4%
Cosmopolitan Couples	14	10	10	25	59	2.2%
Blue-Collar Retirees	8	10	8	17	43	1.6%
Middle-Class Move-Downs	3	4	2	5	14	0.5%
Hometown Seniors	6	5	3	4	18	0.7%
Second City Seniors	79	48	37	46	210	7.8%
Subtotal:	128	99	80	196	503	18.6%
<b>Traditional &amp; Non-Traditional Families††</b>						
e-Type Families	0	0	0	3	3	0.1%
Unibox Transferees	5	8	7	36	56	2.1%
Multi-Ethnic Families	3	4	4	9	20	0.7%
Uptown Families	8	9	9	16	42	1.6%
Multi-Cultural Families	1	1	1	2	5	0.2%
Single-Parent Families	12	8	4	6	30	1.1%
Inner-City Families	7	5	3	4	19	0.7%
In-Town Families	12	10	7	7	36	1.3%
New American Strivers	68	48	41	33	190	7.0%
Subtotal:	116	93	76	116	401	14.8%

Note: For fiscal year 2018, the Durham-Chapel Hill, NC HUD Metro MFR Median Family Median for a family of four is \$80,600.

\*\* Predominantly one- and two-person households.

†† Predominantly three -to five-person households.

SOURCE: Claritas, Inc.;  
Zimmerman/Volk Associates, Inc.

**Target Groups For New Multi-Family For Rent**  
***The Downtown Durham Study Area***  
*City of Durham, Durham County, North Carolina*

. . . . . *Number of Households* . . . . .

<b>Younger Singles &amp; Couples**</b>	<i>Below 30% AMI†</i>	<i>31% to 60% AMI†</i>	<i>61% to 80% AMI†</i>	<i>Above 100% AMI†</i>	<i>Total</i>	<i>Percent of Total</i>
New Power Couples	1	1	1	4	7	0.3%
New Bohemians	15	9	11	46	81	3.0%
Cosmopolitan Elite	1	1	1	4	7	0.3%
The VIPs	16	16	25	88	145	5.4%
Fast-Track Professionals	22	22	35	122	201	7.4%
Suburban Achievers	5	5	5	11	26	1.0%
Suburban Strivers	77	63	73	117	330	12.2%
Small-City Singles	9	9	9	14	41	1.5%
Downtown Couples	10	8	6	9	33	1.2%
Downtown Proud	27	16	15	21	79	2.9%
Twentysomethings	162	110	115	149	536	19.8%
Second-City Strivers	52	39	40	48	179	6.6%
Multi-Ethnic Singles	58	34	23	22	137	5.1%
Subtotal:	455	333	359	655	1,802	66.6%
<b>Total Households:</b>	<b>699</b>	<b>525</b>	<b>515</b>	<b>967</b>	<b>2,706</b>	<b>100.0%</b>
<b>Percent of Total:</b>	<b>25.8%</b>	<b>19.4%</b>	<b>19.1%</b>	<b>35.7%</b>	<b>100.0%</b>	

Note: For fiscal year 2018, the Durham-Chapel Hill, NC HUD Metro MFR Median Family Median for a family of four is \$80,600.

\*\* Predominantly one- and two-person households.

SOURCE: Claritas, Inc.;  
 Zimmerman/Volk Associates, Inc.

**Optimum Market Position: Market-Rate Rents**  
**Mixed-Income Redevelopments**  
***Downtown Durham Study Area***  
*City of Durham, Durham County, North Carolina*  
**October, 2018**

<u>Number of Households</u>	<u>Site</u> <i>Households by Income</i>	<u>Percent Mix</u>	<u>Base Rent/Price Range*</u>	<u>Base Unit Size Range</u>	<u>Base Rent/Price Per Sq. Ft.*</u>	<u>Annual Market Capture</u>
<b>Years 1 and 2</b>						
<b>503</b>	<b>J.J. Henderson</b>	<b>258 seniors</b>				<b>60 to 75</b>
	<b>80 new du; 178 renovated</b>					
<b>128</b>	Senior Households With Incomes Below 30% AMI					15 19
<b>99</b>	Senior Households With Incomes Between 31% and 60% AMI					12 15
<b>80</b>	Senior Households With Incomes Between 61% and 80% AMI					10 12
<b>196</b>	Senior Households With Incomes Above 100% AMI					24 29
	<i>..... Market-Rate .....</i>					
	Studio/1ba	75%	\$950 to \$1,000	425 to 500	\$2.00 to \$2.24	
	1br/1ba	25%	\$1,100 to \$1,175	550 to 600	\$1.96 to \$2.00	
<b>Years 1 and 2</b>						
<b>2,706</b>	<b>Oldham/Liberty</b>	<b>105 seniors</b>				<b>325 to 406</b>
	<b>550 new du</b>					
		<b>108 family</b>				
<b>699</b>	Households With Incomes Below 30% AMI					84 105
<b>525</b>	Households With Incomes Between 31% and 60% AMI					63 79
<b>515</b>	Households With Incomes Between 61% and 80% AMI					62 77
<b>967</b>	Households With Incomes Above 100% AMI					116 145
	<i>..... Market-Rate .....</i>					
	Studio/1ba	35%	\$1,150 to \$1,350	450 to 600	\$2.25 to \$2.56	
	1br/1ba	45%	\$1,450 to \$1,650	650 to 800	\$2.06 to \$2.23	
	2br/2ba	20%	\$2,000 to \$2,200	950 to 1,100	\$2.00 to \$2.11	

NOTE: Base rents/prices in year 2018 dollars and exclude floor, view or lot premiums, options, or upgrades.

SOURCE: Zimmerman/Volk Associates, Inc.



**Optimum Market Position: Market-Rate Rents**  
**Mixed-Income Redevelopments**  
***Downtown Durham Study Area***  
*City of Durham, Durham County, North Carolina*  
**October, 2018**

<u>Number of Households</u>	<u>Site</u> <i>Households by Income</i>	<u>Percent Mix</u>	<u>Base Rent/Price Range*</u>	<u>Base Unit Size Range</u>	<u>Base Rent/Price Per Sq. Ft.*</u>	<u>Annual Market Capture</u>
<b>Year 3</b>						
<u>2,706</u>	<b>Office/County Criminal Justice</b>					<u>271 to 325</u>
	<b>290 new du</b>					
699	Households With Incomes Below 30% AMI					70 84
525	Households With Incomes Between 31% and 60% AMI					53 63
515	Households With Incomes Between 61% and 80% AMI					52 62
967	Households With Incomes Above 100% AMI					97 116
			..... <i>Market-Rate</i> .....			
	1br/1ba	75%	\$1,425 to \$1,725	700 to 850	\$2.03 to \$2.04	
	2br/2ba	25%	\$1,875 to \$2,075	1,000 to 1,150	\$1.80 to \$1.88	
<b>Years 3 and 4</b>						
<u>2,706</u>	<b>Forest Hill Heights</b>	<b>55 seniors</b>				<u>271 to 325</u>
	<b>830 new du</b>					
699	Households With Incomes Below 30% AMI					70 84
525	Households With Incomes Between 31% and 60% AMI					53 63
515	Households With Incomes Between 61% and 80% AMI					52 62
967	Households With Incomes Above 100% AMI					97 116
			..... <i>Market-Rate</i> .....			
	Studio/1ba	30%	\$1,000 to \$1,250	500 to 650	\$1.92 to \$2.00	
	1br/1ba	45%	\$1,350 to \$1,600	700 to 850	\$1.88 to \$1.93	
	2br/2ba	25%	\$1,850 to \$2,050	1,000 to 1,150	\$1.78 to \$1.85	

NOTE: Base rents/prices in year 2018 dollars and exclude floor, view or lot premiums, options, or upgrades.

SOURCE: Zimmerman/Volk Associates, Inc.

**Optimum Market Position: Market-Rate Rents**  
**Mixed-Income Redevelopments**  
***Downtown Durham Study Area***  
*City of Durham, Durham County, North Carolina*  
**October, 2018**

<u>Number of Households</u>	<u>Site</u> <i>Households by Income</i>	<u>Percent Mix</u>	<u>Base Rent/Price Range*</u>	<u>Base Unit Size Range</u>	<u>Base Rent/Price Per Sq. Ft.*</u>	<u>Annual Market Capture</u>
<b>Year 4</b>						
<b><u>2,706</u></b>	<b>Southside Phase III</b>					<b><u>139 to 174</u></b>
	<b>152 new du</b>					
699	Households With Incomes Below 30% AMI					56 70
525	Households With Incomes Between 31% and 60% AMI					42 53
515	Households With Incomes Between 61% and 80% AMI					41 52
967	Households With Incomes Above 100% AMI					77 97
			<i>..... Market-Rate .....</i>			
	Studio / 1ba	30%	\$950 to \$1,000	500 to 550	\$1.82 to \$1.90	
	1br / 1ba	40%	\$1,100 to \$1,350	600 to 750	\$1.80 to \$1.83	
	2br / 1ba	30%	\$1,550 to \$1,750	950 to 1,100	\$1.59 to \$1.63	
<b>Year 5 to 7</b>						
<b><u>2,706</u></b>	<b>Fayette Place</b>					<b><u>139 to 174</u></b>
	<b>550 new du</b>					
699	Households With Incomes Below 30% AMI					56 70
525	Households With Incomes Between 31% and 60% AMI					42 53
515	Households With Incomes Between 61% and 80% AMI					41 52
967	Households With Incomes Above 100% AMI					77 97
			<i>..... Market-Rate .....</i>			
	1br / 1ba	40%	\$1,050 to \$1,200	600 to 700	\$1.71 to \$1.75	
	2br / 1ba	35%	\$1,450 to \$1,600	850 to 950	\$1.68 to \$1.71	
	3br / 1.5ba TH	25%	\$2,050 to \$2,150	1,200 to 1,300	\$1.65 to \$1.71	

NOTE: Base rents/prices in year 2018 dollars and exclude floor, view or lot premiums, options, or upgrades.

SOURCE: Zimmerman/Volk Associates, Inc.

**Optimum Market Position: Market-Rate Rents**  
**Mixed-Income Redevelopments**  
***Downtown Durham Study Area***  
*City of Durham, Durham County, North Carolina*  
**October, 2018**

<u>Number of Households</u>	<u>Site</u> <i>Households by Income</i>	<u>Percent Mix</u>	<u>Base Rent/Price Range*</u>	<u>Base Unit Size Range</u>	<u>Base Rent/Price Per Sq. Ft.*</u>	<u>Annual Market Capture</u>
<b>Year 6</b>						
<u>2,706</u>	<b>Rigsbee Station</b>					<u>139 to 174</u>
	<b>140 new du</b>					
699	Households With Incomes Below 30% AMI					56 70
525	Households With Incomes Between 31% and 60% AMI					42 53
515	Households With Incomes Between 61% and 80% AMI					41 52
967	Households With Incomes Above 100% AMI					77 97
			..... <i>Market-Rate</i> .....			
	1br/1ba	60%	\$1,500 to \$1,700	650 to 800	\$2.13 to \$2.31	
	2br/2ba	40%	\$2,050 to \$2,250	950 to 1,100	\$2.05 to \$2.16	

NOTE: Base rents/prices in year 2018 dollars and exclude floor, view or lot premiums, options, or upgrades.

SOURCE: Zimmerman/Volk Associates, Inc.

# CONCEPTUAL SITE OPTIONS

## DHA OFFICE, CRIMINAL JUSTICE BUILDING



VIEW OF THE DHA PARKING AREA



VIEW OF DHA OFFICE



VIEW OF CRIMINAL JUSTICE BUILDING



### OPTION 1



### OPTION 2



### OPTION 3



### OPTION 4



# CONCEPTUAL SITE OPTIONS

## RIGSBEE AVENUE SUB-STATION



VIEW OF RIGSBEE AVENUE SUB-STATION



VIEW OF DURHAM CENTRAL PARK



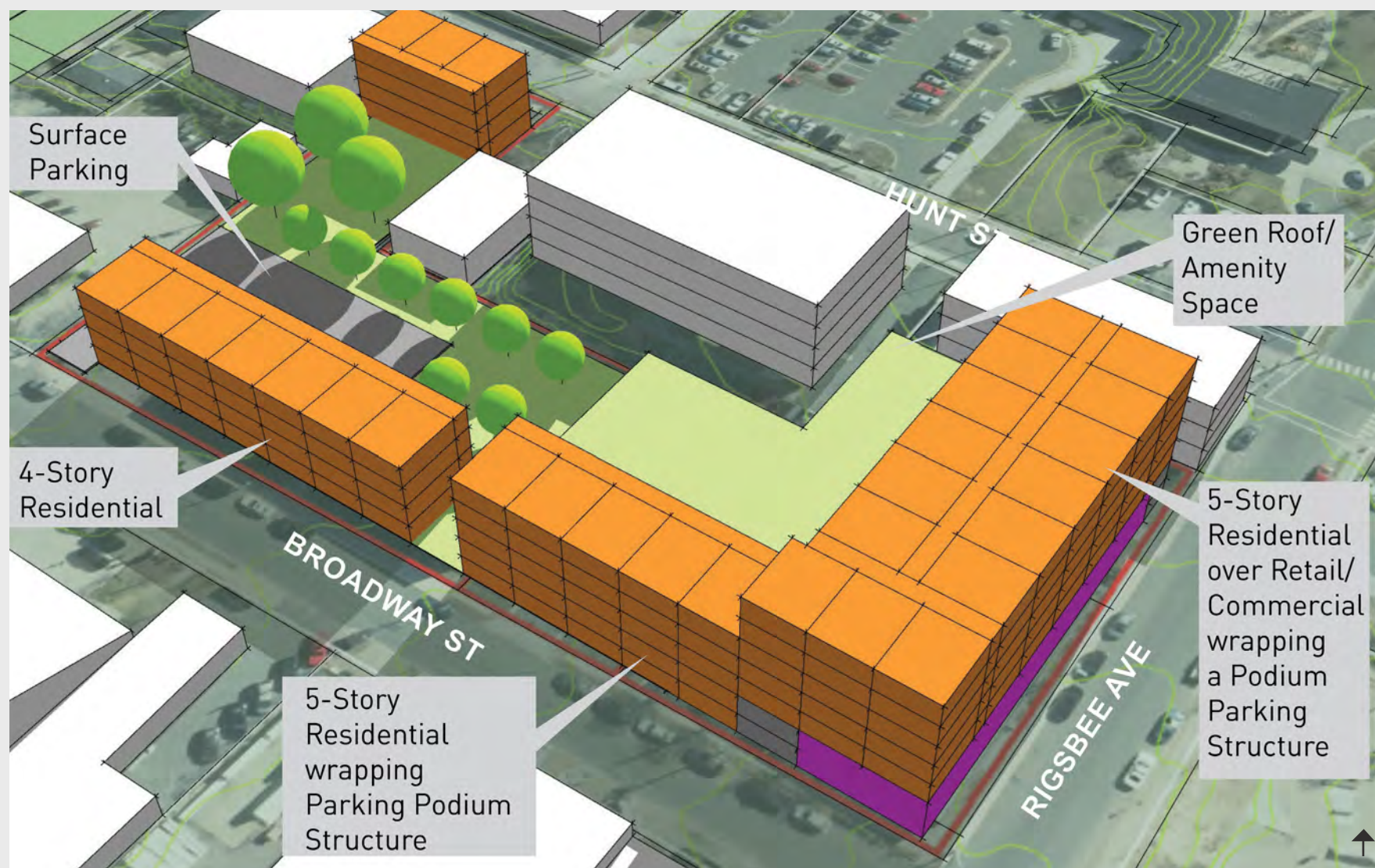
### OPTION 1



UNITS: 105  
RETAIL: 13,100 SF



### OPTION 2

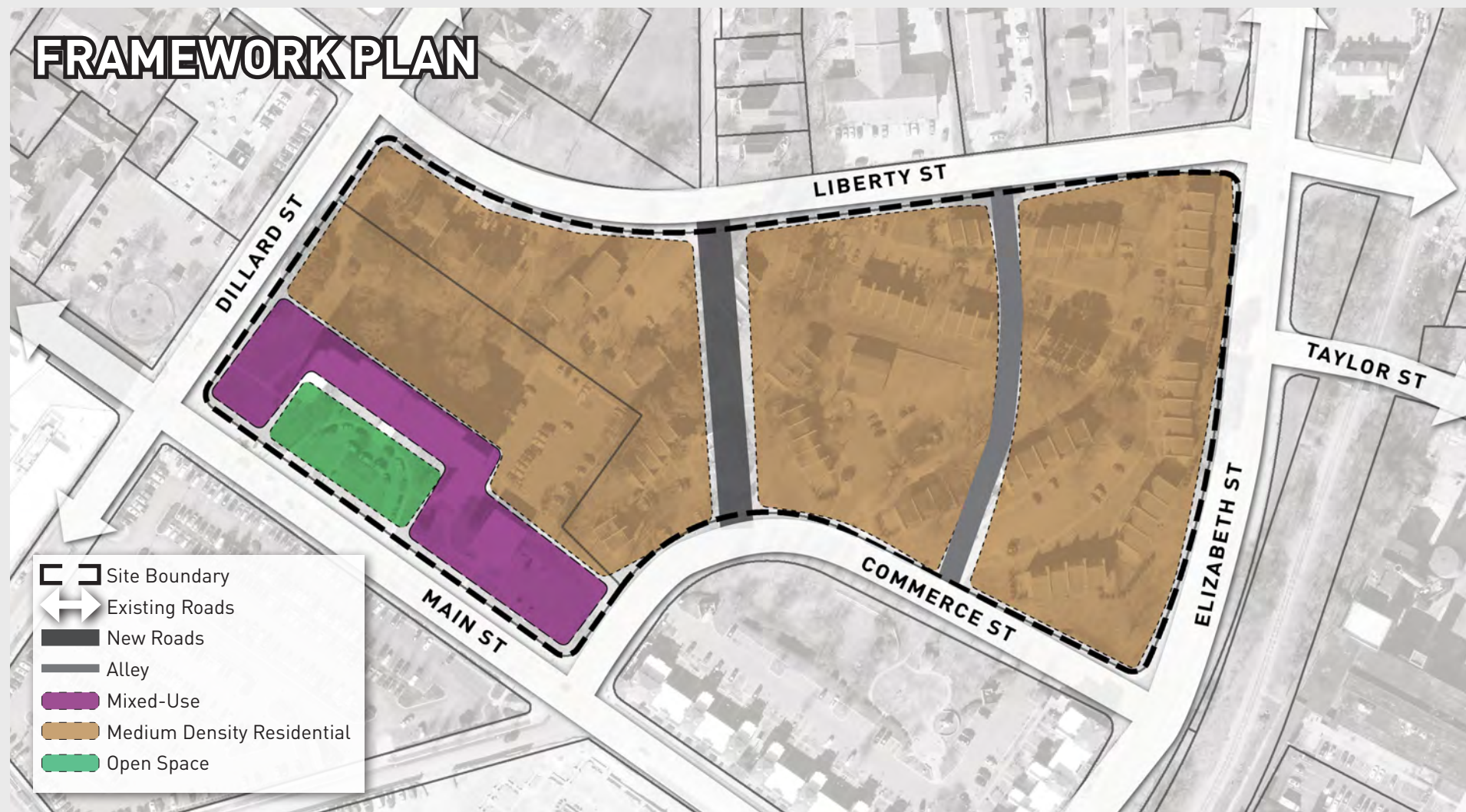


UNITS: 140  
RETAIL: 9,300 SF



# OPTION 1

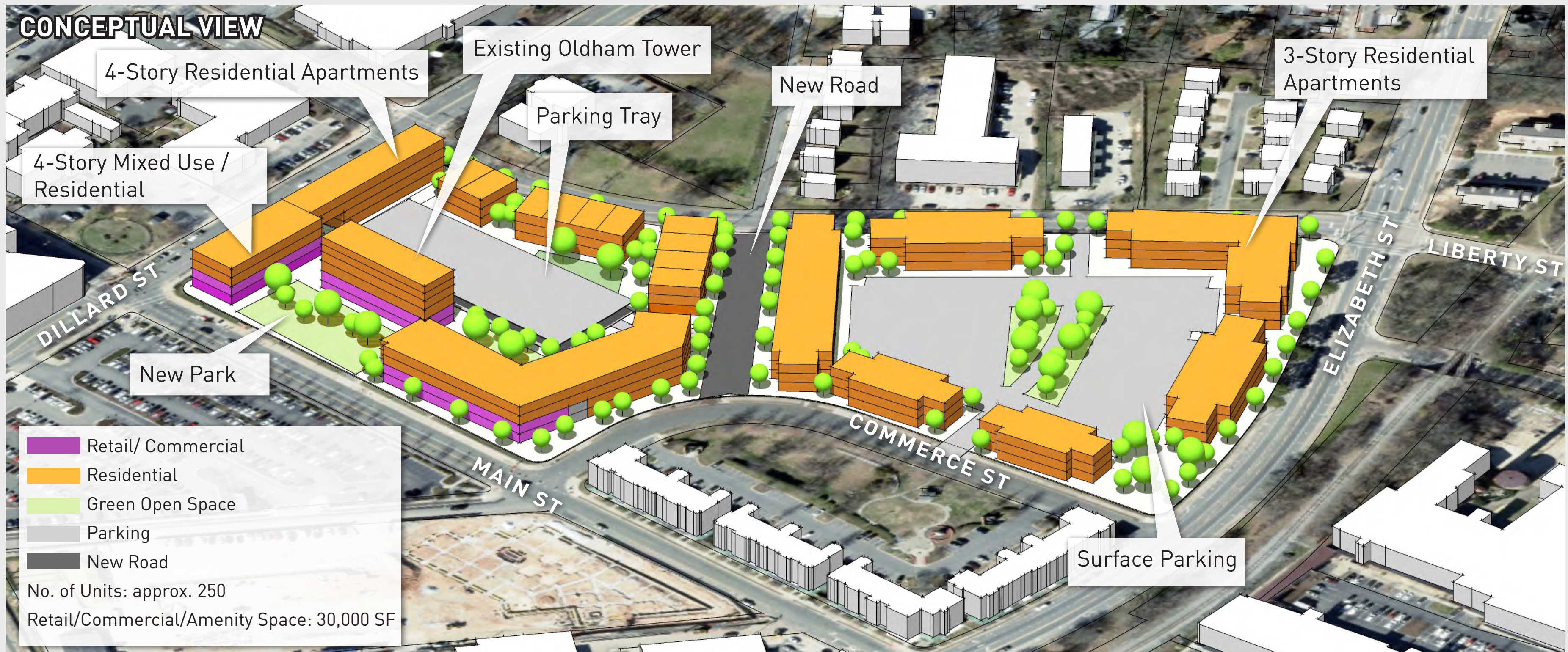
## FRAMEWORK PLAN



## CONCEPTUAL SITE PLAN



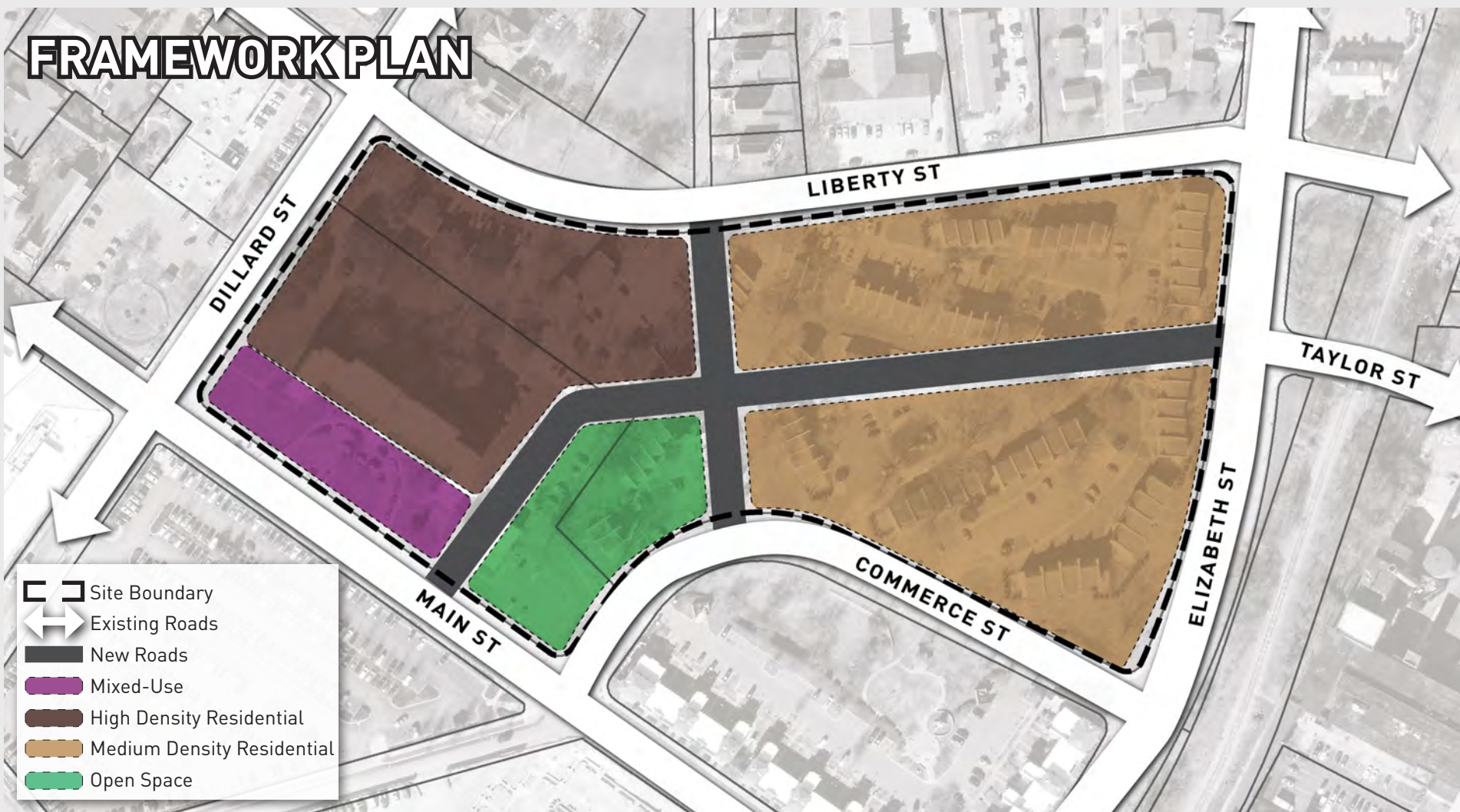
## CONCEPTUAL VIEW



# CONCEPTUAL SITE OPTIONS: OLDHAM & LIBERTY

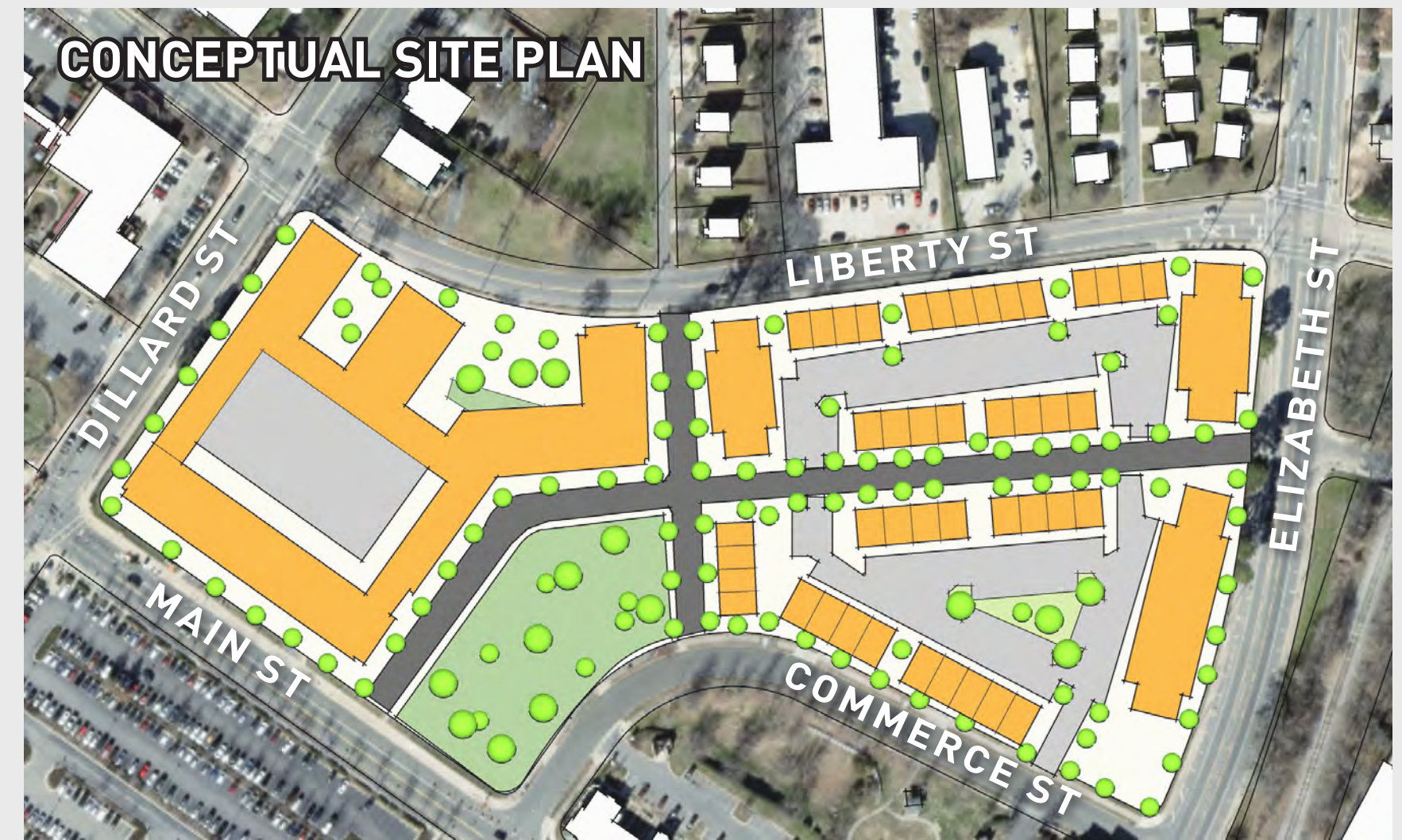
# OPTION 2

## FRAMEWORK PLAN



- Site Boundary
- Existing Roads
- New Roads
- Mixed-Use
- High Density Residential
- Medium Density Residential
- Open Space

## CONCEPTUAL SITE PLAN



## CONCEPTUAL VIEW

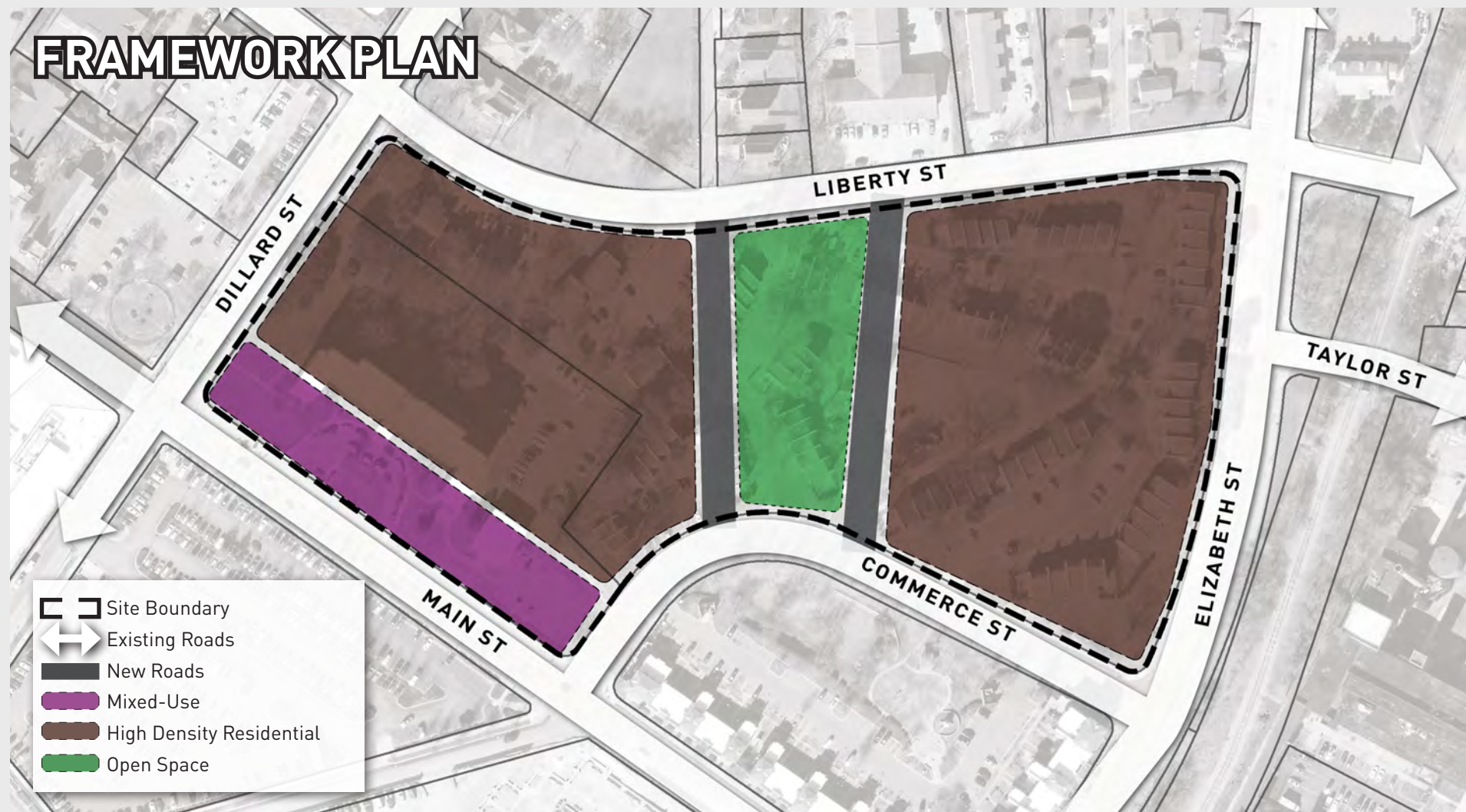


- Retail/ Commercial
  - Residential
  - Green Open Space
  - Parking
  - New Road
- No. of Units: approx. 550  
 Retail/Commercial/Amenity Space: 23,000 SF

# CONCEPTUAL SITE OPTIONS: OLDHAM & LIBERTY

# OPTION 3

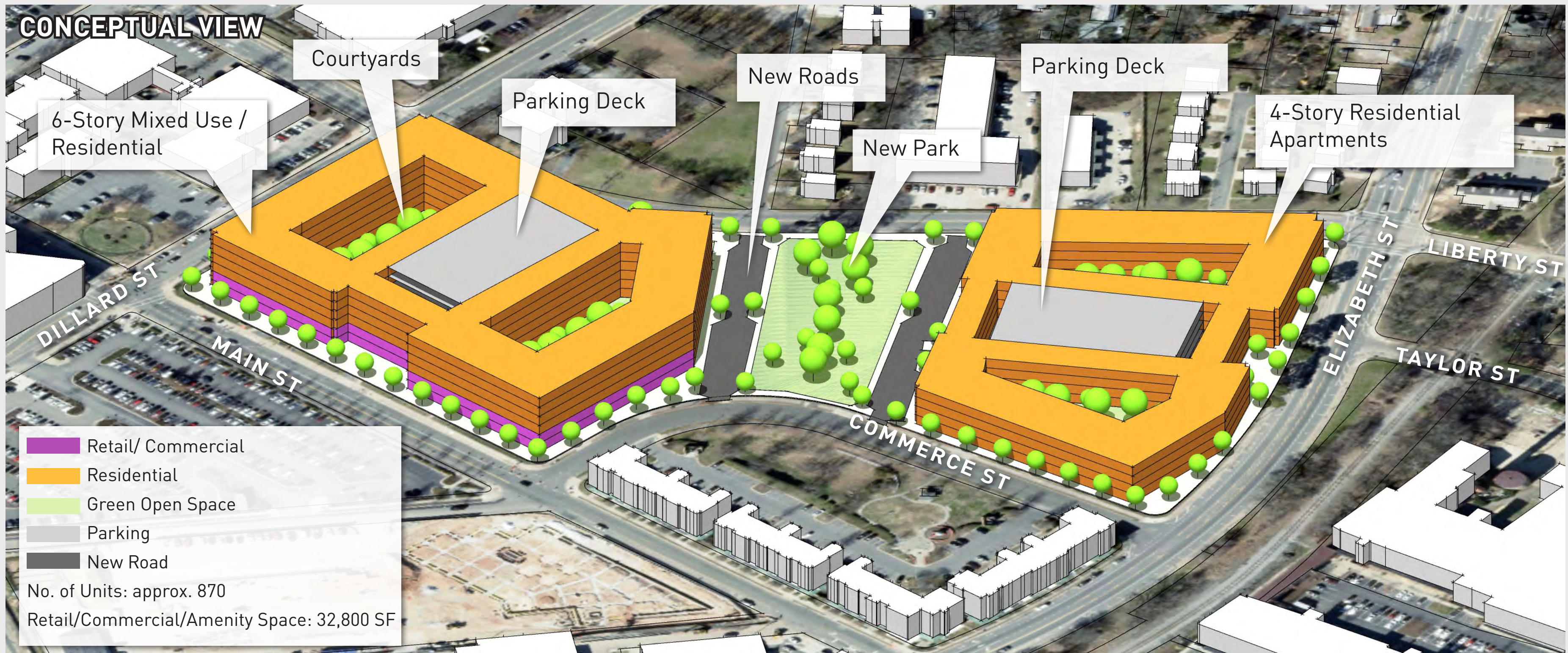
## FRAMEWORK PLAN



## CONCEPTUAL SITE PLAN



## CONCEPTUAL VIEW



# CONCEPTUAL SITE OPTIONS: OLDHAM & LIBERTY



# OPTION 1

## FRAMEWORK PLAN



## CONCEPTUAL SITE PLAN



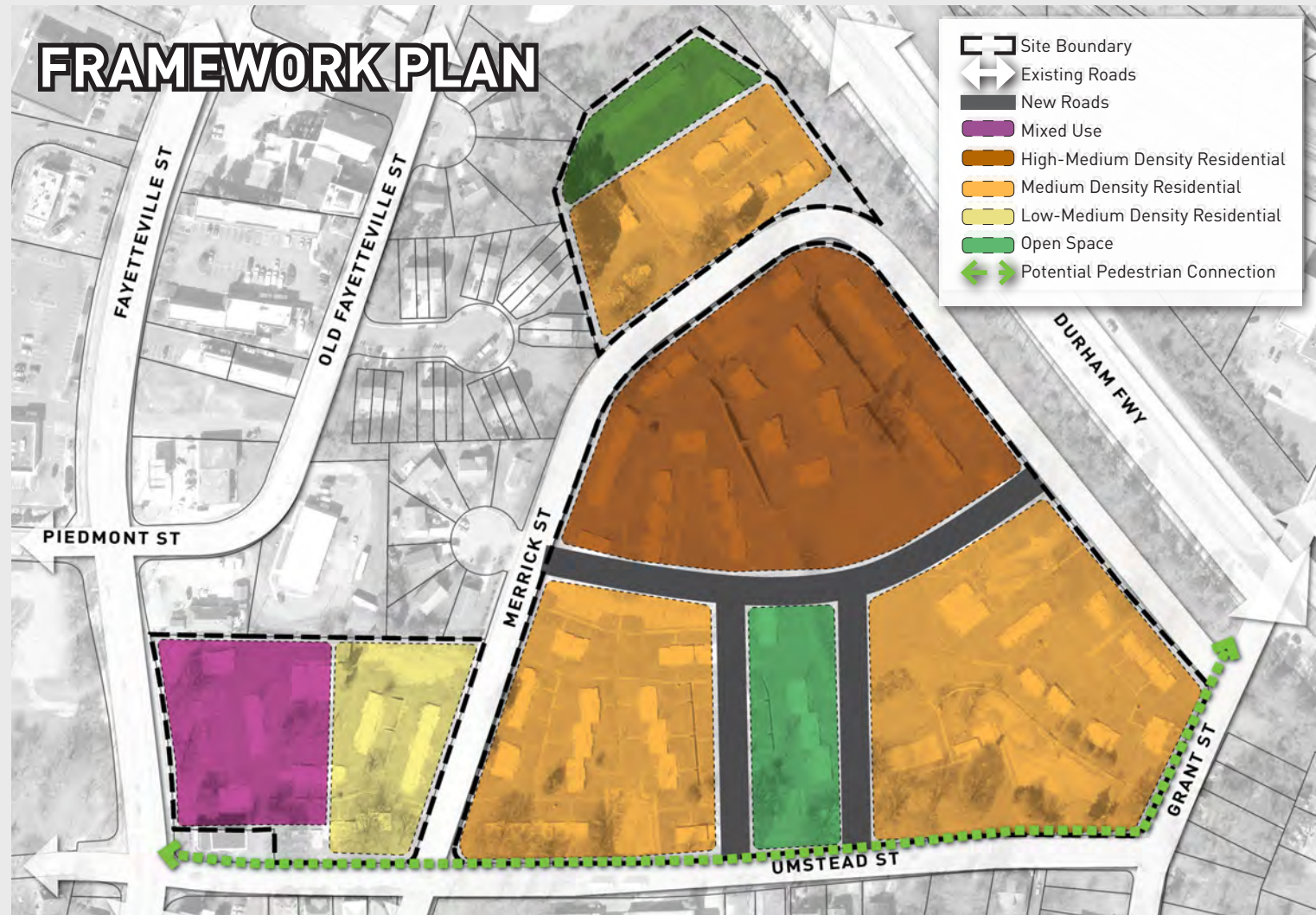
## CONCEPTUAL VIEW



# CONCEPTUAL SITE OPTIONS: FAYETTE PLACE

# OPTION 2

## FRAMEWORK PLAN



## CONCEPTUAL SITE PLAN



## CONCEPTUAL VIEW



# CONCEPTUAL SITE OPTIONS: FAYETTE PLACE

DHA DOWNTOWN & NEIGHBORHOOD PLANNING

Date: July 23, 2018



# SOUTHSIDE PHASE III



Southside Revitalization Phase II Buildings



View From Roxboro Street Looking North



AERIAL VIEW

## OPTION 1

No. of Units: approx. 102

## OPTION 2

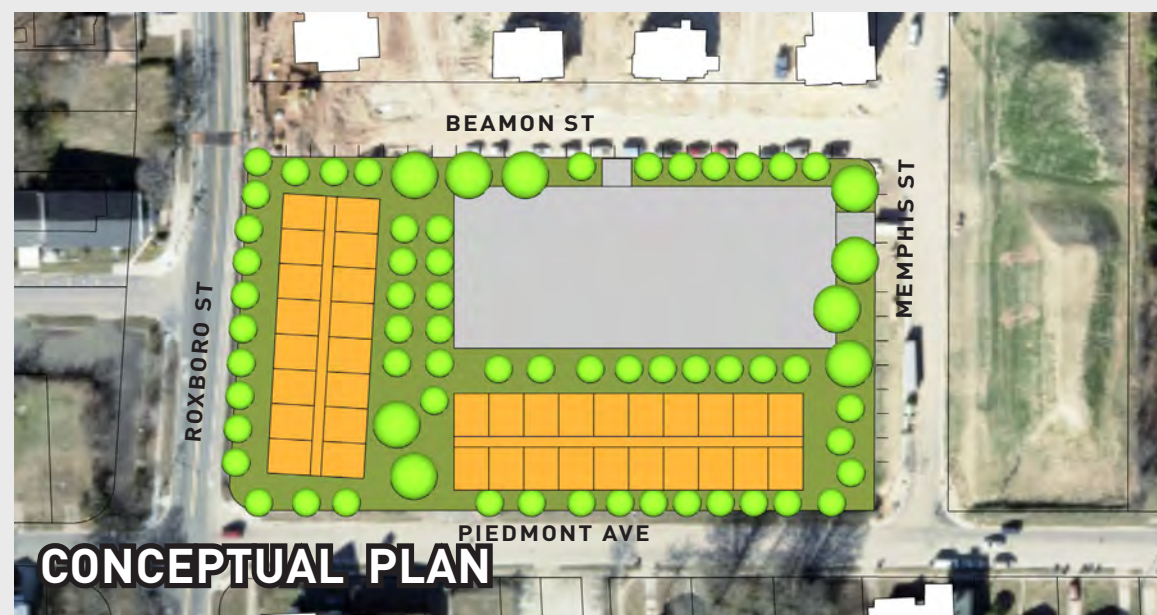
No. of Units: approx. 152

## OPTION 3\*

No. of Units: approx. 39



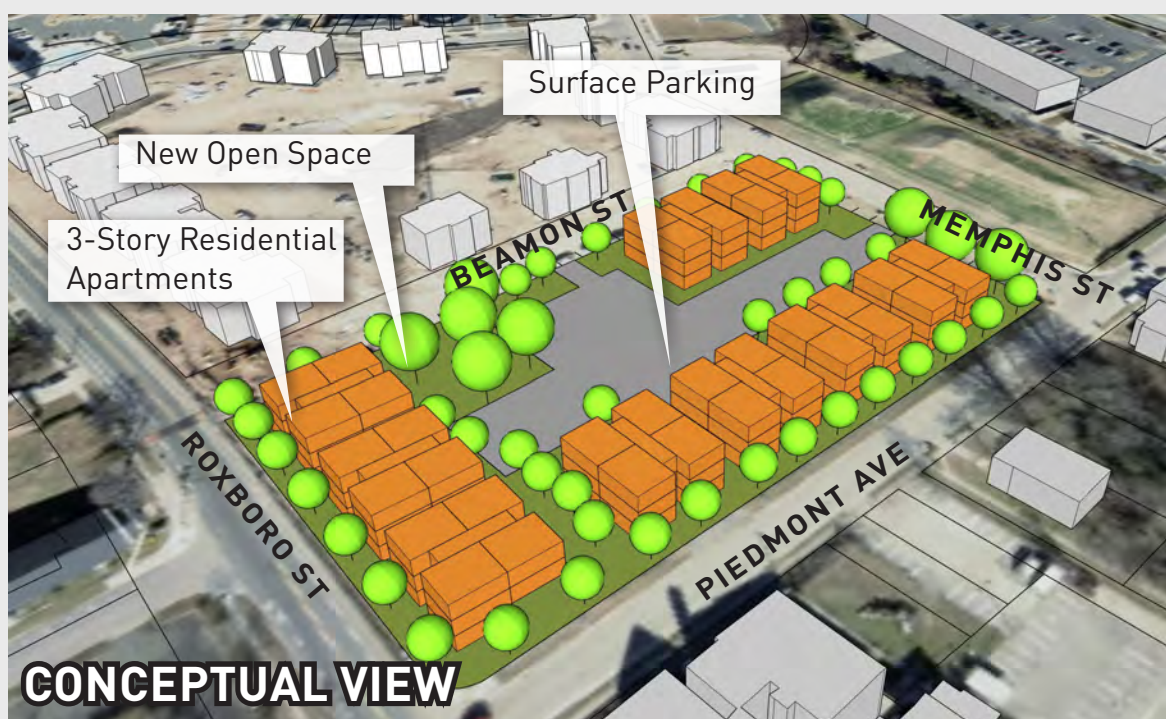
CONCEPTUAL PLAN



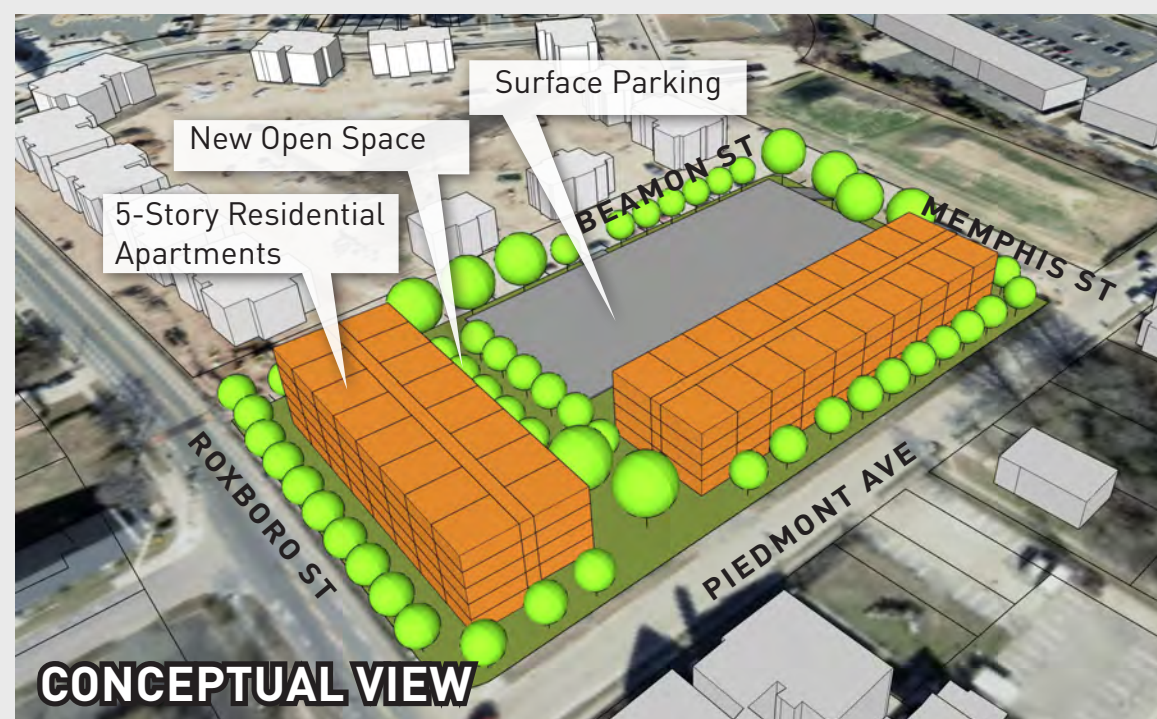
CONCEPTUAL PLAN



CONCEPTUAL PLAN



CONCEPTUAL VIEW



CONCEPTUAL VIEW



CONCEPTUAL VIEW

\*Source : City of Durham: Original Plan developed for Southside Revitalization effort

# CONCEPTUAL SITE OPTIONS: SOUTHSIDE PHASE III

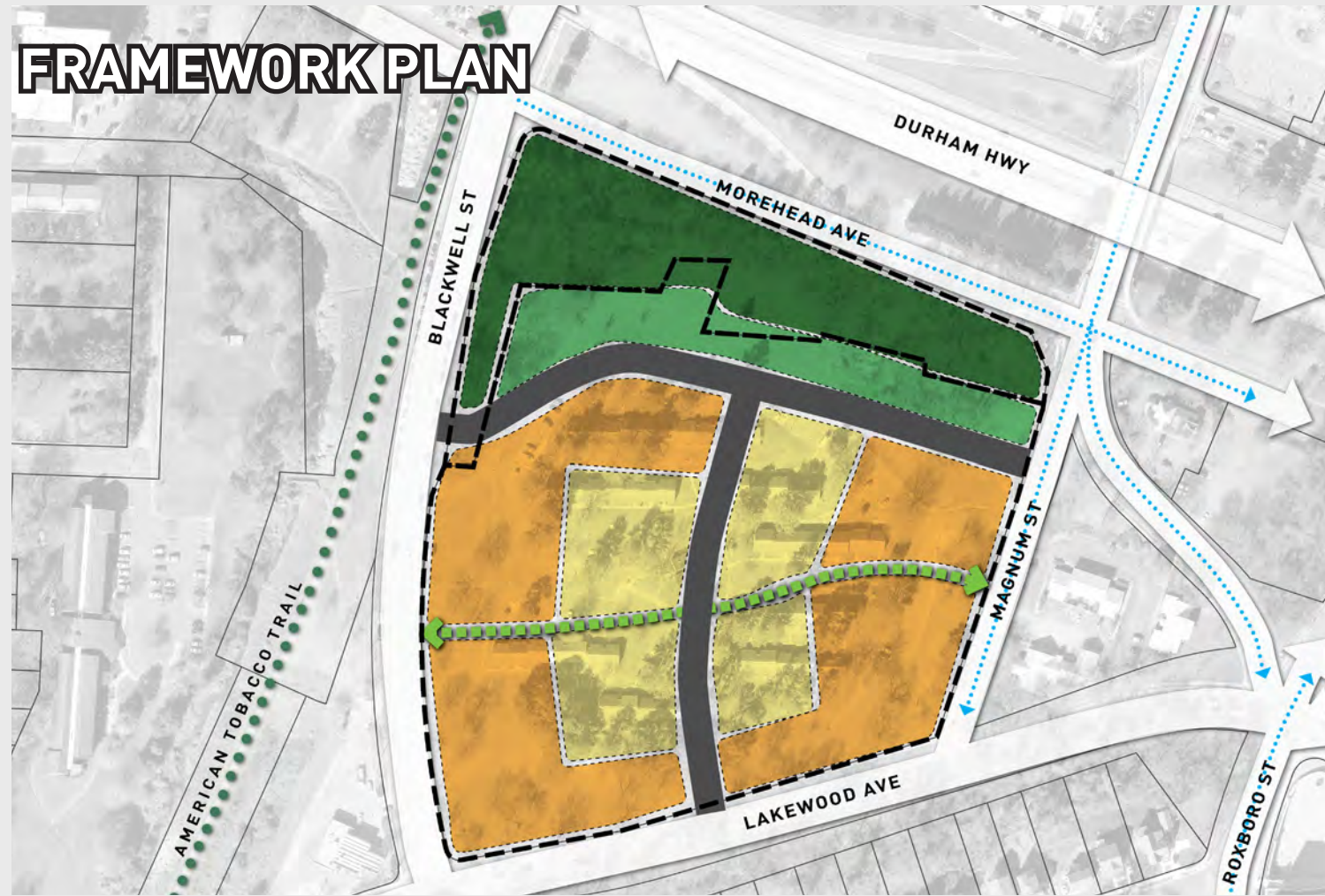
DHA DOWNTOWN & NEIGHBORHOOD PLANNING

Date: July 23, 2018



# OPTION 1

## FRAMEWORK PLAN



## CONCEPTUAL SITE PLAN



	Site Boundary
	Existing Roads
	One-way Streets
	American Tobacco Trail
	New Roads
	Parking
	Pedestrian Pathway
	Medium Density Residential
	Low Density Residential
	Open Space
	Forest Area
	Potential Pedestrian Connection

**No. of Units: approx. 230**

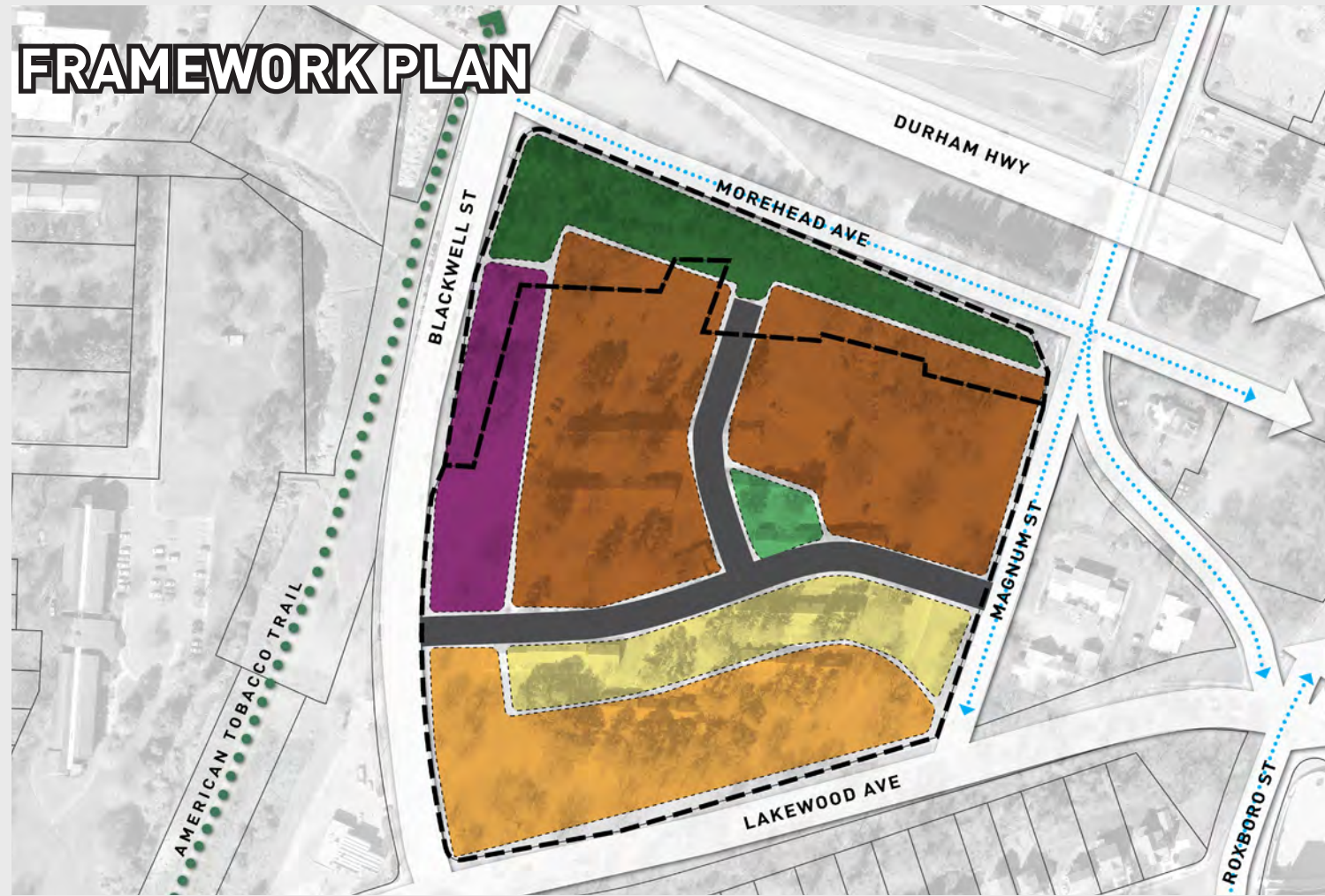


## CONCEPTUAL VIEW

# CONCEPTUAL SITE OPTIONS: FOREST HILL HEIGHTS

# OPTION 2

## FRAMEWORK PLAN



## CONCEPTUAL SITE PLAN



- Site Boundary
- Existing Roads
- One-way Streets
- American Tobacco Trail
- New Roads
- Parking
- Pedestrian Pathway
- High-Medium Residential
- Medium Density Residential
- Low-Medium Density Residential
- Retail
- Mixed-use
- Open Space
- Forest Area

**No. of Units: approx. 800**  
**Retail/Commercial/Amenity**  
**Space: 19,600 SF**



## CONCEPTUAL VIEW

# CONCEPTUAL SITE OPTIONS: FOREST HILL HEIGHTS

# J.J. HENDERSON HOUSING CENTER



Morehead Avenue looking towards J.J. Henderson



Potential location for new housing



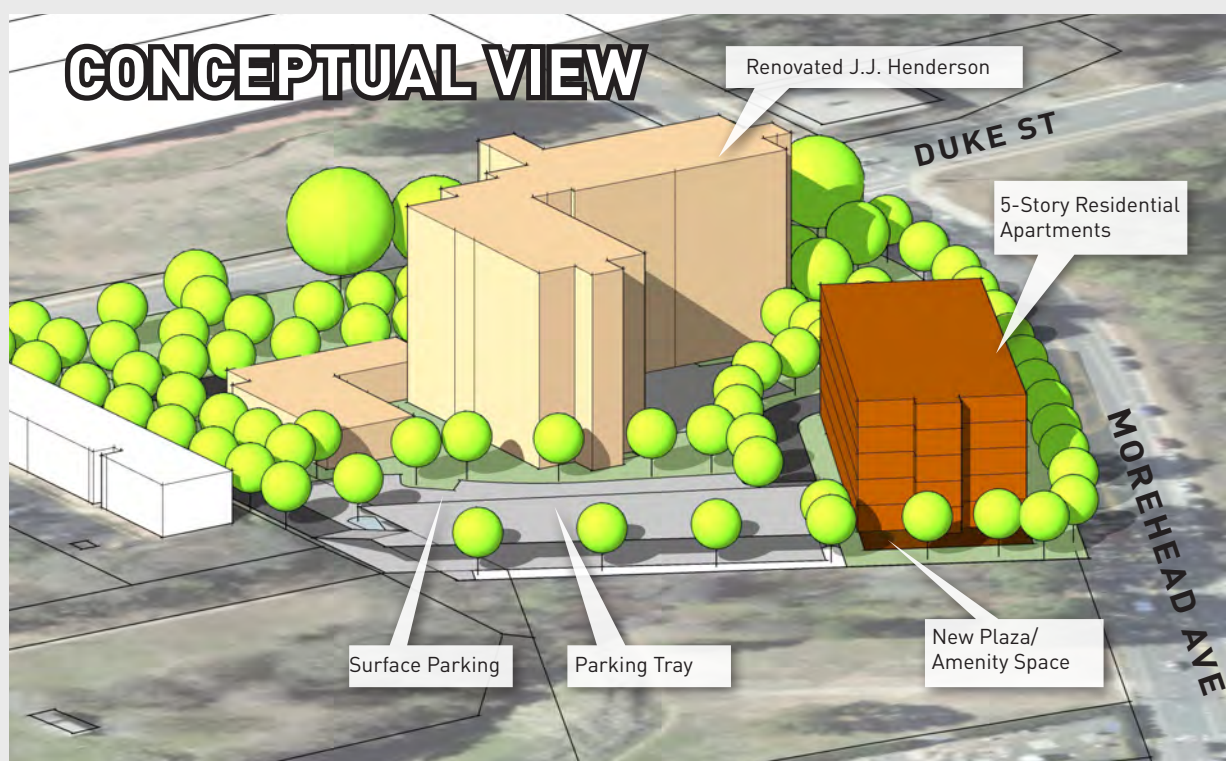
J.J. Henderson Building



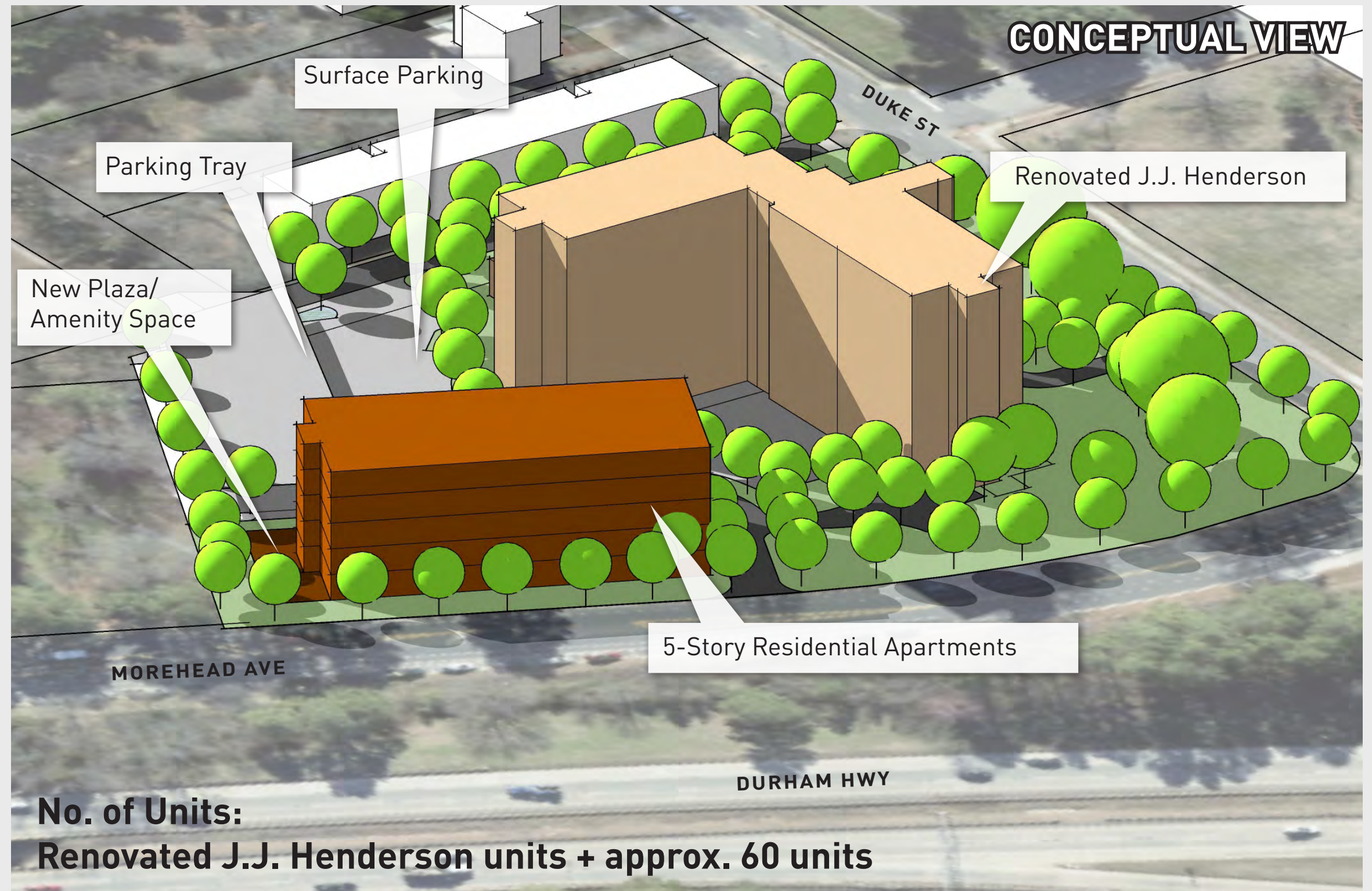
AERIAL VIEW



PLAN



CONCEPTUAL VIEW



CONCEPTUAL VIEW

**No. of Units:**  
 Renovated J.J. Henderson units + approx. 60 units

## CONCEPTUAL SITE OPTIONS: JJ HENDERSON

# DHA DOWNTOWN & NEIGHBORHOOD PLANNING

## COMMUNITY VISIONING SUMMARY



**April 18, 2018**

Durham Housing Authority and City of Durham | Durham NC

**DRAFT**









# OVERVIEW

**Location:** Durham County Social Services Building, 414 East Main Street, 2nd Floor, Rooms A, B & C, Durham NC  
**Time:** 5:30 p.m. - 7:30 p.m.  
**No. of Participants:** 60

Durham Housing Authority, the City of Durham and the DHA Downtown & Neighborhood Planning Team hosted their first public workshop on April 18, 2018. The main goal was to provide an update on the existing conditions assessment and garner maximum input from the community on the overall vision for the development of a comprehensive plan for DHA and City-Owned properties in the downtown area, through four interactive planning stations.

Overview Presentation on DHA Downtown & Neighborhood Planning Effort (40 min): A short overview on the Plan process was presented, which included a brief background on the project area, an update on the process and an overview of the existing conditions assessment and resident needs assessment summary. It was followed by an explanation of the four planning stations and the visioning exercises. The participants were asked to rotate through the interactive stations to express their comments and concerns.

## **Visioning Exercises**

- **Issues and Opportunities Matrix**

This exercise was initiated at a Strategic Advisory Group (SAG) meeting on March 20th, 2018. The SAG members were asked to identify issues and opportunities under each of the following topics:

- Housing
- Economic Development
- Open Space and Circulation
- Safety and Community Services

Input from the resident survey and Resident Meeting were added to the list of issues and opportunities identified by the SAG members. The combined list was available for the Workshop participants to either prioritize an issue (using dots) or add to the list (using post-it notes).

- **Change – No-change**

Participants were asked to use two different colored dots to identify areas that they wanted to see improvements/change and areas that they wanted to preserve, on a base map of the overall study area. The participants could also leave behind specific descriptions/details using post-it notes.

- **Open Space and Circulation**

The participants were asked to identify existing open spaces which needed improvements and location for new open spaces by using dots. They could use post-it notes for any additional descriptions. They were also asked to identify their top 3 destinations (using dots) within the overall study area and highlight any major circulation challenges using post-it notes.

- **Focus Area Vision**

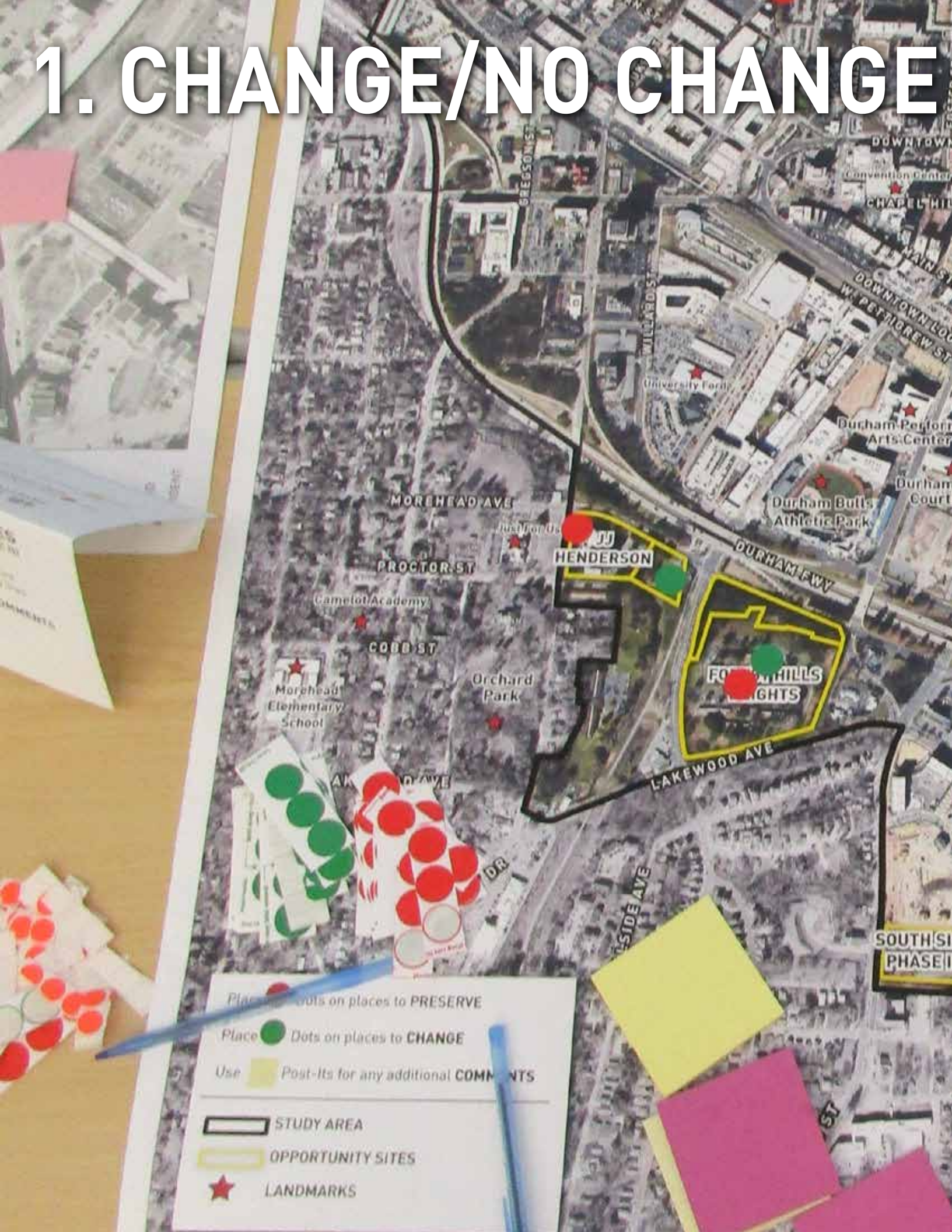
The participants were asked to select the type of housing (townhome, garden apartment, quad, etc.) that they felt was most appropriate for each Focus Area. They used dots to select the appropriate image(s) out of a collage of images.

## **Community Workshops: May 22, July 23 and July 24, 2018**

The above visioning exercises were repeated at the three Community Workshops to ensure maximum opportunity for the community to their input on the overall vision.

This report is a combined summary and reflection of the Visioning Workshop and the Community Workshops output.

# 1. CHANGE/NO CHANGE



- Place Dots on places to **PRESERVE**
- Place Dots on places to **CHANGE**
- Use Post-Its for any additional **COMMENTS**

- STUDY AREA**
- OPPORTUNITY SITES**
- LANDMARKS**



RIGSBEE STREET SUBSTATION

Oakwood Park

East End Park

MALLARD AVE

GILBERT ST

HOLLOWAY ST

LIBERTY ST

West Peachtree Church

RHA

Department of Public Health

OLDHAM

LIBERTY

FAYETTEVILLE ST

E. PETTIGREW ST

ALSTON AVE

FAYETTE PLACE

2. CHANGE / NO CHANGE

- Place (Red dot) Date all places to PRESERVE
- Place (Green dot) Date all places to CHANGE
- Line (Yellow outline) Date all places to be removed

COMMENTS

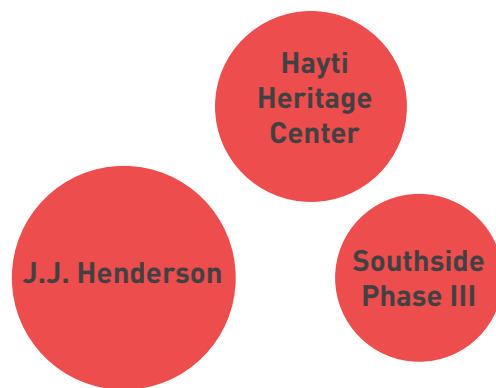




## To Preserve

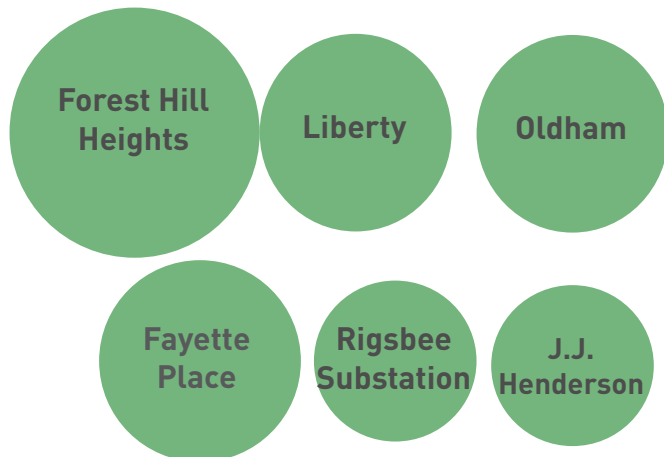
### Comments

- *Upgraded amenities - JJ Henderson*
- *Put in garden behind the parking lot - JJ Henderson*
- *Preserve as affordable housing - Southside Phase III*
- *Prioritize existing Southside residents to preserve community - Southside Phase III*
- *Maintain existing DHA building and to the West- Maintain history/variety*



The participants used red dots to highlight areas to preserve

## To Change, Improve, or Develop



The participants used green dots to highlight areas in need of development or change

### Comments

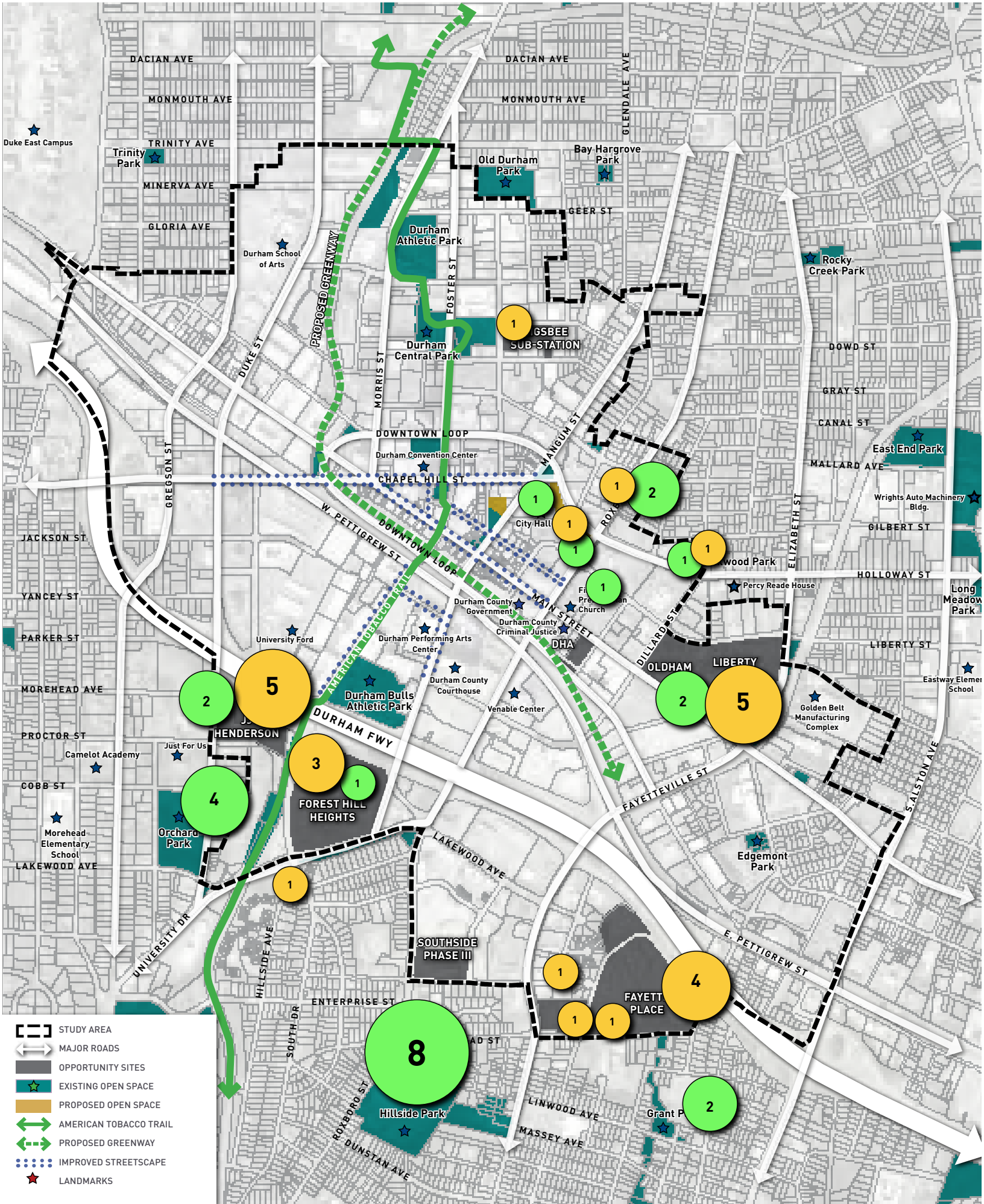
- *Oldham Towers has a senior living population of low-income residents, many have no car, license, living family members. The building is old but cultured and should be remodeled for the residents not torn down creating displacement and destabilization. It is not that large a property and should be allowed to remain - Oldham & Liberty*
- *Preserve and enhance Hayti Heritage Center - Comment on map*
- *Pay attention to Umstead St. Stanford L. Warren Library is an important community resource. Whitted School is historic Building across from Fayetteville St - Comment on Map*

# 2. OPEN SPACES & CIRCULATION



**COMMUNITY WORKSHOP**  
**Focus Area**  
Forest Hill Heights & J.J. Henry  
July





- STUDY AREA
- MAJOR ROADS
- OPPORTUNITY SITES
- EXISTING OPEN SPACE
- PROPOSED OPEN SPACE
- AMERICAN TOBACCO TRAIL
- PROPOSED GREENWAY
- IMPROVED STREETSCAPE
- ★ LANDMARKS

## DHA DOWNTOWN & NEIGHBORHOOD PLANNING

**OPEN SPACE:**  
 Green ● Dots identify EXISTING Open Spaces that need improvements  
 Yellow ● Dots identify places for NEW Open Spaces

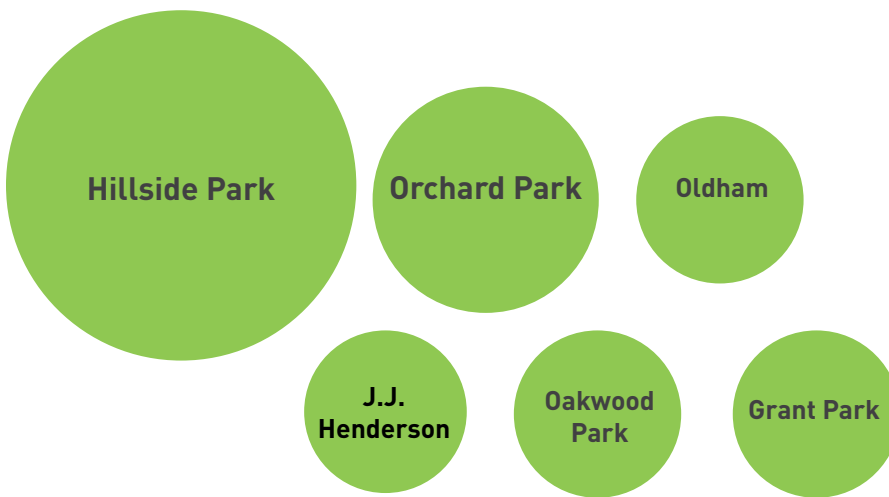
Numbers in Dots represent total dots placed in an area





# OPEN SPACES

## Identified as an existing open space that needs improvement



### Comments

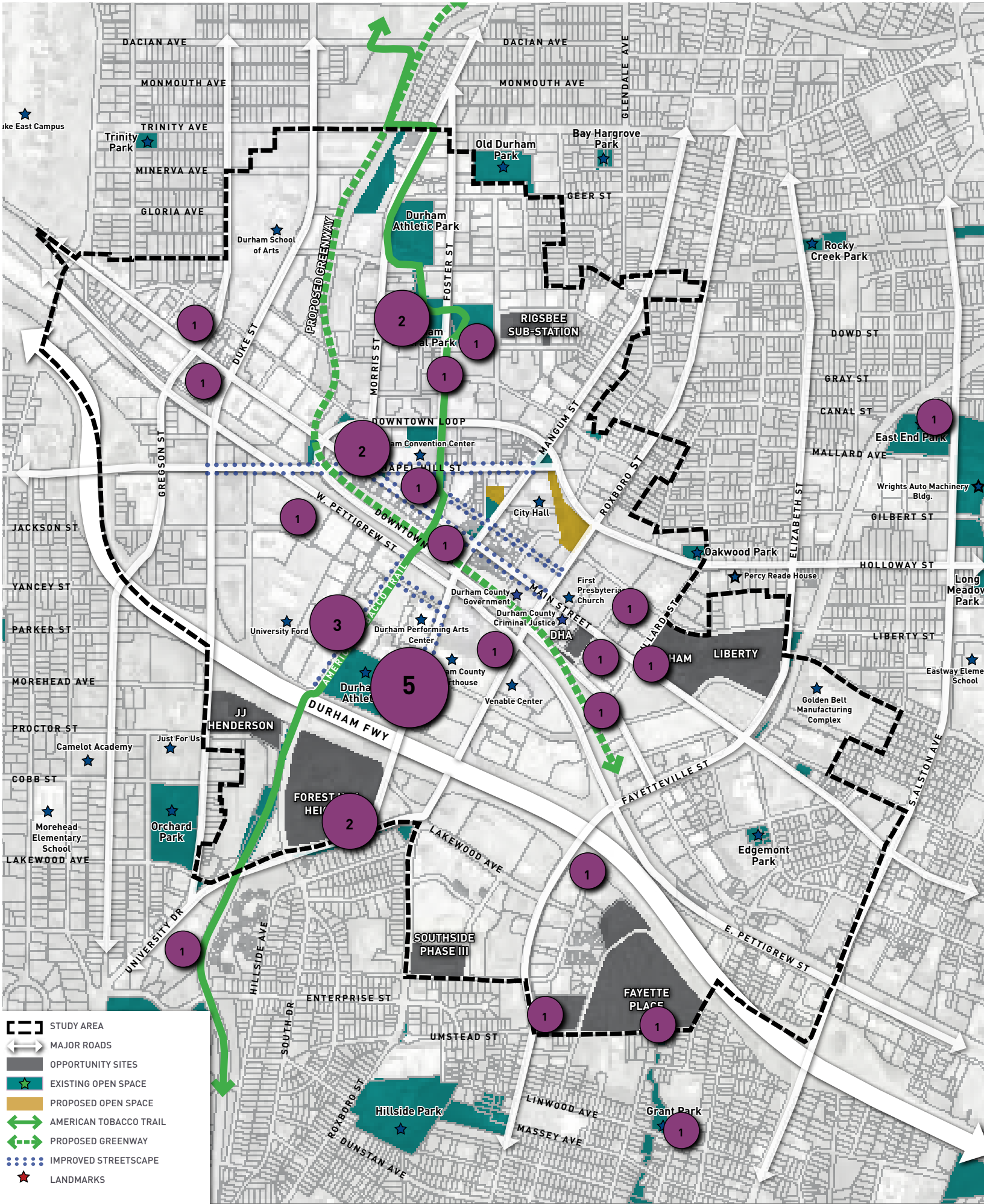
- Needs Lighting- Feels unsafe at night to parking spaces - JJ Henderson
- Please preserve as many old trees as possible -Oldham
- Preserve the Hyati Heritage Center - Comment on Map

## Identified as a location place for new open spaces



### Comments

- Incorporate into dense urban housing - Oldham & Liberty
- The Playgrounds here are sad - Oldham & Liberty
- Small (park at this location) -Rigsbee Substation
- Visible location- Fayette Place



# DHA DOWNTOWN & NEIGHBORHOOD PLANNING

**CIRCULATION:**  
Purple Dots identify a top three DESTINATION TO VISIT  
Numbers in Dots represent total dots placed in an area

Numbers in Dots represent total dots placed in an area



# CIRCULATION

## Challenges in Circulation

- *Need good walks, paths to NCCU (south) transit stops to (northeast) - Fayette Place*
- *Active Building edge on Grant St. and Improve sidewalks on Grant St. especially under NC 147 - Fayette Place*
- *Need better connections between Forest Hill Heights/ Southside III and Downtown (improvements under NC 147, active building edge on Blackwell St.) - Forest Hill Heights*
- *There needs to be better connections between N. Roxboro and S. Roxboro St. and Fayetteville St. and Downtown - Comment placed on map*
- *Need to travel for grocery stores and its not easy*
- *Pedestrian and bike access to light rail and transit needs to be a priority for Fayette Place, Forest Hill Heights, JJ Henderson, Oldham & Liberty*
- *Durham Freeway is a huge barrier*

## Top Three Destinations

- *Durham Bulls Athletic Park \*\*\*\**
- *American Tobacco Trail \*\*\**
- *Durham Central Park \*\**
- *Chapel Hill and Main St corner retail \*\**
- *Forest Hill Heights\*\**

Note: Results were very scattered

# 3. ISSUES & OPPORTUNITIES





# HOUSING

## Top Five Identified Comments

Build a mixed-income community

16

Housing units with central air/heat (2), natural light (1), washer/dryer connections in unit (4)

12

Build first then relocate - Consider Fayette Place first, need space for people to move in

8

Develop a Financing Plan

8

Incorporate workforce housing

7

## Additional Comments

- Incorporate (affordable) workforce housing
- Incorporate space with walking tracks/exercise space/programming
- Energy efficient buildings
- Consider and try to prevent displacement of long-term residents
- More features that improve visibility and safety (i.e., eyes on the street)
- Incorporate a mix of uses and housing typologies
- Illustrate concepts with clear graphics and planned engagement for diverse literacy level participants
- Include more indoor community/shared space
- Multi-generational housing
- Where are students going to school and who transports them?
- Coordinate with building on county lots to provide relocation opportunities
- You did not honor diverse literacy rates tonight (do better)
- Why displace? Build phase 1 on-site and move people in permanently
- Break up the building bulk - Human/Ped scale
- Parking decks!! Keep cars out during Bulls games
- Poverty is hard. Having a washer/dryer in home or building would make a huge difference
- Having a balcony for each apartment would be great
- Having an area for dog walking. It would be great if my dog could have an area where he could walk and sniff and do his business



# ECONOMIC DEVELOPMENT

## Top Five Identified Comments

Full-service grocery

22

Provide job training for unskilled low education

18

Create opportunities that yield sustainable employment pipeline for jobs

7

Capital for grants to historically marginal small businesses

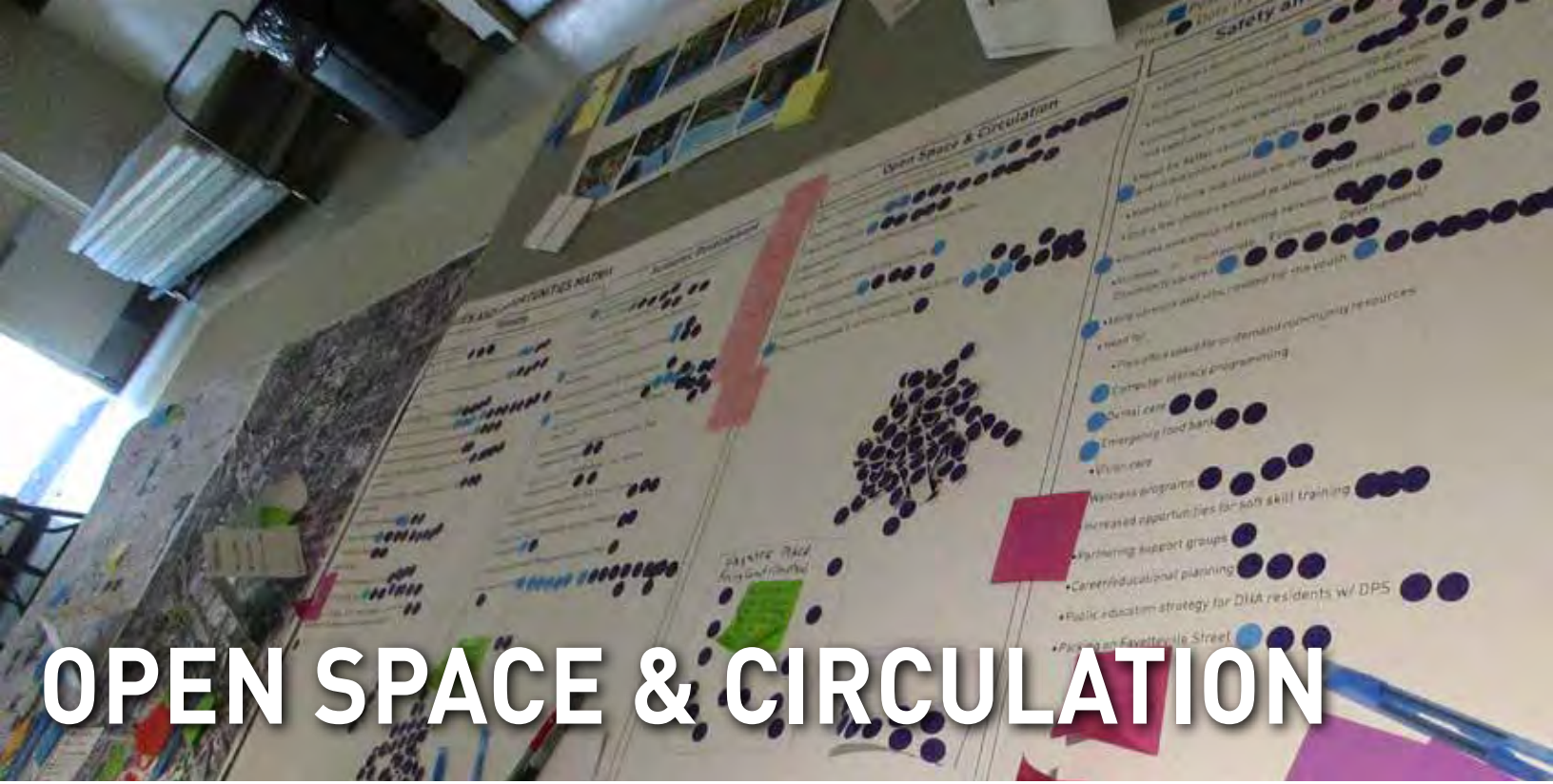
6

Public and private partnerships (banking, employees, foundations)

5

## Additional Comments

- *Job placement partnership with Durham NCWorks Career Center*
- *Minority-Business Contractors program within DHA redevelopment project*
- *Job training / apprenticeships for residents completing education*
- *Form partnership between NCCU, DHA, City and County to conduct Fayette Street Corridor Planning*
- *Provide small builder opportunities*
- *Equitable financing options for small businesses*
- *Provide affordable office space for small business*
- *Connect to Durham public schools for internship as well as connect to Durham business to expose kids to potential jobs / careers and opportunities*
- *City & County Economic Development Policies that help*
- *Affordable retail space that supports community*
- *Community Resource Center*
- *Provide for on-site linkages to workforce development partners, free office space*
- *Provide for on-site linkages to non-profits and community organizations*
- *Urban form*
- *High % transparency on ground floor*
- *Street oriented pedestrian entrances*
- *Active uses on ground floor*



# OPEN SPACE & CIRCULATION

## Top Five Identified Comments

Consider transit-oriented development: access to jobs, other nearby amenities & services in region

18

Need covered bus stops

14

The structures facing Grant St and Umstead St. should be 1-2 stories maximum. Need this to be a neighborhood facing plan

13

More recreational space/green space/ play area

12

Maintain Integrity of neighborhood (Grant St.)

9

## Additional Comments

- *Need walking trails*
- *Better landscape design*
- *Need access/entrance controlled playgrounds with Safety Officer present*
- *Assign community officers by City or County*
- *Move Floor 9 first (JJ Henderson)*
- *Add Homeownership opportunities/Partner with Habitat*





# SAFETY & COMMUNITY SERVICES

## Top Five Identified Comments

Need for better security systems, better street lighting and visible police patrol

9

More services and jobs needed for the youth

9

Safety at Liberty Street site

8

Increase awareness of existing services

7

Outsiders coming through the neighborhood

6

## Additional Comments

- *Loitering, especially in parking lot by dumpster*
- *Only a few children enrolled in after-school programs*
- *Increase or Incorporate Economic Development/Community services*
- *Common types of crime include experiencing gun shots and sale/use of drugs, especially at Liberty Street site*
- *Need for Police sub-station on-site*
- *Need for*
  - *Free office space for in-demand community resources*
  - *Computer literacy programming*
  - *Dental care*
  - *Emergency food bank*
  - *Vision care*
  - *Wellness programs*
  - *Increased opportunities for soft skill training*
  - *Partnering support groups*
  - *Career/educational planning*
  - *Public education strategy for DHA residents w/ DPS*
  - *Parking on Fayetteville Street*
  - *Legal Services*
  - *Free internet*
  - *Free laundry*
- *More Community Policing- getting to know and work with residents*
- *Potential satellite site for Duke or Health Department at some of the housing communities*
- *Many DHA residents eat at UMD community café*
- *Access important*
- *You are glibly discussing destroying communities*
- *Treat current residents with respect, they are not units*
- *Wellness Programs) Including mental health*
- *Free parking on Fayetteville St.*
- *Improved sidewalks*
- *Lighting over the bridge on Duke St.*

# 4. FOCUS AREA VISION







# FOCUS AREA 1

## OLDHAM, LIBERTY, RIGSBEE SUB-STATION

**MEDIUM DENSITY/APARTMENTS- 4/5 STORIES**

**18**

**MIXED-USE**

**14**

**TOWNHOUSES**

**7**

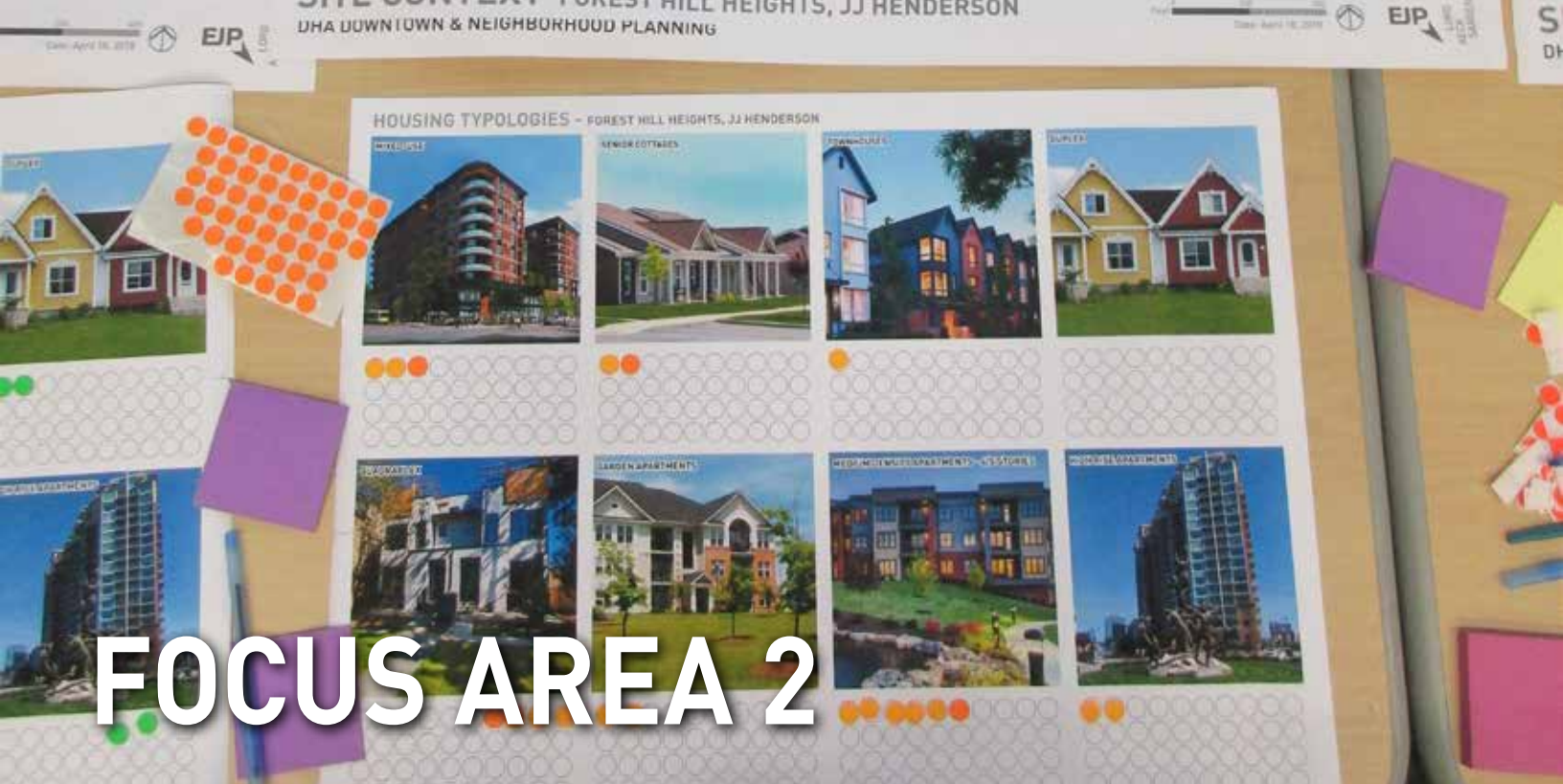
**SENIOR COTTAGES**

**6**

### Oldham and Liberty

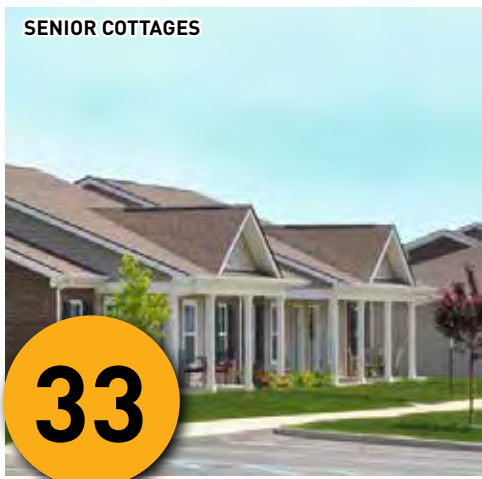
- There is enough market rate and luxury housing Downtown, build more affordable
- The space is big enough to not displace anyone during construction
- Dense housing 600+ affordable units minimum
- Transformational Parcel- Maximize the number of affordable housing units that can be built
- On-site location to provide fresh food options
- Make sure to have front porches to increase social interactions
- Add full-service, affordable grocery store to DHA redeveloped site or to 300 & 500 blocks of E. Main St
- Co-sign with the addition of affordable housing on this lot for redevelopment transition
- 240 units-180 affordable- (1/3 project based) 60 workforce and market rate
- 80 + affordable units with parking, retail, office... 1/3 project-based vouchers
- Brick is traditional in Downtown Durham -Brick represents low maintenance, long-term and safe construction
- *I like this (Mixed-Use apartments)*

Note: Numbers in circles represent total of dots placed on each housing type housing type



## FOCUS AREA 2

### FOREST HILL HEIGHTS, J.J. HENDERSON



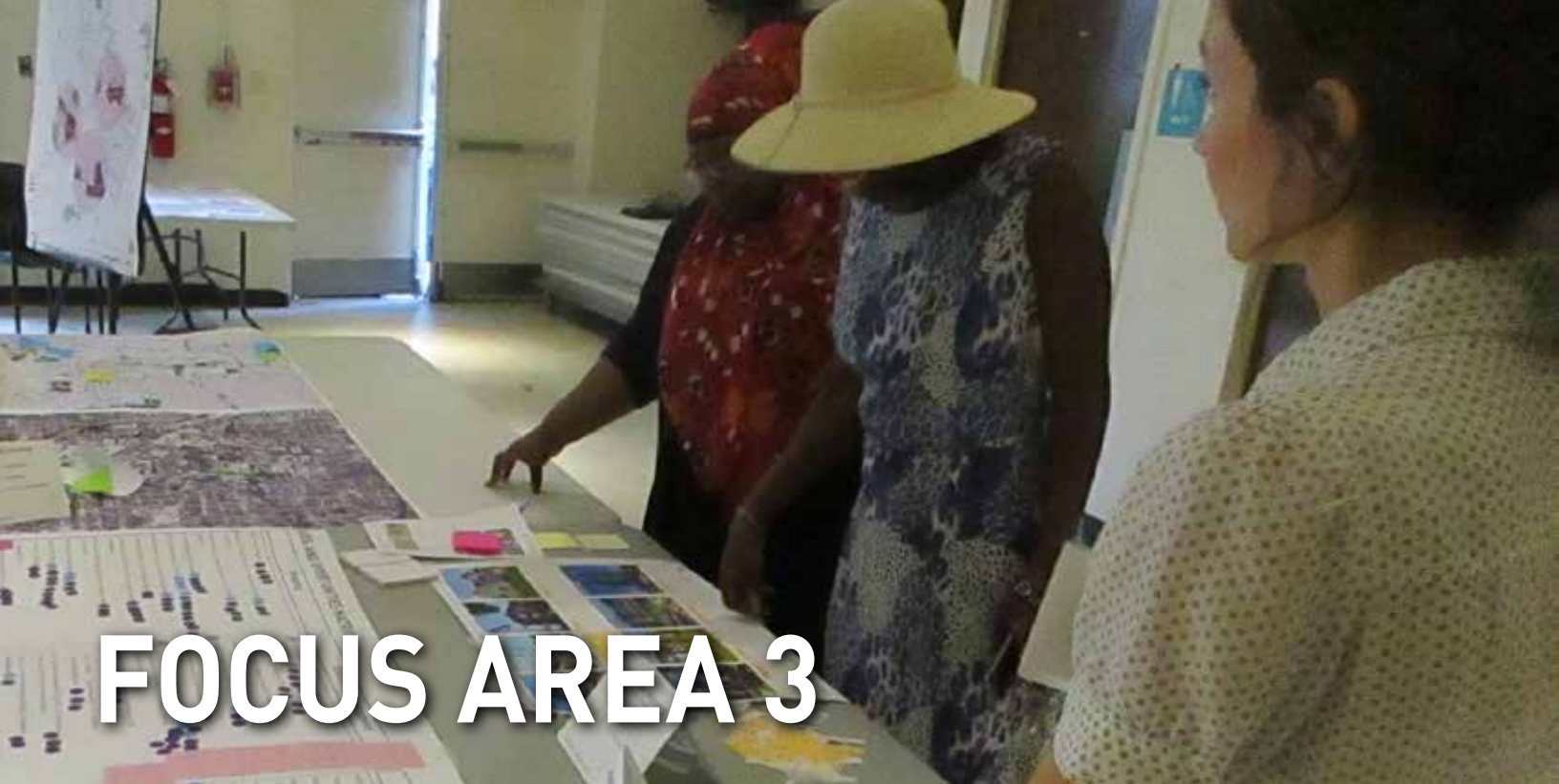
#### Forest Hill Heights

- *Hill is hard to walk*
- *Put at least 100 units for extremely low income here*
- *Need to make sure they are indistinguishable & truly mixed*
- *Can market rate units help finance the affordable units?*
- *Make sure easily connected to surrounding communities through sidewalks, greenways and bike lanes*

#### JJ Henderson

- *There is little retail around*
- *Talk to Morehead Hill too*
- *Make sure easily connected to surrounding communities through sidewalks, green-ways and bike lanes*
- *Larger counterspace in kitchen, New stove, Quieter reffridgerator*

Note: Numbers in circles represent total of dots placed on each housing type housing type



# FOCUS AREA 3

## FAYETTE PLACE, SOUTHSIDE PHASE III



### Southside III

- *Make sure sidewalks, if not already, connect to surrounding area- bike lanes too*
- *The space is big enough to not displace anyone during construction*
- *Make sure we can't tell the difference between market rate and affordable housing units*
- *Ensure community is connected/ integrated into neighborhood around it*
- *Walking trail from ATC to Fayette Place*
- *Sight lines, trails and landscaping, connect Hillside/ WD Hill*

### Fayette Place

- *Transformational dense, beautiful, penthouse feel*
- *Make good connections to health at Lincoln & Jobs at NCCU*
- *How would you access Fayetteville Place other than Fayetteville Street?*
- *Need maximum affordable Housing at 60% AMI or below plus affordable retail space*
- *Grocery Store*
- *Include Community Center (retail)*
- *Retail for local business/incubators*
- *Are there more connections to Downtown? Overpass/underpass*

Note: Numbers in circles represent total of dots placed on each housing type housing type



48. HOUSING TYPOLOGIES

Multi-Family Affordable Housing

- Single-Family Attached
- Multi-Family Attached
- Multi-Family Detached







# DHA DOWNTOWN & NEIGHBORHOOD PLANNING

## COMMUNITY WORKSHOPS SUMMARY

**May 22, 2018: Focus Area #1**

**July 23, 2018: Focus Area #2**

**July 24, 2018: Focus Area #3**

Durham Housing Authority and City of Durham | Durham NC

# FOCUS AREA #1



DMA Downtown & Neighborhood Planning

**COMMUNITY WORKSHOP:**  
Focus Area 1  
May 22, 2024



# OVERVIEW

**Location: Durham County Social Services Building, 414 East Main Street, 2nd Floor, Rooms A & B, Durham NC**  
**Time: 5:30 p.m. - 7:30 p.m.**  
**No. of Participants: 30**

Durham Housing Authority, City of Durham and the DHA Downtown & Neighborhood Planning Team hosted their second public workshop on May 22, 2018. It was the first among the three community workshops planned around the individual Focus Areas. The May-workshop was targeted towards Focus Area 1 which is comprised of the downtown sites – Oldham, Liberty, DHA Office, Criminal Justice property and Rigsbee Avenue Substation site.

The main goal was to provide an update on the planning process, report out the Visioning Workshop results from April 18, 2018 and garner maximum input from the community on the conceptual site development alternatives prepared by the Planning Team. This report is a summary and reflection of the workshop output.

Presentation on DHA Downtown & Neighborhood Planning Effort (40 min): A short update on the Plan process was presented, including a summary of the input results from the Visioning Workshop pertaining to the Focus Area 1 sites, description of the target sites and explanation of the conceptual site options for the individual sites: DHA Office and Criminal Justice property, Rigsbee Avenue Substation and Oldham & Liberty. It was followed by an explanation of the four planning stations. The participants were asked to rotate through the interactive stations to express their comments and concerns.

## Planning Stations

### • Visioning Exercises

To provide an opportunity for anyone who might have missed the April 18th Visioning Workshop, the exercises were made available for the participants to provide input on. The visioning exercises included:

- Issues and Opportunities
- Change-No-change
- Open Space and Circulation
- Focus Area Vision

The results of the above will be added to the Visioning Workshop Summary.

### • Oldham & Liberty

The participants were given a report card and asked to grade each of the three conceptual site options based on their:

- Site Layout
- Type of Housing
- Open Space & Parks

They were also asked to select a preferred architectural character out of four options and provide any additional comments or noted if they had.

### • DHA Office & Criminal Justice Property

The participants were asked to provide any comments on the different site options using post-it notes.

### • Rigsbee Avenue Substation

The participants were asked to provide any comments on the different site options using post-it notes.



# OLDHAM & LIBERTY





## Site Layout



OPTION 1



OPTION 2



OPTION 3

## Type of Housing



OPTION 1



OPTION 2



OPTION 3



## Open Space and Parks



OPTION 1



OPTION 2



OPTION 3

## Overall



OPTION 1



OPTION 2



OPTION 3

# OPTION 2

## FRAMEWORK PLAN



## CONCEPTUAL SITE PLAN



## CONCEPTUAL VIEW



# Comments

## Option 1

- *Not enough density*
- *Not enough (Open space and parks)*

## Option 2

- *Good mix-break up bulk (Open space and parks)*
- *Surrounded by street-Could this relate better to street?*
- *Park at corner of Dillard and E Main*

## Option 3

- *Good density*
- *This option a bit better because closer to the neighborhood than Main Street*

# Report Card Comments

- *There could be a more robust effort to advertise these meetings- Post to several Downtown Listserve*
- *The Rigsbee site has an entirely different geography and group of Stakeholders- It should be its own "Focus Area"*
- *The single N/S street is sufficient*
- *Open Space- like option 3 but also need something on Main so not a solid wall of buildings-Maybe at corner of Commerce and Main?*
- *Not enough density (Type of housing in option 1)*
- *Not enough (Open space and parks in option 1)*
- *Good mix - Break up bulk (Open space and parks in option 2)*
- *Good density (Type of housing option 3)*
- *Surrounded by street- Could this relate better to street? (option 2); this option a bit better because closer to neighborhood than Main Street (option 3)*
- *Important to incorporate high quality design - Everyone should be proud to live here*
- *I like Option 3*
- *Mix income property for low-income redevelopment in Downtown. Decision made in City of Durham*
- *Main Street and Liberty 4 story*
- *Dillard and Elizabeth 8 story*
- *Most like (Traditional architectural character)*
- *Least like (Contemporary architectural character)*
- *Is 6 story the max?*
- *The site location could be taller and slimmer with more open space*
- *Is there a way to make it more integrated?*
- *Open Space*
- *Green is good*
- *Idea to place greenery on roofs*
- *Park at corner of Dillard and E Main (option2)*
- *Brick is traditional in Downtown Durham*
- *Extra roads are an excellent idea*
- *More bricks with style makes units more quiet*





## ARCHITECTURAL CHARACTER





**DHA OFFICE &  
CRIMINAL JUSTICE**

## OPTION 1



## OPTION 2



## OPTION 3



## OPTION 4



## Conceptual Site Options Comments

- *Option 1: Preserve human scale, walkability*
- *Option 2: (Like) Save façade if possible, whole building*
- *Option 4: DHS is so big, overwhelming to have comparable bulk next door*



# RIGSBEE AVENUE SUBSTATION

# OPTION 1



UNITS: 105  
RETAIL: 13,100 SF



# OPTION 2



UNITS: 140  
RETAIL: 9,300 SF



*\*No comments received*

# FOCUS AREA #2



## Agenda

- 1 Welcome and Introduction
- 2 Background
- 3 Focus Area 2
- 4 Questions
- 5 Break - Planning Stations



# OVERVIEW

**Location:** Durham County Social Services Building, 414 East Main Street, 2nd Floor, Rooms A & B, Durham NC  
**Time:** 5:30 p.m. - 7:30 p.m.  
**No. of Participants:** 95

Durham Housing Authority, City of Durham and the DHA Downtown & Neighborhood Planning Team hosted their third public workshop on July 23, 2018. It was the second community workshop planned around the individual Focus Areas. This workshop was targeted towards Focus Area 2, which is comprised of Fayette Place and Southside Phase III sites.

The main goal was to provide an update on the planning process, report out the Visioning Workshop results from April 18, 2018 and garner maximum input from the community on the conceptual site development alternatives prepared by the Planning Team. This report includes a summary and reflection of the workshop output.

Presentation on DHA Downtown & Neighborhood Planning Effort (40 min): A short update on the Plan process was presented, including a summary of the input results from the Visioning Workshop pertaining to the Focus Area 2 sites, description of the target sites and explanation of the conceptual site options for the individual sites: Fayette Place and Southside Phase III. It was followed by an explanation of the three planning stations. The participants were asked to rotate through the interactive stations to express their comments and concerns.

## Planning Stations

### • Visioning Exercises

To provide an opportunity for anyone who might have missed the April 18th Visioning Workshop, the exercises were made available for the participants to provide input on. The visioning exercises included:

- Issues and Opportunities
- Change-No-change
- Open Space and Circulation
- Focus Area Vision

The results of the above will be added to the Visioning Workshop Summary.

### • Fayette Place

The participants were given a report card and asked to grade each of the two conceptual site options based on their:

- Site Layout
- Type of Housing
- Open Space & Parks

They were also asked to select a preferred architectural character out of four options and provide any additional comments or noted if they had.

### • Southside Phase III

The participants were given a report card and asked to grade each of the two conceptual site options based on their:

- Site Layout
- Type of Housing
- Open Space & Parks

They were also asked to select a preferred architectural character out of four options and provide any additional comments or noted if they had.



**FAYETTE PLACE**







## Site Layout



OPTION 1



OPTION 2

## Type of Housing



OPTION 1



OPTION 2



## Open Space and Parks



OPTION 1



OPTION 2

## Overall



OPTION 1



OPTION 2



## Comments

### Option 1

- *Need for lower density - Allows for too many people in one area*
- *Large Grocery Store\**
- *Small business opportunities (for minorities, affordable)*
- *Feels like a dead end to a highway (and) too much open space*
- *Pedestrian and bike option to NCCU*
- *Strengthen pedestrian connection to light rail (via) Grant\*\**

### Option 2

- *Use lower density housing near adjoining SF homes!*
- *Streets makes more sense than a street that dead ends to expressway (like in option 1)*
- *I like the parking tray. It means less space is taken up with parking lots*
- *Is much more appropriate density near downtown and light rail*
- *Place for food and drink and small business*
- *Need for lower density*
- *Consider more density on this parcel (closest to rail at Alston Ave)*
- *Active building edge on Grant Street. Build this corner with LRT on "front burner" (corner of Umstead and Grant)*

## Report Card Comments

- *Multi-generational housing*
- *Low income housing*
- *Affordable housing*
- *Handicap accessible housing*
- *Income based housing opportunities*
- *Please work to make a strong pedestrian connection along Grant Street to the Alston Avenue light rail station*
- *Sidewalks and bike paths to NCCU and transit stop across 147*
- *Put connection to LRT on "front burner"\**
- *Improved sidewalks*
- *Improved lighting*
- *Accessibility for disabled?*
- *Accommodations for visually and hearing impaired?*
- *Space for those who were previously displaced*
- *Job opportunities for former offenders (include pre and post release opp.)*
- *Encourage small business ownership for minorities*
- *Organizations targeting workforce development*
- *Parks and Open space*
- *Fitness facilities\**
- *Community resource center*
- *Grocery stores/ Dry cleaners/ diverse retail space/coffee shop*
- *Laundry facility*
- *Opportunity for food truck rodeo*
- *Strategic placement of surface parking lots*
- *Increased police patrol and presence*
- *"CPTED" Crime Prevention Through Environmental Design*
- *Adequate amount of single family units?*
- *What will be done to correct the already overpopulated homeless community?*
- *What steps are being taken to not add to the displacement of residents in Durham?*
- *I think it is very important to get more units onsite to address affordability*



## ARCHITECTURAL CHARACTER





# **SOUTHSIDE PHASE III**

# OPTION 1



# OPTION 2



# OPTION 3





## Site Layout



OPTION 1



OPTION 2



OPTION 3

## Type of Housing



OPTION 1



OPTION 2



OPTION 3





## Open Space and Parks



OPTION 1



OPTION 2



OPTION 3

## Overall



OPTION 1



OPTION 2



OPTION 3



## Comments

### Option 1

- *Has a nice square adjacent to Beamon but (option) 2 is best*

### Option 2

- *Provides nice open space for circulation and kid play with space between buildings*

### Option 3

- *Makes most green space (but) parking adjacent ruining it*

## Report Card Comments

- *Less Density*
- *What is the target # of residents for the development?*
- *Match the rest of lofts at Southside*
- *I do not know how to find the right balance between attraction of green space and the need for more units*
- *Having the balconies cantilevered beyond the footprint of the building saves interior square foot space and (therefore) is good*
- *Be sure to have windows with screens that can be opened for natural ventilation*
- *(Architectural character style number 1 and 2) look Ok*
- *(Architectural character style number 3) combination of materials looks messy*
- *(Architectural character style number 4) Looks very good but will this fit into the neighborhood and feel "homey" to residents?*
- *This phase is already surrounded by office and backs up to Whitted school so I think the density should thin out from Phase 1 towards Whitted*
- *I prefer a more modern architecture but it should blend into surrounding architecture*
- *(Architectural style number 3) If you build this I will move to Raleigh*
- *Would really like to see single family homes to match S. side home*



## ARCHITECTURAL CHARACTER



# FOCUS AREA #3

DHA Downtown &  
Neighborhood Planning

**COMMUNITY  
WORKSHOP:**

**Focus Area 3:**

Forest Hill Heights & J.J. Henderson

July 24, 2018





**Location: Durham County Social Services Building, 414 East Main Street, 2nd Floor, Rooms A & B, Durham NC**  
**Time: 5:30 p.m. - 7:30 p.m.**  
**No. of Participants: 83**

Durham Housing Authority, City of Durham and the DHA Downtown & Neighborhood Planning Team hosted their third public workshop on July 24, 2018. It was the third community workshop planned around the individual Focus Areas. This workshop was targeted towards Focus Area 3 which is comprised of Forest Hill Heights and J. J. Henderson sites.

The main goal was to provide an update on the planning process, report out the Visioning Workshop results from April 18, 2018 and garner maximum input from the community on the conceptual site development alternatives prepared by the Planning Team. This report is a summary and reflection of the workshop output.

Presentation on DHA Downtown & Neighborhood Planning Effort (40 min): A short update on the Plan process was presented, including a summary of the input results from the Visioning Workshop pertaining to the Focus Area 3 sites, description of the target sites and explanation of the conceptual site options for the individual sites: Forest Hill Heights and J.J. Henderson. It was followed by an explanation of the three planning stations. The participants were asked to rotate through the interactive stations to express their comments and concerns.

### **Planning Stations**

- **Visioning Exercises**

To provide an opportunity for anyone who might have missed the April 18th Visioning Workshop, the exercises were made available for the participants to provide input on. The visioning exercises included:

- Issues and Opportunities
- Change-No-change
- Open Space and Circulation
- Focus Area Vision

The results of the above will be added to the Visioning Workshop Summary.

- **Forest Hill Heights**

The participants were given a report card and asked to grade each of the two conceptual site options based on their:

- Site Layout
- Type of Housing
- Open Space & Parks

They were also asked to select a preferred architectural character out of four options and provide any additional comments or noted if they had.

- **J.J. Henderson**

The participants were asked to provide any comments on the site option using post-it notes.



# FOREST HILL HEIGHTS





## Site Layout



OPTION 1



OPTION 2

## Type of Housing



OPTION 1



OPTION 2





## Open Space and Parks



OPTION 1



OPTION 2

## Overall



OPTION 1



OPTION 2



## Comments

### Option 1

- *No option specific comments received*

### Option 2

- *Include some retail, office, and/or artists' studios. If parking will work this could be a small town*
- *A way to maintain F.H. community in multi-story building*
- *Durham Co Housing building on Hunt Street behind senior center could be a model for Forest Hill – Rooftop patio for plants, common kitchen and meeting space is available*
- *Street pattern: access to parking does not look convenient and I don't like the through street – Try Street from option 1, put parking garage and mixed use in a corner*

## Report Card Comments

- *Opinion: If you want to live in New York City, go there! Durham is more my style-comfort and pleasure found in 2 story or ranch style homes with a lawn for the children and a friendly porch. BR Dixon*
- *Would prefer very small studio-cottage apartment*
- *Want to grow plants*
- *Want to stay with seniors only*
- *Green and sustainable*
- *Need a sidewalk along Blackwell and Morehead*
- *Putting buildings up on Morehead Ext. might increase value (W. view of downtown) and might also help spread around good interior green space*
- *Less than .5 mile from Blackwell/ Magnum Light Rail Station*
- *Please keep Senior's Place – back door and front door*
- *Please keep it green, trees and plants. No children overhead*
- *We would like to keep our cottages just have them renovated then build new apartments around us or in front of us*
- *We are all for progress just remember affordable housing*
- *Please keep our senior community and please keep our back and front door one level cottage*
- *Parking in NW corner for ballpark, ATC and this site -> generate revenue*
- *Parks and Open space along freeway frontage not a good location*
- *Max 2 story housing along Lakewood*
- *Retail along Magnum and Blackwell*
- *Use red brick as much as possible; historic context*
- *Need more density than Option 1, less than Option 2*
- *Preserve existing Forest Hills Community as much as possible*
- *Include mixed use to serve senior needs on site*
- *Use roof for open space – provide garden area somewhere*
- *Encourage pedestrian activity along street frontage*
- *Consider parking surface beyond resident use to assist in game day overflow*
- *How will plans be affected if roads become 2 way*



## ARCHITECTURAL CHARACTER



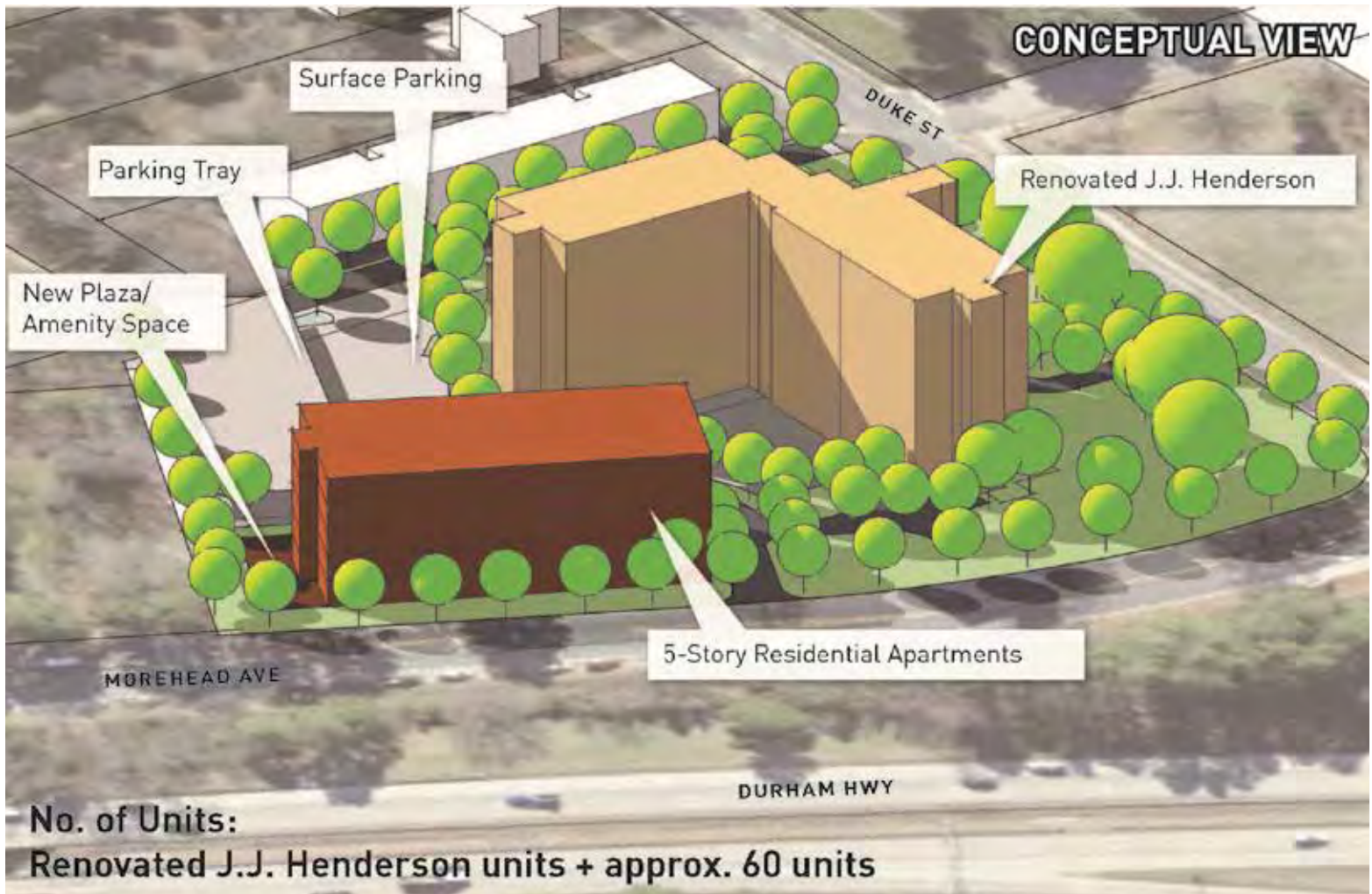
DHA Downtown & Neighborhood Planning

**COMMUNITY WORKSHOP**  
Focus Area

Forest Hill Heights & J.J. Henderson  
July



**J. J. HENDERSON**



## Conceptual Site Option Comments

- *Height can be nice for seniors-(view)*
- *Can the new building be for Forest Hill Heights*
- *Keep park as an amenity*

# DHA DOWNTOWN & NEIGHBORHOOD PLANNING

## COMMUNITY WORKSHOPS SUMMARY

**May 22, 2018: Focus Area #1**

**July 23, 2018: Focus Area #2**

**July 24, 2018: Focus Area #3**

Durham Housing Authority and City of Durham | Durham NC

# FOCUS AREA #1

DHA Downtown &  
Neighborhood Planning

**COMMUNITY  
WORKSHOP:**  
Focus Area 1

May 22, 2018





**Location: Durham County Social Services Building, 414 East Main Street, 2nd Floor, Rooms A & B, Durham NC**  
**Time: 5:30 p.m. - 7:30 p.m.**  
**No. of Participants: 30**

Durham Housing Authority, City of Durham and the DHA Downtown & Neighborhood Planning Team hosted their second public workshop on May 22, 2018. It was the first among the three community workshops planned around the individual Focus Areas. The May-workshop was targeted towards Focus Area 1 which is comprised of the downtown sites – Oldham, Liberty, DHA Office, Criminal Justice property and Rigsbee Avenue Substation site.

The main goal was to provide an update on the planning process, report out the Visioning Workshop results from April 18, 2018 and garner maximum input from the community on the conceptual site development alternatives prepared by the Planning Team. This report is a summary and reflection of the workshop output.

Presentation on DHA Downtown & Neighborhood Planning Effort (40 min): A short update on the Plan process was presented, including a summary of the input results from the Visioning Workshop pertaining to the Focus Area 1 sites, description of the target sites and explanation of the conceptual site options for the individual sites: DHA Office and Criminal Justice property, Rigsbee Avenue Substation and Oldham & Liberty. It was followed by an explanation of the four planning stations. The participants were asked to rotate through the interactive stations to express their comments and concerns.

### **Planning Stations**

- **Visioning Exercises**

To provide an opportunity for anyone who might have missed the April 18th Visioning Workshop, the exercises were made available for the participants to provide input on. The visioning exercises included:

- Issues and Opportunities
- Change-No-change
- Open Space and Circulation
- Focus Area Vision

The results of the above will be added to the Visioning Workshop Summary.

- **Oldham & Liberty**

The participants were given a report card and asked to grade each of the three conceptual site options based on their:

- Site Layout
- Type of Housing
- Open Space & Parks

They were also asked to select a preferred architectural character out of four options and provide any additional comments or noted if they had.

- **DHA Office & Criminal Justice Property**

The participants were asked to provide any comments on the different site options using post-it notes.

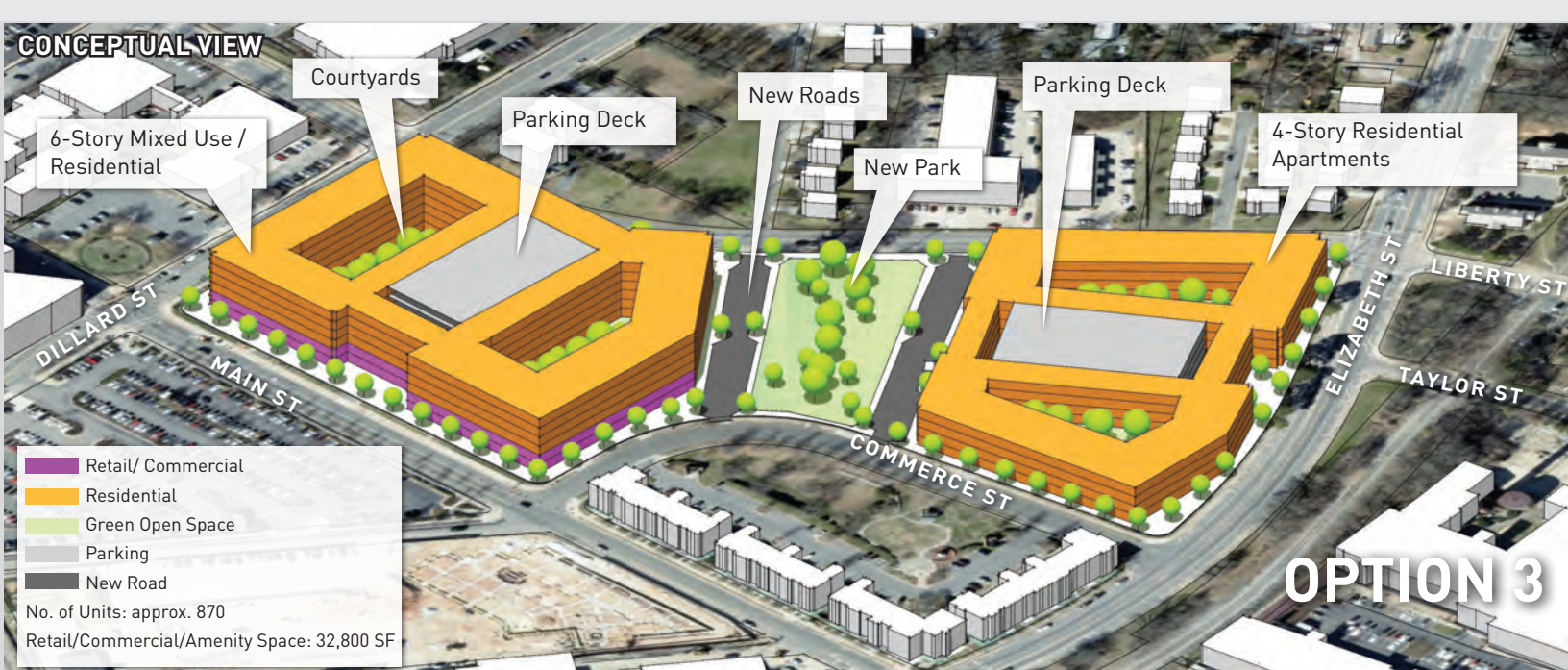
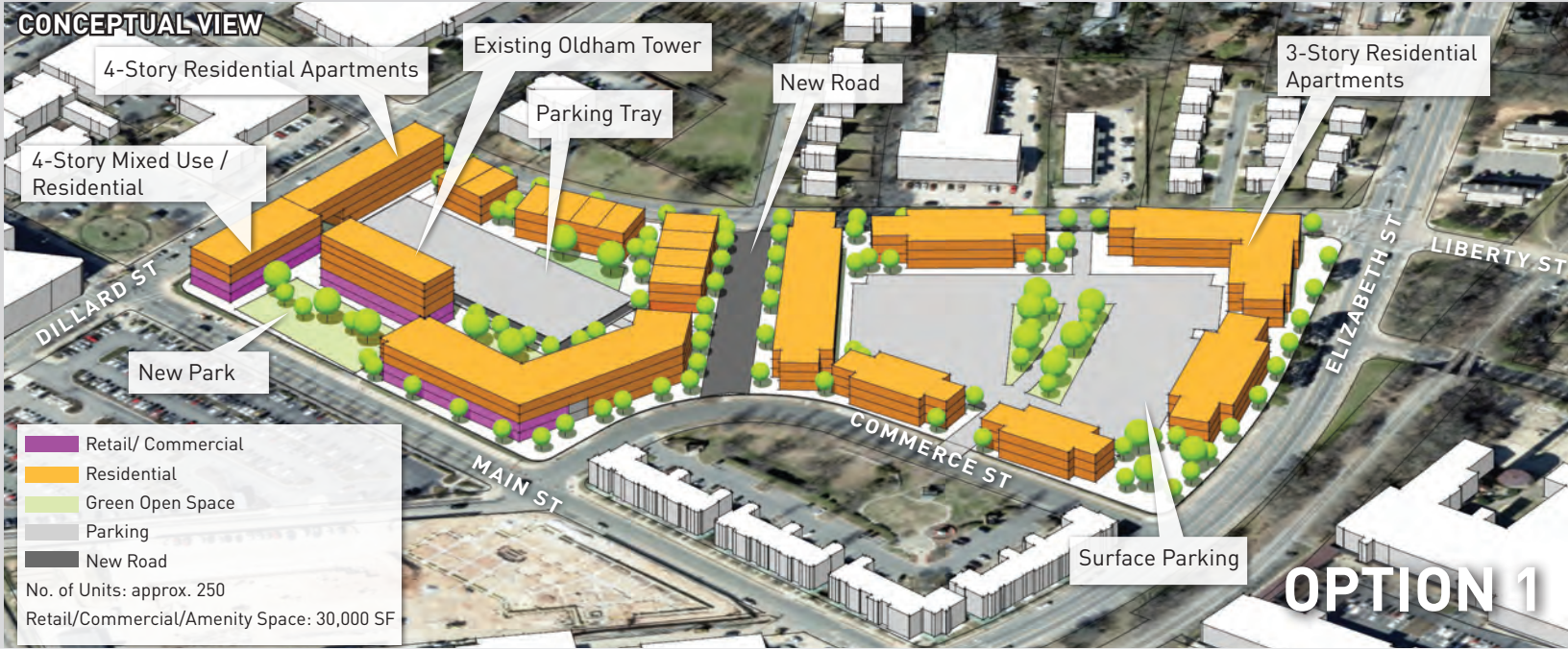
- **Rigsbee Avenue Substation**

The participants were asked to provide any comments on the different site options using post-it notes.





# OLDHAM & LIBERTY





## Site Layout



OPTION 1



OPTION 2



OPTION 3

## Type of Housing



OPTION 1



OPTION 2



OPTION 3



## Open Space and Parks



OPTION 1



OPTION 2



OPTION 3

## Overall



OPTION 1



OPTION 2



OPTION 3

# OPTION 2

## FRAMEWORK PLAN



## CONCEPTUAL SITE PLAN



## CONCEPTUAL VIEW



# Comments

## Option 1

- Not enough density
- Not enough (Open space and parks)

## Option 2

- Good mix-break up bulk (Open space and parks)
- Surrounded by street-Could this relate better to street?
- Park at corner of Dillard and E Main

## Option 3

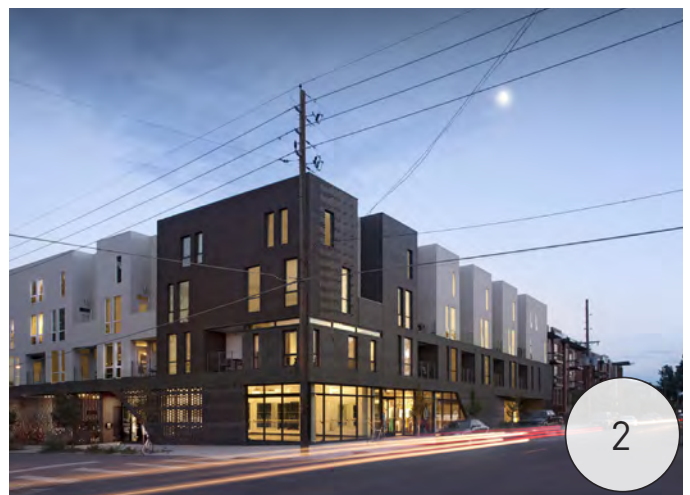
- Good density
- This option a bit better because closer to the neighborhood than Main Street

# Report Card Comments

- *There could be a more robust effort to advertise these meetings- Post to several Downtown Listserve*
- *The Rigsbee site has an entirely different geography and group of Stakeholders- It should be its own "Focus Area"*
- *The single N/S street is sufficient*
- *Open Space- like option 3 but also need something on Main so not a solid wall of buildings-Maybe at corner of Commerce and Main?*
- *Not enough density (Type of housing in option 1)*
- *Not enough (Open space and parks in option 1)*
- *Good mix - Break up bulk (Open space and parks in option 2)*
- *Good density (Type of housing option 3)*
- *Surrounded by street- Could this relate better to street? (option 2); this option a bit better because closer to neighborhood than Main Street (option 3)*
- *Important to incorporate high quality design - Everyone should be proud to live here*
- *I like Option 3*
- *Mix income property for low-income redevelopment in Downtown. Decision made in City of Durham*
- *Main Street and Liberty 4 story*
- *Dillard and Elizabeth 8 story*
- *Most like (Traditional architectural character)*
- *Least like (Contemporary architectural character)*
- *Is 6 story the max?*
- *The site location could be taller and slimmer with more open space*
- *Is there a way to make it more integrated?*
- *Open Space*
- *Green is good*
- *Idea to place greenery on roofs*
- *Park at corner of Dillard and E Main (option2)*
- *Brick is traditional in Downtown Durham*
- *Extra roads are an excellent idea*
- *More bricks with style makes units more quiet*



## ARCHITECTURAL CHARACTER





# DHA OFFICE & CRIMINAL JUSTICE

## OPTION 1



## OPTION 2



## OPTION 3



## OPTION 4



## Conceptual Site Options Comments

- *Option 1: Preserve human scale, walkability*
- *Option 2: (Like) Save façade if possible, whole building*
- *Option 4: DHS is so big, overwhelming to have comparable bulk next door*



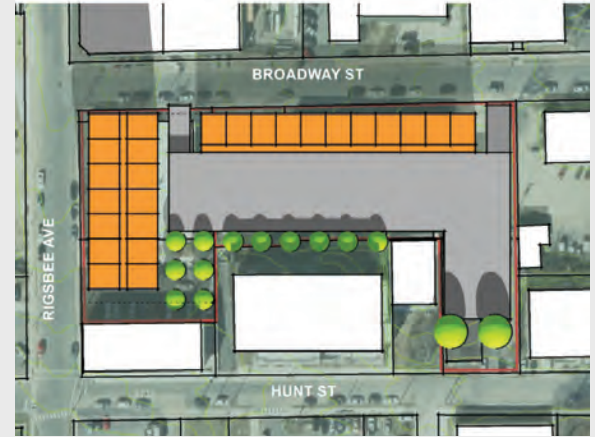


# RIGSBEE AVENUE SUBSTATION

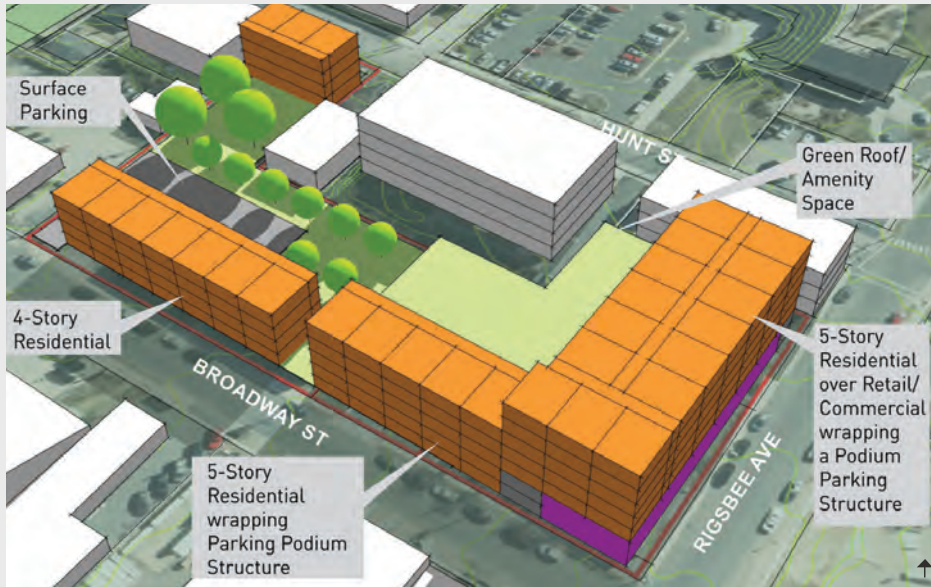
# OPTION 1



UNITS: 105  
RETAIL: 13,100 SF



# OPTION 2



UNITS: 140  
RETAIL: 9,300 SF



*\*No comments received*

# FOCUS AREA #2



## Agenda

- 1) Welcome and Introduction
- 2) Background
- 3) Focus Area 2
- 4) Questions
- 5) Break - Planning Stations



**Location: Durham County Social Services Building, 414 East Main Street, 2nd Floor, Rooms A & B, Durham NC**  
**Time: 5:30 p.m. - 7:30 p.m.**  
**No. of Participants: 95**

Durham Housing Authority, City of Durham and the DHA Downtown & Neighborhood Planning Team hosted their third public workshop on July 23, 2018. It was the second community workshop planned around the individual Focus Areas. This workshop was targeted towards Focus Area 2, which is comprised of Fayette Place and Southside Phase III sites.

The main goal was to provide an update on the planning process, report out the Visioning Workshop results from April 18, 2018 and garner maximum input from the community on the conceptual site development alternatives prepared by the Planning Team. This report includes a summary and reflection of the workshop output.

Presentation on DHA Downtown & Neighborhood Planning Effort (40 min): A short update on the Plan process was presented, including a summary of the input results from the Visioning Workshop pertaining to the Focus Area 2 sites, description of the target sites and explanation of the conceptual site options for the individual sites: Fayette Place and Southside Phase III. It was followed by an explanation of the three planning stations. The participants were asked to rotate through the interactive stations to express their comments and concerns.

### **Planning Stations**

- **Visioning Exercises**

To provide an opportunity for anyone who might have missed the April 18th Visioning Workshop, the exercises were made available for the participants to provide input on. The visioning exercises included:

- Issues and Opportunities
- Change-No-change
- Open Space and Circulation
- Focus Area Vision

The results of the above will be added to the Visioning Workshop Summary.

- **Fayette Place**

The participants were given a report card and asked to grade each of the two conceptual site options based on their:

- Site Layout
- Type of Housing
- Open Space & Parks

They were also asked to select a preferred architectural character out of four options and provide any additional comments or noted if they had.

- **Southside Phase III**

The participants were given a report card and asked to grade each of the two conceptual site options based on their:

- Site Layout
- Type of Housing
- Open Space & Parks

They were also asked to select a preferred architectural character out of four options and provide any additional comments or noted if they had.



**FAYETTE PLACE**





## Site Layout



OPTION 1



OPTION 2

## Type of Housing



OPTION 1



OPTION 2



## Open Space and Parks



OPTION 1



OPTION 2

## Overall



OPTION 1



OPTION 2





## Comments

### Option 1

- *Need for lower density - Allows for too many people in one area*
- *Large Grocery Store\**
- *Small business opportunities (for minorities, affordable)*
- *Feels like a dead end to a highway (and) too much open space*
- *Pedestrian and bike option to NCCU*
- *Strengthen pedestrian connection to light rail (via) Grant\*\**

### Option 2

- *Use lower density housing near adjoining SF homes!*
- *Streets makes more sense than a street that dead ends to expressway (like in option 1)*
- *I like the parking tray. It means less space is taken up with parking lots*
- *Is much more appropriate density near downtown and light rail*
- *Place for food and drink and small business*
- *Need for lower density*
- *Consider more density on this parcel (closest to rail at Alston Ave)*
- *Active building edge on Grant Street. Build this corner with LRT on "front burner" (corner of Umstead and Grant)*

## Report Card Comments

- *Multi-generational housing*
- *Low income housing*
- *Affordable housing*
- *Handicap accessible housing*
- *Income based housing opportunities*
- *Please work to make a strong pedestrian connection along Grant Street to the Alston Avenue light rail station*
- *Sidewalks and bike paths to NCCU and transit stop across 147*
- *Put connection to LRT on "front burner"\**
- *Improved sidewalks*
- *Improved lighting*
- *Accessibility for disabled?*
- *Accommodations for visually and hearing impaired?*
- *Space for those who were previously displaced*
- *Job opportunities for former offenders (include pre and post release opp.)*
- *Encourage small business ownership for minorities*
- *Organizations targeting workforce development*
- *Parks and Open space*
- *Fitness facilities\**
- *Community resource center*
- *Grocery stores/ Dry cleaners/ diverse retail space/coffee shop*
- *Laundry facility*
- *Opportunity for food truck rodeo*
- *Strategic placement of surface parking lots*
- *Increased police patrol and presence*
- *"CPTED" Crime Prevention Through Environmental Design*
- *Adequate amount of single family units?*
- *What will be done to correct the already overpopulated homeless community?*
- *What steps are being taken to not add to the displacement of residents in Durham?*
- *I think it is very important to get more units onsite to address affordability*



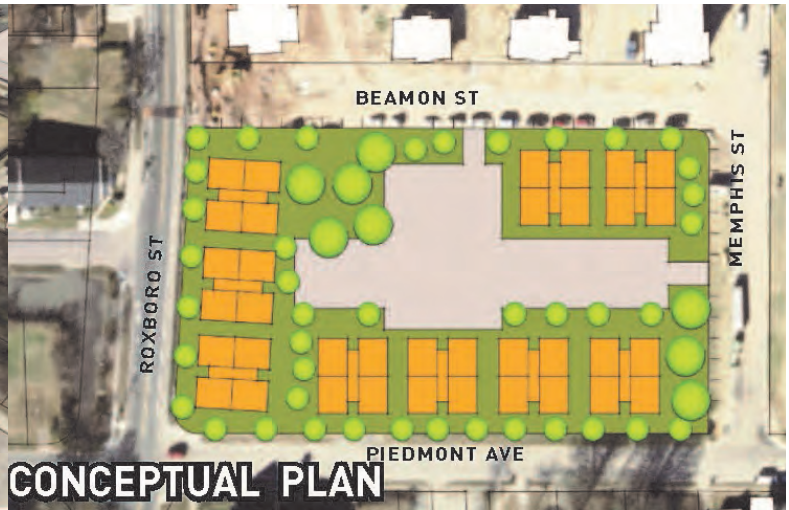
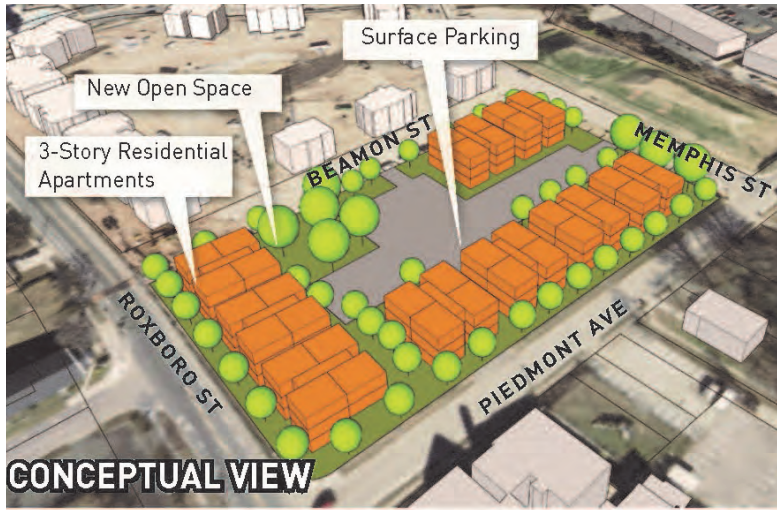
## ARCHITECTURAL CHARACTER



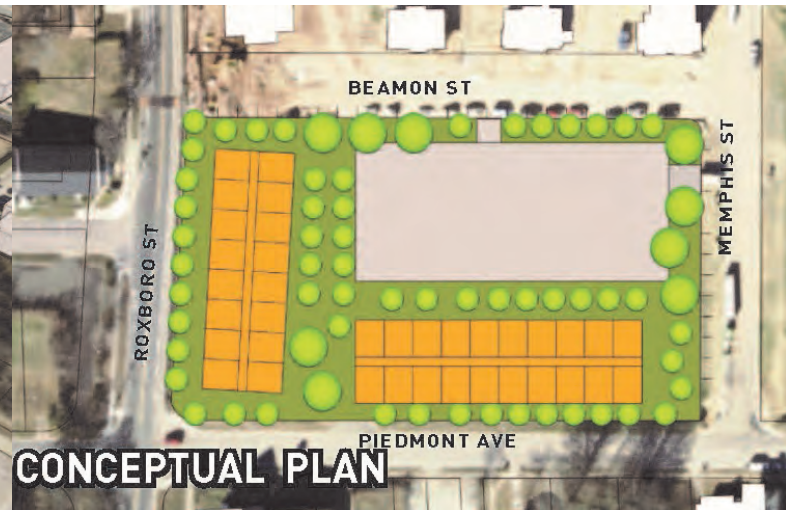
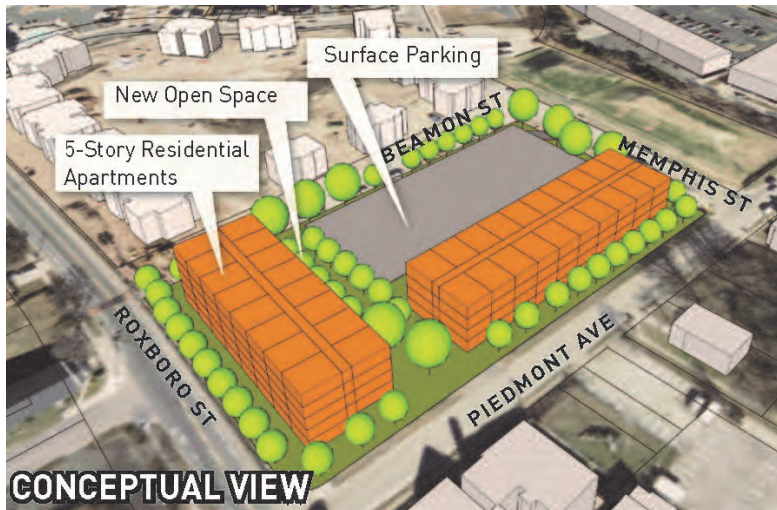


# SOUTHSIDE PHASE III

# OPTION 1



# OPTION 2



# OPTION 3





## Site Layout



OPTION 1



OPTION 2



OPTION 3

## Type of Housing



OPTION 1



OPTION 2



OPTION 3



## Open Space and Parks



OPTION 1



OPTION 2



OPTION 3

## Overall



OPTION 1



OPTION 2



OPTION 3



## Comments

### Option 1

- *Has a nice square adjacent to Beamon but (option) 2 is best*

### Option 2

- *Provides nice open space for circulation and kid play with space between buildings*

### Option 3

- *Makes most green space (but) parking adjacent ruining it*

## Report Card Comments

- *Less Density*
- *What is the target # of residents for the development?*
- *Match the rest of lofts at Southside*
- *I do not know how to find the right balance between attraction of green space and the need for more units*
- *Having the balconies cantilevered beyond the footprint of the building saves interior square foot space and (therefore) is good*
- *Be sure to have windows with screens that can be opened for natural ventilation*
- *(Architectural character style number 1 and 2) look Ok*
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- *(Architectural character style number 4) Looks very good but will this fit into the neighborhood and feel "homey" to residents?*
- *This phase is already surrounded by office and backs up to Whitted school so I think the density should thin out from Phase 1 towards Whitted*
- *I prefer a more modern architecture but it should blend into surrounding architecture*
- *(Architectural style number 3) If you build this I will move to Raleigh*
- *Would really like to see single family homes to match S. side home*



## ARCHITECTURAL CHARACTER





# FOCUS AREA #3

DHA Downtown &  
Neighborhood Planning

**COMMUNITY  
WORKSHOP:**

**Focus Area 3:**

Forest Hill Heights & J.J. Henderson

July 24, 2018





**Location: Durham County Social Services Building, 414 East Main Street, 2nd Floor, Rooms A & B, Durham NC**  
**Time: 5:30 p.m. - 7:30 p.m.**  
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### **Planning Stations**

- **Visioning Exercises**

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The results of the above will be added to the Visioning Workshop Summary.

- **Forest Hill Heights**

The participants were given a report card and asked to grade each of the two conceptual site options based on their:

- Site Layout
- Type of Housing
- Open Space & Parks

They were also asked to select a preferred architectural character out of four options and provide any additional comments or noted if they had.

- **J.J. Henderson**

The participants were asked to provide any comments on the site option using post-it notes.



# FOREST HILL HEIGHTS





## Site Layout



OPTION 1



OPTION 2

## Type of Housing



OPTION 1



OPTION 2



## Open Space and Parks



OPTION 1



OPTION 2

## Overall



OPTION 1



OPTION 2



## Comments

### Option 1

- *No option specific comments received*

### Option 2

- *Include some retail, office, and/or artists' studios. If parking will work this could be a small town*
- *A way to maintain F.H. community in multi-story building*
- *Durham Co Housing building on Hunt Street behind senior center could be a model for Forest Hill – Rooftop patio for plants, common kitchen and meeting space is available*
- *Street pattern: access to parking does not look convenient and I don't like the through street – Try Street from option 1, put parking garage and mixed use in a corner*

## Report Card Comments

- *Opinion: If you want to live in New York City, go there! Durham is more my style-comfort and pleasure found in 2 story or ranch style homes with a lawn for the children and a friendly porch. BR Dixon*
- *Would prefer very small studio-cottage apartment*
- *Want to grow plants*
- *Want to stay with seniors only*
- *Green and sustainable*
- *Need a sidewalk along Blackwell and Morehead*
- *Putting buildings up on Morehead Ext. might increase value (W. view of downtown) and might also help spread around good interior green space*
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- *Consider parking surface beyond resident use to assist in game day overflow*
- *How will plans be affected if roads become 2 way*



## ARCHITECTURAL CHARACTER





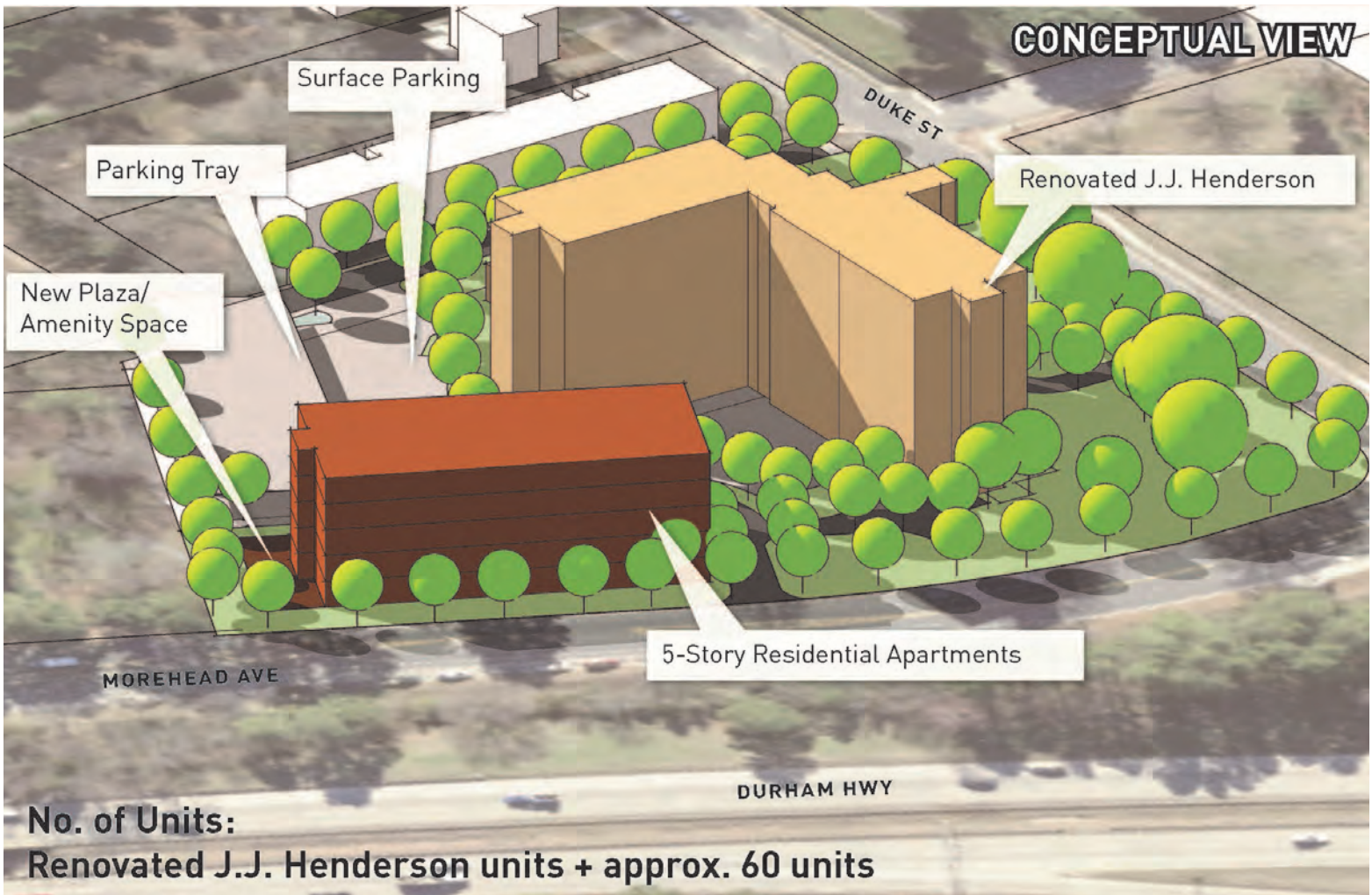
DHA Downtown & Neighborhood Planning

**COMMUNITY WORKSHOP:**  
**Focus Area**

Forest Hill Heights & J.J. Henderson  
July



**J. J. HENDERSON**



## Conceptual Site Option Comments

- *Height can be nice for seniors-(view)*
- *Can the new building be for Forest Hill Heights*
- *Keep park as an amenity*