



Parkville
Missouri

APPENDIX A: History



Appendix A

History



Fig. A.1 - Colonel George S. Park Stone Hotel (Constructed in 1851-53). Photo courtesy of Fishburn Archives Photographic History Collection, Park University, Parkville, Missouri.

A.1 History

With the Platte Purchase Treaty signed in 1836 and ratified on 1837, the area in which Parkville is located quickly converted from Indian occupied territory to be highly populated by white settlers. Platte County was first organized on December 31, 1838 and named after the Platte River.

Originally a thriving river port for hemp, tobacco, and other products, Parkville grew faster than Kansas City, which was located approximately ten miles to the southeast. The close proximity of the Missouri River afforded easy access from river traffic and trade, drawing Indians, trappers, and farmers to Parkville. Hemp was produced and cleaned primarily through manual labor as no machinery had yet been created for this. This strenuous work developed a demand for slave labor in Platte County. After the Civil War, the hemp industry in Platte County virtually disappeared.

The site, which eventually became the town of Parkville, was selected and settled in 1837 by Stephen and David English. Colonel George S. Park, a veteran of the Texas War of Independence and noted as Parkville's first postmaster, purchased the site of Parkville and a riverboat landing from the English brothers in 1838 through a 99 year lease. Park filed the first plat of the town in 1844, and by 1850 had built warehouses and a large stone hotel. In 1849, the Missouri State Legislature granted a charter recognizing Parkville as an incorporated city. In 1853, Park established one of Platte County's earliest newspapers, "The Industrial Luminary." At this time, the border between Missouri and Kansas was plagued with battles over the issue of slavery. Colonel Park's newspaper gained national attention when, raided on April 14, 1855, a pro-slavery mob of roughly two hundred people reacted to his abolitionist editorials by throwing his printing press into the river.

These priorities include:

Two primary church organizations existed in Parkville in 1851, the Methodists and the Presbyterians. The Methodist church was a wooden structure located on East and Fifth Streets. The Presbyterian church was a stone structure located on the east side of town where the Graham Tyler Memorial Chapel stands on the Park Campus. The Baptist Church at Parkville was organized in 1852 and housed in a building located at 300 Main Street.

The future of Parkville seemed to be in jeopardy after the Civil War, but two significant ventures ensured its survival. First, prior to the Civil war, the town had been unsuccessful in acquiring a bridge across the Missouri River and therefore railroad traffic, which went to Kansas City. When George Park returned after the war, he assisted the town in securing a railroad connection. Second, in 1875, Colonel Park and Dr. John A. McAfee collaborated to establish Park College. Initially utilizing the

stone hotel constructed by Colonel Park, the college was eventually shifted to donated property east of downtown. The hotel (which stood on the site currently occupied by the Parkville Memorial Fountain) was designed to combine a hotel and business house, with the first floor as store rooms, the second and third and fourth to be used as a hotel. The second floor housed a printing office for Park and Cundiff.

Park University, a religiously affiliated college, was directed by Dr. McAfee with seventeen students and a vision of providing education for any young man or woman with free tuition and board in exchange for working up to half day in the college's farm, electrical shop or printing plant. Literally built by students, Mackay Hall, completed in 1893, and the Scott Observatory, constructed in 1896 still stand as icons at the edge of the historic town. From this time on, the college played a key role in the development of Parkville.



Fig. A.2 -

View of Parkville Downtown looking Southwest, c. 1900. Photo courtesy of Fishburn Archives Photographic History Collection, Park University, Parkville, Missouri.



Fig. A.3 – View of Parkville looking Southeast (c.1894), note proximity of Missouri River to Downtown. Photo courtesy of Fishburn Archives Photographic History Collection, Park University, Parkville, Missouri.

Mid 1800s through 1900s architecture comprised of modest and traditional detailing, is illustrated throughout the historic downtown with unique ties to the past. In 1851, the mercantile business was primarily represented by four practices; Aspling and Stevens, Remington and Couch, R.A. Ringo and M.T. Summers. George W. Summers, the son of M.T. Summers, carried on the family business after his father's death. Drugstores were run by two firms at this time. Dr. J.W. Ringo and Dr. Young were proprietors of one store, and the other was run by Dr. Love and J.H. Bueneman. Love and Beuneman's store was located at 107 Main Street. Ringo after periods in several area towns (including a few returns to Parkville), settles back in Parkville in 1866 forming a partnership with Doctor J. A. Campbell under the name of Ringo and Campbell.

J. H. Nash operated a livery stable from 1857 to 1862 on East Street with his brother William Nash. In 1870 Nash and Brothers traded the stable to John Haynes for interest in Standard Mills on Water and West Streets. After William Nash's death in 1872, the company was operated by Nash and Bemis through 1874. The property currently housing Stone Canyon Pizza, was constructed for Dr. A.T. Holt by August, 1900. By 1877 there were general stores, a shoe store, grocery, hardware, blacksmith shop and two hotels. In 1880, Parkville's population stood at 482, compared to today's approximate 5,554 (per the 2010 census).

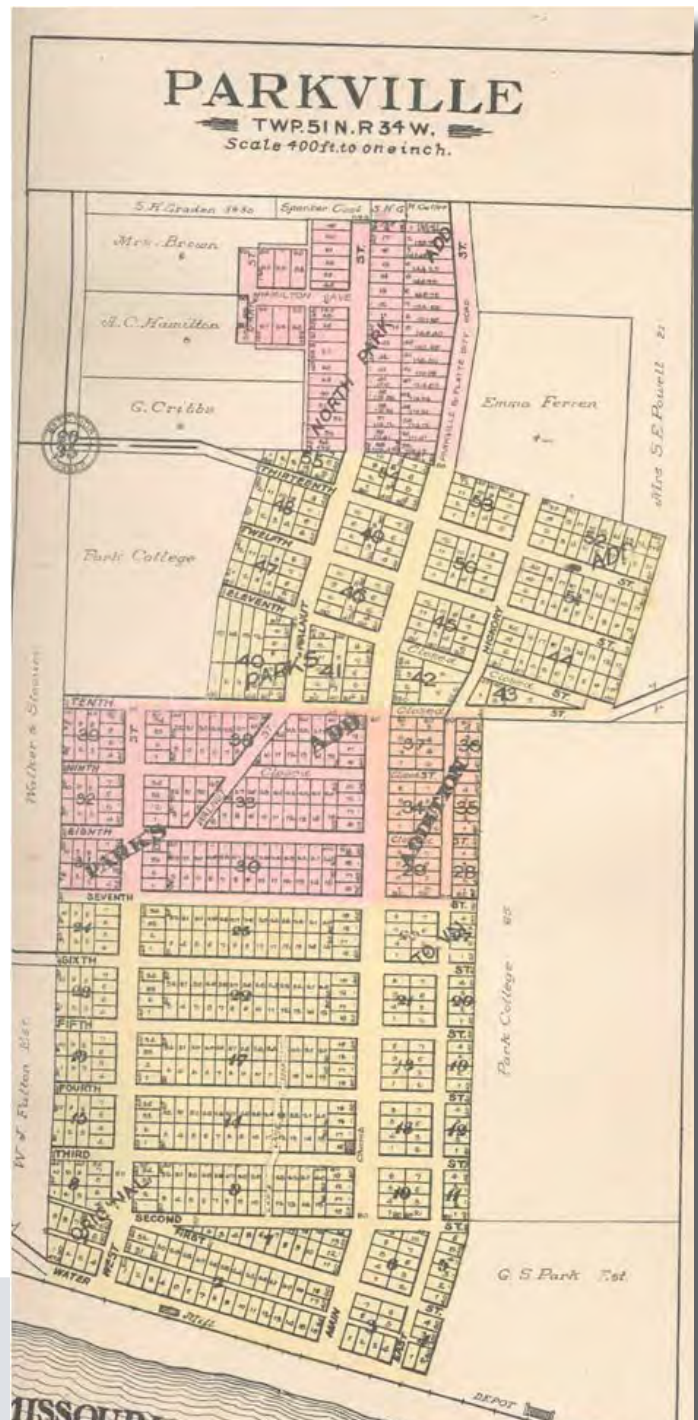


Fig. A.4 – 1907 Atlas of Platte County. Image courtesy of Fishburn Archives Photographic History Collection, Park University, Parkville, Missouri.



Fig. A.5 –
View of Main Street looking Northwest. Photo courtesy of Fishburn Archives Photographic History Collection, Park University, Parkville, Missouri.

Fig. A.6 –
View of Main Street looking Northwest. Photo courtesy of Fishburn Archives Photographic History Collection, Park University, Parkville, Missouri.



Fig. A.7 –
View of Main Street looking Northwest (c. early 1930s). Photo courtesy of Fishburn Archives Photographic History Collection, Park University, Parkville, Missouri.





Fig. A.8 –

Main Street looking Northwest – Note the safes in the street, reputed to have been there from a bank robbery in the late 1870s and used as hitching posts up through the 1890s. Photo courtesy of Fishburn Archives Photographic History Collection, Park University, Parkville, Missouri.



Fig. A.9 –

View of First Street looking Northeast (c.1900). Photo courtesy of Fishburn Archives Photographic History Collection, Park University, Parkville, Missouri.



Fig. A.10 – View along Main looking Northeast towards First Street. Photo courtesy of Fishburn Archives Photographic History Collection, Park University, Parkville, Missouri.



Fig. A.11 –
View of First Street along
Main looking Northeast.
Photo courtesy of Fishburn
Archives Photographic
History Collection, Park
University, Parkville,
Missouri.



Fig. A.12 –
View of Main Street looking South. Photo courtesy of Fishburn Archives Photographic History Collection, Park University, Parkville, Missouri.

Fig. A.13 –
View of Main Street looking Southeast, upper end. Photo courtesy of Fishburn Archives Photographic History Collection, Park University, Parkville, Missouri.



Fig. A.14 –
View of Main Street looking Southeast, lower end. Photo courtesy of Fishburn Archives Photographic History Collection, Park University, Parkville, Missouri.

A.2 Present-Day Use

Today, Downtown Parkville still reflects much of the history from which it came. Many homes and commercial buildings retain the character of the 19th and early 20th centuries in which they were built. Maintenance of the existing buildings varies greatly from one property to another. Buildings downtown would benefit from rehabilitation of exterior walls, storefronts and signage. The topography and natural beauty of the area is also a large part of the character and charm of the downtown core. English Landing Park, which runs parallel to the Missouri River along the south edge of downtown, is Platte County's most used park. The Farmer's Market is held every Saturday, 10 month out of the year. This highly successful market is located in the parking just south of the railroad tracks within the English Landing Park.

The Main Street Parkville Association is an important organization for the promotion of Main Street businesses and the preservation of the historic character of the downtown. They distribute maps and other information regarding the various businesses and events that happen downtown. More information can be found at: www.parkvillemo.org.



Fig. A.15 – Main Street Parkville Association Map of amenities and businesses in downtown Parkville (MSPA, 2012).

Visitors to downtown will find a variety of dining, shopping, and entertainment opportunities, including:

Dining

- Coffeehouse
- French Bistro
- Italian
- Mediterranean
- Pastries
- American
- Wine boutique

Shopping

- Antiques
- Collectibles
- Art
- Boutiques
- Home Décor
- Fabric/Hobby
- Specialty Stores
 - o Cigars
 - o Science
 - o Music
 - o Watch repair
 - o Glass
 - o Jeweler

Entertainment/Events/Festivals

- Final Fridays
- Cruise Nights
- MicroBrew Festival
- Parkville Days
- River Jam
- Christmas on the River
- Farmers Market
- Mini Golf

Services

- Banks
- Salons
- Dentists
- Financial Advisors
- Insurance
- Accountants
- Commercial Offices
- Education/Tutors
- Shipping/Transportation
- Marketing/Sales
- Landscaping
- Automotive
- Photography
- Lawyers
- Main Street Association
- American Legion
- Masonic Lodge
- Funeral Home
- Utilities
- Counseling
- Chamber of Commerce
- Security
- Architecture/Design
- Catering
- Web Design

SOMETHING TASTY TO PLEASE EVERYONE IN THE FLOCK!

Cafe Cedar Restaurant & Bar
2 East 2nd Street, 616-965-2233
Open Daily, 11:00 a.m. - 10:00 p.m.
www.cafecedar.com

Mediterranean, Middle Eastern, American and Greek cuisine made with the finest ingredients and spices. Always open on the right every Tuesday, 4:00 - 8:00 p.m. Chef's cooking every Thursday, 6:00 - 8:00 p.m., and enjoy a special chef-created appetizer on the house. Friday - Sunday Chef's specials from around the world. Appetizer plates every Saturday, 7:00 - 9:00 p.m. Cold Cedar house band every Sunday, 5:30 - 8:30 p.m. Bar/entertainment for up to 150 people. Visit our website and sign up for e-mail alerts. Like us on Facebook and Twitter.

Cafe des Amis
A French Bistro
112 1/2 Main Street, 616-567-6767
www.cafedesamis.com

Lunch served Tuesday - Saturday, 11:30 a.m. - 2:30 p.m.
Dinner served Tuesday - Saturday, 5:30 - 10:00 p.m.
Sunday brunch, Noon - 3:00 p.m.
Sunday dinner, 5:00 - 8:00 p.m.

Amusing service and delicious food. Extensive wine list and full-service bar. Outdoor deck seating available.

Cafe Italia
190 English Landing Drive, 616-544-0007
Sunday - Thursday, 4:00 - 9:00 p.m.
Friday & Saturday, 4:00 - 10:00 p.m.
www.cafekitaz.com

An authentic Italian experience. Enjoy the Italian culture in a casual atmosphere. Come in and watch us make our wonderful pastas and breads.

Frankie's Italian Restaurant
100 Main Street, 616-746-8282
www.frankiesparkville.com

Tuesday - Thursday, 11:00 a.m. - 8:30 p.m.
Friday, 11:00 a.m. - 9:00 p.m.
Saturday, 8:00 a.m. - 9:00 p.m.
Sunday, 8:00 a.m. - 7:00 p.m.

Home of the Italian dining in Historic Downtown Parkville. \$4.99 lunch specials Tuesday thru Friday. Breakfast on weekends, 8:00 - 11:30 a.m.

La Estancia Steak House
(Formerly Pinnacle Grill)
Steaks with a View
1 West 1st Street, 616-741-9600
Please call for details.

The Old Mining Station
10 Main Street, 616-567-4471
Open Tuesday - Saturday at 11:00 a.m. and Sunday at noon.

Serving up the "coolest" ice cream treats, frosts, shakes and sundries in town, fresh smoothies and breakfast. Dig into one of our subverts, New York-style quarter pound hot dogs (and join us for Grandpa Ma's meatball grinder with huge stacks on weekends).

Panache's Bites
100 South Main Street (in the Train Car)
We're returned to historic Downtown Parkville. You'll find all your old favorites from the original Panache's menu, plus many new items to enjoy.

Parkville Coffeehouse
103 Main Street, 616-216-6560
www.parkvillecoffeehouse.com
Monday - Saturday, 6:00 a.m. - 9:00 p.m.
Sunday, 7:00 a.m. - 6:00 p.m.

handcrafted espresso, house hot beer and fruit beverages served hot, iced or frozen, sandwiches baked on fresh, Farm-to-Table bread, pastries, soups, salads, chips, desserts and quite a few treats, whole bean coffee roasted in Parkville. Gift items and coffee accessories.

River's Bend Restaurant & Bar
2 Main Street, 616-680-0996
www.riversbendrestaurant.com
Open Daily, 11:00 a.m. - 11:00 p.m.

Enjoy hearty meals, your favorite drinks, and your favorite games on big-screen TV. Featuring burgers, pork tenderloin, pasta, salads, sandwiches, steaks and an array of appetizers. Banquet room available for parties of 20 to 150. Seating also available.

Shabby Nellie's Tea Room & Boutique
113 Main Street, 616-567-1044
Lunch served Monday - Saturday, 11:00 a.m. - 3:00 p.m.
Breakfast served on Saturday for reserved groups only.
www.shabbytutties.com

Made-from-scratch quiche, soups, hearty sandwiches and desserts. Fruit tea smoothies, hot breads, drinks, and Missouri River bottom fudge. More than 50 drink treat, accessories and gifts.

Stone Campen Pizza Co.
15 Main Street, 616-746-8686
www.stonecampenpizza.com
Open Daily at 11:00 a.m.

A wonderful family environment! Daily lunch specials starting at \$3.99. Monday - Friday, 11:00 a.m. - 2:00 p.m. Happy Hour, Monday - Friday, 2:00 - 6:00 p.m. 1/2 price wine by the bottle every Thursday evening. Table side magic every 2nd and 4th Friday evening, 8:00 - 8:00 p.m. Family Night every Sunday, 4:00 p.m. with timing. Burger 24 Night every Thursday, 4:00 p.m. with kids eat! Affordable private dining area available for up to 25 people.

Wines by Jonathan
406 Main Street, 616-566-8463
www.winesbyjonathan.com
Tuesday - Saturday, Noon - 8:00 p.m.

A global wine boutique and tasting room. Wine tastings, wine by the glass, more than 60 beer varieties, appetizers, specialty foods, wine accessories and gifts. Private parties and catering services available. Check our website for information about our special events.

DOWNTOWN PARKVILLE AFTER HOURS

FINAL FINDS
Last Friday of Every Month
Starting at 6:00 p.m.

Come for the fun, look for dinner, special evening entertainment featuring great live music and more. Enjoy pizza, special appetizers and party lighting, drinks and entertainment.

WINE, MUSIC, AND WINE, WINE

Enjoy live musical entertainment shopping at scenic's lunch gallery, 14 M.A. Soule's, Variety Conventions, The Cigar Shoppe and the Parkville Antique Mall.

First Saturdays
May 2nd, June 2nd, August 4th, and September 1st in the South Main parking lot. Starts at 4:00 p.m.
Music, food and wine on wheels!

Parkville Farmer's Market

Saturdays, 7:00 a.m. - 1st Noon
Wednesdays, 2:00 - 5:00 p.m. (starting in June)

Shop for bio-dynamic vegetables, fruits, flowers, jams, honey, baked goods, eggs, meats and more. Located just south of the railroad tracks near the banks of the Missouri River.

For more information, call 616-565-2227 or visit www.parkvillemo.org.

Upcoming Festivals & Events

Music On Main
Enjoy live music by local musicians on Saturday afternoons, 1:00 - 3:00 p.m.
Jazz, Blues & Fine Art River Jam
Friday & Saturday, June 15th & 16th
Free Admission
Non-stop music, art fair, food and fun!

4th of July Celebration
Wednesday - Saturday, July 4th - 7th
Free Admission

Carnival Rides July 4th
10:00 a.m. - 10:00 p.m.
July 5th - 7th
9:00 - 10:00 p.m.

Parade Wednesday, 5:00 a.m.
Fireworks Wednesday, 9:45 p.m.

Parkville Days
Friday - Sunday, August 17th - 19th
English Landing Park.
More than 100 vendors including art and crafts.
Free Admission

Carnival Rides Friday
9:00 - 10:00 p.m.
Saturday
10:00 a.m. - 10:00 p.m.
Sunday, Noon - 6:00 p.m.

5k Run Saturday Morning (before parade)

Parade Saturday, 10:00 a.m.

For more information and updates, visit www.parkvillemo.org.

Parkville Visitor's Map and Calendar of Events

SPRING • SUMMER 2012

HISTORIC DOWNTOWN Parkville MISSOURI

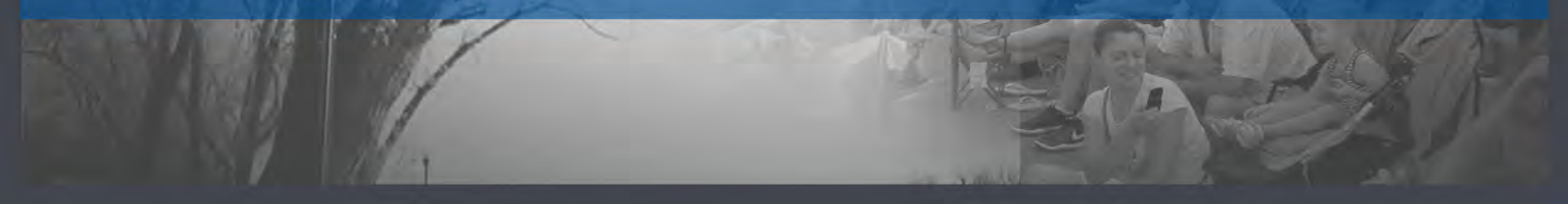
Far from ordinary. Close to home!

www.parkvillemo.org

Fig. A.16 – Main Street Parkville Association businesses and events in downtown Parkville (MSPA, 2012).



APPENDIX B: Existing Conditions



Appendix B

Existing Conditions

B.1 Introduction

This chapter provides a brief summary of the various existing condition elements that make Downtown Parkville what it is today. The observations, information, and data used in the existing conditions inventory were collected in the following ways by the planning team:

- On-Site Inventory – Surveyed the downtown area, either by foot or by car, and recorded all relevant observations. Photos were also taken at this time to document the existing conditions of the area.
- Available GIS Data – Identified and collected all the relevant GIS data that was available.
- Google Earth – The Google Earth application has a variety of useful tools that were used to verify and supplement information gathered in the inventory process.
- County GIS Data-The County GIS data provides parcel and ownership data.
- Parkville Master Plan, 2009.
- Parkville Regional Multi-Modal Access and Livable Community Study, 2012.
- Fishburn Archives and Special collections, McAfee Library, Park University, Carolyn Elwess.
- Excerpts from articles written by Carolyn Elwess for the Parkville Luminary based upon “reminiscences of Parkville” originally published in the 1885 Parkville Independent, McAfee Library, Park University.
- An Architectural/Historic Survey of Parkville, MO, Reference No. 977.8135 AK25 BL.1, 1994.

The collected information was then used to create a series of maps, spreadsheets, and image boards to help the planning team understand the downtown area in its proper context.

B.2 Downtown Study Area Boundaries

To the north, the study area extends just beyond the point where Main Street and 9 Highway intersect. To the south, the boundary is the Missouri River. To the west, the project area extends to Crooked Road and Bell Road. And to the east, the boundary is defined by the edge of the Park University endowment land.

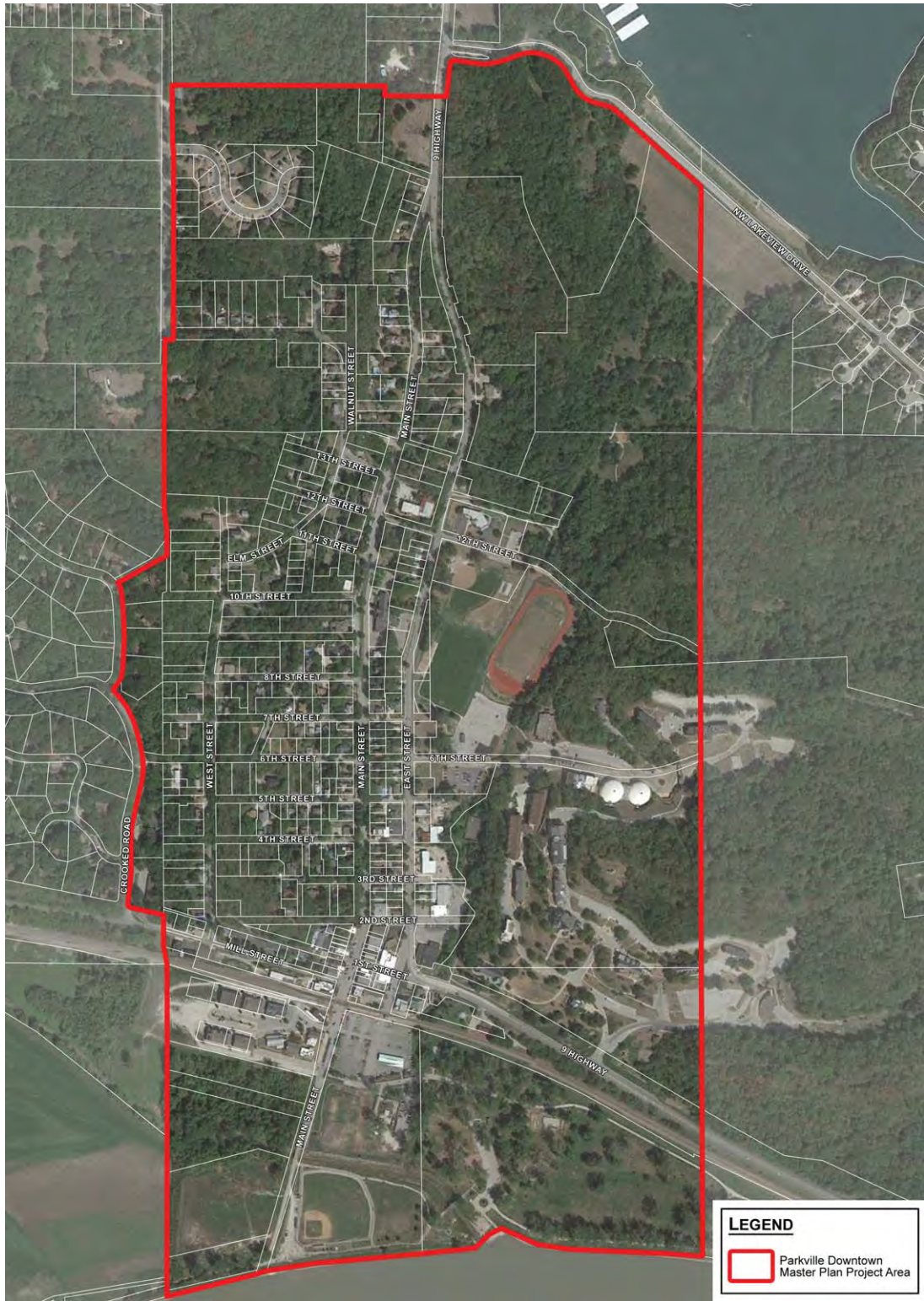
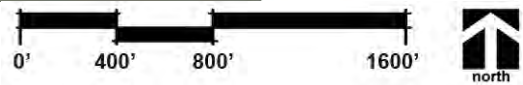


Fig. B.1 – Project Area Plan



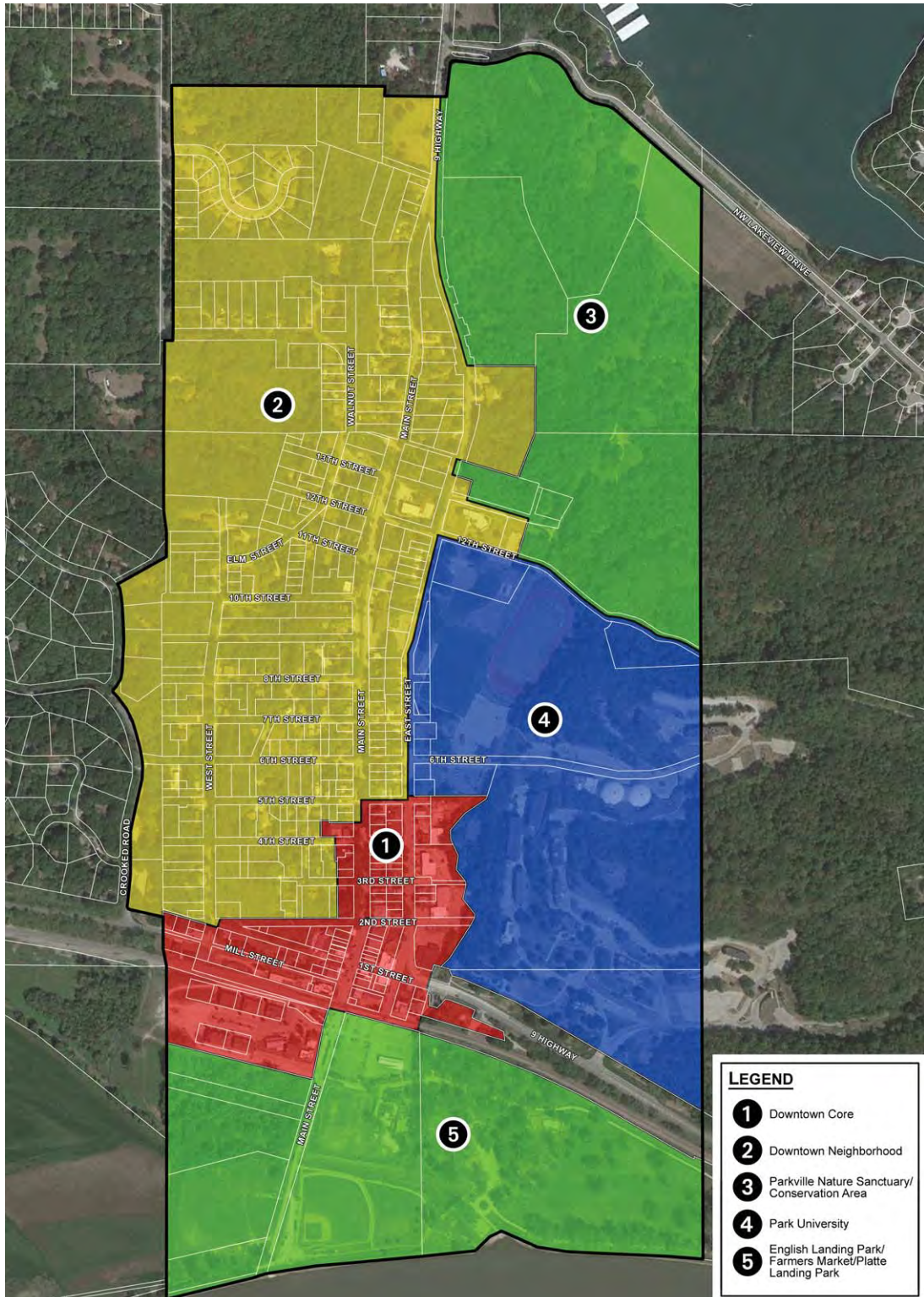
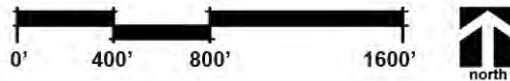


Fig. B.2 – Existing Land Use Diagram



B.3 Land Use

Downtown has been divided into five (5) areas, as seen in Figure B.2. What follows is a description of the existing land uses within each area.

Downtown Core

The downtown core is made up of a broad mix of uses typical of a downtown, including:

- South of 2nd Street, Main Street and the west side of East Street are mostly commercial. The commercial uses range from bars and restaurants to specialty shops and services. Many of the two story buildings along Main Street have the ability to function as mixed use, though they currently do not.
- The land uses from 2nd Street to 5th Street are much more mixed in nature. Main Street and the west side of East Street include a nice blend of single family, multifamily, commercial, and office. Some of the commercial and office uses are actually located in single family structures.
- The east side of East Street consists of a combination of commercial, public, and quasi-public uses. Commercial development is mostly of the large lot, single story variety, while public and quasi-public uses include the Post Office, Missouri Water, and Firehouse #1.
- Mill Street consists of commercial development on both sides of the street, including a large parking lot on the north side.
- The buildings within English Landing Center are multiple stories and mixed use in nature, including two buildings with office and commercial in front and residential in back.
- Vacancy in Downtown is fairly limited. Some of the second story office and residential appear to be vacant or unused, but that is difficult to verify based on visual observation. Compared to the rest of Downtown, English Landing Center has a higher rate of vacancy. One of the mixed use buildings on the south end appears to be completely vacant on the first floor. However, all the buildings from English Landing that front Main Street are occupied.

Downtown Neighborhood

As one might expect, the downtown neighborhood is predominantly single family in nature. The homes and the lots they occupy range in size throughout the neighborhood. Other uses include:

- There are four churches intermixed within the residential neighborhood, with the Parkville Presbyterian Church (819 Main Street) being the largest of the four.
- There are two neighborhood parks (Adams Park and Watkins Park) that serve the residents. Both are further discussed in the 'B1.8 Parks and Open Space' section of this appendix.
- Multifamily homes are sprinkled throughout the neighborhood. This includes duplexes, multi unit buildings (4-10 units), and a senior assisted living facility.
- There is a fair amount of vacant land throughout the west half of the residential neighborhood. This is most likely due to challenges created by the natural topography and vegetation of the area. The elevation drop from west to east is fairly dramatic and the vegetation is quite dense, which makes direct vehicular access to some parcels an issue. For instance, 7th and 8th Streets dead end west of West Street, extending just far enough to provide vehicular access for the adjacent residential properties. On the other hand, 9th and 10th Streets west of West Street have been platted but never constructed, leaving some parcels with very limited access.
- Some commercial and office uses do exist within the area, including a collection of properties along Crooked Road. Overall, the properties are fairly spread out and mostly fit within the context of the neighborhood.

Parkville Nature Sanctuary/White Alloe Creek Conservation Area

The Parkville Nature Sanctuary (49 acres) and the adjacent Alloe Creek Conservation Area (66 acres) account for a total of 115 acres of natural forest land along the northeastern portion of the study area. A 2.8 mile trail systems offers visitors a chance to hike and observe flora and fauna in their natural environment.

Park University

Park University sits along the east edge of the downtown area, just south of the Parkville Nature Sanctuary. Park University is an independent, non-profit private institution that offers 40 campus locations throughout 21 states and has an annual student enrollment of approximately 23,000. The Parkville location serves as the flagship campus. It is spread out across 800 acres and has an annual enrollment of approximately 1,600. The campus includes a combination of educational and administrative buildings, student dormitories, and athletic facilities in addition to significant underground facilities in the undermined area of the campus.

The University has a large international population, many of who live on campus and have limited access to vehicular transportation. The student population also includes a significant number of commuters who live in the Kansas City metropolitan area.

Though the University is adjacent to the downtown core, the two are partially segregated from one another due to a combination of factors like topography and pedestrian connectivity.

English Landing Park, Farmers Market, & Platte Landing Park

English Landing Park and the future Platte Landing Park occupy the southern edge of the downtown study area.

English Landing Park is Parkville's largest park and one of downtown's most valuable resources. The park encompasses 68 acres of recreational open space and

includes 3 miles of walking trails, playground facilities, a boat ramp, picnic shelters, a sand volleyball court, a disc golf course, and baseball fields. It is the most visited parks and recreation site in the County.

The Parkville Farmers Market sits in a large parking lot adjacent to the northwest edge of English Landing Park. The parking lot serves the downtown commercial core, as well as the park, the farmers market, and large festivals/events. The Farmers Market itself runs on Saturdays from late April to late October, and on Wednesdays from late June to late October.

Platte Landing Park represents a planned extension of English Landing Park to the west. The master plan for the 144-acre park extension includes additional ball fields, a nature trail and boardwalk, boat ramp, dog park, concessions, restroom facilities, and a riverfront plaza/stage.

Existing Land Use Map

For a closer examination, the Existing Land Use Map shown in Figure B.3 identifies the land uses for each parcel within downtown Parkville.

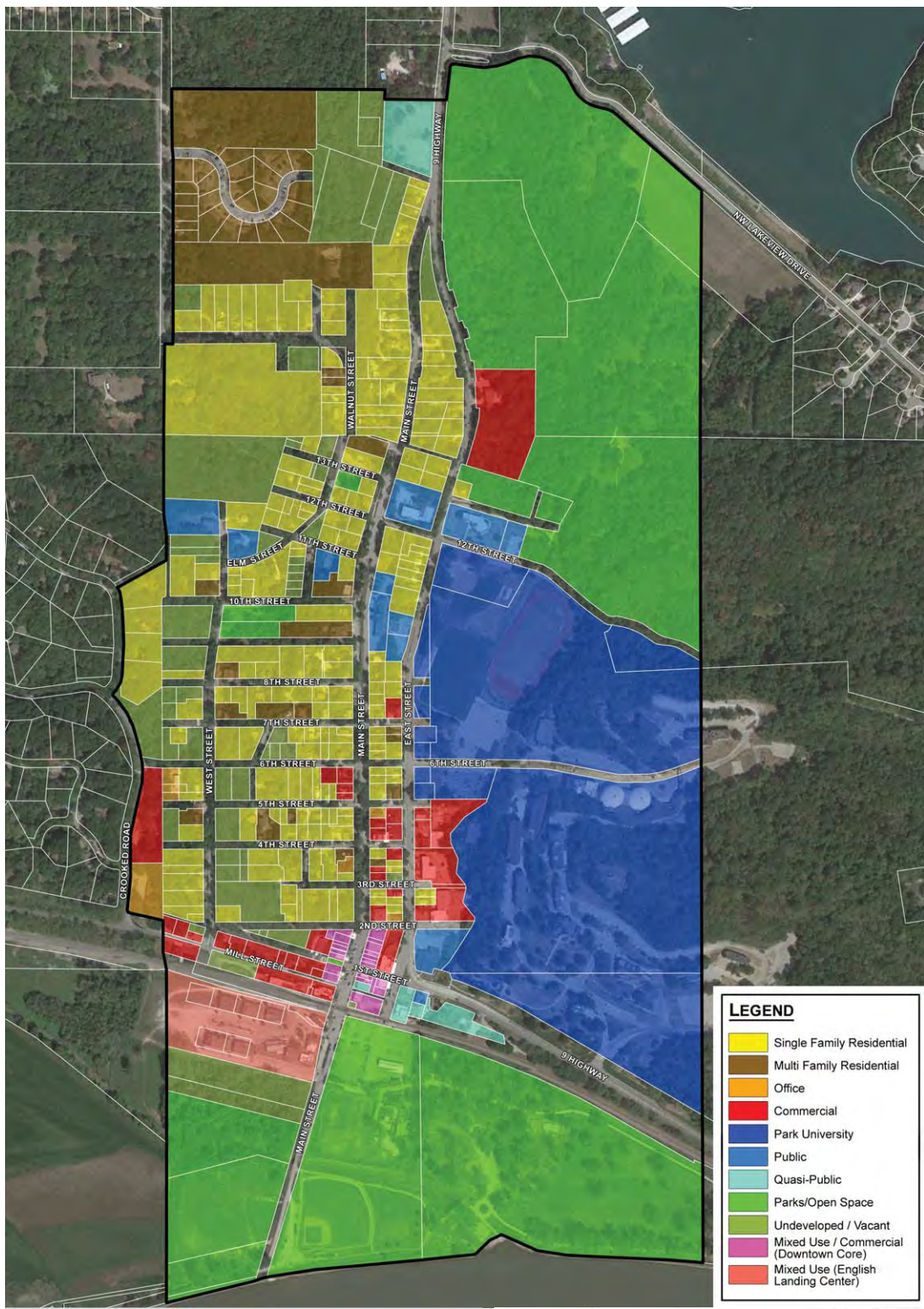
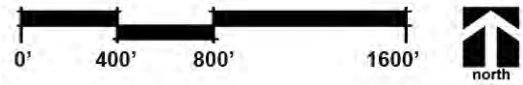


Fig. B.3 – Existing Land Use Map



B.4 Zoning

The City of Parkville adopted the current zoning map, depicted in Figure B.4, in December, 2008. The map projects development of the City in a manner that protects the health, safety, prosperity, and general welfare of its residents. Zoning within the downtown area includes the following districts:

- **PLCD** Parkland and Conservation District
- **R-1** Single Family District
- **R-2** Single Family Residential District
- **R-4** Multiple Family Residential District
- **PEC** Planned Educational Campus
- **OTD** Old Town District
- **B-4** Planned Business District
- **I-2** Light Industrial District
- **I-3** Heavy Industrial District

The downtown residential neighborhood is zoned “R-4” throughout. This district allows for single family, two family, multifamily, apartment buildings, lodging and bed and breakfast establishments, and religious or non-profit uses.

The commercial core of downtown is zoned “OTD.” The Old Town District permits a mix of uses typical of downtown development. Residential dwellings units are allowed, “when located within a structure that contains retail space on the street level” (Source: City of Parkville Zoning Code). The OTD has design guidelines and detailed sign requirements that aim to maintain the look and character of downtown. Currently, while this designation is a part of the code, no properties have been rezoned OTD.

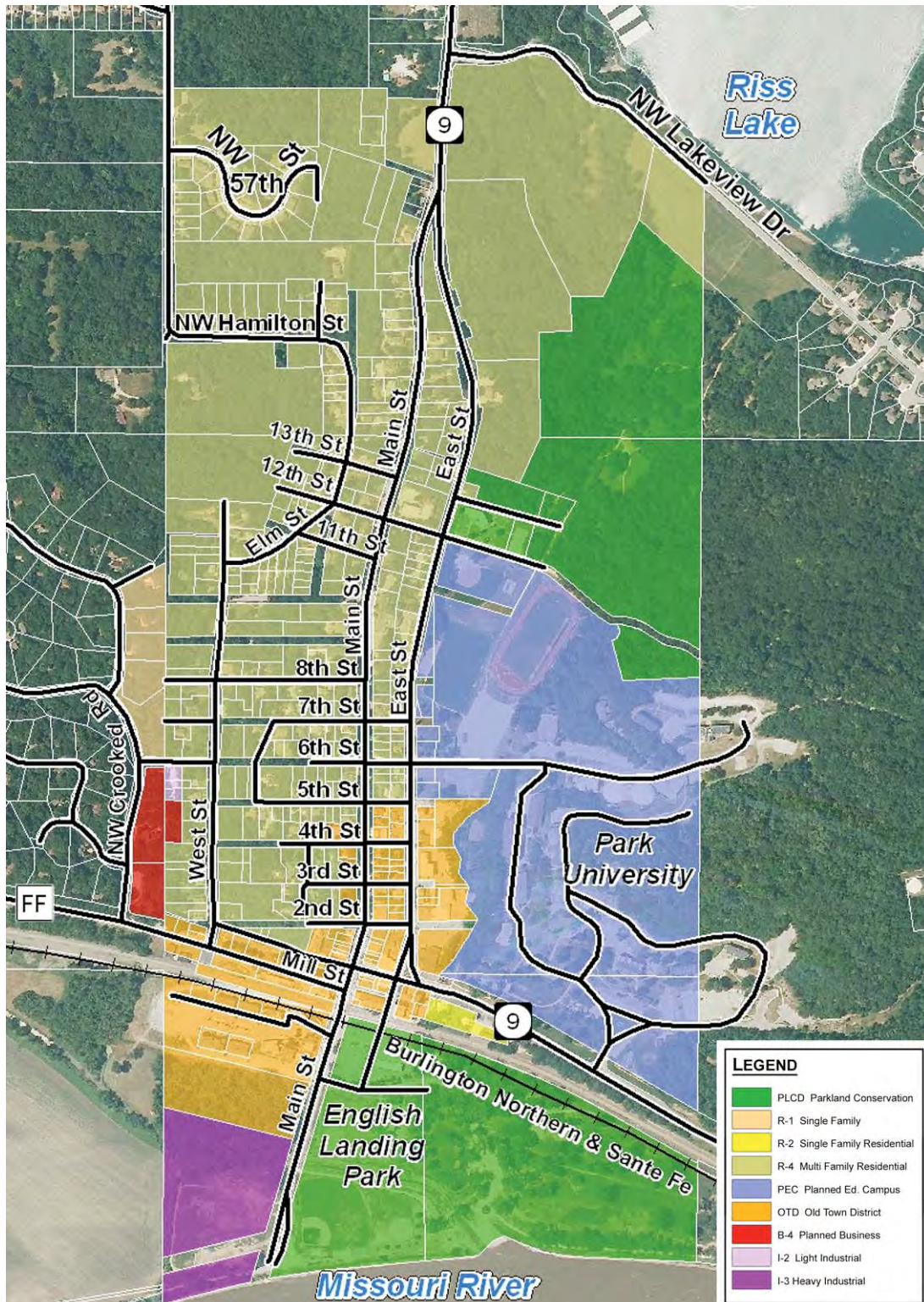
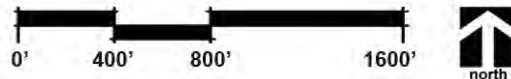


Fig. B.4 – Existing Zoning Map



B.5 Housing Characteristics

As mentioned under land use, housing in downtown consists predominantly of single family residences. The size, architectural style, and age of the homes varies throughout the downtown area. The historic Downtown Parkville core consists of a collection of commercial and residential structures of varying architectural styles, construction types and construction dates ranging from the mid 1840's – 1960. Typical housing architectural styles include, Queen Anne, Folk Victorian, Foursquare, Early American, Neo-Ecclectic and Craftsman Bungalow to name a few.



Fig. B.5 – View looking south along Main Street (SRJA, 2012)

To help understand the quality of housing and property condition that exists, a housing conditions survey was completed. This was a quick windshield survey that used a simple rating system and considered both the housing structure and the site. Each parcel was given a score of 5 to 1, with 5 representing excellent conditions and 1 representing dilapidated conditions. Below is a brief description of each rating:

5 Rating

Site and structure in excellent condition. Very well maintained.

4 Rating

Site and structure in good condition. Well maintained.

3 Rating

Site and structure in sound condition with only minor deficiencies. Adequately maintained.

2 Rating

Significant deficiencies in condition of site and/or structure. Poorly maintained.

1 Rating

Dilapidated site and/or structure conditions. Maintenance appears minimal to non-existent.

Housing structure elements that were reviewed for condition quality included roofing, paint, windows,

siding, observable foundation, porches, and general architectural aesthetics. Similarly, site elements were reviewed and scored based on the maintenance of driveways, retaining walls, lawns and landscaped areas, as well as site access and overall aesthetics. The results of this survey are as follows:

- **20%** of houses received a 5
- **33%** of houses received a 4
- **35%** of houses received a 3
- **11%** of houses received a 2
- **1%** of houses received a 1

In general, conditions are excellent to sound throughout much of the eastern half of the study area. Main Street and East Street, as well as the side streets directly west of Main Street include a number of excellent properties. Moving farther west of Main Street, the conditions are much less consistent. Though there are still a number of sound properties in this area, there are also an increasing number of deteriorating ones. Dead-end streets, deteriorating retaining walls and dramatically sloped properties are all common issues. Gravel driveways, poor lawn and overall site maintenance and general building deterioration also contribute to the inconsistency in this portion of the study area.

B.6 Character of the Built Environment

The historic Downtown Parkville core consists of a collection of commercial and residential structures of varying architectural styles, construction types and construction dates ranging from the mid 1840's – 1960.

Many of the commercial buildings are traditional one and two part commercial block buildings located along Main Street and 1st Streets. Typical construction materials are brick, concrete block, wood and stone. Several of these buildings have bronze oval plaques depicting their date of construction which are installed on the building's main facade. The majority of these one and two part commercial block buildings are located along Main Street from 5th Street to the North; Highway 9 to the East; and the railroad to the South. The historic buildings are in good to fair condition overall. Several buildings with wood trim, windows, storefronts and buildings of wood construction are in need of wood repair and/or replacement and many need regular, routine maintenance.

Character defining features of the built environment in the downtown core include, but are not limited to, the following items:

- Storefront windows
- Signage
 - Painted Wood Signs
 - Screenprinted/Vinyl Signs on Storefront Windows
 - Flag/Blade Hanging Signs
 - Banners
- Second story fenestration (if applicable)
- Parapets with flat or low slope roofs beyond
- Awnings (fabric, wood or steel)
- Defined front door or main entry
- Angled parking in front of storefronts
- Planters
- Sidewalks
- Streetlights with banners and overhead power lines



Fig. B.6 & B.7 – Views looking east along Main Street (SRJA, 2012)

Main Street

One of the most identifiable areas of downtown is the two block stretch of Main Street from the railway to 2nd Street. The buildings are occupied by a mix of shops, services, and dining options. Buildings vary in quality, level of maintenance, and repair. There is a significant amount of original context still remaining in Parkville's historic downtown, though throughout the years, it has been concealed below layers of non-original and sometimes inappropriate materials.

The 'historic feel' to Main Street still exists and per the National Park Service's Secretary of the Interior's Standards for Rehabilitation with a minimum level of improvements could meet the requirements for listing on the National Register of Historic Places either individually or as a historic district.

In many cases, residential quality materials have been used to modify storefronts and buildings, reducing the overall appearance of the area. A lack of attention to quality maintenance and upkeep further reduces the overall appearance.

Parking lines both sides of the two-lane street. This leaves 8'-10' of pedestrian streetscape from the edge of the buildings to the edge of the street curb. The streetscape is primarily a pedestrian walkway, but it is also used by property/business owners to attract traffic. Site furnishings, landscape pots, and sandwich boards often occupy the space directly in front of the buildings. Though these amenities are essential elements of a downtown streetscape, they have the effect of making a cramped walkway even tighter.

South of the railroad tracks, newer development exists on the west side of Main Street known as English Landing Center. This mixed use retail, office, service, and housing development is internally designed and focused. It has an internal parking lot with buildings on the north and south. Quality of the development is good, with an architectural style that mimics eastern-stacked, mixed use seen on main streets or urban nodes. Materials are brick and siding that are in good condition.

Aesthetically, the streetscape along Main Street feels tired and worn out. The large fields of well worn reddish-grey concrete pavers are monotonous, offering little beyond a surface to walk on. The benches and landscape pots are appealing, but there are so many styles, sizes, colors, and types of materials being used that the end result is a mishmash of elements that do not always appear to belong together. There are no street trees along this stretch of Main Street, and the street lights are spaced too far apart to be a unifying element.

All this adds up to create a cramped, cluttered, and uninviting streetscape that lacks an identity beyond the names on the fronts of the buildings.

The streetscape in the residential neighborhoods north of 2nd Street along Main Street, is in good condition. Existing large trees line the streets and sidewalks are on both sides of the street. These features add significantly to the overall character and quality feeling of the neighborhood. Existing vegetation overhangs the sidewalks which are deteriorated in places. These conditions need to be addressed to help provide a safe and convenient route for pedestrians.



Fig. B.8 – View looking north down Main Street (SRJA, 2012)

Fig. B.9 – View looking south down Main Street (SRJA, 2012)



Fig. B.10 – View looking northwest along Main Street (SRJA, 2012)

East Street

When viewing the study area as a whole, it is important to identify the relationship between Main Street and East Street as it relates to character and context. Main Street is densely defined by buildings on both sides, and the character of those buildings gives it a vibrant “downtown” feel. While the west side of East Street is still quite dense, the east side is fronted by a number of large parking lots, undefined open space, and more modern development patterns. As a result, East Street lacks the same “downtown” qualities that make Main Street special. Furthermore, East Street does not offer any visual connections that would invite travelers west toward Main Street. Given the amount of vehicular traffic that exists along East Street, this appears to be a missed opportunity to capitalize on such an asset.

Fig. B.11 – View looking east along East Street (OHH, 2012)



Fig. B.12 – View looking west along East Street (OHH, 2012)

West Street

West Street is residential in nature and has a completely different character than Main Street. Trees in front yards take the place of street trees. Streets are uncurbed. Sidewalks are sporadic. The general character of the homes varies greatly and includes many suburban style homes that are incongruous with the historic nature of the rest of the project area. There are numerous properties with distressed conditions, and vacant properties as well.



Fig. B.13 – The character of the built environment along West Street is quite different from Main Street.



Fig. B.14 – The hilly topography and dense woodlands that border the east side of West Street would make further development in this area difficult.



Historic Structures

Parkville has a long and rich history in the region and actually has a number of individual structures that are currently listed on the National Register of Historic Places. However, the only structure within the downtown area that is currently listed on the National Register is the ‘Waddell “A” Truss Bridge’ located in English Landing Park.



Fig. B.15 – Historic ‘Wadell “A” Truss Bridge (SRJA, 2012)



Fig. B.16 – Historic ‘Wadell “A” Truss Bridge (SRJA, 2012)

B.7 Attractions

The Attractions, Activities & Areas of Interest Plan shown in Figure B.17 identifies important functional assets to the downtown area. The identified uses are those which actively attract people to the corridor, both as residents and as visitors. In doing so, they play a substantial role in defining the public perception of downtown and the surrounding community.

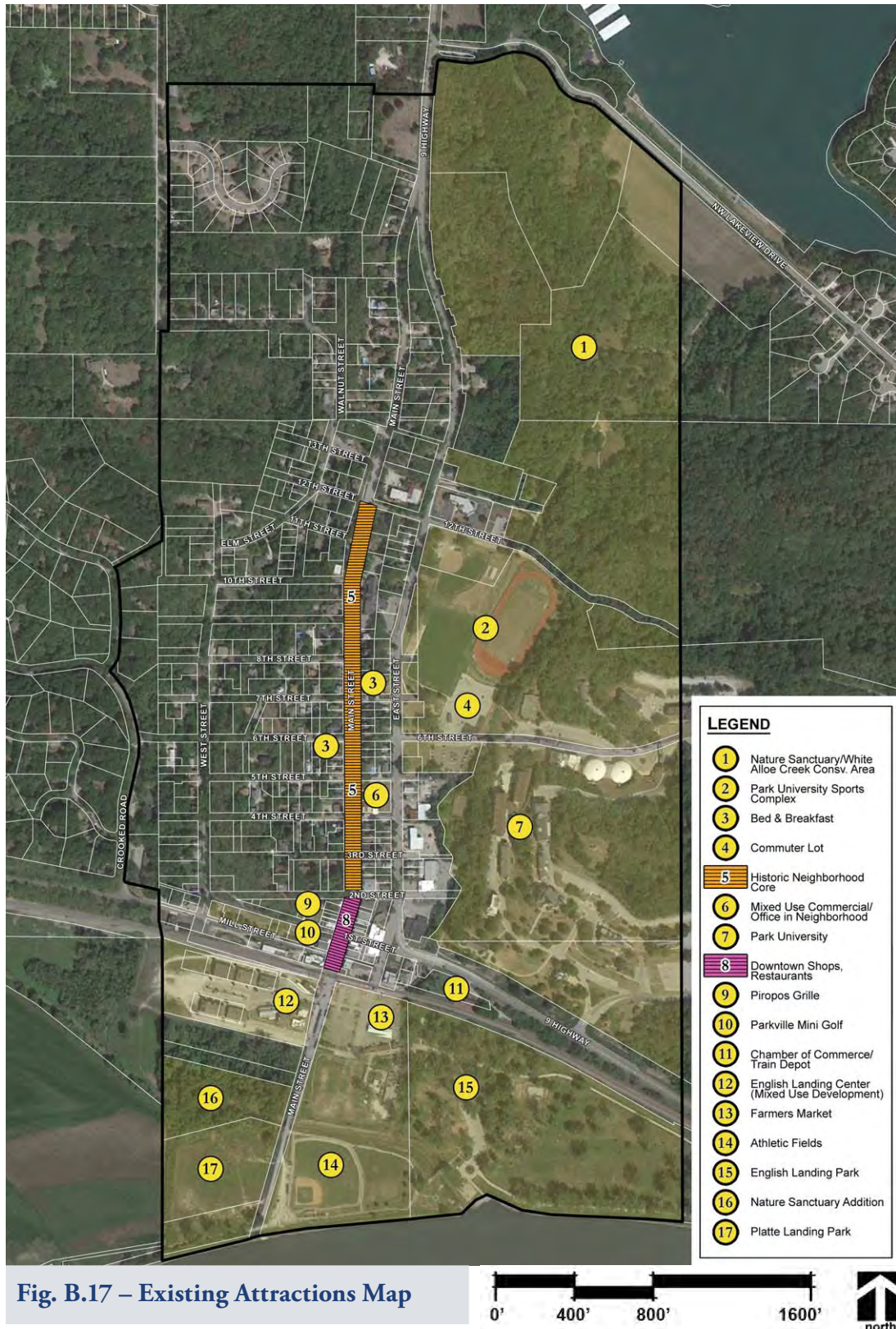


Fig. B.17 – Existing Attractions Map



Fig. B.18 – Existing Parks Map

B.8 Parks and Open Space

There are six parks located with the downtown study area, as described below:

Parkville Nature Sanctuary/White Alloe Creek Conservation Area

The Parkville Nature Sanctuary (49 acres) and the adjacent Alloe Creek Conservation Area (66 acres) account for a total of 115 acres of natural forest land along the northeastern portion of the study area. A 2.8 mile trail systems offers visitors a chance to hike and observe flora and fauna in their natural environment.

Adams Park

Located at the corner of 13th Street and Walnut Street, this mini-neighborhood park includes a small shelter and picnic area.

Bruce Watkins Park

Located at the corner of 10th Street and West Street, Watkins Park includes a short oval trail, open lawn space, a picnic shelter, a basketball half court, and an area for horseshoes.

Main Street Pocket Park

Located directly west of the intersection of 1st Street and Main Street, this urban park consists of a small gathering area with three benches, a trash receptacle, a water fountain, terraced retaining walls, and seasonal landscaping. The park also provides stair access to the commercial properties to the west.

Platte Landing Park

Platte Landing Park represents a planned extension of English Landing Park to the west. The master plan for the 144-acre park extension includes additional ball fields, a nature trail and boardwalk, boat ramp, dog park, concessions, restroom facilities, and a riverfront plaza/stage.

English Landing Park

Located south of the railway, the park encompasses 68 acres of recreational open space and includes 3 miles of walking trails, playground facilities, a boat ramp, picnic shelters, a sand volleyball court, a disc golf course, and baseball fields. It is the most visited parks and recreation site in the County.

Additionally, the park hosts several large events each year, including RiverJam, Parkville Days, Turkey Trot, and Christmas on the River.

B.9 Trails

There are several existing trails within and adjacent to the study area that need to be considered for potential connections. These include the South Platte Pass trail along MO Rte 45, the trail system within the Nature Sanctuary, and the trail system within English Landing. In addition to these existing trails is a proposed trail from the junction of MO Rte's 9 and 45 south to the junction of MO Rte FF (Mill St) and Main Street. The proposed trail is shown in Figures B.19 and B.20 and is delineated in two phases. Phase I at approximately 0.9 miles from MO Rte 45 to Honor Lane is currently funded with design underway. Phase II is not yet funded. The location is schematic and subject to refinement. The trail is envisioned as a 10-foot wide paved surface separated from any roadways.

Phase I of the trail would start on the east side of MO Rte 9 and travel south for nearly 2,000 feet until crossing MO Rte 9 at the Platte County Community Center. Here the trail becomes an off-road trail connecting to a path around an existing detention pond west of the community center before heading south again for another 2,000 feet passing near the east edge of 51st Street and then connecting into Honor Lane.

The Phase II trail is shown schematically along Honor Lane crossing Hamilton Street and heading south following along the western property lines of homes along Elm Street for approximately 1,500 feet. A connection is shown along 12th Street towards Main Street. The trail then crosses Elm Street and 10th Street entering



Fig. B.19 – Phase 1 Trail Exhibit (TranSystems 2012)



Fig. B.20 – Phase 2 Trail Exhibit (TranSystems 2012)

Watkins Park. The trail then exits Watkins Park and heads south along West Street for approximately 1,500 feet before turning easterly along Mill Street for 700 feet to Main Street.

The Phase II trail poses several connectivity issues. The connection via 12th Street is only 100 feet from Adams Park. 12th Street also leads to Parkville Nature Sanctuary and its trail system. The trail passes by (or potentially through) the National Register property of the Benjamin Baker School before crossing Elm Street into Watkins Park. The trail is shown stopping at Mill and Main Streets less than 500 feet from the existing English Landing trail network. Eventually future trails are likely to connect through Park University.

A brief description of the parallel street network is provided under the assumption that the trail is a 10-foot wide path separated at least 5 feet from the edge of travel way.

- Honor Lane – This 50-foot wide right-of-way and 32-foot wide roadway would require modification unless an on-road system was utilized.
- Elm Street – While the 40-foot right-of-way is relatively narrow, the 28-foot wide roadway could be utilized for a shared roadway. Nonetheless, sidewalks would be desirable.
- West Street - The 40-foot right-of-way is relatively narrow and so is the 20-foot wide roadway. Creating a separated trail in this section may require permanent easements or property takings.
- Mill Street - The 40-foot right-of-way is relatively narrow and so is the 22-foot wide roadway. Conditions are made more challenging by a retaining wall on the north side and a steep drop-off on the south side.
- Main Street – The 80-foot right-of-way provides opportunities for a separated trail. It could connect to the existing trail on the east side of Main Street south of Herb Bush Drive.
- 12th Street - The 40-foot right-of-way is relatively narrow with a 24-foot wide roadway. Conditions are

made challenging by a retaining wall on the north side. Crossing MO Rte 9 may also be challenging.

B.10 Topography

One of the defining features of Downtown Parkville is the dramatic grade change that occurs throughout the study area. In general, the entire area slopes toward the Missouri River along the south edge. Rush Creek feeds into the river from the west, and White Alloe Creek feeds into Rush Creek from the north. Park University sits on a ridge east of White Alloe Creek that isolates it from much of the downtown area to the west. There is also a major ridge that runs through the center of the downtown, west of Main Street. The ridge has a significant impact on the residential neighborhood between 2nd Street and 12th Street. The vacant property and undeveloped streets that exist within the west half of the neighborhood are likely a result of challenges created by the steep slopes and dense vegetation of the area.



Fig. B.21 – Existing Topography Map

B.11 Flooding

The 1% flood zone encompasses all of English Landing Park, the future Platte Landing Park, and the BNSF railway. It also encroaches on Mill Street, Crooked Road, and portions of the downtown commercial core. The first two blocks of Main Street north of the railway are impacted by the flood zone, as well as much of the development along the east side of East Street.

The City and the U.S. Army Corps of Engineers monitor Missouri River levels every year for the potential for flooding. Historically, flooding has been addressed by building dams using portable units and sandbags. Damages to English Landing Park are caused by flood waters that are unable to drain.

Flooding due to heavy rain events occurs along White Alloe Creek and Crooked Road. The new Rte 9 bridge over White Alloe Creek has improved flow along this channel during heavy rain events.

B.12 Vegetation

Much like the topography, the natural vegetation of downtown is both a challenge and an asset. A large portion of the west half of the residential neighborhood is protected by dense, overstory vegetation. This overstory undoubtedly adds to the beauty of the area, but it is also a limiting factor when considering the ability infill undeveloped residential lots.

Additionally, the Parkville Nature Sanctuary/White Alloe Creek Conservation has a total of 115 acres of natural forest land that serves to both preserve nature and attract visitors. The beautiful land offers a unique refuge near the heart of Downtown Parkville.

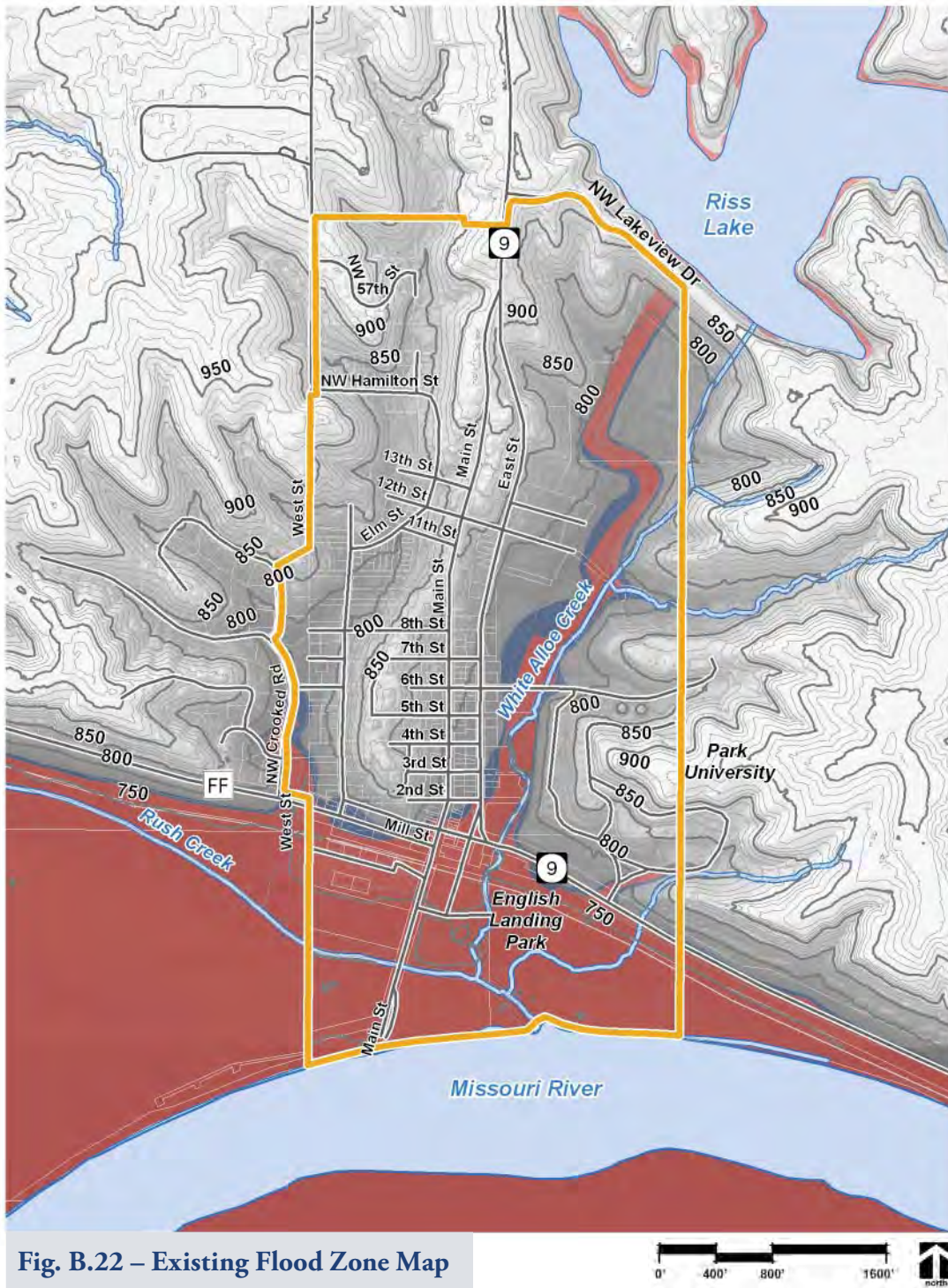


Fig. B.22 – Existing Flood Zone Map

B.13 Transportation Systems

As part of the data collection efforts and means to document existing conditions, the key street network was identified and information regarding traffic volumes, railroad crossings and accidents was assembled, reviewed and is summarized here. Site visits and observations were conducted during Summer 2012. Elements from the observations included street conditions and an inventory of sidewalks and on-street parking. The study area reviewed includes approximately 1.5 square miles with nearly 3.6 centerline miles of roadway.

B.13.1 Roadway and Traffic Volumes

The majority of streets are two-lane, two-way, undivided, narrow-asphalt roadways. A few of the ways are alleys and 2nd Street is a one-way street. Main Street, between 7th and 11th Streets, has a median which accommodates the split-profile of directional travel.

Streets are classified in three basic categories; local, collector and arterial. The majority of streets are local and account for 64% of the centerline miles. Collector streets consist of MO Rte FF (Mill and 1st Streets) and Main Street. MO Rte 9 is the only arterial street. Over half of the streets (55%) are considered primarily residential in character. Just less than 20% of the streets have centerline pavement markings, mostly single yellow dashed lines. Based upon observations only, 70% of the pavement is considered in good condition. Traffic control Stop signs are located at the following intersections:

- Main Street (SB/NB) at 13th Street/Walnut Street
- MO Rte 9 (SB) at 1st Street
- 1st Street (EB) at MO Rte 9
- 1st Street (WB) at Main Street
- Mill Street (EB) at Main Street

Prior traffic counts were reviewed to understand historic growth trends and ascertain travel patterns. The initial focus is upon the State highway system that affords both current and historic traffic volumes. The State highway system through Parkville includes Interstate 435, MO Routes 45 and 9, as well as State Highways K and FF. The two state routes of importance to Downtown Parkville are MO Rte 9 (River Park Drive/ East Street) and Highway FF (Mill Street/River Road). The daily traffic volumes on each highway reflect their function with 2,500 vehicles per day (vpd) on Highway FF and a range of 11,000 vpd (north of 1st Street) to 16,400 vpd (east of East Street) on MO Rte 9. Recent traffic counts conducted in September 2012 indicate some slightly different volumes. Traffic on Highway FF has grown to nearly 6,000 vpd while traffic on MO Rte 9 continues to decline to less than 10,000 vpd (north of 1st Street) and to less than 14,000 vpd (east of East St.).

Historic growth along the state highways through the Downtown and a few other highways around Parkville show a consistent decline along many of the corridors including MO Routes 9 and 45 as well as Highway FF. Over a 10-year period from 2000 to 2010, traffic volumes as reported from MoDOT traffic volume maps, all showed a decline as illustrated in Figure B.23. While many of the count locations are not directly in the Downtown area, they should reflect an overall trend in traffic volumes. In many locations, changes over a five year period (either 2000 to 2005, or 2005 to 2010) were nominal. Traffic volume data was not available for the year 2000 along Highway FF.

Traffic distributions follow expected commuter patterns of predominantly eastbound in the AM and westbound in the PM along the MO Rte FF/9 corridor. A similar patterns occurs on Route 9 in the north-south orientation; southbound in the AM and northbound in the PM. The FF/9 corridor also follows a near equal total peak for both the AM and PM traffic reaching just shy of 1,200 vehicles per hour (vph) for MO Rte 9 (east) and nearly 600 vph for Highway FF. On the other hand, MO Rte 9 to the north has a higher PM peak (at 900 vph) that the AM peak (over 600 vph) although these volumes last for more than the one hour peaking period.

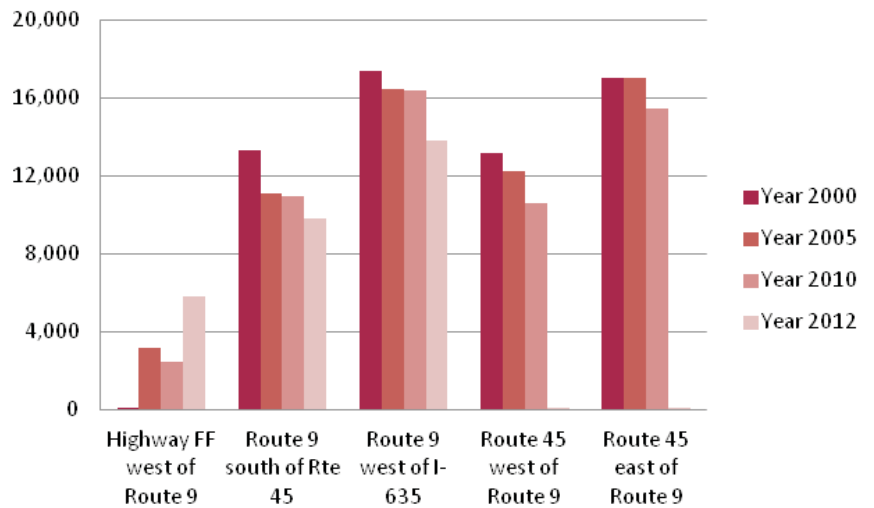


Fig. B.23 – Historic Traffic Volumes

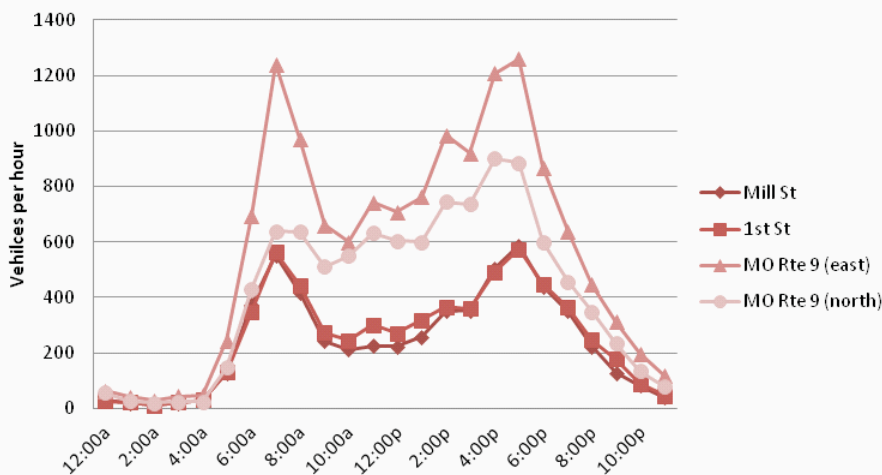


Fig. B.24 – Hourly Traffic Volumes

A recent study conducted through the Traffic Engineering Assistance Program (TEAP) involved a series of intersections along MO Rte 9 and Highway FF. These intersections were also reviewed to gain an understanding of travel patterns. At the stop controlled junction of MO Rte 9 with 1st Street, approximately 60% of traffic (based upon peak hour turning movement counts) goes to and comes from the north. The remaining 40% goes to and comes from the west along Highway FF. It should be noted that the projected peak hour volumes, as shown in Figure B.25, are approaching the practical capacity of a one-lane roadway for MO Rte 9, east of East Street.

When discussing travel along Highway FF from the west, one travels along Mill Street and stops at Main Street. The majority of traffic turns left and then immediately right onto 1st Street. 1st Street continues through East Street and encounters a stop control at the junction with MO Rte 9. When travelling from the east, westbound traffic on MO Rte 9 does not stop and continues either northward on East Street (essentially turning right) or straight on 1st Street until encountering a stop sign at Main Street. The majority of traffic turns left, then immediately right onto Mill Street, following the route of Highway FF. While Main Street has considerably less traffic volume, both Mill Street and 1st Street are considered the side streets in a typical 3-legged “T” shaped configuration.

Existing and Projected Intersection Peak Hour Volumes						
Location	Existing			Projected		
	WB	EB	Total	WB	EB	Total
1st Street – Highway FF (West of Main Street)						
AM	78	394	472	116	587	703
PM	434	189	623	647	281	928
River Park Drive – MO Rte 9 (east of East Street)						
AM	298	882	1,180	461	1,345	1,806
PM	1,103	216	1,319	1,679	660	2,339
East Street – MO Rte 9 (south of 2nd Street)						
AM	472	169	641	735	269	1,104
PM	301	655	956	459	1,130	1,589

Fig. B.25 – Peak Hour Volumes

Speed data along these roads was also collected, as shown in Figure B.26. The posted speed limit in all these segments is 25 mph. Only the 1st Street segment achieved a lower 85th percentile speed. The 85th percentile speed is typically used to assess posted speed limits. The 85th percentile speed on MO Rte 9 (east) was highest at 36 mph; this data was collected on Route 9 between the White Alloe Creek bridge and traffic signal at the entrance to Park University. The eastbound approach traffic travelled at 37 mph while the westbound was 34.4 mph. A greater difference might be expected as westbound traffic is attempting to slow down from a posted speed of 55 mph farther east.

B.13.2 Safety and Vehicular Crashes

MoDOT provided accident data for the study area over

a five-year period from 2007 through 2011. During that time period, 149 total accidents were recorded with 15 injury accidents and one fatal accident. The fatal accident involved a pedestrian along MO Rte 9 at 4th Street. The total number of accidents jumped from 27 in 2008 to 37 in 2010. Figure B.27 shows the total accidents and injury accidents by month over the five-year period. January had the most accidents (at 18) followed by June and September (at 16 each). Figure B.28 shows the breakdown of accidents by classification. The top three types of accidents were rear-end, out of control, and right angle. These three classifications encompass 45% of the total accidents and include a majority (56%) of the injury accidents. The overall percentage of injury accidents is 10% which is relatively low. A dot-plot over the five year period of the crash locations is shown in Figure B.29.

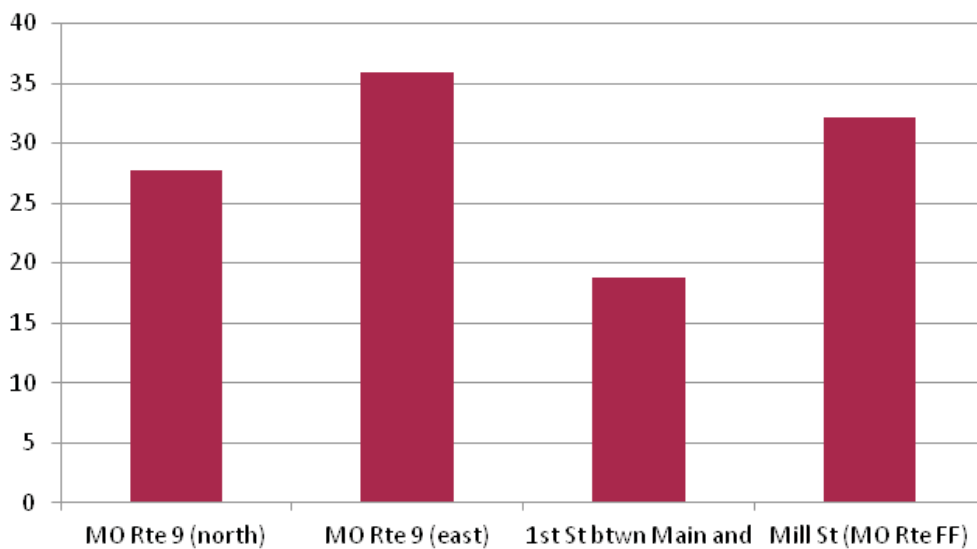


Fig. B.26 – 85th Percentile Speed Data

5-year Accidents by Month

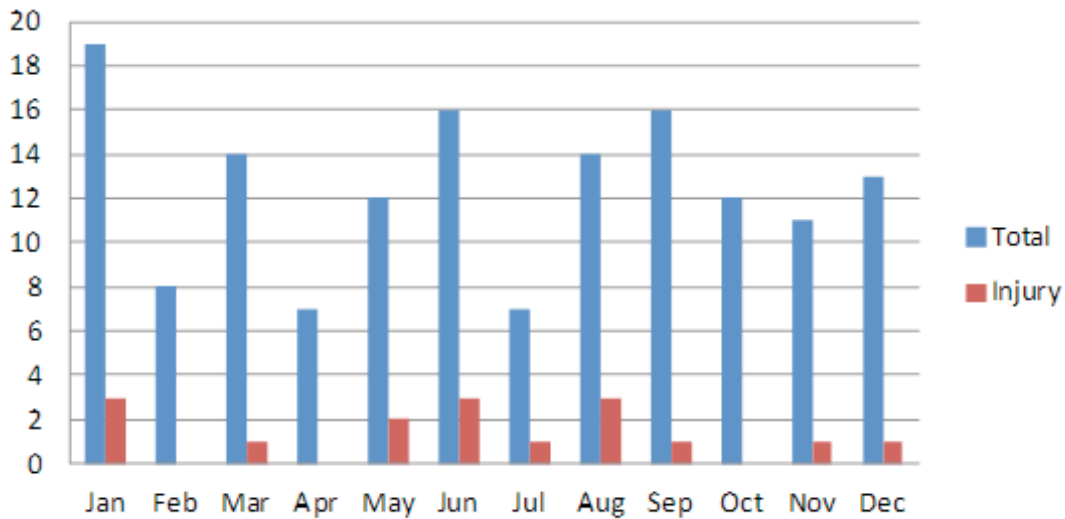


Fig. B.27 – 5-Year Accidents (2007-2011)

Downtown Parkville Accident Types

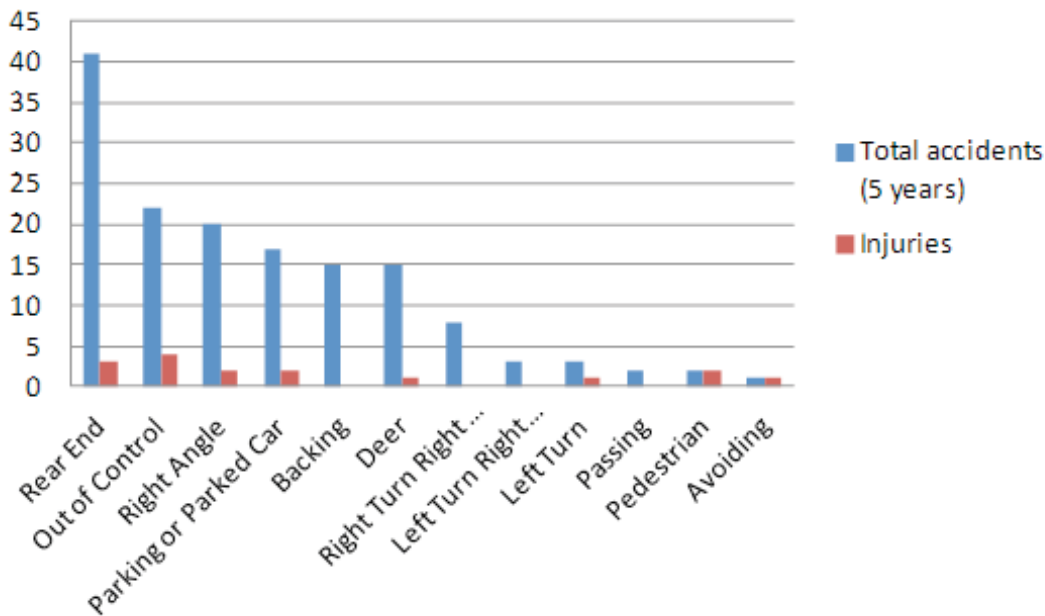


Fig. B.28 – 5-Year Accidents (2007-2011) by Type



Fig. B.29 – 5-Year Accident Locations

Other accident characteristics note:

- The majority (82%) of all accidents are intersection related.
- The majority (75%) of all accidents occur under clear weather.
- The majority (79%) of all accidents occur under dry road surface conditions.
- The majority (73%) of all accidents occur under daylight conditions.
- Half (50%) of injury accidents occur during daylight conditions.

While several accidents occurred in the study area and some clustering of accidents can be noted, a positive aspect is that in general the injury percentage is low. Unfortunately a fatal accident occurred with a pedestrian across MO Rte 9. A comparison to statewide average accident rates is not applicable as the segment lengths within the study area are shorter than required and would result in artificially high crash rates.

B.13.3 BNSF Railroad

There are two at-grade railroad crossings in the Downtown area which include Main Street and East Street just 225 feet apart centerline to centerline. East Street is milepost (MP) 9.64 and Main Street is MP 9.66. Consequently, when a train passes through, both streets are blocked. The Main and East Street junctions are controlled by gates and mast mounted flashers. Wrought iron fencing is installed along the north side of the railroad track between and adjacent to Main and East Streets in order to control pedestrian crossings. The crossing surface is concrete. No pavement markings are present on the approaches. Both streets are classified as urban local streets that provide access to English Landing Park. Traffic volumes as reported by the FRA in 1994 are 1,000 vehicles per day (vpd) for Main Street and 1,750 vpd for East Street.

The rail line is owned by BNSF Railway and is part of the Nebraska/St. Joseph/KC-Carling division/subdivision/branch. There are 23 to 45 trains per day on the one main track. Many of the trains are coal trains. By track classification, trains can operate up to 60 mph. However, loaded coal trains typically operate up to 40 mph while empty coal trains may travel up to 45 mph. The right-of-way varies though it is typically 80 to 100 feet wide. The rail line is an important freight corridor for the BNSF. Discussion with the BNSF indicates that increases in train traffic are likely to result in a capital improvement to go to two main tracks into the BNSF Yard next to Wheeler Airport in Kansas City. At this time there is no schedule for implementation yet the expansion is considered a long term improvement.

A review of accident history notes a recent fatality (less than five years ago) with a pedestrian that had stopped on the Main Street crossing at night. Figure B.30 summarizes the five accidents from the Federal Railroad Administration (FRA) database.

Exhibit 13. Crash History at At-Grade Railroad Crossings								
Date	USDOT Crossing	Street Name	Time	Visibility	Type of Accident	Casualty	Position	Speed of Train (mph)
10/08/2008	079389S	Main Street	8:40 PM	Dark	Pedestrian	Fatality	Stopped on Crossing	38
06/12/1994	079389S	Main Street	12:35 PM	Day	Auto	Property Damage Only	Moving over Crossing	36
10/07/1987	079389S	Main Street	5:30 PM	Day	Truck	Property Damage Only	Moving over Crossing	40
03/22/1988	079388K	East Street	3:30 PM	Day	Auto	Property Damage Only	Stopped on Crossing	40
09/16/1989	079388K	East Street	9:40 AM	Day	Auto	Property Damage Only	Stopped on Crossing	30

Fig. B.30 – Crash History at At-Grade Railroad Crossings

Parkville has its former passenger depot located on the north side of the tracks some 500 feet east of East Street. The next at-grade crossing to the east is at a private crossing to Ball Power Equipment (approximately MP 8.5) approximately 400 feet west of Coffey Road at the eastern edge of Parkville. The next at-grade crossing to the west is at Rush Creek Road (MP 11.77).

B.14 Parking and Utilization

A total of 189 marked, on-street parking spaces were counted within the study area. Parking varies amongst parallel, angle in, and perpendicular parking spaces. The majority of spaces are perpendicular spaces, typically located south of the railroad tracks. None of the marked spaces are under time control (signs or meters). The majority of marked parking spaces are adjacent to commercial or public/institutional uses. Unmarked parallel parking is primarily used by residents along local streets.

No formal utilization study was completed but informal observations were made while manual traffic and pedestrian counts were collected. It appears that during normal peak travel hours, there is regular parking and vehicle turnover activity. Observers did note that some

cars remained parked through the duration of the counting period indicating that parking duration can last for several hours.

The Americans with Disabilities Act (ADA) does not specifically address on-street parking, though when on-street ADA spaces are provided, various regulations apply. Some general suggestions regarding on-street ADA spaces include:

- Clearance Space can be provided by opening space on the sidewalk side of the parking space.
- Angled spaces are acceptable as ADA-compliant parking.
- One in eight spots should be van accessible to the full 96-inch specification. It is acknowledged that for on-street parking, van spaces may be difficult to accommodate.
- When considering location, the shortest route is not necessarily the best benchmark.

The access board also discusses “the project” or “project area” and suggests that on-street spaces be dispersed within the project area. It also notes that “accessible on-street parking shall be permitted to be combined with off-street parking under the same jurisdiction serving the same project area.” This is interpreted to mean that ADA parking in the nearby municipal lots could adequately serve the project area. However, spaces dispersed throughout the area should be considered. Review of other discussions regarding on-street ADA parking noted the need for clarity in signing and the use of a map identifying the location of ADA parking spaces.

A total of 10 off-street (in the municipal lot) ADA parking spaces plus 2 on-street spaces (one each) on Main Street and East Street are provided in the study area. Two former spaces on the east side of Main Street north of 1st Street have been removed. Both of the on-street ADA spaces could “double up” and provide additional ADA spaces IF the access aisle had a ramp to the sidewalk. Individually and collectively, both the central parking lot (6 ADA spaces from total of 102 spaces) and the Farmer’s Market parking lot (4 ADA from a total of 71 spaces) meet the total number of ADA parking spaces required. None of the ADA spaces are signed as being van accessible. When reviewing the district as a ‘project area’ and including the on-street spaces along Main and East Streets as well as 2nd Street (total parking of 294 spaces), the number of ADA spaces also appears adequate, although they may not be considered to be well dispersed. For less than 300 spaces, a total of 7 ADA spaces are required. For 301 spaces, a total of 8 ADA spaces are required.

This parking assessment does not consider private off-street spaces or any land use assessment for the number of parking spaces by square foot of commercial or office, or spaces per residential units.

B.15 Street Infrastructure

B.15.1 Streets and Curbs

The public streets in downtown, which are almost entirely asphalt, are generally in good to adequate condition. As has been previously mentioned, there are multiple locations within downtown where streets have been platted but not actually built to completion. In these cases, the street either dead ends, or it has simply been replaced with a narrow driveway for vehicular access to the adjacent properties. The infill of undeveloped parcels within the residential neighborhood would require the completion of some of these streets.

The condition of the concrete curbs varies throughout the area. The curbs in the downtown core are in fairly good condition. However, the condition and even existence of the curbs in the residential neighborhood is much more inconsistent. The west half of the residential neighborhood (west of Main Street), extending up to 11th Street, is essentially devoid of consistent curbing. Main Street is also lacking curbs from 8th Street to the northern downtown area boundary. Those curbs that do exist within the neighborhood vary in quality. Many of the older curbs have begun to show signs of the “disappearing curb” effect. Multiple overlays of the asphalt streets over the years have essentially raised the elevations of the streets to the extent that only two to three inches of the curb are visible in some locations. This can sometimes cause drainage concerns along the fronts of residents’ properties.

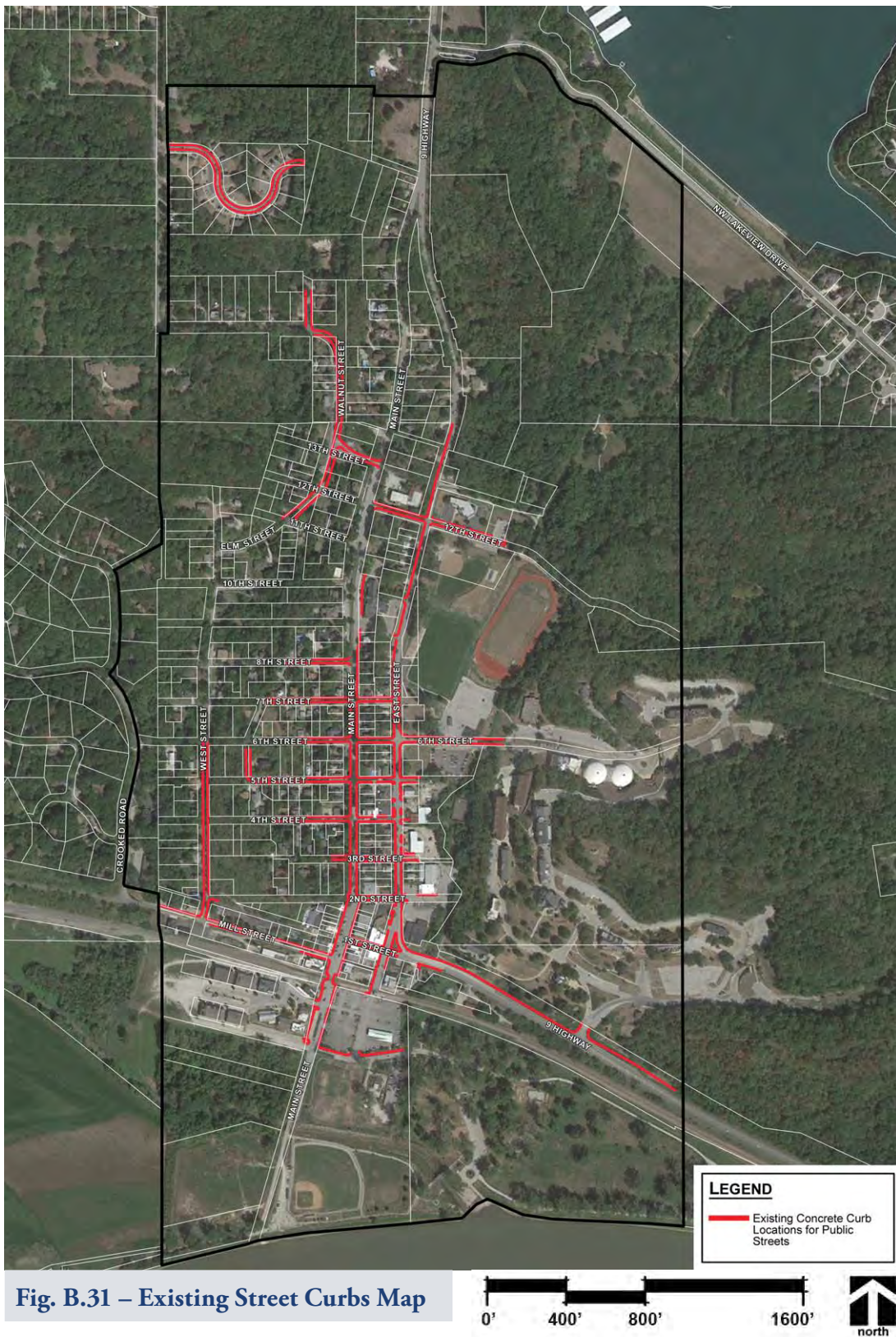


Fig. B.31 – Existing Street Curbs Map

B.15.2 Sidewalks and Pedestrians

Just under half of the streets inventoried (49%) have sidewalks. One-third of the sidewalks are four feet wide or less, which is considered a narrow width. Several segments of sidewalk are at a different (often higher) elevation than the roadway. The majority of sidewalks are concrete with 8% being brick. Not all sidewalks are ADA accessible. A total of 66 ramps were inventoried. Crosswalk delineation occurs at:

- MO Rte 9 at 6th Street, 1st Street, and mid-block east of Aloe Creek
- 2nd Street at Main Street
- 1st Street at Main Street and East Street
- Main Street at 1st Street
- Mill Street at Main Street
- East Street at 1st Street (north and south)

East St./MO Rte 9 - Beginning at Herb Bush Drive, a brick sidewalk is present on the west side north of English Landing Drive. The sidewalk on the west side changes to concrete north of the alley, north of the railroad tracks. Only a partial sidewalk is present on the east side. 1st Street is marked with a crosswalk.

North of 2nd Street, sidewalk is present on both sides until 6th Street. However, several wide driveways create a near continuous curb cut exist along commercial properties on both sides. None of the side streets are marked with crosswalks. A crosswalk is delineated across MO Rte 9 on the north side of 6th Street, with advance warning signs posted. Parking is prohibited on both sides. North of 6th Street, sidewalk is only present on the west side for approximately 800 feet until it stops and is interrupted by a paved surface used for parallel on-street parking. The study limit boundaries stop at 12th Street. North of 12th Street, no sidewalks are present though a 120 foot long pocket of on-street parking is provided.

Main Street - Beginning at Herb Bush Drive, a concrete sidewalk is present on the west side north until English Landing Drive. North of English Landing Drive, a brick sidewalk is present along both sides, crosses the railroad

tracks and continues to 2nd Street. Mill Street, as well as 1st and 2nd Streets, is marked with crosswalks. North of 2nd Street, sidewalk is present on both sides until 12th Street. None of the side streets are marked with crosswalks. Stop bars are delineated across Main Street at 6th Street, though a STOP control is not in place. On-street parallel parking is provided on both sides, though this is in part accomplished by the apparent removal of a grass strip. Angle parking is provided in front of a church in the northbound direction. Here the sidewalk is flush with the roadway pavement. Between 7th and 12th Streets, a median is provided that accommodates varying elevations. The northbound roadway is lower than the southbound roadway.

West/Elm Streets - Beginning at Mill Street, a narrow concrete sidewalk is present on the west side north until 6th Street. North of 6th Street no sidewalks are present on either side. West Street effectively ends north of 10th Street where it turns northeasterly and becomes Elm Street. North of 8th Street on the east side is a short paved area for on-street parking. A similar on-street parking area is created on the west side north of 10th Street. An internal asphalt path is provided within Watkins Park on the east side south of 10th Street. Along Elm Street, no sidewalks are present on either side.

Pedestrians - Observations of pedestrians were made on a Friday and Saturday at approximately noon. The locations included 1st and MO Rte 9, Main Street at the railroad tracks, and the “square” at Mill, Main and 1st Streets. Saturday was busier except at the crossing of MO Rte 9. On Friday, six of the 23 observations crossing MO Rte 9 were observed to enter the Patriot Bank.

Saturday observations of pedestrians crossing the railroad tracks at both Main Street and East Street indicate several groups of people. Statistically there were 1.9 people per crossing observation. The Main Street crossing was busier and accounted for 87% of all crossings observed. The heavily traveled direction was northbound at 53% of all crossings. During the one hour count period, three trains went through the crossing and blocked the crossing for approximately four minutes each time. The off-street parking lot

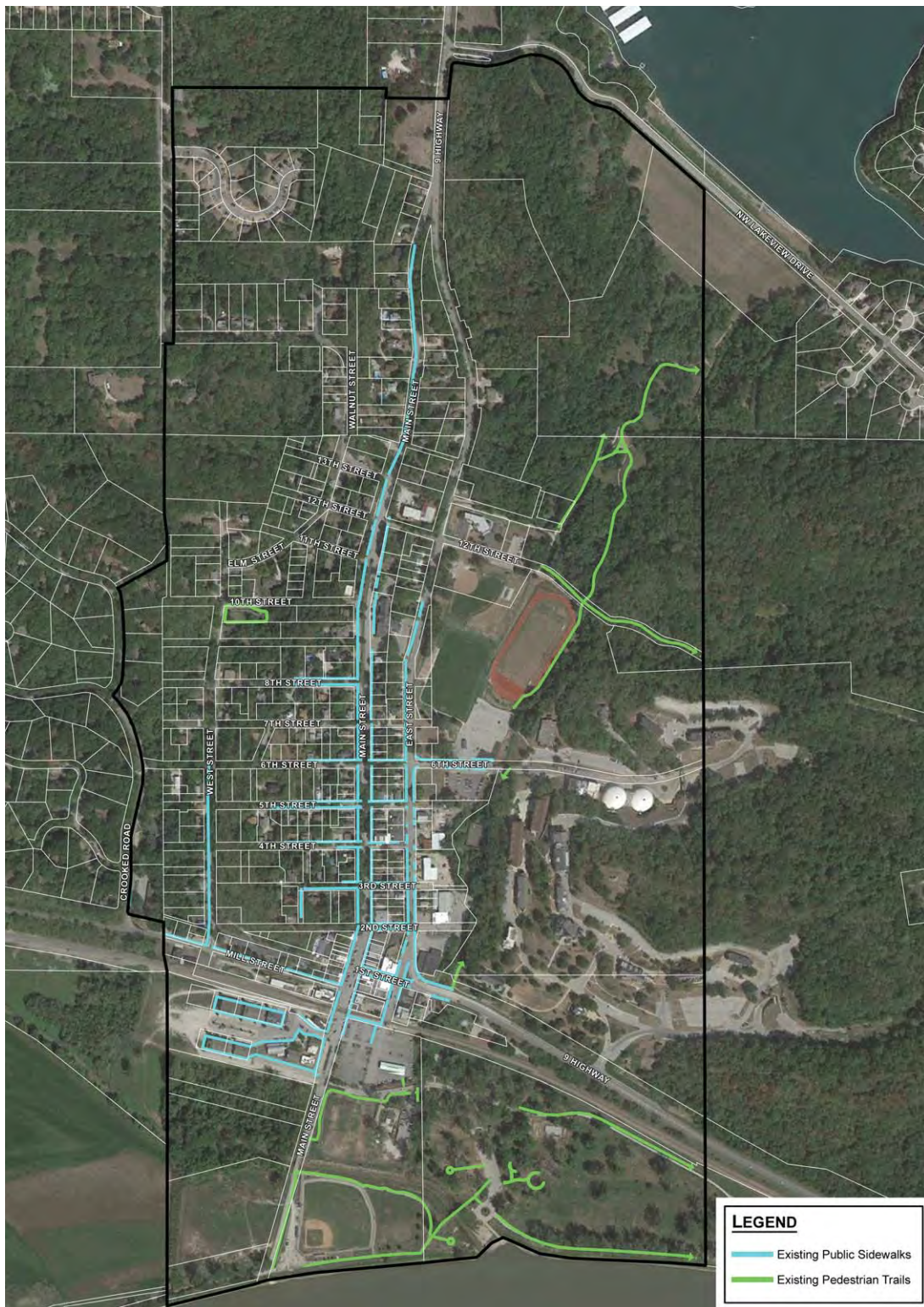


Fig. B.32 – Existing Sidewalks and Trails Map



was observed to be more than half full on Saturday. A similar crossing pattern utilizing Main Street was noted on Friday. On Friday, the off-street parking lot was only marginally utilized.

The junction of Mill/Main/1st Street is a busy intersection for pedestrians. Nearly double the number of pedestrians were observed on Saturday as compared to Friday. Again many observations had groups of people, up to four in a crossing. Crossings were nearly equal in a cardinal direction; 29% cross to the west, 25% cross to the east, 25% cross to the south and 23% cross to the north. On several occasions crossings were made in multiple directions by the groups being observed. On-street parking was fully utilized (greater than 80%) on both Friday and Saturday. Observations indicated little parking turnover within the hour.

B.15.3 Street Lights

The downtown area appears to be well lit to safely accommodate vehicular and pedestrian activity.

B.16 Utilities

Downtown Parkville has access to all major public and private utilities. Property owners report that utility service in the downtown is adequate but much of the underground utility infrastructure is aging. This creates backflow issues and occasionally odor concerns.

Most of the underground water and sewer infrastructure will eventually need to be replaced and resizing based on development potential should be considered. Some utility access south of the railroad tracks is limited (mainly centered on high-speed internet). Some private utilities do not see an adequate return on investment for serving such a small area with the needed investment of crossing the railroad tracks.

B.17 Operations and Function

B.17.1 Wayfinding

Wayfinding for both vehicular users and pedestrians is mostly absent in Downtown Parkville. Vehicular users entering the downtown area are given no direction beyond the typical street signs. This is especially problematic for visitors entering the downtown area from the east along 9 Highway. Those who are not familiar with the area could easily continue traveling north along 9 Highway and miss downtown entirely.

Pedestrian wayfinding downtown is limited to a single kiosk that is located within the pocket park along Main Street. It sits back from the street and is not easily identifiable for new visitors. Those who park south of the railroad and walk north toward the commercial core are given no direction.

English Landing Park does have some wayfinding/signage, but it is all internally focused and does not address the surrounding downtown.

B.17.2 Hours of Operation

Hours of operation for businesses were observed for the downtown core, particularly those located on Main Street. The following observations were made based on a visual survey as well as an internet search of Downtown businesses:

- Many of the businesses on Main Street do not post their typical hours of operation at all.
- For those that do, most appear to open at 10:00 a.m. and close between 4:00 and 6:00 p.m. from Monday to Saturday. Sunday hours are typically 12:00 to 5:00 p.m.
- The restaurants and cafes tend to stay open later to accommodate evening visitors.
- The office and professional service types typically keep standard business hours.
- The unique specialty shops and galleries on Main Street appear to be the businesses most likely to maintain limited or irregular hours.

B.17.3 Organizations

The following organizations exist or have influence within the downtown study area:

Main Street Parkville Association

Per the Main Street Parkville Association website (www.parkvillemo.org):

The Main Street Parkville Association's (MSPA) mission is dedicated to the preservation and promotion of Historic Downtown Parkville. MSPA was originally formed to assist with revitalization efforts in Historic Downtown Parkville following the 1993 flood. In accordance with the guidelines established by the National Trust for Historic Preservation's National Main Street Center, MSPA focuses on:

- Preserving and maintaining Parkville's historic downtown, including beautification initiatives
- Promoting the economic development of downtown
- Promoting and supporting the small businesses located downtown

MSPA is governed by a volunteer Steering Committee. Leadership of the Steering Committee includes the volunteer Chair, Vice Chair, Subcommittee Co-Chairs, Secretary, and Treasurer. Several subcommittees are organized to address specific issues, i.e., beautification efforts, marketing, festivals, etc.

Parkville Community Development Corporation

Per the Main Street Parkville Association website (www.parkvillemo.org):

The Parkville Community Development Corporation (PCDC) was founded in 1994, following the 1993 flood. PCDC is a 501©3 Non-Profit Organization governed by a volunteer Board of Directors.

The Board of Directors consists of 13 members, representing various interested groups, including the City of Parkville, Parkville Chamber of Commerce,

Park University, and representatives from the leadership of the three components, as well as at-large members.

Purpose of PCDC

Furthering the economic development of the area within the boundaries of the city limits of Parkville, Missouri, including preserving the city's historic structures and records, promoting the economic development of the business area, particularly the downtown, assisting small businesses to bring customers to the city, plan and carry out community activities, celebrations.

PCDC Annual Events

- Parkville Jazz
- Blues and Fine Arts River Jam

Parkville Old Towne Market Community Improvement District

The Parkville Old Towne Market Community Improvement District (POTMCID) was established in 2006 with the intent of providing the following services:

- Develop and implement a master plan, including a comprehensive image, marketing, and promotions program
- Improve the visual appearance of the district, including, but not limited to, the installation of kiosks and the purchase and maintenance of street furniture, banners, flower baskets, art, and other amenities.
- Organize and fund annual and special events benefiting the district
- Provide maintenance of public areas within the district
- Advocate and provide assistance to attract further investment within the district

The POTMCID is funded by a self-imposed 1% sales tax of all properties within the district. For reference, the boundaries of the district are essentially the same as the boundaries of the Old Town District identified on Parkville's Zoning Map (See Figure B.4).

Parkville Chamber of Commerce

Per the Parkville Chamber of Commerce website (www.parkvillechamber.com):

The Parkville Chamber of Commerce evolved from The Downtown Merchants Association. In the 1980's and early 90's the Chamber was the primary organization in the community responsible for promotions, festivals, and public relations. Membership consisted of businesses and local residents. In 1993 more than two-thirds of the downtown became victim of a 100 year flood. The area was hit hard when a predicted 12 inches of water rose to eight feet. A new non-profit organization was formed to focus on flood recovery and historic preservation for the downtown. The Chamber joined with others to rebuild the heart of the city and support the downtown focus. A limited Chamber board continued to promote tourism, enhance public relations, and complete one major community project each year. This small, but dedicated, group of volunteers worked to keep the Chamber active until the community was ready for a city-wide focus.

In 2002, this group of volunteers realized the time was right to begin growing the Chamber again. The historic downtown was fully recovered and new businesses in Parkville and the surrounding area were eager to become part of the greater Parkville community. Business owners and local stakeholders agreed it was time for the Parkville Chamber of Commerce to begin conducting regularly organized events and to once again accept memberships. The Parkville Chamber of Commerce established a tiered membership structure and continued to grow. Officers were elected and committees were formed. The Chamber once again had a presence at festivals, and special events. Since that time, membership has grown to over 300.

In 2005 the Parkville Chamber of Commerce and the City of Parkville formed a partnership that allowed the Chamber office to relocate to the historic train depot in the downtown area. This prominent location across from Park University, near the English Landing Park and the "Spirit" Fountain, continues to provide an ideal location for Chamber activities, a Parkville Visitor's Center, and an ever-expanding Railroad Museum.

Parkville Economic Development Council

Per the Parkville Economic Development Council website (www.parkvilleedc.com):

The Parkville Economic Development Council (Parkville EDC) is a public private partnership between the City of Parkville and private investors. The Parkville EDC was formed in 2011 following the creation of the Parkville Plan for Progress with a directive to help bolster the Parkville economy. The Parkville EDC's mission is to help maintain and enhance the valued quality of life of Parkville by encouraging and coordinating responsible economic activity and community improvement, by helping recruit new businesses to Parkville and helping retain and foster growth of existing business

Each year the Parkville EDC identifies key economic priorities, forming committees and task forces to help address each. In 2013, major task forces and committees included:

- Creative Community Builders which focuses on residential growth and sustainability opportunities. Entrepreneurship will also be a focus for this committee as well as talent attraction and retention. The committee will look for ways to connect the community through the Parkville Trading Company.
- The Partnerships Committee which focuses on developing partnerships/relationships with our local, regional and state partners such as the Chamber, Main Street, Park Hill School District, Platte County EDC, KCADC, MARC, the Missouri Department of Economic Development and many others. This committee serves as the government relations arm of the board. It will review federal and state legislation that has potential impact on businesses and economic development in Parkville.
- The Infrastructure Task Force which reviewed Parkville's infrastructure needs in existing and future developments in support of the the City of Parkville's Master Plan goal to: "provide enhanced infrastructure systems throughout Parkville."
- The Parks & Trails Task Force which reviewed Parkville's existing trails and parks system, explore future opportunities for expansion.

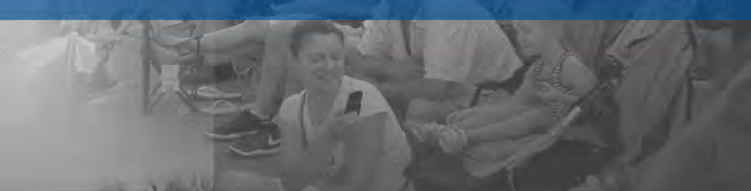
-
- The Western Edge Task Force which explored opportunities to develop a financially viable project located adjacent to the I-435 corridor.

Parkville Original Plat Neighborhood Association

The Parkville Original Plat Neighborhood Association (POPNA), a voluntary neighborhood association representing the residents of the older residential portions of downtown Parkville was formed in 2004. POPNA was created to help organize neighbors around common objectives including preservation and improvement of the residences in downtown. POPNA is represented by Board members elected from within their membership. Major initiatives in recent years include the development of the Old Town Residential zoning district, created to provide an alternative to preserve the general architectural character of the neighborhood without forming a ridged historic preservation district.



APPENDIX C: Community Engagement Process



Appendix C

Introduction

C.1 Community Engagement Process

The community engagement process can be an invaluable tool for gathering community input and building group consensus around a collective, overall vision. This common vision is then used by the planning team to guide decision making throughout the development of the master plan.

In order to maximize public input, the planning team scheduled the following events over the course of the project:

- Project Kick-Off and Community Workshop
- Downtown Property Owners Forum
- Parkville Neighborhoods Forum
- 2-Day Design Charette
- Board of Alderman Update Session
- Community Open House
- Parkville EDC Presentation
- Planning Commission Presentation
- Community Land and Recreation Board Presentation
- Board of Alderman Presentation

In addition to these events, the planning team conducted one-on-one interviews with key stakeholders to gather more detailed insight from valuable members of the community.

The following is a brief summary of each event and the common themes that were discussed.

C.2 Project Kick-Off and Community Workshop

The community workshop was held at the American Legion Hall (11 Main Street) in downtown Parkville and lasted from 6:00 – 9:00 p.m. on September 4th, 2013. Approximate headcounts suggest that upwards of 80-85 people were in attendance when the meeting began.

The planning team began the workshop with a short presentation that addressed the following:

- Introduction of the design team
- Brief history of the PDMP and how it came to be, including issues such as project funding, project support, and its relationship to the Parkville Master Plan and the Livable Community Study
- Explanation of the purpose of the PDMP
- Goals of the workshop

The three goals that were identified are as follows:

- Begin a dialogue with the community about the future of the downtown area.
- Identify the assets and liabilities of downtown, as well as the potential opportunities and constraints for future change.
- Prioritize the most important issues and opportunities at hand.

Attendees of the workshop were then handed a short survey that asked them to write down three different words that describe downtown Parkville and three different words that describe the critical issues that the PDMP should address. The responses from this survey were to be used at the 2-Day Design Charette to help prioritize the most important issues at hand.

After the introductory presentation, participants were randomly divided into five smaller groups in order to optimize the amount of input and allow everyone a greater chance to contribute to the process. The groups rotated from station to station, and at each station, a member of the planning team facilitated a discussion on one of the following five topics:

- Land Use and Housing
- Utilities, Flooding and Transportation
- Aesthetics
- Economics
- Operations and Function

Each break-out session lasted approximately 20-25 minutes in length. After the break-out sessions were concluded and the meeting had ended, the planning team stuck around to answer questions and gain additional feedback from participants who chose to stay.

C.3 Downtown Property and Business Owners Forum

The forum was held at the American Legion Hall (11 Main Street) and lasted from 6:30 – 8:40 p.m. on September 12th, 2013. Approximately 15 people were in attendance when the meeting began. The goal of this forum was to meet with property owners within the downtown project area (residential and commercial) and try to understand their perspective on the following:

- What are their issues and concerns with downtown as it currently exists?
- What are their expectations for downtown in the future?

In order to accomplish this, the planning team developed the following seven questions to be addressed at the forum:

- 1) How does the downtown fit into the larger fabric of Parkville? (What is it now?)
- 2) What role should downtown have in the larger fabric of Parkville? (What will it be?)
- 3) Does the current condition of downtown Parkville meet your expectations for what YOU want your downtown to be?
- 4) Does the current condition of downtown Parkville meet the expectations for what VISITORS want your downtown to be?
- 5) What conflicts exist between residential neighborhoods and the commercial core of downtown?
- 6) What are the benefits of the relationship between the residential neighborhoods and the commercial core of downtown?
- 7) What one (1) thing needs to be addressed in the master plan for it to be considered by you a success?

Each question/topic was discussed in length before moving on to the next, and all responses were recorded for future analysis.

C.4 Parkville Neighborhoods Forum

The forum was held at the Platte County Community Center South/YMCA (8875 Clark Avenue) and lasted from 6:30 – 9:00 p.m. on September 12th, 2013. Approximately 12 people were in attendance when the meeting began. The goal of this forum was to meet with residents of the Parkville community who do not live downtown and try to understand their perspective on the following:

- How do residents of Parkville currently interact with downtown?
- What are residents' expectations for downtown in the future?

In order to accomplish this, the planning team developed the following ten questions to be addressed at the forum:

- 1) Where is the social/cultural heart of the City of Parkville and why is it that way?
- 2) How does the downtown fit into the larger fabric of Parkville? (What is it now?)
- 3) What role should downtown have in the larger fabric of Parkville? (What will it be?)
- 4) Does the current condition of downtown Parkville meet your expectations for what YOU want your downtown to be?
- 5) Does the current condition of downtown Parkville meet the expectations for what VISITORS want your downtown to be?
- 6) How often do you go to the downtown area?
 - Daily – Weekly?
 - Weekly – Monthly?
 - Less than Monthly?
- 7) When you visit downtown, what do you do?
- 8) What is missing downtown that would increase your enjoyment when you visit?
- 9) If you do not visit the downtown area regularly, what prevents you from doing so?

- 10) What changes to the downtown area would entice you to visit more often?

Each question/topic was discussed in length before moving on to the next, and all responses were recorded for future analysis.

C.5 2-Day Design Charette

C.5.1 What is a Charette?

The word charette refers to a collaborative session in which a group of planners and designers drafts a solution to a planning/design problem. A charette is a method of organizing thoughts from planners and interested parties into a structured medium that is tied to creativity and the development of a myriad of planning/design solution often take place over multiple days or sessions in order to capture as much feedback as possible.

In short, charettes serve as a way to quickly generate planning/design solutions while integrating the aptitudes and interests of a diverse group of people. This is a collaborative planning process that harnesses the talents and energies of all interested parties to create and support a feasible plan which represents positive change. The success of charette ultimately hinges on the level of participation of the affected community.

With the help of the community, the goal of a charette is to present all the information and feedback gathered to date, and then use it develop site-specific planning/design concepts that aim to achieve the overall vision of the plan.

C.5.2 2-Day Design Charette Introduction

Both days of the design charette were held at the American Legion Hall (11 Main Street) and lasted from 9:00 a.m. – 6:00 p.m. on September 10th and 11th, 2013. Approximately 50 people participated in the charette at various points throughout the two days.

The goals of the design charette were as follows:

- Prioritize the input gathered in the previous community engagement sessions.
- Develop master plan concepts based on the prioritized input.
- Offer stakeholders and community members a chance to view and participate in the planning/design process. Work interactively with them to address their concerns and incorporate their feedback into the master plan concepts.

C.5.3 2-Day Design Charette, Day 1

Morning Session:

Day 1 began with a brief presentation that addressed the following:

- Introduction of the design team
- Brief history of the PDMP and how it came to be, as well as an explanation of its purpose
- Goals of the charette
- Land use appropriateness

The land use appropriateness portion included a series of slides that showed visual examples of various land use types. Multifamily housing was the first land use type presented. Nine images were shown, each representing a different type/style/scale of multifamily housing. The goal of this exercise was to educate the community on what the term “multifamily” could mean, versus what they may have perceived it to mean. Retail and mixed use development were addressed in a similar fashion. Aesthetic downtown issues like streetscape, signage, and wayfinding were also discussed in this visual format.

The planning team wrapped up the presentation by explaining the agenda for the two days and encouraging the community to participate as much as possible throughout.

Following the presentation, the team spent the rest of the morning discussing the common themes that had been brought up during the previous community engagement sessions. This was an important step,

ensuring that everyone on the planning team was on the same page before moving forward.

Afternoon Session:

The team spent part of the afternoon session meeting with participants from the community in small groups to gain additional input from them. At the same time, some members of the used this time to walk the downtown area and discuss potential solutions.

The planning team reconvened at the midpoint of the afternoon session and led an informal planning discussion with the community to address their thoughts about land use, as it related to the downtown area. The team presented their ideas for future land use in the downtown, and the participants provided feedback. The result of this discussion was a land use diagram that was later presented at the day 1 wrap-up presentation.

The wrap-up presentation offered a review of everything that had taken place throughout day 1. The land use diagram was presented, and attendees were given a chance to respond.

At this time, the team also reintroduced the “3 words” survey that was conducted at the community workshop. As mention previously in Section 4.2, participants at the workshop were asked to write down three different words that describe downtown Parkville and three different words that describe the critical issues that the PDMP should address. The planning team took these responses and input them into a word cloud application. The responses that were recorded most often appeared in the largest font in the clouds.

To conclude the presentation, the team reviewed the agenda for the following day.

C.5.4 2-Day Design Charette, Day 2

Morning Session:

Day 2 began with an opening presentation similar to day 1. While part of the team conducted this presentation,

the remaining members began producing planning/design concepts to be presented at the end of the day. Concepts that were produced included the following:

- Main Street Streetscape Improvements
- Main Street Redevelopment Opportunities
- East Street Streetscape Improvements
- East Street Redevelopment Opportunities
- Railway Relocation Plan
- Transportation/Connectivity Improvements
- Gateways and Wayfinding Master Plan
- Gateway and Wayfinding Concepts
- Potential Storefront Improvement Concepts

During this planning session, the team continued to meet with participants as they came in and discussed what they were working on. Members of the team also used day 2 as opportunity to meet with individual stakeholders in a one-on-one setting in order address any gaps in community input that might have existed.

Afternoon Session:

The afternoon session followed the same format. Part of the team produced planning/design concepts, while the remaining members interacted with the public. As the day came to an end, the team posted all of their concepts to the wall and gathered the public for a final wrap-up presentation.

The wrap-up presentation reviewed everything that had taken place over the course of the two days. All of the concepts were presented, and the community was given a chance to respond and provide additional feedback.

As the presentation came to an end, the team reminded everyone that this was just the beginning of the planning/design process, and that the public would have additional opportunities to offer their thoughts and opinions as the master plan continued to take shape.

C.5.5 Community Engagement Summary

Throughout the early phases of the community engagement process, the planning team recorded all public input for future reference. From this, many common themes emerged. These themes have been divided into the following six categories:

- Land Use
- Aesthetics and First Impressions
- Transportation and Parking
- Utilities and Infrastructure
- Operations, Function and Regulation
- Economics

What follows is a summary of the recurring themes that emerged from each of the listed categories.

C.5.5.1 Land Use

Downtown has been divided up into six areas for the purposes of discussing land use. Below is a summary of the common themes, as they relate to each area.

Main Street Commercial Core

- There are conflicting views on the current state of downtown's commercial core.
 - Many residents of downtown and surrounding Parkville neighborhoods feel that the commercial core works well as is. They believe that it offers a nice balance of uses and dining options.
 - Others are concerned about the lack of full-time, professional businesses in the area. They believe that this is a limiting factor in drawing visitors and generating revenue.
- There are also conflicting views on the question of "Who should the downtown serve?"
 - Some believe that downtown businesses should cater to the surrounding neighborhood and the students and faculty at Park University. Many residents of Parkville believe that there needs are not being provided for by downtown businesses and have no reason to visit on a regular basis. Furthermore, they find the experience of going downtown unpleasant.

- However, the majority of participants believe that downtown should be a destination that accommodates out-of-town shoppers. They believe that destination shopping will bring visitors and revenue to downtown without resulting in additional housing.
- Most agree that the commercial core is not capitalizing on the popularity of the park. Services that cater to this potential revenue base need to be encouraged. Examples that were discussed included fitness and health-related retail, yoga studios, children's stores, pet boutiques, and a juice and smoothie shop.
- Most, if not all agreed that downtown is Parkville's most iconic and recognizable location. The commercial core is a big part of this, and its character and quaintness should be preserved.
- There is a general consensus that high-density housing alternatives are not ideal within the commercial core and should not be encouraged.

Downtown Transitional Zone

- The downtown transitional zone is the area fronting Main Street and the west side of East Street, between 2nd Street and 6th Street. This area includes a nice blend of uses, including single family, multifamily, commercial and office. Some of the commercial and offices uses are located in single family structures.
- The community believes that this area adds to the character of downtown and should be preserved.
- At the same time, residents do not want this type of mixed use development to continue any further north than it currently does. They want to establish a zoning boundary along 6th street that limits commercial and office development beyond that point.

East Street

- The east side of East Street was discussed often as a potential redevelopment opportunity for downtown. Most agreed that what currently exists doesn't fit with the overall character of downtown, and future redevelopment should aim to extend the character of downtown to East Street.

- Some are concerned that changing the character of East Street will slow traffic to the point of becoming an inconvenience. This is further discussed under the *Transportation section*.
- Park University's role in potential redevelopment along East Street was also discussed. The University owns some of the potential redevelopment land, so their vision for this area could loom large.
- The students and faculty are underserved by downtown. Redevelopment along East Street may provide an opportunity to cater to the needs of this growing population and help bridge the gap between the University and downtown.
- While some participants identified East Street as a potential opportunity for high density housing, others expressed concern about affordable housing regulations that may be attached to such developments.

Residential Neighborhood

- A majority of those who identified themselves as residents of downtown and the surrounding neighborhoods generally felt that housing should remain as is. There was a belief by some that regardless of quality, additional housing would not be a positive for downtown. It was not clear if the issue was density, character or socio-economic driven.
- Those who identified themselves as business owners in downtown often had a contradicting viewpoint. Some felt that young families and students from the University needed to be considered, and that additional housing would lead to greater commercial success. As one participant put it, "Rooftops before retail."
- There is a feeling amongst the community that there is a rebirth taking place in the residential neighborhoods. People are rehabbing/renovating older homes and adding to the character of the neighborhoods.
- Additional housing opportunities exist to the west of the project boundary. They could have significant impact on downtown if you can entice them and connect them to downtown.

- There is a lot of undeveloped land along the west half of the project area that could potentially be infilled with housing. When discussing this land, most participants felt that it was fine to leave this area as is in order to protect the natural landscape and topography of the neighborhood.

Park University

- Park University owns land along the west side of East Street. Their plans for this land could dramatically impact the future of that entire area (See comments under East Street).

Park/Open Space

- English Landing Park is one of Parkville's most valuable resources. In fact, many Parkville residents admitted that English Landing Park is the only reason that they go downtown on a regular basis.
- The commercial core is not currently doing a great job of capturing the potential revenue dollars from park visitors. With the addition of Platte Landing Park, this could become even more of a missed opportunity in the future.
- At the same time, the park itself could possibly become more of a revenue generator in the future. Food trucks were discussed as options for festivals and large events. There was also some discussion about providing more formal recreation opportunities in the park, such as yoga or fitness classes. Whether provided by the City's Parks & Recreation department or a downtown business, this would be a great way to utilize the park and connect with the community.

C.5.5.2 Aesthetics & First Impressions

Below is a summary of the common themes for this category, as they relate to character, streetscape, and gateways.

Character

- Parkville citizens love their downtown for its unique charm and variety of buildings, businesses and topography. However, there was a split on how exactly to protect/preserve the character of the existing historic buildings and new development.
- Most think that the natural topography and landscape of downtown is essential to its character and should be maintained. Undeveloped land along the west half of the downtown neighborhood should be viewed as an asset instead of an opportunity for future infill.
- Many were worried about clutter obscuring the character of downtown. A more concerted effort toward maintenance and upkeep of buildings is needed. But they do not want to lose the natural character and charm of the area. It is important to be 'Parkville' not Zona Rosa or any other new pseudo historic area.
- Although there is an interest from many to redevelop East Street/9 Highway, there is concern that the new develop will not match the character of Main Street. Design guidelines were discussed as an option for overseeing future development in this area.
- Though the establishment of an historic district was discussed as a tool to preserve the character of downtown, there was no real consensus on the topic. Many assumed that there was a historic district in place already. Some downtown property owners feared the financial impact that historic district restrictions could have on future building improvements. The benefits of a local historic district versus a National Register historic district were discussed and there seemed to be more support for the local district. A local historic district would likely have fewer restrictions, but would also offer fewer financial incentives.

Streetscape

- Residents find the pedestrian streetscape along Main Street to be less than inviting. There are few places to sit or gather within the commercial core. Sidewalks are too narrow in spots, and the condition of the paving has deteriorated over the years. Simple site furnishing like benches, trash receptacles, and landscape planters are mostly missing from the commercial core of downtown.
- There was some discussion amongst property and business owners about the lack of branding in downtown. Some thought that things such as banners, hanging flower baskets, plaques, and consistent signage could add to the character of downtown.

Gateways

- It was almost unanimous that more needs to be done in terms of signage/gateways to signify an arrival to downtown. The entry to downtown along 9 Highway (from the east) was identified as the location that could use the most improvements in regards to gateways.

C.5.5.3 Transportation and Parking

Below is a summary of the common themes for this category, as they relate to vehicular transportation, pedestrian/bicycle/transit, parking, and the railroad.

Vehicular Transportation

- There are conflicting views on how to approach transportation still remain.
 - There is a general view that transportation is a "problem" for the downtown and many suggested improvements revolve around measures that would increase speed or "push" traffic through downtown.
 - This contradicts the typical commercial business attitude that desires to slow down traffic and provide more amenities to shoppers.
- Roundabout at East Street may be a solution for downtown/9 Highway

- The connections from parking lot to downtown need to be improved.
- Truck loading and unloading needs to be addressed on Main Street.
- Concerned about truck turning with proposed bulb outs.

Pedestrian/Bicycle/Transit

- The connections from parking lot to downtown need to be improved.
- Challenge in getting students and faculty from campus to downtown.
- Most business owners desire providing more sidewalk amenity improvements.
- The Golf Cart ‘People Mover’ system has been proposed but has not gained any traction as an alternative method for moving people throughout the downtown core.
- A pedestrian connection along 9 Highway north to 45 Highway and infilling missing sidewalks was important to many, although some thought adequate trails existing and expressed concerns for public funding and use of condemnation.
- In general, there is a desire to improve sidewalk and crosswalk connections throughout downtown and the surrounding neighborhoods.

Parking

- There is some desire for handicap parking along Main Street.
- There is also some interest in bicycle parking along Main Street.
- There are conflicting views regarding the regulation of parking along Main Street.
 - Some believe that parking along Main Street should be controlled through signage and regulation
 - However, most appear to be opposed to parking regulations in this area.
 - Some business owners want standards as it relates to owner/staff parking in front of stores.

- Parking remains a top priority for business owners. No matter the level of data collection and analysis, there will always be a sentiment that there is a lack of front door parking. Measures to increase the visibility of nearby parking and ways to make the walking experience more acceptable to the public parking lot were viewed as important for the success of downtown.

Railroad

- Many participants were interested in the idea of creating a quiet zone in order to reduce the noise impact.
- The railroad tracks are a hindrance for any development to the south of them (including English Landing Center and future build out of County Park)
- A local property owner’s proposal for relocating the railroad tracks south of the parking lot/English Landing Center was discussed, though there was no real consensus about this issue.

C.5.5.4 Utilities, Infrastructure, and Flooding

Below is a summary of the common themes for this category, as they relate to utilities, infrastructure, and flooding.

Utilities and Infrastructure

- Utility costs are perceived as high (particularly water service).
- There is a general concern about aging infrastructure.
- Old infrastructure along Main Street needs to be upgraded.
- Public Wi/Fi service in area is desired.

Flooding

- There was a concern over flood control issues for potential redevelopment adjacent to White Aloe Creek.
- Greater flood control was generally desired and

flooding was said to hamper the southern flood prone area of Main Street's long-term viability.

- Desire to communicate to general public that flooding issues in the park are not necessarily downtown (concern for impact to businesses and perception they will be closed).
- Most desired a higher level of communication with media during flood events.
- Regarding redevelopment, the need to design and build with flooding in mind was acknowledged.

C.5.5.5 Operations, Function, and Regulation

Below is a summary of the common themes for this category, as they relate to wayfinding, Main Street parking, operation hours, organization, regulations and guidelines, interpersonal politics, and services.

Wayfinding

- There is a concern that if you invite people in to enjoy downtown you need three things:
 - 1) Somewhere to go.
 - 2) Something to do.
 - 3) An understanding of how to get there.
- It appears that signage and wayfinding doesn't meet the needs of the downtown area. There is concern that changes could damage the character of the downtown, or that it could become too cluttered and detract from the character in the area. But there is a real disconnect between what is downtown and what people know is downtown. The existing signage ordinance should be reviewed and determined if it should be modified to better meet the needs of the downtown area. Regulation would be OK if it didn't force anyone to do anything and it grandfathered existing owners.
- There is a belief that visitors, particularly those coming from the east, are confused about how to navigate the downtown area.
- Wayfinding concerns aren't just limited to vehicular traffic. Some think that adding wayfinding kiosks

at the pedestrian level could lead to more business downtown.

- Temporary wayfinding kiosks for large events were also discussed as a possibility for directing visitors.

Main Street Parking

- We had heard numerous times during the Livable Communities Study that owner and employee parking in front of stores is a real problem. It was taking up space for customers, and then owners were indicating they had no parking. When asked about the issue, discussion groups indicated they were generally ok with them parking in front of their stores. The exception seemed to be from those who had intimate working knowledge of the downtown commercial areas. Those people indicated that something needed to be done to address the issue. When regulation was talked about, most indicated they didn't want regulation (signs, meters, restrictions).

Operation Hours

- In many cases we have heard that the lack of consistent, convenient, or expected store hours for the potential patrons of the area hurts business. In many cases hours posted do not reflect actual hours open. Additionally, the hours that a store is open are not convenient. This seems to be confirmed in the context of a shopping district, but is a complicated issue. The small owner struggles to keep regular hours and long hours. The competition is open for regular expected commercial hours (see above) and this puts the stores in downtown that are not at a disadvantage. There was significant resistance to the idea of mandating/regulating hours, but again, those who have intimate knowledge of the area and other successful areas strongly indicated that this is an issue that reduces the ability of the downtown to be more economically successful.

Organization

- The Main Street Parkville Association was discussed at length and several member of the Association were involved in the sessions. Advocacy groups and

groups that take care of day to day operations are critical to the future success of any ‘district’. And downtown has an organization that is currently very involved.

Regulations & Guidelines

- Repeatedly, issues were identified and solutions were discussed in the sessions. But, when it came to the idea of regulating the issue, the idea of not forcing any existing owner/business into changing or complying with any new changes became a constant theme. However, those who were more closely involved in day to day issues in the downtown area did not see this as a requirement and see the inability to create change as a real issue. Most were unclear that the Master Plan wouldn’t be forcing people to do anything. It is a map for addressing future opportunities and change.
- The preservation of the existing character and ‘feel’ of downtown seemed important to some. Many were concerned that new development or infill development be compatible, be a good fit, and respecting the character that many people seem to like about the existing downtown area. Design guidelines and an architectural review board were brought up as ways to control this issue. This idea was generally supported as long as all existing properties were grandfathered in and not forced to make changes.

Interpersonal Politics

- The inability to build to consensus among the personal interests is a real challenge downtown.

Services

- Things that should be addressed in the Master Plan should be recycling, both for merchants and their operations, and the public.
- Additionally, the discussion about public restrooms versus using merchant’s restrooms is a concern.

C.5.5.6 Economics

Below is a summary of the common themes for economics.

- Primary strengths of downtown Parkville include:
 - High local income levels;
 - Downtown Parkville’s existing brand;
 - Access to the Missouri River;
 - Proximity to Park University; and
 - Customer draw of Farmers Market and major festivals.
- Primary constraints of downtown Parkville include:
 - The noise and frequency of the railroad;
 - Lack of business diversity;
 - Limited business hours;
 - Tired, aging aesthetics; and
 - Flooding that disrupts business and discourages businesses from locating downtown.
- Downtown Parkville’s current “brand” is as a quaint historic downtown offering restaurants, antiques and specialty shops.
- Many respondents indicated that downtown does not cater to Park University students.
- Similarly, there was a general consensus that more businesses should complement the park and river, including runner’s equipment store, bike shop, yoga/ exercise studio, kayak rentals, bait shop, river rafting company, etc.
- Other desirable downtown stores could include international restaurants, international bookstore, children’s store, art and home furnishings, professionals and personal services, and entertainment-based businesses.

C.6 Board of Alderman Project Update

On October 15, 2013, OHH presented a project progress report and general update to the Board of Alderman.

Key issues discussed were:

- Project Schedule
- Project Process
- Community Engagement Process
- Definition of Project Vision and Overarching Themes and Supporting Principles
- Community Comments
- Definition of Project Issues to be Addressed
- Addressing Key Issues
- Upcoming Schedule

An open discussion was had with the Board Members about Big Picture issues, the amount of community input, the upcoming Market Study information, and the concepts for redevelopment.

Key issues discussed were:

- The challenge of the interpersonal relationships in the downtown area and its polarizing personalities.
- Lack of coordinated leadership in the downtown area that can mobilize people.
- Frustrations of past and current people involved in downtown.
- Concepts for the redevelopment of East Street.
- How do you create change in downtown?

C.7 Community Open House

On October 28, 2013 a Community Open House was conducted at the American Legion Hall in downtown Parkville. The Open House displayed the current work to date on the Master Plan. It provided detailed information on issues raised during the project process, as well as potential options and concepts for addressing those issues. The meeting was scheduled from 5:30pm to 9:00pm.

The meeting was well attended and had a steady stream of participants throughout the entire meeting. Estimated attendance was over 100 for the entire evening, and many people stayed for extended periods of time.

Format was informal open house. Stations were set up around the venue on specific topics. Participants were able to enter, read and absorb the presentation materials, and move from station to station at their own pace. Members of the Master Plan Team were available to answer questions and engage in conversations about various items displayed. Comments and feedback were encouraged. Several people provided comments by post-it note on the displayed material.

Information displayed included:

C.7.1 Station #1 The Master Plan Theme and Supporting Principles

Addressing Change

- Create a document that assists in decision making as change occurs.
- No matter what you do or do not, change will occur.
- 3 Approaches to managing change:
 - Do nothing and not react
 - React to it as it occurs
 - Plan for it so you direct and guide it
- By choosing to prepare a Parkville Master Plan in 2009, the Livable Community Study in 2012, and now the Parkville Downtown Master Plan, the Parkville has chosen to **PLAN FOR CHANGE**.

2009 Parkville Master Plan

On July 7, 2009, the City adopted a new Parkville Master Plan. The update was the result of a multi-year community effort by elected and appointed officials, citizens, and other community stakeholders.

The Parkville Master Plan is the comprehensive guide for development and redevelopment of the community. In order to create a successful Downtown Master Plan,

it is important to first understand overarching goals of the greater Parkville community. The goals identified in the 2009 Master Plan are as follows.

Chapter Two – Community Sustainability

Goal: Serve as a metropolitan area leader in sustainability by conducting daily operations through balanced stewardship of human, financial, and environmental resources for present and future generations.

Chapter Three – Community Character

Goal: Preserve and enhance Parkville’s small town ambiance

Chapter Four - Environmental Stewardship

Goal: Protect natural resources and ensure that future development occurs in harmony with existing environmental assets.

Chapter Five - Park, Civic and Open Spaces

Goal: Provide parks, open space, recreation uses and unique intimate spaces to enhance public health and safety and for the visual enjoyment of residents and visitors.

Chapter Six - Land Use

Goal: Provide a sustainable and well designed realm of vibrant neighborhoods, parks and environmental conservation open spaces, and civic institutions within walking distance of shops, services, jobs, and transportation services.

Chapter Seven - Transportation

Goal: Provide a balanced transportation network that provides transportation alternatives and reduces the number and length of automobile trips.

Goal: Provide enhanced infrastructure systems throughout Parkville.

A Closer Look

The preservation of the unique character of downtown Parkville has been a strong theme throughout the planning process. This falls in line with what was identified as the goal of the Parkville Master Plan under “Chapter 3 - Community Character.” The policies that were identified to address this goal are as follows.

Chapter Three – Community Character

Goal: Preserve and enhance Parkville’s small town ambiance

Policy: Establish quality public spaces that encourage social interaction, foster a distinct “sense of place” and reinforce the character of the community.

Policy: Promote a built environment through building form, scale, placement and architectural design that provides a sense of place and reinforces the street as civic space.

Policy: Integrate distinct features throughout the community that create value, identity and pride.

Policy: Balance new development with preservation of the natural resources that give Parkville so much of its character.

Policy: Improve gateway areas to create focal points and visual announcement to the community.

2012 Livable Community Study

The recommendations of the 2009 Parkville Master Plan have resulted in multiple implementation projects and studies, including the Parkville Regional Multi-Modal Access and Livable Community Study. The study was initiated to identify opportunities to increase multi-modal access in southern Platte County and the City of Parkville. Ultimately, the study resulted in the following recommendations:

- Historic Main Street District Enhancements
 - Historic District Designation
 - Railroad Quiet Zone
 - Streetscape Improvements

- East Side Connectivity
 - Phase 1: Infill
 - Phase 2: Off-Road Trail
 - Phase 3: Complete Pedestrian Network
 - Phase 4: Pedestrian Bridge
- Integrating with Our Parks
 - Gateways, Parking, Sidewalks
 - Vehicular Bridge Over the BNSF Railroad Near Crooked Road

The Common Thread

The common thread and overarching theme that has come out of the Community Engagement for the establishment of a guiding principle or vision for downtown Parkville is:

“The preservation of the small town, historic and charming character of downtown, while capitalizing on opportunities to enhance commerce, economic activity, and community interaction is critical to the future success of downtown Parkville.”

The community’s reinforcing principles for achieving this vision are:

- Preservation and protection of residential neighborhoods
- Preservation and protection of Main Street Transition Area (from 2nd Street to 6th Street)
- Preservation and enhancement of small town historic and quaint look, feeling and aesthetics
- Preservation and enhancement of park and natural resources
- Ensure that all future development/redevelopment/infill is compatible with the downtown character
- Enhancement of downtown as a destination for local/regional tourism and commerce

C.7.2 Station #2 The BIG PICTURE

1. Internal relationships in downtown are difficult.

How do we address this issue? What does it mean?

- Find common ground
- ‘What do you want?’
- Are you willing to compromise for overall good of downtown?
- Get people involved again
- Buy them out
- Ensure that everyone will gain more with success than status quo
- Understand conflicts and mediate

* We have been told by numerous people that this has been the reason for apathy, frustration, and lack of involvement. Many good people tried, got frustrated, and quit.

2. Lack of community leadership that can unify downtown

How do we address this issue? What does it mean?

- People are polarized by self interest
- Apathy because ‘nothing changes’

3. Most people’s image of Parkville is of downtown

How do we address this issue? What does it mean?

- Gives downtown a leg up on other competition (brand recognition)
- This can reflect positively/negatively on entire community
- Capitalize on recognition to facilitate downtown being a destination draw that you want to come back and visit
- Marketing should be easier – Focus on creating a comprehensive marketing program for the entire area

4. Inability to cause change on a larger basis

How do we address this issue? What does it mean?

- See #1
- See #2
- Small steps = progress forward
- Small, visible, collective, noncontroversial wins can build success on smaller success

5. Cost of recommendations and who pays for it?

Cost of recommendations – How do we address this issue? What does it mean?

- Cost of recommendations based on experience and data
- Planning level costs
- Refine costs as budgets and needs are determined

Who pays for it? – How do we address this issue? What does it mean?

- Public/private partnerships
- Private market driven demand/cost/burden
- Public improvement and government fund \$
- Grant and funding \$ from local, regional, state, and federal

* There is never enough public \$ to do the projects. You have to leverage public dollars so they create the most private investment – i.e. new roads and infrastructure open up developable land that generate taxes, create demand for goods and services; new beautification creates added quality, better experience. More new and REPEAT customers = more revenue and taxes.

6. Forced compliance with new regulations

How do we address this issue? What does it mean?

- Any new regulations adopted do not affect existing property owners (grandfathered)
- Provide incentive to address bad or significant existing issues

- Pay to play
- Voluntary compliance

C.7.3 Station #3 Land Use and Housing

1. Conflicting views of current state of downtown

How do we address this issue? What does it mean?

- Struggles of existing Mom & Pop vs. Full Time Businesses
- More Full Time Businesses will address community desire to be a destination because of:
 - Visitor expectations
 - Visitor demands
 - Creating a more vibrant downtown
 - Creating more diverse business environment
 - Better word of mouth

2. Majority want downtown to be a destination instead of for local neighborhoods

How do we address this issue? What does it mean?

- Need to meet expectations of those invited to destination
- Need to market downtown as destination
- Provide for visitors
 - Services
 - Goods
 - Safety
 - Experience
 - Character
 - Reason to stay
 - Reason to come back
 - Reason to come in first place
 - Uniqueness
 - Diversity and options
- Can't ignore locals – If visitors are being provided for, you can also capture locals for those goods and services (maybe not all needs)

- When economy takes a dip – discretionary income is hit first. If you are destination only, you are hit first.

3. Not capitalizing on park visitors to downtown

How do we address this issue? What does it mean?

- Park is #1 destination draw in Platte County
- Parkville Master Plan puts great emphasis and interest in parks & trails
- Not much cross traffic
 - Stores not open
 - Stores not offer things of interest and need
 - Railroad tracks are barrier
 - Lack of quality walks, etc. to downtown
 - Lack of wayfinding & signage
 - General “worn out” look of downtown
 - Location and convenience of parking
- Bring park into downtown
 - Improve connections
 - Create “green thread” through downtown for pedestrians and bikes connection with park
 - Create “must see” amenity in downtown that is attractive to park users
 - Have complimentary mix of stores that cater to park users
 - Provide street alternatives for park users – dog parking, dog fountain, pod stations, bike parking & benches
- Bring downtown into park
 - Move farmers market south to unusable ball field. Build parking there for market, park auto overflow
 - Build now complimentary retail on existing parking lot on Main St.
 - Make well defined connection to English Landing Center
 - Reconfigure existing market parking lot
 - Have final retail spot get overlook into park
 - Fill with complimentary uses

4. High density residential in neighborhoods & commercial core not favored

How do we address this issue? What does it mean?

- Much fear about subpar housing/low income families
- Fear about teardowns & new housing that doesn't fit
- Since most of area is built out, wide footprint or height necessary to make project successful would ruin fabric of downtown or neighborhood
- Fear of a much denser downtown environment lead many people to indicate or argue with downtown being a tourist destination focused area
- Despite historic precedent for good multifamily that fits context in area (and some that doesn't on 9 Hwy), residents not interested in historic style multifamily infill
- Focus multifamily on east street/9 Hwy
- Campus housing
- Professor/professional housing
- Diversify downtown in existing second story or add second story
- Make connections from downtown to outlying areas that may support easier diversity
- Diversify area west of English Landing Center

5. Preserve mixed use blocks from 2nd to 6th Street

How do we address this issue? What does it mean?

- Preservation of area important – acts as buffer
- Actually very unique – most quaint and idyllic area
- Do not allow further teardowns of existing residential/local structures
- Allow all residential structures in area to have commercial in them
- Relax off street parking requirements
- Create a guideline & restrictions for redevelopment of lots in area
- All infill shall be residential in scale & character (must fit)
- Establish non-encroachment boundary into residential neighborhoods

6. Preserve residential neighborhoods

How do we address this issue? What does it mean?

- Establish non-encroachment boundary for non residential uses
- Modify subdivision/zoning to allow for historic development patrons of existing properties that don't fit character
- Establish 353 program to assist rehabilitation of homes
- Allow redevelopment of West Street properties

7. Redevelopment opportunities exist on east side

How do we address this issue? What does it mean?

- Opportunities exists to change character of 9 Hwy
- Changing 9 Hwy could expand scope and critical mass of downtown core
- Could be the bridge between Main & Park University
- Could Redevelop:
 - East side of East/9 Hwy (no road change)
 - East side of East/9 Hwy (roadway change)
 - East/West side of East/9Hwy (roadway change)

8. Higher density housing aiding East Street that may provide student housing is possible

How do we address this issue? What does it mean?

- While higher density multi family was generally felt in appropriate in the residential neighborhood, East Street could accommodate denser housing if it fits character, market, and aesthetics of area
- Could be important part of mix of uses on redeveloped east side
- Existing multi family on east should be acquired and redeveloped

9. Overwhelmingly opposed to Section 8/low income housing

How do we address this issue? What does it mean?

- There are no plans/thoughts/proposals to do so

- Housing choice and variety doesn't mean low income housing
- There may be demand for more housing choices in area because of amenities and population (demographics)
- Burlington Creek success shows demand for high end

10. Rehabilitation of houses in neighborhoods is preferred to how house construction so they will fit context

How do we address this issue? What does it mean?

- Preserve residential integrity with residential overlay that limits teardowns, encourages rehab, provides strong guidelines on fit and character of new and rehab
- See #6

11. Lack of mix of retail/service/dining options hinders boring attractive to tourism (destination)

How do we address this issue? What does it mean?

- Currently have several unique & distinct stores/dining
 - Stone Canyon
 - Coffee Shop
 - Piropos
 - Café des Amis
 - Watch Place
 - Franks
 - Art Gallery
- Comment refers to significant # of antique/junk stores which makes up X% of total square footage offered in downtown
- Issue is about what does downtown want to be?
- Downtown is a very niche market for shopping, composed by the proliferation of the same type store (sometimes by same owner). Narrow window of business hours and overall quality of experience shrinks chances of success.
- Could do aggressive marketing and position

downtown as premier area but much competition from River Market, West Bottoms, etc. If so, quality and experience issues need to be addressed. This approach would not:

- Appeal to park users
- Appeal to University
- Appeal to Locals
- Could increase diversity of offerings that appeal to broader audience and local market
- Could create niche for area that would generate more traffic/draw/destination than current offerings do
 - Eateries, cafes, great eclectic dining destinations, already have:
 - Stone Canyon
 - Café des Amis
 - Piropos
 - French Bakery
 - Focused on high quality great experience
 - Pair with Farmers' Market
 - Pair with fine butcher like McGonigles or Kurzweils, Bichelmeyer, local pig

12. Residents on West Street feel isolated from downtown

How do we address this issue? What does it mean?

- Topography and broken street grid create separation
- Connections to downtown core & West Street don't exist
- Character is much different than Main Street
- Has varied home sizes, styles, etc. Does not match historic character of main
- Numerous proportions in disrepair
- Opportunity to redevelop area
 - Redevelop to match historic character of Main
 - Remove blight
 - Tie into history of area
 - Connect downtown core

C.7.4 Station #4 Transportation and Parking

1. Truck loading and unloading needs to be addressed on Main Street.

How do we address this issue? What does it mean?

It is common in older downtown districts for truck delivery to commercial establishments with only store fronts and without loading docks or alleys to occur on street. Observations of the delivery operations in downtown Parkville did not note significant delay or backup of motor vehicles on Main Street between 1st and 2nd Streets, behind the delivery truck. Typically, traffic volumes are minor on Main Street in the mid-morning and motorists can pass the delivery truck. One difficulty observed, is that the delivery truck can block parked vehicles dependent on its location.

If a solution is desired, there are several parking strategies as well as design options to consider. One strategy would be to restrict parking for a designated delivery time period (as a loading/unloading zone), allowing the delivery vehicle to utilize several diagonal parking spaces. The number of spaces will vary dependent upon the type of truck, ranging from three spaces for a panel truck to five spaces for a tractor-trailer combination.

A physical design solution would be to change the angle parking (on one side) to parallel parking and utilize the extra width to create a center lane for the delivery vehicle to park in for unloading and allowing room for motorists to pass the delivery vehicle. This would allow deliveries to occur throughout the day. However, as many as ten on-street parking spaces could be removed changing from diagonal to a parallel parking configuration (on one side).

2. Concerned about truck turning with proposed bulb outs.

How do we address this issue? What does it mean?

Professional design standards (i.e., APWA, MUTCD) would be followed with the construction of any

geometric improvements in downtown Parkville. The proposed Phase I curb extensions, or bulb-outs, would generally follow the existing pavement markings. This would not change a truck's path along Mill and 1st Streets.

Additionally, the designated truck route is south of the railroad tracks, although trucks often do not comply with the designated route nor is it routinely enforced by Police. The truck length, weight, number of axles, or configuration is not clearly identified on the signage.

3. Roundabout at East Street may be a solution for downtown/9 Highway.

How do we address this issue? What does it mean?

A roundabout is not just a transportation solution. In fact, there is not a significant enough transportation "problem" (defined as capacity or congestion) at this intersection that warrants a "solution." The concept of a roundabout is an enhancement opportunity that should be considered in conjunction with land use changes and redevelopment potential along East Street. The roundabout would assist in reinforcing low traffic speeds in the area, provide a place making element, as well as, assisting with pedestrian crossing.

The Livable Community Study addresses a roundabout on page 46.

"The current suburban style of development on East Street indicates that a three-lane section with a center turn lane to address the numerous curb cuts to businesses may be appropriate. But if more traditional development were to occur, complimentary in scale and character to Main Street, then a two-lane roadway with on-street parking, bike lanes and wide sidewalks might be applicable. Even a roundabout, as shown in Exhibit 30, could be considered at the junction of MO Rte 9 and 1st Street, though this is suggested in coordination with redevelopment and a change in the land use, especially along the east side of East Street."

4. Railroad quiet zone is of great concern.

How do we address this issue? What does it mean?

The Livable Community Study discusses railroad enhancements on pages 47 and 48.

"Any railroad enhancement should minimize the noise disruption of the trains through downtown. One way to do that is to eliminate the at-grade crossings or to investigate quiet zones. Grade separations can be costly, not only because of their capital and maintenance costs for structure but associated impacts to adjacent properties. Even if adjacent properties may not be physically and directly affected by a roadway over the railroad, the lack of access to properties could create an effective taking. Elevating the railroad may reduce the impacts to adjacent properties, yet this option is also quite expensive. A financially feasible option is to consider a "quiet zone." A quiet zone is a segment of a rail line where the locomotive horn is not routinely sounded at public highway-rail grade crossings. The initial requirements for a quiet zone focus on the corridor length and the warning devices installed at each crossing. In most cases, for a quiet zone to be approved one or more Supplemental Safety Measures (SSMs) is installed at each public crossing in the quiet zone. For the crossings in Parkville, a median or four-quadrant gates would be considered appropriate SSMs."

The Livable Community Study addresses railroad quiet zones on page 50.

"The second element [of the Historic Main Street District Enhancements], a railroad quiet zone, is suggested to be implemented when the BNSF constructs an additional railroad track to the mainline through Parkville (double track). The timing of the railroad construction is undetermined, though it is not likely to occur within the next five years. The trigger for the construction could be associated with increased rail traffic, such as with coal. That trigger may not necessarily be associated with any activity within the Kansas City region. When the track improvements are constructed it would be beneficial for the city to partner with the railroad to

install four quadrant gates at Main Street and East Street which allow the train to pass without sounding its horn. The estimated construction cost is approximately \$1.0 million.”

5. Railroad tracks are a hindrance for any development to the south of them (including English Landing Center and future build out of County Park).

How do we address this issue? What does it mean?

It may be necessary to distinguish between a hindrance for development and limiting access to development. As activities grow in the City park and proposed County Park, then a grade separated access across the railroad tracks may become more desired. The best location for such a potential crossing is closer to Crooked Road along MO Rte FF. However, the exact location and extent of a crossing is heavily dependent upon a public street network south of the railroad track that currently does not exist.

The Livable Community Study addresses the railroad and access to the south on page 52.

“The second element [of the Integrating with Our Parks Enhancements] of a vehicular bridge over the BNSF railroad, located near the junction with Crooked Road, is suggested to be implemented in conjunction with the construction of the Platte Landing Park and its elements or activities that would generate significant amounts of traffic. The estimated construction cost for a three-lane wide bridge with a sidewalk and a trail spanning the entire width of the railroad right-of-way is approximately \$5.0 million. “

6. “People Mover” system is a proposal that has been on table for a while.

How do we address this issue? What does it mean?

Currently, there is no traction in place for this concept with private participation to finance, test and encourage the potential market. At this time there is no business

plan for how the system would operate. Typically, any transit system needs vehicles, operators, a maintenance facility, and a revenue source to conduct day-to-day operations. No specific business model has been put forth to address such a basic plan. The operating characteristics have also not been addressed to determine any potential ridership or routing. In general, a people mover system would require an area significantly larger than the effective walking shed of downtown Parkville to be feasible.

The Livable Community Study discusses Neighborhood Electric Vehicles on page 42.

“Another opportunity discussed has been the use of Neighborhood Electric Vehicles (NEV’s) that could serve as a shuttle system for distributing patrons to a variety of destinations within the immediate vicinity of the parking lot. A transit center or stop could be integrated with the existing Farmer’s Market shelter to create a focal gathering point that can also use the shelter as a means of protection from weather elements. The NEV shuttle system has been suggested as a Spring/Summer/Fall service as the vehicles are unconditioned and open to the air.”

7. There are conflicting views on making cars move faster or slower through downtown.

How do we address this issue? What does it mean?

The posted speed is already low (25 mph) in the downtown area. As such, the design and philosophical direction in assessing the transportation characteristics has been to assist in achieving operating speeds closer to the posted speed through both physical and visual cues to motorists.

The Livable Community Study discusses traffic speed on page 46.

“Speed studies conducted on the approaches to downtown Parkville indicate that finding ways to reduce speeds would help improve the livability in the

area. There are several options to achieve a reduction in speed, they include:

- Enforcement through police presence or education which has been implemented through variable message signs showing “Your Speed” versus posted speed. While often effective, the results can be temporary.
- Physical devices as well as visual cues to motorists could assist. Some examples include installing medians at gateway locations, which could serve several functions, or changing the dashed pavement markings to solid lines for “no passing.” Other methods could include the use of on-street parking or a boulevard section.”

8. Moving the railroad tracks south was discussed.

How do we address this issue? What does it mean?

The Livable Community Study discussed numerous options for railroad enhancements on page 47, including:

“A relocation of the railroad (new alignment) would require extensive environmental review and would adversely impact English Landing Park. Construction costs could be in excess of \$100 million. A roadway bypass would be very expensive and would impact English Landing Park significantly.”

The Livable Community Study discusses railroad enhancements considered on pages 47 and 48.

“Any railroad enhancement should minimize the noise disruption of the trains through downtown. One way to do that is to eliminate the at-grade crossings or to investigate quiet zones. Grade separations can be costly, not only because of their capital and maintenance costs for structure but associated impacts to adjacent properties. Even if adjacent properties may not be physically and directly affected by a roadway over the railroad, the lack of access to properties could create an effective taking. Elevating the railroad may reduce the impacts to adjacent properties, yet this option is also quite expensive.”

The Livable Community Study addresses railroad enhancements as an element [of the Integrating with Our Parks Enhancements] on page 52.

“Numerous alternatives for providing grade-separated vehicular access to the south side of the railroad tracks have been explored. The most viable option appears to be a roadway overpass connecting Mill Street near Crooked Road to a new roadway south of the English Landing development. Implementation is highly dependent on funding and design considerations.”

9. A pedestrian connection along 9 Highway east to 45 Highway was important.

How do we address this issue? What does it mean?

The Livable Community Study presents the East Street Connectivity enhancement concept on page 54.

“The first element to be implemented in this package could be to construct infill sections of sidewalk and associated ADA ramps. The second phase of the off-road trail network may occur as part of a public-private-partnership in conjunction with the adjacent property owners such as Park University or as part of development along White Alloe Creek. Before the third phase of constructing a pedestrian overpass, a continuous non-motorized network connecting major attractions and generators such as English Landing Park and Park University needs to be provided along the existing street network as discussed in the Integrating with Our Parks concept. The proposed pedestrian bridge would serve several functions including acting as an important gateway into downtown.

Additional non-motorized facilities could be contemplated along East Street (MO Route 9) as part of infill development or redevelopment. The facilities could range from marked on-street bike lanes to wide sidewalks with enhancement zones. “

10. Filling in existing gaps in sidewalks is important.

How do we address this issue? What does it mean?

The Livable Community Study presents an inventory of sidewalks on pages 13, 14, and 15.

The Livable Community Study presents the East Street Connectivity enhancement concept on page 54.

“The first element to be implemented in this package could be to construct infill sections of sidewalk and associated ADA ramps, as applicable, estimated at around \$100,000 for construction. This cost includes some curb and gutter along with the sidewalk yet the extent of drainage aspects such as inlets and piping is not included.”

11. Some thought had enough trails and walks in area.

How do we address this issue? What does it mean?

The Livable Community Study presents information on trail perspectives on page 33.

“Input also indicated that when the data collected is compared to public input there are sometimes competing perspectives limiting the ability to achieve a common goal. An example could be alignments for a trail(s) through downtown connecting to existing and planned trails both north and south of downtown, as well as incorporating plans for the Platte Landing Park. In this regard, downtown Parkville is but a part of a larger decision-making process including the community, county and regional trail advocates.”

12. The connections from parking lot to downtown need to be improved.

How do we address this issue? What does it mean?

The proximity of the downtown municipal parking lot is an asset. While accessing the lot from downtown

means crossing the railroad tracks, this alone should not create a perception of unavailability or an unattractive quality of the overall space. The parking lot also serves as a transition area to the Park.

The Livable Community Study discusses parking enhancements on page 42, including:

“A key to wayfinding elements is to assist visitors who may be unfamiliar with an area locate parking and then begin their journey on foot. A typical pedestrian walking distance is one-quarter mile or approximately 1,200 feet. Often referred to as a “ped shed,” the area encompassing a radius of 1,200 feet can help identify where parking should be placed with respect to major generators or points of interest. The existing off-street public parking lot, south of the railroad tracks, is literally within the downtown area, yet may be perceived by some to be outside the downtown simply because of the railroad tracks. As shown in Exhibit 27, a majority of downtown is within half the typical walking distance. Directing visitors seeking a parking space to this relatively plentiful surface parking lot is important. Yet equally important is creating pleasant pedestrian linkages from this parking facility to downtown as well as to English Landing Park.”

The Livable Community Study presents the Integrating with Our Parks enhancement concept on page 54, including:

“The parking lot south of Main Street is currently used to accommodate the needs of downtown, English Landing Park, and the Farmers Market. Improving the overall parking lot layout provides additional parking spaces, improved circulation for drivers and pedestrians, and opportunities to extend the streetscape experience along Main Street giving pedestrians a safe, attractive, and clearly defined path to downtown.”

13. Some conflict between providing sidewalk amenities and having no need or desire for them. Most business owners desire improvements.

How do we address this issue? What does it mean?

There are sometimes competing perspectives limiting the ability to achieve a common goal. Specific to sidewalk amenities, some owners may question who pays for amenities, cost (and ability) to maintain and an aesthetic design that “pleases everyone” may need to be addressed.

14. Minor interest in regulating or posting signage to control parking. Most desire no standard. Some business owners do want standards because of owner/staff parking in front of stores.

How do we address this issue? What does it mean?

On a downtown district basis, the overall low parking utilization does not suggest the need to regulate parking times. However, certain on-street parking locations were observed to have the same vehicles parked for the duration of field observations (four hour time period). Business owners may need to decide if they should encourage or require their staff to park in the municipal lot in order to make on-street parking available for customers.

15. ADA parking on Main Street is desired.

How do we address this issue? What does it mean?

The Livable Community Study presents information on ADA parking on pages 17 and 18.

“The Americans with Disabilities Act (ADA) does not specifically address on-street parking, though when on-street ADA spaces are provided, various regulations apply. Some general suggestions regarding on-street ADA spaces include:

- Clearance Space can be provided by opening space on the sidewalk side of the parking space.
- Angled spaces are acceptable as ADA-compliant parking.
- One in eight spots should be van accessible to the full 96-inch specification. It is acknowledged that for on-street parking, van spaces may be difficult to accommodate.

- When considering location, the shortest route is not necessarily the best benchmark.

“The access board also discusses “the project” or “project area” and suggests that on-street spaces be dispersed within the project area. It also notes that “accessible on-street parking shall be permitted to be combined with off-street parking under the same jurisdiction serving the same project area.” This is interpreted to mean that ADA parking in the nearby municipal lots could adequately serve the project area. However, spaces dispersed throughout the area should be considered. Review of other discussions regarding on-street ADA parking noted the need for clarity in signing and the use of a map identifying the location of ADA parking spaces.

“A total of 10 off-street (in the municipal lot) ADA parking spaces plus 2 on-street spaces (one each) on Main Street and East Street are provided in the study area. Two former spaces on the east side of Main Street north of 1st Street have been removed. Both of the on-street ADA spaces could “double up” and provide additional ADA spaces IF the access aisle had a ramp to the sidewalk. Individually and collectively, both the central parking lot (6 ADA spaces from total of 102 spaces) and the Farmer’s Market parking lot (4 ADA from a total of 71 spaces) meet the total number of ADA parking spaces required. None of the ADA spaces are signed as being van accessible. When reviewing the district as a “project area” and including the on-street spaces along Main and East Streets as well as 2nd Street (total parking of 294 spaces), the number of ADA spaces also appears adequate, although they may not be considered to be well dispersed. For less than 300 spaces, a total of 7 ADA spaces are required. For 301 spaces, a total of 8 ADA spaces are required.”

Many communities utilize curb extensions as a physical means to provide ramps from the parking space to the sidewalk. This suggests that if ADA parking were provided, the inclusion of curb extensions would be appropriate.

16. Bicycle parking is desired.

How do we address this issue? What does it mean?

Bicycle amenities such as bike racks can be considered part of the streetscape. The potential creation of curb extensions allows for increased public space that can be used for such amenities as benches, trash cans, wayfinding kiosks, light poles, and bicycle racks.

17. Challenge in getting students and faculty from campus to downtown.

How do we address this issue? What does it mean?

The perspective on this issue is from a physical implementation viewpoint independent of an actual attraction that would bring University personnel and students to downtown. The University has two major pedestrian access points, one at White Alloe Creek on Route 9/East Street and another at 6th Street. Both locations have marked crossings. The 6th Street crossing lacks a sidewalk on the south side east of East Street into the University. Thereafter, technically speaking a path is available to the downtown (Main and 1st Streets) though some segments may be challenging in terms of ADA compliance or having an “attractive” path. While the definition of “attractive” can be subjective, walkability plans focus upon such elements as directness, continuity, street crossings, visual interest and amenities, and security.

The Livable Community Study presents the East Street Connectivity enhancement concept on page 54.

“The first element to be implemented in this package could be to construct infill sections of sidewalk and associated ADA ramps. The second phase of the off-road trail network may occur as part of a public-private-partnership in conjunction with the adjacent property owners such as Park University or as part of development along White Alloe Creek. Before the third phase of constructing a pedestrian overpass, a continuous non-motorized network connecting major attractions and generators such as English Landing Park and Park

University needs to be provided along the existing street network as discussed in the Integrating with Our Parks concept. The proposed pedestrian bridge would serve several functions including acting as an important gateway into downtown.

Additional non-motorized facilities could be contemplated along East Street (MO Route 9) as part of infill development or redevelopment. The facilities could range from marked on-street bike lanes to wide sidewalks with enhancement zones. “

C.7.5 Station #5 Utilities, Infrastructure, and Flooding

1. Communication of flooding issues in park and not necessarily downtown.

How do we address this issue? What does it mean?

City staff, elected officials and downtown organizations need to clearly communicate conditions to the media and customers during flood events.

2. Concern over flood control costs on White Alloe Creek if it is redeveloped.

How do we address this issue? What does it mean?

The design of any structure would need to address the flood control issue. Depending upon the type and extent of development and associated structure, the costs to design within the floodway may become prohibitive. This “pro forma” analysis will not occur until a specific development proposal is given consideration.

3. Greater flood control was generally desired and was said to hamper flood prone area long-term viability.

How do we address this issue? What does it mean?

Flood control measures are important to consider for any redevelopment but it is just one factor in the decision to locate new business or residences in downtown Parkville.

4. Utility costs are perceived as high (particularly water service).

How do we address this issue? What does it mean?

Utility cost is but one factor in the decision to locate new business or residences in downtown Parkville. In regard to water service, the franchise will expire in a few years and the city is investigating other options. Downtown representatives did comment that the water utility is a good community partner.

5. Old infrastructure along Main Street needs to be upgraded.

How do we address this issue? What does it mean?

Utility infrastructure upgrades are important to consider for existing customers and for any redevelopment but it is one factor in the decision to locate new business or residences in downtown Parkville.

6. Public Wi/Fi service in area is desired.

How do we address this issue? What does it mean?

Some stakeholders are interested in providing Public Wi/Fi as an enhancement to downtown Parkville. There is currently no business plan outlining who pays for the service nor the cost (and ability) to maintain the service.

7. General concern over aging infrastructure.

How do we address this issue? What does it mean?

Utility infrastructure upgrades are important to consider for existing customers and for any redevelopment but it is just one factor in the decision to locate new business or residences in downtown Parkville.

C.7.6 Station #6 Parks, Recreation, and Natural Resources

1. English Landing Park is a very important resource and should be preserved and enhanced.

How do we address this issue? What does it mean?

- A Platte County survey indicated that English Landing Park is the #1 destination in Platte County.
- The reconstruction of the park is complete from the previous flood. Additional amenities could be added, but would need to address their vulnerability to flood damage.
- Additional amenities could include shelters, gardens, overlooks, etc. An English Landing Park Enhancement Plan should be considered to continue to draw visitors, as well as create new demand.

2. New Platte Landing Park could bring new visitors to downtown as it is developed.

How do we address this issue? What does it mean?

- As the Platte Landing Park is developed, it could draw additional visitors to the area because of the additional unique attractions in the park, as well as the future proposed master plan improvements. These visitors are potential customers of the downtown area.

3. Community compartmentalizes English Landing Park and downtown as two different places.

How do we address this issue? What does it mean?

- There is a disconnect between the community and visitors between English Landing Park and downtown.
- Lack of interest in the current state of the downtown and the physical properties of parking, access, and barriers foster this compartmentalization.
- On event days the majority of visitors to the event don't cross the tracks and venture up into downtown

4. Downtown does not do a good job capturing patrons of the park.

How do we address this issue? What does it mean?

- A built in potential customer base exists with the park visitors on normal days, event days, weekends, market days, sports events, etc. The majority of those users do not venture north of the railroad tracks, or in to English Landing Center.

- Reasons:
 - Compatible store hours
 - Convenience of parking for parking in Park
 - Lack of complimentary uses attractive to park users
 - Railroad is a barrier
 - Lack of bike racks in downtown
 - Lack of comfortable and attractive pedestrian connection from park to downtown
 - Came to exercise only and don't need to anything else
 - Overall attractiveness of downtown

5. Capitalizing on park(s)/downtown relationship is a critical issue.

How do we address this issue? What does it mean?

- Downtown and ELP should be complimentary of each other.
- Easily accessible connections should be created to allow park users to feel comfortable to walk or bike from park to north of tracks.
- Offering compatible uses and amenities that are useful to the visitors of the park should help draw more potential visitors to the downtown north of the tracks.
- Adding wayfinding and signage to indicate where to go and what you can do in the parking lot would help entice users north of tracks.
- Adding retail along Main Street south of tracks in parking lot may provide a needed connection to English Landing Center and the downtown Core in the Park where it is convenient, accessible and enticing to park users.
 - This would necessitate a redesign of parking and circulation in the existing parking lot.
 - This would allow the relocation of the Farmers Market Structure to the ball field just south of the parking lot.
- Match operation hours better with park peak usage hours.

6. Green space and trees are important to the feeling of downtown (focused in neighborhoods and parks, not commercial core).

How do we address this issue? What does it mean?

- Tree preservation ordinances
- Tree replacement program for parks
- Tree replacement program for neighborhoods
- Tree, vegetation, erosion, water evaluations, and wildlife management on a scheduled basis in parks and along trails
- Minimum standards for open space in development and redevelopment that are compatible with the area
- Preservation of natural features

7. Vision for relocating rail lines is contrary to vision to building on the success of the park.

How do we address this issue? What does it mean?

- The proposal for moving the railroad tracks south of the parking lot/English Landing Center will have a significant negative impact on the existing English Landing Park.
 - The alignment that meets railroad standards will run through the middle of the existing park to accommodate the necessary horizontal curvature(alignment) of the train tracks.
 - Realignment of the track would greatly reduce the programmability, usability and variety of park uses.
 - Grading operations would destroy significant existing trees.
 - The track would be raised above the park at the elevation where it currently exists, creating a significant side slope and the visual and physical connections of the park with the river and highway 9.

C.7.7 Station #7 Aesthetics and Architecture

1. Preservation of the ‘quaint’ nature of downtown commercial area is important.

How do we address this issue? What does it mean?

- In order to preserve, it is important to first identify the elements of the commercial area that truly add to the quaintness of downtown.
- It’s also important to identify those elements which don’t add to the quaintness of downtown. These areas should be considered in future redevelopment or rehabilitation opportunities that may arise.
- Develop a full set of design guidelines for the commercial area so that new infill, redevelopment, and rehab projects fit the character of the built environment.
- Consider creating a local historic district (see #7).

2. Arrival to downtown needs to be signified on Highway 9 and Mill Street.

How do we address this issue? What does it mean?

- Development of a layered gateway plan will help to define visitors’ first impression of downtown Parkville and Parkville as a whole. Levels of gateways would include:
 - Primary gateway – “Welcome to Parkville”
 - Secondary gateways – “Welcome to downtown”
 - Downtown markers – Marking the boundaries of the downtown core
 - Neighborhood markers – Marking the boundaries of the downtown residential neighborhood

3. Preservation of historic character of neighborhoods is important.

How do we address this issue? What does it mean?

- Identify properties that fit within the historic context of the neighborhood and those that do not.
- Develop an incentives plan to encourage the rehabilitation of properties that fit within the historic context, but have deteriorated in quality over time.

4. Concern about clutter and overall upkeep and maintenance of area.

How do we address this issue? What does it mean?

- The sense of clutter and poor upkeep in the commercial area is a result of the following:
 - Narrow walks (8’-10’ in front of storefronts)
 - Old, deteriorating concrete pavers that make the walks look dirty and poorly maintained.
 - A mishmash of site furnishings, landscape pots, and sandwich boards that lack consistency, while narrowing the walks even further.
 - Deteriorated facades in some locations.
- Many of the issues listed above could be addressed in a streetscape improvements plan (See #8).
- In order to address maintenance, it is important to review the existing maintenance program and identify the gaps in the services and resources being provided.

5. Downtown facades were described as unmaintained, tired and dirty. Could use a rehab to freshen and update looks.

How do we address this issue? What does it mean?

- Often, property and business owners have a desire to improve the look of their facades, but don’t have the vision or resources to properly do so. The master plan will include:
 - Recommendations for general exterior building maintenance items and rehabilitation of storefronts.
 - A summary of potential incentives and resources for such improvements.

6. Important to be Parkville and not somewhere else.

How do we address this issue? What does it mean?

- Any improvements to the built environment of the downtown area should be sure to consider the historical character of Parkville and what makes it unique.
- All future design guidelines that are developed should also consider this character.

- Opportunities for redevelopment should aim to complement what already exists.

7. Some interest in Historic District but no real consensus on approach or desire. Concern for overreaching regulation and loss of private property rights.

How do we address this issue? What does it mean?

- There are several options to consider in regards to historic districts. This is something that will need to be addressed at a later date by the downtown property owners, but the master plan will serve as a resource when reviewing these options, which include:
 - Local historic district
 - National historic district
 - Individually listed buildings on the National Register of Historic Places

8. Streetscape is not inviting for visitors in most areas of the downtown core. Sidewalks too narrow, no place to sit, condition is deteriorated.

How do we address this issue? What does it mean?

- The development of a streetscape plan in the commercial area could not only improve the aesthetics of the area, but also serve as a catalyst for economic revitalization for downtown. Elements to consider in a streetscape improvements plan would include:
 - Updated walks and crosswalks that are designed to fit the historic quality of downtown.
 - Development of site furnishing standards to be used throughout the district.
 - The incorporation of added seating opportunities throughout the district.
 - Branding (See #9).

9. Branding and amenities should be added to enhance look and experience of downtown streetscape.

How do we address this issue? What does it mean?

- The development of a branding plan could be done in coordination with the streetscape plan (see #8) to create a truly cohesive and inviting Downtown environment. Elements that may be part of branding plan include:
 - Signage & wayfinding
 - Gateways & monumentation
 - Logo development
 - Street light banners and hanging baskets
 - Site furnishing recommendations
 - Storefront signage recommendations
- Downtown amenities should also be considered in the development of a streetscape plan in order to maximize the user experience. Potential amenities may include:
 - Seating and gathering areas, both small and large
 - Interactive water features
 - Interactive educational opportunities

C.7.8 Station #8 Operations and Function

1. Much concern over current hours of operation of Main Street downtown stores.

How do we address this issue? What does it mean?

- Users of the park, merchants, neighbors and the rest of the community has provided input that the stores in downtown are not open:
 - At peak park times
 - At peak weekend times
 - Late enough for evening use
 - At their own posted times
- Because of the nature of small proprietor/Mom and Pop stores in downtown, there are only so many hours that they can be open and operating.
- If one of the overall goals for downtown is to increase visitors and tourists, matching their expectations for business hours is critical for success.

- Overall success in the area would allow for additional employees and additional store hours.

2. When issues were identified and discussed, with potential solutions put forward, the idea of regulating the issue was met with resistance, except with those more closely involved in day to day issues.

How do we address this issue? What does it mean?

- While the community-at-large want to protect the property rights and not be forced into regulation, the business owners see the need to address various issues of concern that they see as negatively affecting their ability to be successful. Issues brought up include:
 - Owners and Employees parking in the limited parking on Main Street
 - Hours of Operation
 - Maintenance and Upkeep
- It was clear that some participants were opposed to forced regulation or the idea of being taxed for any proposed improvements.

3. Wayfinding is a concern in downtown.

How do we address this issue? What does it mean?

- There is a significant lack of directional and informational signage and wayfinding in the downtown area.
- There is a lack of understanding and recognition of exactly what stores are in downtown.
- If one of the overall goals for downtown is to increase visitors and tourists, providing a comprehensive wayfinding and directional signage program is critical to serving those people.

4. Concerns about adding too much signage and wayfinding that will clutter overall character of downtown.

How do we address this issue? What does it mean?

- Signage and wayfinding should be design to provide information, should be in scale with its purpose, should be constructed of durable materials and

should reflect the brand, style and character of the downtown area.

- A comprehensive signage program should be an accent to reinforce, not dominate or distract from the character of downtown Parkville.
- Create a sign regulation for the area that is focused on reinforcing the preservation of the character of downtown Parkville.

5. Recycling needs to be addressed.

How do we address this issue? What does it mean?

- There is interest in providing pedestrian recycling containers incorporated into the streetscape.
- There is interest in having a centralized recycling location for the commercial businesses.

6. Public restrooms need to be addressed.

How do we address this issue? What does it mean?

- It is important to address providing public restrooms for the downtown area.
 - Some merchants welcome the public to use their restrooms and then hope they will get business from them, and in many cases do.
 - Some merchants do not allow the use of their restrooms for the public.
 - Because there are no public restrooms and limited business hours are identified as an issue, the use of merchants restrooms for public restrooms is not a short term solution.
 - A location for public restrooms should be identified as a long-term solution. Issues associated with a permanent public restroom include:
 - Location
 - Availability of utility services
 - Security
 - Maintenance

C.7.9 Station #9 Economics

Demographics

1. The future growth in population and income will generate additional consumer purchasing power and retail sales growth.
 - Primary Trade Area – 10 Minute Drive Time
 - Population Growth – 49,264 (2013) to 61,580 (2030)
 - Per Capita Income Growth - \$31,359 (2013) to \$44,788 (2030)
2. The future growth of office –related employment will increase the demand for professional and medical office space in Platte County and Parkville.
 - Office Related Employment Growth – 1,830-2,135 jobs from 2013 to 2030
3. Continued population growth in Parkville will fuel additional housing demand.
 - Population – 5,554 (2010) to 8,148 (2030) – Growth of 2,594

Business Location Factors

1. Several challenges face future economic development:
 - A limited stock of quality commercial space.
 - Periodic river flooding that is disruptive to business and damaging to properties and business.
 - Main Street's limited visibility and exposure.
 - Frequency/noise of freight trains through downtown.

Competitive Retail Market

1. Inventory = 153,189sf ground floor retail
2. Vacancy = approx 8.6% (13,207sf)
3. Lease Rates = approx \$10-\$13/sf

4. Primary Market Area = 10 minute drive time (up to 7 miles)
5. Secondary Market Area = 15 minute drive time (7-10 miles)
6. Parkville Pull Factor = 1.154 – The City is capturing retail sales at a rate of 15.4 % above state-wide average. Proof of high income levels and ability to attract customers from outside the City.
7. Estimated Pull Factor for Trade Area = 0.506 indicates considerable leakage and the opportunity to support additional retail sales.
8. The recent declines in retail sales are an indication the Parkville is suffering from increased retail competition. (2012-down 3.5%) (2013 first half – down .8%)

Current Retail Gap and Absorption

1. Current (2013) Primary Trade Area Gap = \$219.4m = 800,000sf to 975,000sf
2. Future (2030) Primary Trade Area Demand = 585,000 to 716,000sf
3. Downtown Parkville Estimated Capture = 7.5% (through 2030)
4. Downtown Parkville Estimated Absorption = 103,875 to 126,825sf through 2030

Competitive Office Market

1. No office Park currently exists in Parkville
2. Current Inventory = 54,119sf
3. Current Vacancy = 5.5%
4. English Landing Center accounts for 70% of downtown inventory
5. Lease Rates = approx \$12-\$13/sf
6. Platte County Absorption of Office Space = 457,500 - 533,750sf (through 2030)
7. Downtown Parkville Estimated Capture Rate = 15% (through 2030)
8. Downtown Parkville Estimated Absorption = 68,625 to 80,000sf (through 2030)

Competitive Hotel Market

1. Existing Lodging Downtown = 4 room B&B
2. Future Hotel Site and Location Factors reduce market feasibility to a B-Rated location
3. Incorporation within a mixed use project would improve feasibility.
4. Prospective property types include limited service or boutique hotel.

Competitive Housing Market

Single Family

1. Current New Single Family Permits (on Pace) = 50-60 permits
2. Current New Single Family Home Construction Valuation = \$263,000
3. Home size and value is trending down from 2008 peak (\$541,429.00).

Apartments

1. Northland Region Occupancy Rate (2012) = 93%
2. Warranted New Construction

Housing Demand Projections

1. Growth in population and employment will create a demand for new housing
2. Parkville Housing Demand = 790 Owner Occupied Units, 200 Rental Units
3. Downtown Parkville Demand = approx 125 to 175 Multifamily Dwelling Units
4. Park University Housing Gap = approx 1,400 students seeking off-campus housing (2017)

Downtown's economic survival and redevelopment hinges on expanding the current market niches, introducing new market niches and providing consumers a larger selection of merchandise and services.

C.7.10 Station #10 Development, Redevelopment, and Infill

1. Development is new development on undeveloped land.
2. Redevelopment is the repurposing of existing developed land that has become outmoded, outdated, deteriorated, or doesn't fit with existing and future uses.
3. Infill is the development of underutilized or undeveloped land or properties surrounded by other utilized properties or buildings.
4. There are several development, redevelopment, and infill opportunities in the Downtown area.
 - East side of East Street (2nd to 6th Street) – Mixed Use Redevelopment
 - 9 Highway – Transportation Redevelopment – Roundabout, redeveloped road section between 1st and 6th Street, revised section with sidewalk between 6th Street and the northern project boundary.
 - West side of East Street (2nd to 6th Street)
 - West side of West Street – Residential Redevelopment Opportunity
 - Infill in Residential Neighborhoods – Spot infill of residential homes that match the style, character, scale and materials of the surrounding neighborhood.
 - Downtown Neighborhoods - Rehabilitation of distressed residential properties in the Downtown Neighborhoods
 - Downtown Parking Lot – Redevelopment of Downtown Parking Lot, Farmers Market area, and small baseball field.
 - Main Street Downtown Core – Redevelopment/ Façade Improvement to the commercial core storefronts.
 - Main Street Downtown Core – Streetscape improvements and enhancements to the downtown area.

Significant and meaningful discussion, feedback and support of concepts and the methodology for addressing

the issues of the Master Plan was had at the meeting. The meeting was the best attended of all meetings held to date, and the atmosphere was that of genuine interest in the issues for improving downtown Parkville. Comments gathered during the Open House were incorporated into the Master Plan Recommendations.

Of additional note, during the day of Open House, the Master Plan Team conducted individual previews of the Open House Materials to available Key Stakeholders for their feedback on their key issues and how they were being addressed. Those comments and feedback are incorporated into the Master Plan Recommendations.

C.8 Parkville EDC Presentation

On November 6th, 2013, the Master Plan Team will present the key Master Plan Recommendations to the Parkville EDC.

C.9 Planning Commission Presentation

On November 12th, 2013, The Master Plan Team will present the Master Plan Recommendations to the Parkville Planning and Zoning Board.

C.10 Community Land and Recreation Board Presentation

On November 13th, 2013, The Master Plan Team will present the key Master Plan Recommendations to the Community Land and Recreation Board.

C.11 Board of Alderman Presentation

On November 19th, 2013, the Master Plan Team will present the Master Plan Recommendations to the Parkville Board of Aldermen.



APPENDIX D: Economic and Market Analysis

CANYON RESEARCH SOUTHWEST, INC.

COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

ECONOMIC AND MARKET ANALYSIS DOWNTOWN PARKVILLE, MISSOURI

November 2013

Prepared for:

Ochsner Hare & Hare, LLC
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Kansas City, MO 64108

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475 Ellicott Street #301
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PR# 13-09-01

475 ELLICOTT STREET #301 / BUFFALO, NY 14203 / (716) 551-0655

CANYON RESEARCH SOUTHWEST, INC.

COMMERCIAL REAL ESTATE RESEARCH AND ANALYSIS

November 8, 2013

Ken Boone
Director of Design
Ochsner Hare & Hare, LLC
1801 McGee Street, Suite 101
Kansas City, MO 64108

Re: Economic and Market Analysis
Downtown Parkville, Missouri

Mr. Boone;

The City of Parkville, Missouri retained Ochsner Hare & Hare, LLC to prepare the *Downtown Parkville Master Plan*. As a sub-consultant to Ochsner Hare & Hare, LLC, Canyon Research Southwest has prepared the *Economic and Market Analysis* portion of the assignment. The study evaluated opportunities and constraints for future commercial and residential growth in downtown Parkville, Missouri.

Upon review of the report, should any questions arise or additional information requested, contact me directly at (716) 551-0655.

Respectfully submitted,

CANYON RESEARCH SOUTHWEST, INC.

Eric S. Lander, Principal

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Canyon Research Southwest, Inc.		

SUMMARY OF MAJOR FINDINGS

The City of Parkville, Missouri retained Ochsner Hare & Hare, LLC to prepare a *Downtown Master Plan* to assist in guiding future urban growth and redevelopment efforts. In support of the Downtown Master Plan, Canyon Research Southwest prepared an *Economic and Market Analysis* that evaluated opportunities and constraints for future commercial and residential growth in downtown Parkville, Missouri. The report's major findings and recommendations are summarized in the text below.

Economic and Demographic Indicators

The City of Parkville is a northern suburb of the Kansas City MSA located adjacent to the Missouri River approximately 10 miles northwest of downtown Kansas City, Missouri. Parkville is a growing, affluent community that in recent years has attracted high-end new home construction, escalated commercial development and high income households.

A trade area's population size, growth, age composition, income levels and education levels play significant roles in the demand for housing, retail goods and services, employment-related development.

A trade area population's growth and age composition play significant roles in the demand for a variety of retail goods and services. Each of these age groups possess distinctively different consumer and housing needs. Downtown Parkville's primary trade area population within a 10-minute drive-time is forecast to increase from 49,264 in 2013 to 61,580 by 2030 with per capita income rising from \$31,359 to \$44,788. These future gains in primary trade area population and income levels will generate additional consumer purchasing power and retail sales growth. The age composition of the population will favor the growth in demand for hardware; furniture and home furnishings; home electronics; department stores; eating and drinking places; entertainment; personal services; and healthcare goods and services.

The composition of employment growth is a key factor influencing the future demand for professional and medical office space. From 2012 to 2030, total employment for Platte County is projected increase by 6,100 jobs. Office-related employment is forecast to account for 30 to 35 percent of total job growth. These capture rates translate into office-related employment growth of 1,830 to 2,135 jobs from 2013 through 2030. This growth in office-related employment will translate into increased demand for professional and medical office space in both Platte County and City of Parkville.

The Missouri Economic Research & Information Center projects the Platte County population to reach 114,904 by 2030, an increase of 25,940 residents from 2010. By 2030, the City of Parkville population is estimated at 8,148, an increase of 2,594 residents from 2010. This continued population growth will fuel additional housing demand in Parkville.

Business Location Factors

The Downtown Master Plan Kick-off Public Meeting as well as interviews conducted with several local business owners, property owners, and government and economic development staff identified assets/opportunities and constraints/limitations of downtown Parkville as a business location.

Assets / Opportunities

- Parkville possesses high income levels;
- Missouri River and riverfront park are major draws;
- The riverfront park is a major community asset. Construction of the new county park will add a boat ramp and dog park which should increase pedestrian traffic;
- The historic character of downtown makes it unique, should embrace history;
- Park University is growing and could generate increased potential customers;
- Downtown is a destination location and independent merchants sets it apart;
- Several quality restaurants operate downtown;
- The predominance of independent merchants set downtown Parkville apart from other commercial districts;
- The Farmers Market is a big draw for downtown;
- Major festivals are the biggest sales days for downtown merchants;
- Downtown Parkville possesses an existing brand;
- Tour buses come to downtown Parkville; and
- Kansas City supports a large tourism market

Constraints / Limitations

- Lack of affordable housing for employees of local businesses and Park University;
- Railroad trains are very loud when passing through town;
- Business mix lacks diversity and doesn't cater to local residents and Park University;
- Limited customer parking on Main Street;
- Downtown lacks an available inventory of quality commercial space;
- Landlords that don't invest in their properties;
- Highway 9 doesn't run through Main Street;
- Limited amount of park activities offered that would attract people downtown;
- Downtown lacks a city center;
- Many people don't know what's downtown;
- Many downtown businesses are closed at nights and on the weekends;
- Main Street businesses north of 2nd Street have struggled;
- The Missouri River cuts the trade area in half;
- Downtown Parkville needs an attraction to draw people;
- Most Park University students don't live in Parkville;
- Downtown looks tired and not well maintained;
- The river flooding disrupts business and discourages some businesses from opening downtown;
- Sidewalks aren't wide enough to accommodate outdoor seating for restaurants; and
- Many downtown merchants are under capitalized

As ascertained by the stakeholder interviews, downtown Parkville possesses ample advantages for attracting businesses, jobs and development activity. Park University, Parkville's high household income levels, Missouri River and riverfront park, downtown's historic character, Kansas City's large tourism market and major festivals were cited as playing key roles in attracting retailers and professional/personal service businesses. Challenges facing future economic development of downtown Parkville include a limited stock of quality commercial space, periodic river flooding that disrupts business, Main Street's limited visibility and exposure, and frequency/noise of freight trains.

As it relates to this report, desirable commercial space and development sites must be created to improve the ability to attract new retail, professional and medical businesses to Parkville. The future demand for retail space will rely on the region's population and income growth with office space also depending on increasing the number of college educated residents and continued expansion of Park University.

Competitive Retail Market

Parkville supports two principal retail districts, including downtown along Main Streets and Parkville Commons at the intersection of Highways 9 and 45. Each retail district caters to a distinctive market niche with downtown focusing on destination specialty shops and restaurants and Parkville Commons satisfying the daily retail needs of local residents.

From 2003 through 2007 taxable retail sales for the City of Parkville grew by nearly 80 percent, reaching \$90 million. Much of the accelerated growth in taxable retail sales was a direct result of the development of Parkville Commons during this 5-year timeframe, adding approximately 200,000 square feet of commercial space to the City's inventory.

Consistent with metro-wide trends, during 2009 taxable sales in Parkville declined as a result of the national recession. Taxable sales rebounded 4.3 percent in 2010 to \$93 million. The upward trend in taxable retail sales continued into 2011 increasing by 2.7 percent. Taxable sales digressed in 2012 declining by 3.5 percent to \$92.1 million. For the first half of 2013 taxable retail sales in Parkville were down 0.8 percent over the first half of 2012. The recent declines in retail sales are an indication that Parkville is suffering from increased retail competition.

The inventory of ground floor retail space in downtown Parkville totals approximately 153,189 square feet, housing a mix of restaurants, art galleries, hair salons, antique shops, home furnishings, and gift and collectible stores. Parkville Coffeehouse, Rock Canyon Pizza, French Bee Bakery and the Farmers Market are major generators of customer traffic in downtown Parkville. Downtown offers a quaint historic charm that is reflected in the predominance of independently-owned businesses. As of the date of this report 13,207 square feet of retail space was available for lease in downtown Parkville, translating to an average vacancy rate of 8.6 percent. Lease rates for commercial space generally range from \$10 to \$13 per square foot.

Given downtown Parkville's historic character, unique tenant mix and central location businesses benefit from an expanded retail trade area. The primary market area encompasses the geographic area located within a 10-minute drive time with the secondary market area expanded to include a 15-minute drive-time. The tertiary market area incorporates the entire Kansas City MSA as well as out-of-town visitors.

Parkville's current pull factor of 1.154 suggests the city is capturing retail sales at a rate equivalent to 15.4 percent above the state-wide average. This pull factor is proof of Parkville's high income levels and the ability of businesses to attract customers from outside the city. However, the well above average pull factor does not suggest that Parkville is over retailled and not capable of supporting additional retail space. Conversely, the estimated pull factor for the primary trade area of 0.506 indicates considerable leakage and the opportunity to support additional retail sales.

Downtown Parkville's modest inventory of retail space places a constraint on the ability to attract additional businesses and generate increased customer volumes and retail sales. A key in improving the business climate in downtown Parkville will be to increase the inventory of commercial space and level of business and customer activity. Prospective commercial development sites include: 1) surface parking lot on the east side of Main Street south of the rail road track; 2) east side of Highway 9 from 1st Street north to 6th Street; and 3) west side of Highway 9 from 1st Street north to 6th Street.

Of three prospective downtown sites, the site on the east side of Highway 9 north of 1st Street is superior. This site offers superior access, visibility, exposure and the size to facilitate several retail formats. The site on the west side of Highway 9 also boasts superior access, visibility and exposure; however, its smaller size and shallow lot depth place constraints on the supportable retail formats. Commercial uses on Highway 9 from 1st to 6th Streets would provide a much needed highway entry window for downtown and facilitate a broader range of goods and services businesses. Development of this section of Highway 9 would also provide a "bridge" that more effectively connects downtown Parkville with Park University.

The surface parking lot bound by the rail road track to the north, McAfee Street to the south, East Street to the east and Main Street to the west is ideal for extending commercial uses on Main Street south of the rail road track as well as increase the inventory and critical mass of commercial space in the downtown core. The best suited retail development formats include downtown-style commercial buildings or mixed-use development.

At a floor-to-area ("FAR") of 0.25 to 0.40, the three prospective development sites could add approximately 75,000 to 120,000 square feet of new retail space. The current retail gap for downtown Parkville's primary trade area of \$219.4 million can support approximately 800,000 to 975,000 square feet of additional occupied retail space. The primary trade area is forecast to generate demand for an additional 585,000 to 716,000 square feet of retail space by the year 2030. At a 7.5 percent capture, through 2030 downtown Parkville is estimated to absorb 103,875 to 126,825 square feet of retail space.

Competitive Office Market

Despite a highly educated population no office park has been developed in Parkville. Professional and personal service firms are generally located within commercial space at Parkville Commons and in individual buildings in downtown Parkville. As a professional office location downtown Parkville benefits from its historic character, adequate zoning and public infrastructure, established identity, presence of Park University, close proximity to executive housing and convenient regional access via Interstates 29, 435 and 635.

The current inventory of professional and medical space in downtown Parkville totals just 54,119 square feet. A total of 24 professional, medical and personal service businesses currently operate in downtown Parkville, led by financial services, insurance, real estate, attorney, counseling and dentist. English Landing accounts for nearly 70 percent of downtown's inventory of office space. Much of downtown's inventory of office space is second floor space over ground floor retail. A reported 3,000 square feet of second floor office space is currently available for lease at English Landing for \$13.00 per square foot, translating into an average vacancy rate of 5.5 percent. The average rent for office space in downtown Parkville is \$12.00 per square foot.

Park University operates Parkville Commercial Underground that offers approximately 385,000 square feet of leasable warehouse and office space. Parkville Commercial Underground is the only underground business park in Platte County. Lease rates are much lower than conventional office space, ranging from \$3.00 to \$6.00 per square foot gross depending on the use and tenant build-out. The Parkville Commercial Underground isn't viewed as directly comparable to existing conventional office space in the core of downtown Parkville. New conventional office space built in downtown Parkville won't be considered directly competitive given the nature, design and large suite sizes offered at the Parkville Commercial Underground.

According to the *County Business Pattern* published by the U.S. Census Bureau, as of July 2011 employment in Platte County for the office using sectors of information; finance, insurance and real estate; professional, scientific and technical services; administrative and support services; and management was reported at 10,989 jobs, or 29.1 percent of total employment. From 1998 through 2011 office-related employment in Platte County grew by 1,338 jobs, or 13.9 percent.

From 2013 through 2030, Platte County is estimated to absorb approximately 457,500 to 533,750 square feet of professional office space. Parkville's ability to capture office space demand will be based on further population growth and the population's high education levels. Downtown Parkville is forecast to capture 15 percent of Platte County's office-related employment growth through 2030, translating into the absorption 68,625 to 80,000 square feet of office space.

Three prospective future office development sites were identified in downtown Parkville, including: 1) surface parking lot on the east side of Main Street south of the rail road track; 2) east side of Highway 9 from 1st Street north to 6th Street; and 3) west side of Highway 9 from 1st Street north to 6th Street. Each prospective development site is within the flood plain which will require site and building modifications. The properties along the east side of Highway 9 are viewed as the premier location, benefitting from excellent highway access and exposure, location adjacent to Park University and the ability to accommodate large-scale, mixed-use development.

Competitive Hotel Market

Kansas City is a regional tourist and family destination supported by a wide selection of shopping and dining and host of sporting, gaming, recreational and cultural attractions. In 2010, 21.6 million out-of-town visitors to the Kansas City MSA spent \$2.57 billion with a total economic impact of \$4.3 billion. Tourism expenditures for the year were led by lodging at \$728 million, food and beverage at \$596 million, shopping at \$492 million and recreation at \$341 million. Parkville is located in Platte County which garnered 18 percent of total visitor spending.

Given its historic character and mix of independently-owned specialty shops, downtown Parkville serves as a heritage tourism destination. Heritage tourism targets older, affluent travelers. According to the *2010 Economic Impact Study & Visitor Profile* prepared by Reach Market Planning, nearly 18 million leisure travelers visited Kansas City, the average age of a visitor to Kansas City was 44.5 years, and top activities for leisure travelers included shopping (40%); dining (21%); casino (15%); museum (13%); nightlife (10%) and historic sites (9%). These visitation patterns bode well for the opportunity of downtown Parkville to attract out-of-state visitors, particularly heritage tourists.

Existing lodging in downtown Parkville, Missouri is limited to the Main Street Inn, a 4-room bed & breakfast. Of the peer cities selected only Weston and Independence support downtown hotels. Hotels in Weston, Missouri include the historic 47-room Saint George Hotel opened in 1845, 4-room Weston Landing and 4-room Hatchery House B&B. Downtown Weston's ability to generate hotel room demand stems from its rural destination location, many festivals and presence of such attractions as the Weston Brewing Company and Pirtle Winery. Ophelia's Restaurant & Inn is an 8-room boutique hotel operating in downtown Independence, Missouri.

Thirty hotel properties operate within Northwest Kansas City totaling 3,757 guest rooms. The competitive hotel properties are located primarily at major Interstate 29 interchanges in close proximity to the Kansas City International Airport and cater to leisure and business travelers. The inventory of hotels by type includes three full-service hotels (968 rooms); eleven limited-service hotels (1,391 rooms); ten budget/economy hotels (586 rooms) and a 258-room casino resort hotel. The closest hotels to downtown Parkville include the Argosy Casino Hotel & Spa and Super 8 at Interstate 635 and Highway 9 approximately five miles to the east.

The site in downtown Parkville located on the east side of Highway 9 between 1st and 6th Streets possesses the necessary location and site characteristics to support future hotel development, but its dependence on Park University as a lodging demand generator and location on a secondary highway reduces its market feasibility to a B-rated location. Its presence within a mixed-use project would improve the feasibility of future hotel development. Prospective property types include a limited-service or boutique hotel

Competitive Housing Market

Parkville is a growing suburban community that benefits from convenient access to downtown Kansas City, Missouri; several employment centers; and a wide array of retail, dining, entertainment and cultural options. Household income levels in Parkville are among the highest in the Kansas City MSA; and, thus the city has supported high-end new home construction in such premier communities as The National and Riss Lake.

Consistent with national trends, single family home construction in Parkville peaked from 2002 through 2006 with a total of 263 permits issued. Due to local job losses and tighter lending practices new home construction declined to very low levels through 2010. By 2011, the Parkville new housing market began to recover and by 2012 permit levels were nearing pre-recession levels. Through August 2013, year-to-date new single family construction activity continued to escalate and is on pace to total 50 to 60 permits for the year.

Over the past decade the average construction valuation for new single family homes in Parkville peaked at \$541,429 in 2008. Since 2011 the value of new home construction has averaged just over \$263,000, suggesting smaller homes are now being built.

Parkville is located within the Northland region. Over the past two years apartment market conditions in the Northlands region have remained healthy marked by increased occupancies and rental rates as well as reduced rental concessions. By year-end 2012 the average occupancy rate for apartments in the Northlands region reached 93 percent, resulting in a significant decline in rental concessions. The improving market conditions have warranted new construction with 298 units under development by year-end 2012.

New residential construction is expected to continue in Parkville, prompted by continued employment and population growth within the Kansas City MSA as well as the ongoing expansion of Park University. Through 2030, local employment and population growth is forecast to generate demand for 990 new housing units in Parkville, including 790 owner-occupied units and 200 rental units.

Most Park University students and employees don't live in Parkville for a variety of reasons including high housing values and the lack of quality rental housing. Park University estimates on-campus housing demand for 400 additional students through 2017, bringing the total on-campus resident population to 750 students. The current and planned on-campus housing will leave approximately 1,400 students living off campus. However, a large percentage of Park University's students are commuters for reasons such as residing with family, location of employment, lifestyle and others. Regardless, the large number of students living off campus represents a potential market for rental housing in Parkville. The downtown area could capture a modest portion of students residing off campus assuming adequate and affordable housing is available.

The site along the east side Highway 9 is the superior location for future apartment development in downtown Parkville, possessing the necessary location, size and site characteristics. Prospective development formats include a large-scale apartment community or a mixed-use project with residential over ground floor commercial space.

Recent home sales velocity and pricing trends suggest downtown Parkville is a desirable for-sale single family housing market. Vacant lots remain available in downtown Parkville for future single family home construction, though the rolling topography poses challenges. The historic character of the existing residential neighborhoods surrounding downtown's commercial district should be maintained and enhanced. New construction or additions should be compatible with existing housing.

Study Recommendations

Downtown Parkville's Market Niche

Downtown Parkville is already a destination benefitting from an existing branding and market niche. Main Street's historic character and predominance of independent merchants sets downtown Parkville apart from other commercial districts. Prominent retail categories include restaurants, art galleries, hair salons, antique shops, home furnishings, and gift and collectible

stores. Downtown's survival and redevelopment hinges on expanding the current market niches, introducing new market niches and provide consumers a larger selection of merchandise and services.

Downtown Parkville's principal assets in expanding on current niches or establishing new niches include the historic character of Main Street; hosting of major festivals; farmers market; proximity to Park University; Missouri River and riverfront park; Parkville's high income levels; convenient access to the metropolitan area; and Kansas City's large tourism market.

Suitable consumer-based niches for downtown Parkville include heritage tourists/retirees, out-of-town visitors, local residents and ethnic groups. Park University represents a secondary niche, do primarily to its small student and employee population and small number of on-campus residents. Some communities with colleges and universities have successfully targeted the student population. Smaller communities with commuter campuses similar to Park University tend to have more difficulty developing this niche. Even as the campus population grows only a small segment of downtown businesses will likely attract considerable sales associated with Park University.

Existing goods and services niches in downtown Parkville suitable for expansion include restaurants, entertainment/culture, antiques, home furnishings, arts and crafts, and gifts and collectibles. Improving the selection of merchandise within these goods and services niches will generate increased customer traffic and sales. What is needed is to create larger "clusters" and a critical mass of commercial space.

An untapped market niche for downtown Parkville is the visitors to English Landing Park. The planned construction of a new waterfront County park at the foot of Main Street will include a marina/boat ramp and introduce an entirely new potential customer base. Recreation-based niches could play a growing role in downtown Parkville's business mix. Potential recreation-based niches include a bicycle shop, yoga studio, fitness center, runner's shoe store, kayak rentals, pet store, and bait and tackle shop.

To facilitate the growth of recreation-based niches, pedestrian and vehicular linkages along Main Street between the Missouri River and the core of downtown must be established. This could be accomplished through street improvements, a landscaped pedestrian corridor, the construction of new commercial buildings south of the railroad track and relocation of the existing farmers market to the current location of a baseball field southeast corner of Main and McAfee Streets. This strategy would also increase the economic impact on downtown businesses from major events hosted at the English Landing Park.

Forecast Demand for Commercial Space and New Housing

Demand for commercial space and new housing in downtown Parkville through 2030 has been forecast and quantified. Based on trade area population and employment growth, through 2030 downtown Parkville is estimated to absorb approximately 172,500 to 207,000 square feet of commercial space and 125 to 175 multi-family dwelling units.

Most Park University students and employees don't live in Parkville due to high housing values and the lack of quality rental housing. Park University estimates on-campus housing demand for 400 additional students through 2017, bringing the total on-campus resident population to 750

students. The current and planned on-campus housing will leave approximately 1,400 students to secure housing off campus. This represents a large potential market for rental housing in downtown Parkville.

Prospective Development Opportunities

A key in improving the business climate in downtown Parkville will be to increase the inventory of commercial space and level of business and customer activity. Higher density, mixed-use development should be encouraged. This development format promotes increased density, security, pedestrian activity and business activity. Increasing the housing stock through “infill” development will be a key component in enhancing the pedestrian activity and economic vitality of downtown. A mix of attached housing catering to students and young adults is recommended along with in-fill single family housing within the neighborhoods surrounding the central business district. Second floor residential over commercial space should be encouraged.

Prospective commercial development sites evaluated in this report include: 1) surface parking lot on the east side of Main Street south of the rail road track; 2) east side of Highway 9 from 1st Street north to 6th Street; and 3) west side of Highway 9 from 1st Street north to 6th Street.

The 2.2-acre surface parking lot bound by the rail road track to the north, McAfee Street to the south, East Street to the east and Main Street to the west is ideal for extending commercial development on Main Street south of the rail road track as well as increase the inventory and critical mass of commercial space in the downtown core. The best suited development formats include downtown-style, mixed-use commercial buildings supporting retail and office uses. Two-story buildings are appropriate on the western portion of the site fronting Main Street with surface or structured parking on the eastern half. Assuming a zero setback on Main Street the site could accommodate an estimated 50,000 to 70,000 square feet of commercial space.

Development of Highway 9 from 1st to 6th Streets would provide a much needed highway entry window for downtown and facilitate a broader range of goods and services businesses. Development of this section of Highway 9 would also provide a “bridge” more effectively connecting downtown Parkville with Park University.

The prospective development site located on the east side of Highway 9 from 1st Street north to 6th Street consists of nine individual parcels totaling approximately 3.66 acres. Existing land uses include a U.S. Post Office, former restaurant, two single family homes, Glen’s Automotive, Four Seasons Lawn & Landscape and vacant land. This site is considered downtown’s premier development site offering superior access, visibility, exposure and the size to facilitate the development of several commercial formats. The most appropriate development format is 2- and 3-story mixed-use structures supporting retail, office and residential uses. Assuming a “Main Street” design the site could accommodate an estimated 240,000 to 280,000 square feet of building area. The mix of space would be approximately half commercial and half residential, with the inventory of housing totaling approximately 125 to 175 dwelling units.

The prospective development site located on the west side of Highway 9 from 1st Street north to 6th Street consists of twelve individual parcels totaling approximately 1.07 acres. Existing land uses include the French Bee Bakery, parking lot, nine single family homes and a 4-unit apartment building. The street right-of-way patterns and shallow lot depths for the properties fronting the west side of Highway 9 will limit the potential to accommodate large-scale mixed-

use development. Likely development scenarios include the adaptive re-use of the existing residential structures or razing current structures to facilitate the construction of single-tenant commercial buildings or multi-family housing.

Prospective Downtown Businesses

Based on the peer city downtown business and trade area demographic comparison analysis as well as downtown Parkville's current market niches, prospective retail businesses for downtown Parkville include:

- Eating & Drinking Places (emphasis on ethnic foods)
- Bakery
- Coffeehouse
- Apparel
- Jewelry
- Hair & Nail Salon
- Furniture & Home Furnishings
- Antiques
- Books
- Sporting Goods
- Gifts & Collectibles
- Florists
- Entertainment/Cultural
- Art Galley
- Art Supplies
- Bike Shop
- Nutrition & Fitness

Potential recreation-based niches associated with English Landing Park and the Missouri River include a bicycle shop, yoga studio, fitness center, runner's shoe store, kayak rentals, pet store, and bait and tackle shop.

Future office demand will be generated through continued population growth led by personal/professional services and healthcare. Prospective personal and professional services firms include banking and financial services, accounting and tax services, insurance, real estate, architect, legal, technology, physical and massage therapist, fitness and wellness.

Public Infrastructure

To improve the ability of downtown Parkville to support commercial and residential development additional public infrastructure and façade improvements should be considered.

Recommended streetscape improvements to Main Street south of 2nd Street include new pavement, curbing, gutters, sidewalks, historic street signs, period street lights, seating, trash cans, banners, planters and public restrooms.

Street improvements to East Street (Highway 9) between 1st and 6th Streets would improve traffic patterns and create viable redevelopment opportunities. Recommended street improvements include two lanes of traffic, bicycle lanes, on-street parking, curbing, gutters, sidewalks, landscaping, historic street signs, period street lights and a round-about at the intersection of 1st and East Streets. An iconic monument, sculpture or landscaping or the round-about would create a unique entryway into downtown.

Public parking on the north end of Main Street is limited to on-street parking. Demolition of the existing commercial structure at the northeast corner of 2nd and Main Street for conversion to a surface lot would increase the inventory of parking space at the north end of Main Street and improve the commercial viability of properties north of 2nd Street.

Gateway features on Main and East Streets leading into downtown would establish boundaries for the downtown business district as well as create a sense of arrival and place. This can be accomplished through streetscape improvements and monument signs.

Historic markers could be erected in downtown identifying historic places and events in Parkville's history. Self guided or docent guided tours of downtown and local historical landmarks should be considered. This strategy would assist in promoting heritage tourism.

Economic Incentives

When used with private funding sources, government financing/incentive programs greatly enhance a real estate project's financial feasibility. To generally qualify for government incentives, a project must serve a public purpose, stimulate economic growth and conform to local planning and development guidelines. Downtown commercial and mixed-use development generally meets all three requirements, providing goods and services to often under-served residential areas, offering opportunities for employment, increasing the community's tax base and meeting all local requirements for zoning and construction.

Development incentives in downtown Parkville should be utilized to attract new development and businesses. Incentives may include infrastructure as well as direct subsidies. Tax increment financing would be preferred over creation and implementation of specific incentive districts such as a Business Improvement District. Potential applications include using tax increment financing to fund streetscape and off-site infrastructure improvements to Main and East Streets. It should be noted that tax increment financing should only be utilized to facilitate real development deals (i.e., a specific business plans to construct a facility), but not as a tool to foster speculative future development (i.e., construct infrastructure with the hopes of stimulating economic development).

The buildings on Main Street between the railroad track and 2nd Street possess a historic character; however, the district is not on the National Register of Historic Places. It is recommended that the historic portion of downtown Parkville seek historic district designation. Doing so will add to the historic identity of downtown, enhance heritage tourism and promote property investment through use of federal historic tax credits. Nomination to the National Register of Historic Places does not place restrictions on the use or physical appearance of properties in the district. However, for those properties seeking the 20 percent federal tax credit the National Park Service must review the rehabilitation work proposed by to ensure that it complies with the Secretary of the Interior's standards for rehabilitation.

Building improvements are usually the first visible evidence of positive economic change in a traditional commercial district. During the early years of a downtown revitalization program, though, business and property owners may be reluctant to make substantial capital investments in building improvements. A matching fund façade improvement grant program should be implemented in downtown Parkville to assist in enhancing the physical appearance of buildings as well as return buildings to their original historic character.

Benchmarking of Strategic Goals and Objectives

Statistical data can be used to establish goals and measure progress (“benchmarking”) of the *Downtown Parkville Master Plan*. Metrics can be used to compare downtown Parkville’s performance over time and to determine whether goals are being met. They can also be used in comparison with high performing peer city downtowns as a basis for refining strategic goals and objectives.

Statistical indicators for measuring performance can take many formats, including: 1) demographics; 2) employment; 3) investment; 4) housing; 5) retail and office space; 6) arts and entertainment; 7) lodging; 8) restaurants and 9) transportation and safety.

From a market perspective the goal of the *Downtown Parkville Master Plan* is to improve the competitiveness of downtown and ensure long-term prosperity. Principal objectives in meeting this goal include expanding downtown’s market niche and selection of goods and services; increasing business activity and retail sales; increasing the housing stock; promoting private sector investment; and business retention and expansion. Therefore, pertinent statistical indicators to measure the future performance of downtown Parkville include:

Employment Indicators

- Total downtown employment and growth
- Employment by sector

Investment Indicators

- Private and public sector investment dollars
- Total square footage of newly constructed buildings
- Total construction costs of newly constructed and renovated buildings
- Projects in the pipeline
- Increase in property tax base

Housing Indicators

- Number of newly constructed housing units
- Residential vacancy rates
- Average apartment rental rate
- Sales velocity and average pricing of single family home sales

Commercial Space Indicators

- Average vacancy rate
- Average rental rate
- Net space absorption
- Tenant movement into and out of downtown

- Growth in annual retail sales and number of retail establishments

Restaurant Indicators

- Annual restaurant sales and growth rate
- Restaurant composition by sector (i.e., casual, fine dining, café, bar, etc.)
- Restaurant composition by style of restaurant
- Total seating capacity

Transportation and Safety Indicators

- Total number of parking spaces
- Vehicular traffic counts at key intersections
- Pedestrian counts
- Per capita crime rate

**ECONOMIC AND MARKET ANALYSIS
DOWNTOWN PARKVILLE, MISSOURI**

November 2013

INTRODUCTION

The City of Parkville, Missouri retained Ochsner Hare & Hare, LLC to prepare a Downtown Master Plan to assist in guiding future urban growth and redevelopment efforts. The downtown/CBD is a principal factor in establishing a city's image and economic/fiscal/land use sustainability. The *Downtown Master Plan* will require a number of actions in support of the City's vision, one of which includes preparing an *Economic and Market Analysis* evaluating future development opportunities and outlining a market positioning strategy.

Study Objective and Organization

In support of the Downtown Master Plan, Canyon Research Southwest, Inc. has prepared an *Economic and Market Analysis* for downtown Parkville, Missouri. Given current and prospective land use patterns the *Economic and Market Analysis* evaluated the potential to support future development of additional retail, office, lodging and housing in downtown Parkville, Missouri. The goal was to identify commercial space and housing unit demand and establish a market positioning strategy for downtown Parkville based on market forces as well as location/site and physical characteristics.

The *Economic and Demographic Analysis* section of the study identified past trends and forecast future economic and demographic patterns for both the Kansas City MSA and the City of Parkville, designed to assist in quantifying future demand for housing and commercial/industrial space. Examples of economic and demographic characteristics discussed include population growth, age distribution, income, household size and composition, consumer expenditure patterns, job growth and construction trends. The analysis further identified opportunities and constraints for future urban growth and development of Parkville and its downtown area. Opportunities and constraints (i.e., historic building stock, river location, etc.) were ascertained through stakeholder interviews with property owners, business owners, bankers, real estate agents, economic development professionals, developers and city staff.

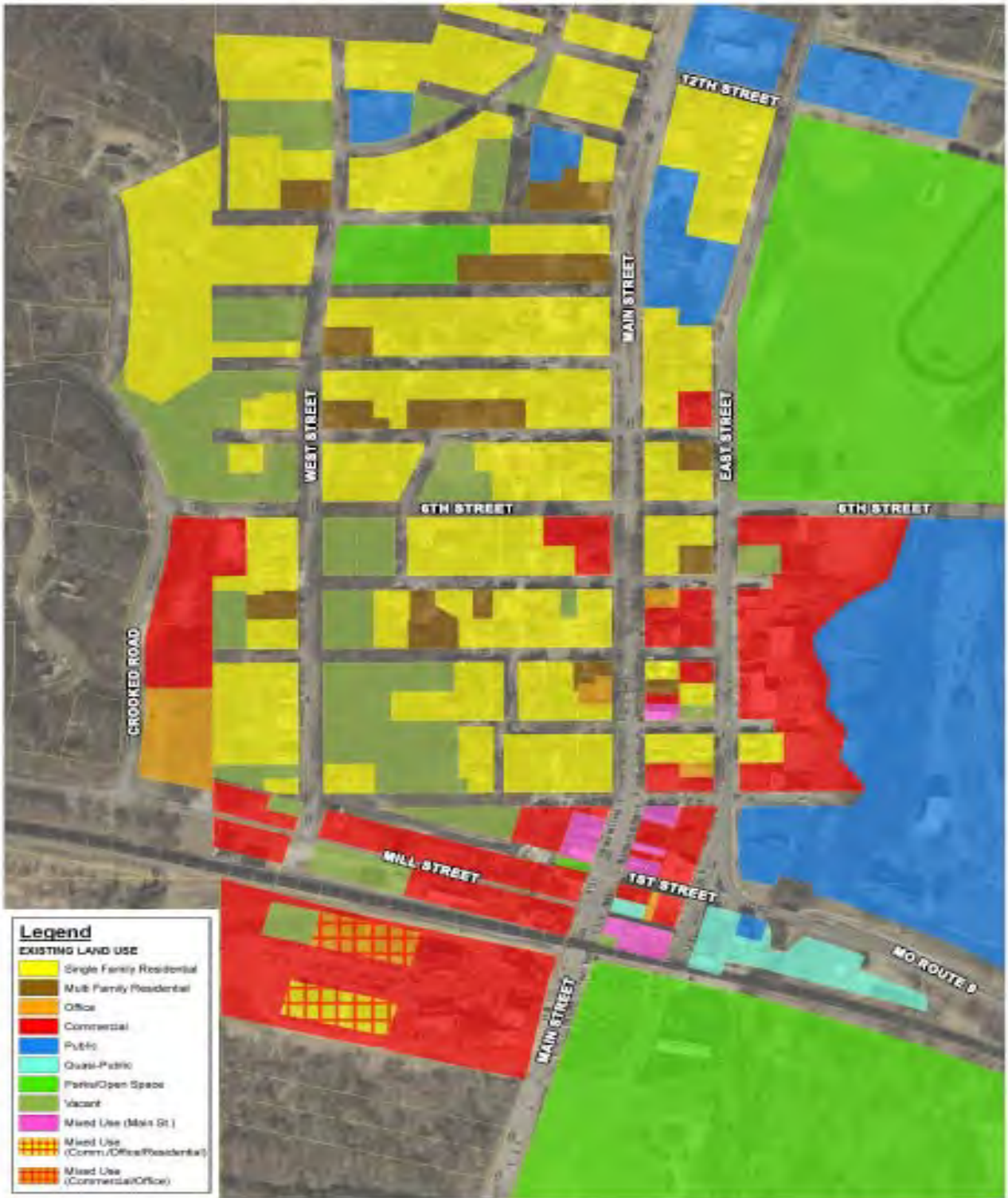
The *Market Analysis* section of the report evaluated directly competitive retail, office, hospitality and housing market trends impacting downtown Parkville, by identifying the city's historical trends in new construction, sales tax collections and population growth; competitive concentrations of commercial and housing activity; and surveying downtown commercial properties and housing stock. Downtown Parkville's business profile was compared to peer city downtowns in an attempt to identify prospective business and development opportunities. The study also quantified Parkville's short- and long-term need for additional commercial space, hotel rooms and housing units as well as examined the ability of the downtown to accommodate future urban development. A site specific analysis evaluated prospective commercial and housing development sites.

Based on the study findings, potential commercial and residential development opportunities for downtown Parkville were identified, as well as a market positioning strategy. Study recommendations included the following:

- Identify market niche strategy for downtown Parkville;
- Quantify the supportable inventory of new commercial space and housing units in the City of Parkville and downtown Parkville through 2030;
- Identify prospective commercial and housing development opportunities for downtown Parkville. Issues such as potential redevelopment sites, historic preservation, density, development formats and integration with surrounding land uses will be discussed.
- Identify prospective retail and professional business types suitable for expansion into downtown Parkville;
- Suggest supportive infrastructure improvements needed to accomplish commercial and residential development;
- Identify potential development incentives needed to attract desired commercial and residential development and indicate level of public support by incentive. Identify additional public initiatives needed to support future redevelopment efforts; and
- Benchmarking of strategic goals and objectives should be discussed.

Downtown Master Plan Study Area

The study area for the Downtown Master Plan is Parkville's CBD, bounded by the Missouri River on the South, Park University on the east, the intersection of Main and 9 Highway on the north, and Crooked Road on the west. This area encompasses the historic commercial / office / mixed-use development on Main Street, infill development between the railroad tracks and river, the Park University campus and their over 500-acre endowment lands, over 200 acres of park land, State Highways 9 and FF, and the downtown residential neighborhoods. Downtown Parkville's geographic boundaries and existing land use are depicted on page 3.



PARCEL-SPECIFIC EXISTING LAND USE PLAN
 PARKVILLE, MO OCTOBER 2012

Project # 12-002  

ECONOMIC AND DEMOGRAPHIC ANALYSIS

It is well understood that product preferences vary across different groups of consumers. These preferences relate directly to consumer demographic characteristics, such as population, income, age, and ethnicity. For this reason, it is not only the *amount* of demand that truly matters to a retail trade area. The *mix* of consumers also has a major impact on the level and composition of retail sales and commercial space demand within a retail trade area.

This section of the report examines economic and demographic factors for both the City of Parkville and Platte County. It includes an analysis of population and household growth trends, age distribution, household income, employment composition. Five-year demographic projections were provided by ESRI, a national demographic research firm. Quantifying these demographic and economic characteristics will assist in projecting the future demand for commercial space in downtown Parkville.

Population and Household Growth Trends

Population and household growth are key components for quantifying the current market size and forecasting future demand for commercial space and residential housing. Over the past five decades the City of Parkville has experienced steady population growth, increasing by 343 percent from 1,253 residents in 1970 to 5,554 residents by 2010. Platte County too has supported strong population growth, increasing by 178 percent since 1970 to a 2010 Census count of 89,322 residents. By outpacing the rate of growth for Platte County, Parkville’s population has increased from 3.91 percent of the Platte County population in 1970 to 6.22 percent by 2010.

The 2012 population is estimated at 5,777 residents for Parkville and 92,054 residents for Platte County. The City of Parkville now accounts for 6.28 percent of the Platte County population.

Historical Population Trends for the City of Parkville and Platte County

City of Parkville		Platte County				Annual Growth Rate	Parkville % of County
Year	Population	Population Change	Growth Rate	Population	Population Change		
1970	1,253			32,081			3.91%
1980	1,995	742	59.22%	46,341	14,260	44.45%	4.31%
1990	2,458	463	23.21%	57,867	11,526	24.87%	4.25%
2000	4,059	1,601	65.13%	73,781	15,914	27.50%	5.50%
2010	5,554	1,495	36.83%	89,322	15,541	21.06%	6.22%
2012	5,777	223	3.90%	92,054	2,732	4.00%	6.28%

Source: U.S. Census and Canyon Research Southwest, Inc.

The Missouri Economic Research & Information Center projects the Platte County population to reach 114,904 by 2030, an increase of 25,940 residents from 2010. Parkville is forecast to capture approximately 10 percent of the county population growth. By 2030, the City of Parkville population is estimated at 8,148, an increase of 2,594 residents from 2010. This continued population growth will fuel additional demand for new housing units.

A trade area population's growth and age composition play significant roles in the demand for a variety of retail goods and services. Each of these age groups possess distinctively different consumer and housing needs. Downtown Parkville's primary trade area population within a 10-minute drive-time is forecast to increase from 49,264 in 2013 to 61,580 by 2030 with per capita income rising from \$31,359 to \$44,788. These future gains in primary trade area population and income levels will generate additional consumer purchasing power and retail sales growth.

Over the past decade the composition of households in Platte County shifted slightly with single female and householders living alone comprising larger market shares. Family households in Platte County as a percentage of total households declined from 69.1 percent in 2000 to 66.8 percent by 2010. Since 2000, the number of family households increased by 3,904 households. The number of married-couple families with children under 18 years old rose at a modest rate from 7,676 in 2000 to 8,120 by 2010. The number of female householder families with no husband present rose from 2,562 in 2000 to 3,516 by 2010, an increase of 37.2 percent. The number of householders living alone rose from 7,287 in 2000 to 9,741 by 2010. These shifts in the types of households in Platte County have likely had an impact on the composition of housing demand and new home construction.

The number of householders 65 years and older account for 5.4 percent of all households. In the coming years senior households will have a growing impact on the Platte County housing market and the demand for independent and assisted living facilities.

Platte County Trends in Household Types

Household Type	2000	% of		
		Total	2010	Total
Total Households	29,278	100.0%	36,103	100.0%
Family Households	20,222	69.1%	24,126	66.8%
Married-Couple Family	16,680	57.0%	19,118	53.0%
With Children Under 18	7,676	26.2%	8,120	22.5%
Female Householder, No Husband Present	2,562	8.8%	3,516	9.7%
Non-Family Households	9,056	30.9%	11,977	33.2%
Householder Living Alone	7,287	24.9%	9,741	27.0%
Householder 65 Years and Older	1,765	6.0%	1,949	5.4%
Average Household Size	2.49		2.45	
Average Family Size	3.00		2.99	

Source: U.S. Census.

Platte County's changing household composition will also impact the local retail market through a changing demand for goods and services. For example, the elderly population will produce demand for healthcare related goods and services. The declining percentage of families with school-aged children will adversely impact the demand for such consumer items as groceries, clothing, electronics, sporting goods and restaurants.

Population Age Distribution Trends

The trade area population's growth and age composition play significant roles in the demand for a variety of retail goods and services. Personal expenditures change as individuals grow older. Platte County's population for the decades ending in 2000 and 2010 is summarized in the table below by seven primary age groups, including adolescent (0-19 years), college age adults (20 to 24 years), young adults (25 to 34 years), family/working adults (35-44 years); empty nesters (45-54 years and 55-64 years) and elderly (65+ years). Each of these age groups possess distinctively different consumer and housing needs.

Platte County Population Age Distribution Trends

Age Group	2000 Census	% of Total	2010 Census	% of Total	2000-10 Change	% Change	2017 Estimate	2010-17 Change	% Change
0-19 Years	20,765	28.1%	24,092	27.0%	3,327	16.0%	25,703	1,611	6.7%
20-24 Years	4,354	5.9%	4,902	5.5%	548	12.6%	5,028	126	2.6%
25-34 Years	10,624	14.4%	11,608	13.0%	984	9.3%	13,059	1,451	12.5%
35-44 Years	13,427	18.2%	12,815	14.3%	-612	-4.6%	13,375	560	4.4%
45-54 Years	11,357	15.4%	14,630	16.4%	3,273	28.8%	14,408	-222	-1.5%
55-64 Years	6,749	9.1%	11,308	12.7%	4,559	67.6%	13,543	2,235	19.8%
65+ Years	6,505	8.8%	9,967	11.2%	3,462	53.2%	13,005	3,038	30.5%
Totals	73,781	100.0%	89,322	100.0%	15,541	21.1%	98,121	8,799	9.9%
Median Age	40.1		40.6				41.8		

Source: U.S. Census and Esri Business Analyst.

From 2000 through 2010, the Platte County population grew by 21.1 percent adding 15,541 new residents. Over the decade the number of family/working adult residents declined by 4.6 percent. Absolute population gains were the largest for empty nesters ages 55 to 64 years (4,559 residents) and elderly (3,462 residents).

Platte County's adolescent population supports the sales of apparel and accessories; groceries; sporting goods; music; home electronics; eating and drinking places; and general merchandise. The young adult and family/working adults ages 25 to 44 are in their principal consumer years, favoring hardware; furniture and home furnishings; home electronics; department stores; and eating and drinking places. Seniors generates demand for medical goods and services. The population aged 45+ years is generally less of a consumer of hard goods such as apparel, furniture and home furnishings than are younger consumers.

Household Income

Purchasing power is a function of consumer population and income levels. Generally, as incomes rise the more retail sales are supported. According to the U.S. Census Bureau *Average Annual Expenditures of all Consumer Units by Income Level 2009*, average annual expenditures increased from \$33,810 for incomes of less than \$70,000 to a high of \$124,306 for incomes exceeding \$150,000.

The table below summarizes household income estimates for the City of Parkville provided by Esri Business Analyst. As of the date of this report the U.S. Census Bureau had not yet published 2010 Census household income data for Parkville so estimates published by ESRI Business Analyst were provided for both 2012 and 2017.

City of Parkville Trends in Households by Income

Income Bracket	2012 Estimate	% of Total	2017 Projection	% of Total	% Change 2012-17
Less than \$15,000	130	6.5%	117	5.6%	-10.0%
\$15,000 - \$24,999	124	6.2%	90	4.3%	-27.4%
\$25,000 - \$34,999	150	7.5%	100	4.8%	-33.3%
\$35,000 - \$49,999	188	9.4%	158	7.6%	-16.0%
\$50,000 - \$74,999	372	18.7%	455	21.8%	22.3%
\$75,000 - \$99,999	246	12.3%	300	14.4%	22.0%
\$100,000 - \$149,999	283	14.2%	307	14.7%	8.5%
\$150,000 - \$199,999	308	15.4%	354	17.0%	14.9%
\$200,000+	193	9.7%	205	9.8%	6.2%
Totals	1,994		2,086		
Median Income	\$77,619		\$83,538		7.6%
Median Household Income					
Missouri	\$45,321				
United States	\$51,017				

Source: U.S. Census and Esri.

The U.S. Census Bureau estimated the 2012 median household income for Missouri of \$45,321 and the United States of \$51,017. ESRI estimated that the 2012 median household income at \$65,430 for Platte County and \$77,619 for the City of Parkville of \$77,619, both of which far exceeds the national and statewide averages.

The median household income for Parkville rose from \$68,600 in 2000 to \$77,619 by 2012, an increase of 13.1 percent. By comparison, from 2000 to 2012 the median income rose 19.5 percent in Missouri and 23.6 percent for the nation as a whole.

By 2017, the average household income for Platte County is forecast to increase by 12.4 percent to \$73,524.

From 2012 to 2017, the average household income for Parkville is forecast to increase by 7.6 percent to \$83,538 annually. Again, the largest percentage gains are forecast for incomes exceeding \$50,000. By 2017, over 14 percent of all Parkville households are estimated to possess median incomes ranging from \$75,000 to \$99,999, with 41.5 percent of households with incomes exceeding \$100,000. The largest percentage gains were reported for the income brackets from \$50,000 to \$74,999 (22.3%); \$75,000 to \$99,999 (22.0%) and \$150,000 to \$199,999 (14.9%). The strong gains in the highest income brackets bode well for fueling escalated retail sales growth in the City of Parkville.

Educational Attainment

Education levels figure into an area’s socio-economic status. Because income increases with advancing educational attainment, many retailers focus on a trade area population’s education levels. Education levels of an area’s labor pool are also becoming increasingly important in the ability to attract and retain knowledge-based industries as well as the ability to support above average wages.

The table below provides educational attainment levels in 2010 for the City of Parkville, Missouri and the United States. The U.S. Labor Department provided educational attainment levels for the population age 25+ years.

Educational Attainment Levels For Residents 25 Years and Over

Highest Education Level Attained	City of Parkville	State of Missouri	United States
9th to 12th Grade, No Diploma	4.90%	14.30%	15.35%
High School Graduate	24.45%	33.75%	29.24%
Some College, No Diploma	23.86%	21.50%	20.56%
Associate Degree	8.11%	6.11%	7.50%
Bachelors Degree	25.48%	15.85%	17.52%
Graduate Degree	13.20%	8.48%	9.84%

Source: U.S. Department of Labor.

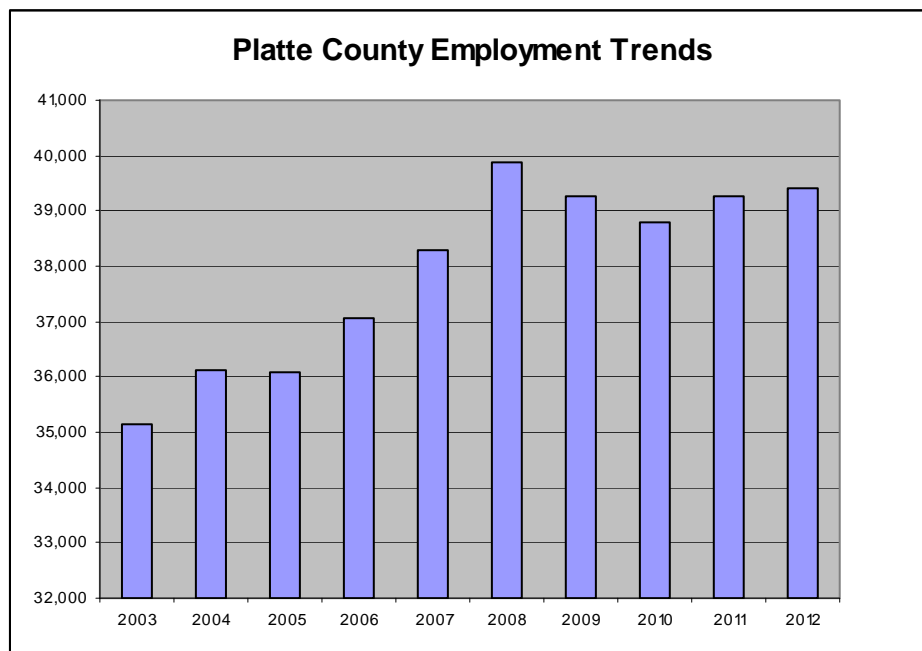
As the data indicates, Parkville residents on average are much more highly educated than the norms for both Missouri and the United States. Approximately 46.79 percent of Parkville residents 25 years and over have attained associate, bachelors and advanced degrees. By comparison, 30.44 percent of Missouri residents and 34.86 percent of U.S. residents possess an associate, bachelors or advanced degree.

Parkville’s higher educational levels assist in generating higher income and retail sales levels. The demand for office space improves as more residents are employed in professional service and medical professions.

Employment Trends

Since gains in employment generally fuels population, income and retail sales growth, employment trends are a reliable indicator of general economic conditions and commercial space demand. Typically, households prefer to live near work for convenience. Parkville’s central location, reduced commute times, small town atmosphere and superior quality of life assist in attracting people employed in Platte County and the Kansas City MSA.

The bar chart below illustrates annualized employment trends for Platte County since 2003 published by the U.S. Bureau of Labor Statistics. Throughout the recent national recession, unlike most urban areas, Platte County didn’t suffer a considerable decline in employment. In fact, from 2007 through 2010 employment levels remained relative constant in the range of 38,000 to 40,000 jobs. Since 2010 employment in Platte County has grown at a modest pace.



The Kansas City MSA is comprised of two separate employment centers—the Missouri portion and the Kansas portion. The Kansas portion, which accounts for 45 percent of the area’s workforce, gained 9,500 jobs (2.1 percent) from May 2012 to May 2013. Employment in this portion of the MSA reached 454,800 and surpassed the peak of 452,800 recorded in June 2008. The Missouri portion, with 55 percent of the area’s workforce, registered no change in total nonfarm employment over the year and was 3.6 percent below its peak of 579,600 in May 2008.

The composition of an area’s employment base helps dictate the types of commercial space in highest demand. High levels of such white collar occupations as professional and technical services; financial, insurance and real estate; and administrative generate demand for professional office space while health and social services jobs create demand for medical office

space. The table below provides current nonfarm employment levels by industry for the Missouri portion of the Kansas City MSA.

Nonfarm Employment by Sector; May 2013 Missouri Portion of the Kansas City MSA

Industry Classification	May 2012	May 2013	Change
Total Employment	558,500	558,500	0
Mining, Logging & Construction	23,100	21,500	-1,600
Manufacturing	37,800	37,900	100
Trade, Transportation & Utilities	105,400	105,100	-300
Information	14,700	13,900	-800
Financial Activities	41,000	42,100	1,100
Professional & Business Services	78,700	78,600	-100
Education & Health Services	74,800	73,600	-1,200
Leisure & Hospitality	61,700	65,900	4,200
Other services	28,100	27,900	-200
Government	93,200	92,000	-1,200

Source: U.S. Bureau of Labor Statistics.

According to the U.S. Bureau of Labor Statistics, as of May 2013 the leading employment sectors in the Missouri portion of the Kansas City MSA included trade, transportation & utilities (105,100 jobs); government (92,000 jobs); professional & business services (78,600 jobs) and education & health services (73,600 jobs). Over the 12-month period from May 2012 to May 2013 the sectors reporting the strongest job growth included leisure & hospitality (4,200 jobs) and financial activities (1,100 jobs). As it relates to commercial space demand, the local employment composition and job growth generate demand for professional and medical office space, retail space, warehouse and manufacturing space and lodging.

According to the U.S. Department of Labor, 81.83 percent of adults living in Parkville are employed in white collar occupations, compared to 72.49 percent for Missouri and 74.72 percent for the United States. White collar occupations in which Parkville possesses above average levels of employment include management, business and financial operations (23.52%) and professional and related (24.61%). Sales and office occupations also account for a high level of employment reported at 25.32 percent of the City's total. Parkville residents' employment composition suggests the potential to support additional professional and medical office space.

Esri Business Analysis provided a summary of businesses and jobs operating within a 10-minute drive-time from downtown Parkville. As depicted in the table on the following page, a total of 2,951 businesses with 24,321 employers operate within a 10-minute drive-time. Leading employment sectors include education, manufacturing, retail trade and finance, insurance and real estate, suggesting strong demand for office, retail and industrial space.

Business and Employment Summary

10-Minute Drive-Time of Downtown Parkville, Missouri

Business Category by SIC Code	# of Businesses	% of Employees	% of Total
Agriculture & Mining	91	316	1.3%
Construction	277	1,635	6.7%
Manufacturing	125	2,746	11.3%
Transportation	105	1,347	5.5%
Communication	16	59	0.2%
Utility	10	140	0.6%
Wholesale Trade	191	1,640	6.7%
Finance, Insurance & Real Estate	276	1,225	5.0%
Government	30	653	2.7%
Retail Trade			
Home Improvement	15	136	0.6%
General Merchandise	3	143	0.6%
Grocery & Food	34	317	1.3%
Auto Dealers & Gas Stations	43	232	1.0%
Apparel & Accessories	19	68	0.3%
Furniture & Home Furnishings	30	136	0.6%
Eating & Drinking Places	110	979	4.0%
Misc. Retail	131	689	2.8%
Services			
Hotels & Lodging	12	144	0.6%
Automotive Services	58	283	1.2%
Amusements	63	1,563	6.4%
Health Services	152	766	3.1%
Legal Services	47	117	0.5%
Education Institutions & Libraries	40	3,568	14.7%
Other Services	1,073	5,418	22.3%
Totals	2,951	24,321	100.0%

Source: Esri Business Analyst.

The composition of employment growth is a key factor influencing the future demand for professional and medical office space. From 2012 to 2030, total employment for Platte County is projected increase by 6,100 jobs. Office-related employment is forecast to account for 30 to 35 percent of total job growth. These capture rates translate into office-related employment growth of 1,830 to 2,135 jobs from 2013 through 2030. This growth in office-related employment will translate into increased demand for professional and medical office space in both Platte County and City of Parkville.

Business Location Factors

The Downtown Master Plan Kick-off Public Meeting as well as interviews conducted with several local business owners, property owners, and government and economic development staff identified assets/opportunities and constraints/limitations of downtown Parkville, Missouri as a business location. The bullet points below summarize the content of those interviews.

Assets / Opportunities

- Parkville possesses high income levels
- Missouri River and riverfront park are major draws
- The riverfront park is a major community asset. Construction of the county park will add a boat ramp and dog park which should increase pedestrian traffic
- The historic character of downtown makes it unique, should embrace history
- Park University is growing and could generate increased potential customers
- Downtown is a destination location and independent merchants sets it apart
- Several quality restaurants operate downtown
- The predominance of independent merchants set downtown Parkville apart from other commercial districts
- The Farmers Market is a big draw for downtown
- Major festivals are the biggest sales days for downtown merchants
- Downtown Parkville possesses an existing brand
- Tour buses come to downtown Parkville
- Kansas City supports a large tourism market

Constraints / Limitations

- Lack of affordable housing for employees of local businesses and Park University
- Railroad trains are very loud when passing through town
- Business mix lacks diversity and doesn't cater to local residents and Park University students, faculty and staff

- Limited customer parking on Main Street
- Downtown lacks an available inventory of quality commercial space
- Landlords that don't invest in their properties
- Highway 9 doesn't run through Main Street
- Limited amount of park activities offered that would attract people downtown
- Downtown lacks a city center
- Many people don't know what's downtown
- Many downtown businesses are closed at nights and on the weekends
- Main Street businesses north of 2nd Street have struggled
- The Missouri River cuts the trade area in half
- Downtown Parkville needs an attraction to draw people
- Most Park University students don't live in Parkville
- Downtown looks tired and not well maintained
- The river flooding disrupts business and discourages some businesses from opening
- Sidewalks aren't wide enough to accommodate outdoor seating for restaurants
- Many downtown merchants are under capitalized

Downtown Parkville possesses ample advantages for attracting businesses, jobs and development activity. Park University, Parkville's high household income levels, Missouri River and riverfront park, downtown's historic character, Kansas City's large tourism market and major festivals will play key roles in attracting retailers and professional/personal service businesses. Challenges facing future economic development of downtown Parkville include a limited stock of quality commercial space, periodic river flooding that disrupts business, Main Street's limited visibility and exposure, and frequency/noise of freight trains.

As it relates to this report, desirable commercial space and development sites must be created to improve the ability to attract new retail, professional and medical businesses to Parkville. The future demand for retail space will rely on the region's population and income growth with office space also depending on increasing the number of college educated residents and continued white collar employment growth.

Conclusions

The City of Parkville is a northern suburb of the Kansas City MSA located adjacent to the Missouri River approximately 10 miles northwest of downtown Kansas City, Missouri. Parkville is a growing, affluent community in Platte County that in recent years has attracted high-end new home construction, escalated commercial development and high income households.

A trade area's population size, growth, age composition, income levels and education levels play significant roles in the demand for housing, retail goods and services, employment-related development.

A trade area population's growth and age composition play significant roles in the demand for a variety of retail goods and services. Each of these age groups possess distinctively different consumer and housing needs. Downtown Parkville's primary trade area population within a 10-minute drive-time is forecast to increase from 49,264 in 2013 to 61,580 by 2030 with per capita income rising from \$31,359 to \$44,788. These future gains in primary trade area population and income levels will generate additional consumer purchasing power and retail sales growth. The age composition of the population will favor the growth in demand for hardware; furniture and home furnishings; home electronics; department stores; eating and drinking places; entertainment; personal services; and healthcare goods and services.

The composition of employment growth is a key factor influencing the future demand for professional and medical office space. From 2012 to 2030, total employment for Platte County is projected increase by 6,100 jobs. Office-related employment is forecast to account for 30 to 35 percent of total job growth. These capture rates translate into office-related employment growth of 1,830 to 2,135 jobs from 2013 through 2030. This growth in office-related employment will translate into increased demand for professional and medical office space in both Platte County and City of Parkville.

Over the past five decades the City of Parkville has experienced steady population growth, increasing by 343 percent from 1,253 residents in 1970 to 5,554 residents by 2010. Platte County too has supported strong population growth, increasing by 178 percent since 1970 to a 2010 Census count of 89,322 residents. The 2012 population is estimated at 5,777 residents for Parkville and 92,054 residents for Platte County. The City of Parkville now accounts for 6.28 percent of the Platte County population.

The Missouri Economic Research & Information Center projects the Platte County population to reach 114,904 by 2030, an increase of 25,940 residents from 2010. By 2030, the City of Parkville population is estimated at 8,148, an increase of 2,594 residents from 2010. This continued population growth will fuel additional housing demand in Parkville.

RETAIL MARKET ANALYSIS

The *Retail Market Analysis* portion of the report evaluates directly competitive retail market trends impacting downtown Parkville, Missouri, by identifying the city's historical trends in sales tax collections, inventory of downtown commercial space and a business mix comparison of peer downtowns. An analysis of retail capture, retail pull factor and retail sales gap qualifies opportunities for additional retail uses in Parkville. The study also quantifies Parkville's short- and long-term need for additional retail space to determine the ability of downtown to accommodate future commercial development as well as evaluated prospective retail development sites.

Metropolitan Kansas City Retail Market Overview

Historic Market Trends

According to the *Kansas City Retail Report 2013* published by Lane4 Property Group, by year-end 2012 the Kansas City MSA maintained approximately 69.0 million square feet of shopping center space. The suburban sub-markets of Southern Johnson County, Kansas (13.2 million), Northern Johnson County, Kansas (11.9 million square feet) and Eastern Jackson County, Missouri (10.9 million square feet) support the largest inventories of shopping center space. Given the size of the Kansas City MSA (2.0 million residents), most national big-box retailers maintain a presence. National retailers operating stores in the Kansas City area are listed in the table below.

National Retailers Operating in the Kansas City MSA

Discount Department Stores

Kmart/Sears Grand
Target
Wal-Mart

Department Stores

Dillard's
J. C. Penney
Kohl's
Nordstroms
Sears
Macy's

Home Improvement

Home Depot
Lowe's

Warehouse Clubs

Costco
Sam's Club

Electronics

Best Buy

Office Supply

Office Depot
Office Max
Staples

Linens/Home Store

Bed, Bath & Beyond

Book Stores

Barnes & Noble
Books-a-Million

Pet Supplies

Petco
PetsMart

Auto Supply

Auto Zone
O'Reilly Auto Parts
Advanced Auto Parts

Sporting Goods

Dick's Sporting Goods
Bass Pro Shops
Cabela's
Sports Authority

Hobby/Crafts

Hobby Lobby
Michaels

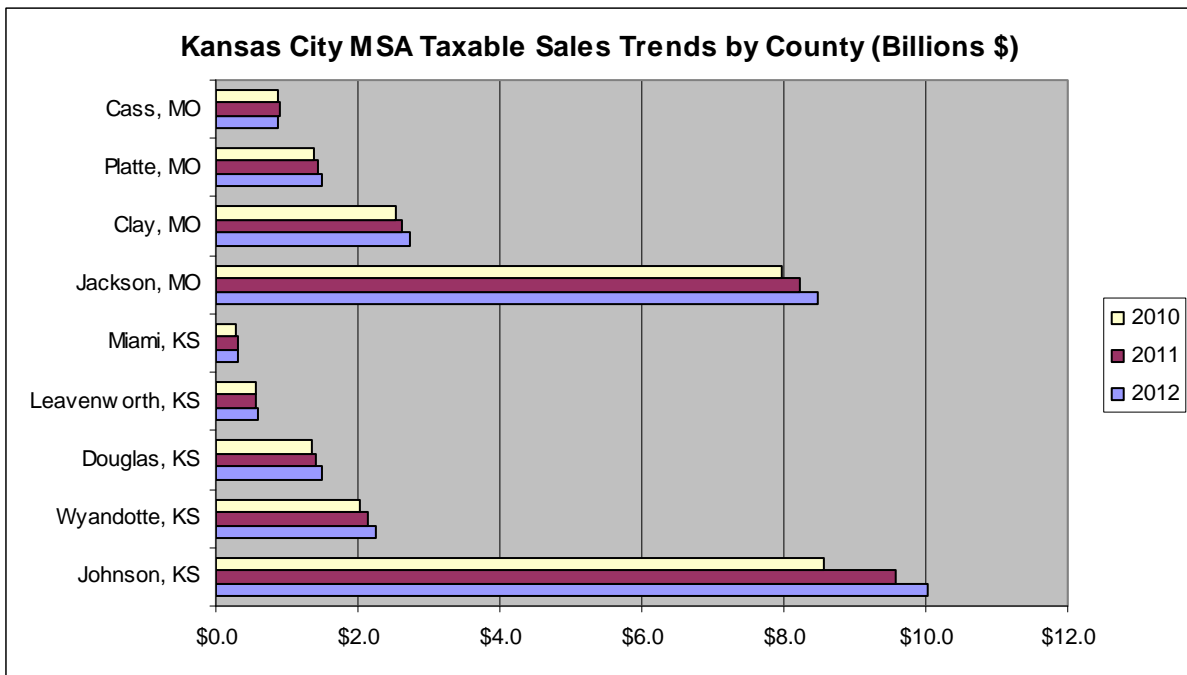
Clothing

Gap
Old Navy
Stein Mart
TJ Maxx

Retail chains entering the Kansas City market in recent years include Bass Pro Shops, Books-a-Million, Crate & Barrel, Bonafish Grill, Life Time Fitness, Pei Wei, Sephora, Lucky Strikes Lanes, Sports Authority, Staples and Von Maur. With the recent completion of such upscale retail projects as the Kansas City Power & Light District in downtown Kansas City, Missouri and One Nineteen in Leawood, Kansas, several new restaurant chains have opened in the Kansas City MSA, including Gordon Biersch Brewery & Restaurant, Maker’s Mark Bourbon House & Lounge, PBR Big Sky, North and Sullivan’s Steakhouse. Retailers planning to enter the Kansas City market include Scheel’s All Sports, IKEA, Sprouts Farmers Market, Toby Keith’s I Love this Bar & Grill and Aspen Fitness.

Retailers recently closing stores or vacating the Kansas City market include Kmart, Sharper Image, Comp USA, Circuit City and Steinmart. Linens & Things and Borders filed for Chapter 11 and closed their stores in the Kansas City area.

The Kansas and Missouri Departments of Revenue reported taxable retail sales for the 9-county Kansas City MSA. Due to a weakening national and local economy, taxable sales declining by 5.95 percent in 2009 and 0.8 percent in 2010 to \$25.57 billion. For 2011, the local retail market stabilized, supporting a 6.3 percent increase in taxable sales to \$27.17 billion. Local retail sales have continued to rebound, up 4.0 percent in 2012 to \$28.26 billion and 4.3 percent through June 2013. Jackson County, Missouri and Johnson County, Kansas account for 65 percent of taxable sales in the Kansas City MSA. Leading sectors for retail sales included general merchandise, gasoline stations, food and beverage, eating and drinking places, and building materials.

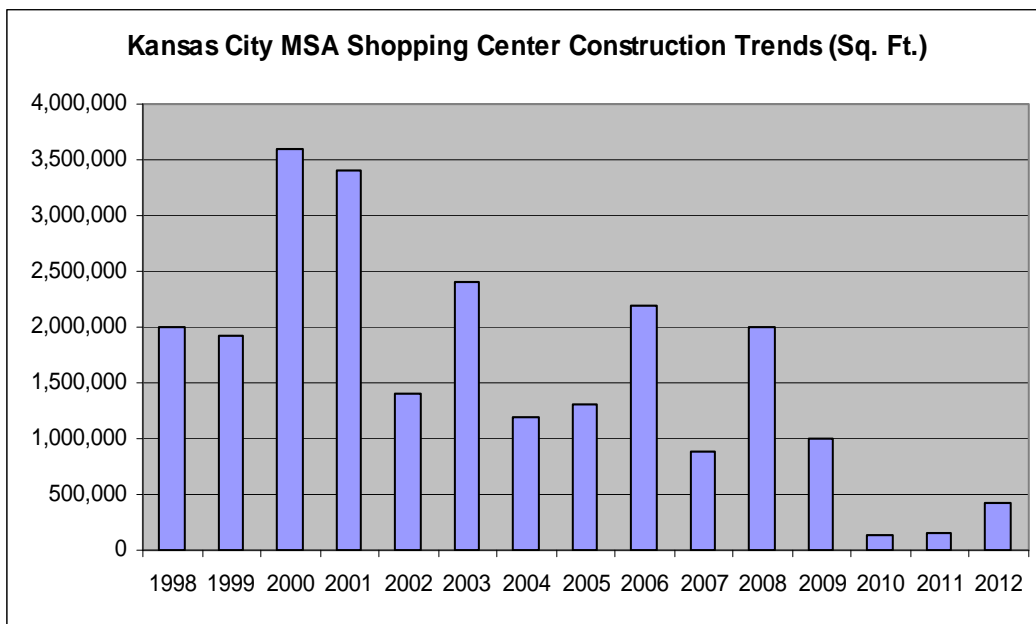


From 1992 through 1999 approximately 19.3 million square feet of shopping center space was constructed in the Kansas City MSA. After peaking in 1995 at 4.57 million square feet of new space, retail construction gradually declined to a level of 1.92 million square feet in 1999. In response to an active new housing market from 2000 to 2007 new shopping center construction rebounded with approximately 16.4 million square feet of space built as several national retailers

both entered the market and expanded. The growing suburban markets of Southern Johnson County, Kansas; the Northland region of Kansas City, Missouri; and Eastern Jackson County, Missouri supported the bulk of new shopping center construction.

During 2008, eight shopping centers completed construction within the Kansas City MSA totaling approximately 2.0 million square feet. Many of the new shopping centers were planned and under construction before the national economic recession hit in 2008. Major shopping centers completed included the 353,885 square foot Zona Rosa Phase 2, 620,437 square foot Tiffany Springs Marketplace and 155,000 square foot North Oak Village in the Northlands; 450,000 square foot Kansas City Power & Light District in downtown Kansas City, Missouri; and 160,000 square foot One Nineteen in Leawood, Kansas.

During 2009, the national and local retail industry continued to be adversely impacted by declining economic conditions marked by growing unemployment, declining housing and stock values, and increasingly conservative consumer spending. The net result was a drop in the level of new retail construction in the Kansas City MSA to less than 1.0 million square feet. New shopping center construction came to a near standstill from 2010 to 2012 with just 712,000 square feet of new space built.



The year-end 2011 average occupancy rate for Kansas City MSA shopping center space was reported at 87.93 percent. By year-end 2012 the average occupancy rate improved slightly to 88.13 percent with new inventory of 425,050 square feet and net absorption of 512,690 square feet. Occupancy levels are the highest for power centers (95%) and lifestyle centers (93.8%). During 2012, occupancy rates improved among power, community and neighborhood centers and declined for lifestyle and strip centers. By the second quarter 2013 the metro-wide occupancy rate improved to 88.2 percent.

For 2011, the average shopping center lease rate for the Kansas City MSA was reported at \$13.58 per square foot triple-net. During 2012 the average lease rate declined 5.2 percent to \$12.88 per square foot. Lifestyle and power centers garner the highest average rents in the \$16 to \$23 per square foot range. The lease rate for shop space averages approximately \$13 per square foot triple-net for community centers, \$11 per square foot for neighborhood centers and \$13 per square foot for strip centers. The Central Kansas City (\$17.17 per square foot) and Southern Johnson County (\$15.37 per square foot) sub-markets support the metropolitan area’s highest average lease rates.

Overall, Kansas City’s retail market for 2013 and beyond is more promising than it has been in many years. Retail sales have stabilized and rebounded since 2010 and several long planned retail projects that were shelved during the recession are now on track for construction starts. Retailers new to the Kansas City market are opening their first wave of stores after several years of planning, while others are adding to their store counts for the first time since the recession. Five years of modest new construction, combined with escalating retail space demand, has left a very tight market for quality space.

There is a growing disparity between “A” quality retail projects and all others. Retailers are still not bullish enough to move forward with “B” locations for the sake of meeting targets for new store growth. Most retailers are likely to sit on the sidelines waiting for a great location to become available than stretch into a less desirable location. Most retailers’ definition of what constitutes an “A” quality retail project/location remains narrow with location, design, visibility, access, demographics and tenant mix must all be superior.

Retail Sub-markets

The Lane4 Property Group’s *Kansas City Retail Report 2013* divides the Kansas City MSA into nine sub-markets. Year-end 2012 shopping center market conditions by sub-market are outlined in the table below.

Kansas City MSA Shopping Center Market Operating Results by Sub-market; Year-end 2012

Sub-market	Space Sq. Ft.	% of Total	Occupancy Rate	Average Lease Rate
Northwest Kansas City	3,988,047	5.7%	92.5%	\$14.72
Northeast Kansas City	7,993,231	11.5%	89.8%	\$11.54
Central Kansas City	6,140,613	8.8%	90.1%	\$17.17
South Kansas City	5,273,006	7.6%	78.0%	\$12.01
Lee's Summit/Raymore/Belton	5,394,240	7.8%	87.3%	\$12.63
East Jackson County	11,060,015	16.4%	91.2%	\$11.16
Northern Johnson County	11,970,837	17.2%	89.1%	\$12.04
Southern Johnson County	13,264,032	19.1%	88.8%	\$15.37
Wyandotte County	4,388,195	6.3%	79.2%	\$9.26
Totals	69,472,216	100.0%	88.13%	\$12.88

Source: 2013 Kansas City Retail Report; Lane4 Property Group.

Much of the recent new retail construction in the Kansas City MSA has concentrated within the outlying suburbs to capitalize on steady population and income growth. Emerging retail destinations include 135th Street in Overland Park, Kansas; State Route 58 in Belton, Missouri; Highway 152 in north Kansas City, Missouri and the intersection of Interstate 470 and U.S. 50 Highway in Lee's Summit, Missouri. A growing number of national big-box retailers have opened stores within these emerging retail hubs.

Parkville is located within the Northlands region which includes the portion of the Kansas City MSA situated north of the Missouri River. The Northland incorporates both the Northeast Kansas City and Northwest Kansas City sub-markets. During the mid-2000's strong new home construction and population growth fueled accelerated retail construction within the Northlands. By year-end 2012 the Northlands accounted for 17.2 percent of the Kansas City area's total inventory of shopping center space, or 12.0 million square feet, operating at an occupancy rate of 90.7 percent. Northeast Kansas City is a highly desirable retail location led by the intersection of Interstate 35 and Highway 152 supporting a large inventory of big-box retailers including Walmart, Target, JC Penney, Home Depot, Lowe's, Dick's Sporting Goods, Office Depot and others. The owners of the Metro North Mall have begun work on a major city incentive-backed redevelopment project designed to reverse the recent decline of the mall and surrounding retail. The intersection of Interstate 29 and Highway 152 represents Northwest Kansas City's principal retail destination, housing the Zona Rosa lifestyle center anchored by JC Penney, Dick's Sporting Goods and Barnes & Noble and Tiffany Springs MarketCenter anchored by JC Penney, Target, Home Depot and Best Buy.

By year-end 2012 the Central Kansas City sub-market supported 6.14 million square feet of shopping center space operating at a healthy occupancy rate of 90.1 percent. The Central Kansas City sub-market includes such retail destinations as downtown Kansas City, Westport, Crown Center and Country Club Plaza. Country Club Plaza has long been the Kansas City area's premiere shopping and dining district. Country Club Plaza continues to attract new tenants and generate strong retail sales. A new retail district in Central Kansas City is the Kansas City Power & Light District in downtown Kansas City. The Baltimore-based Cordish Company received municipal assistance to construct the 450,000 square foot entertainment district adjacent to Sprint Arena. The initial tenants opened during fall 2007 with the official grand opening in early March 2008. The project is anchored by a host of national restaurant and bar chains as well as such unique venues as Lucky Strike Lanes, AMC Theatre and Midland by AMC. Cordish is aggressively pushing to add more soft goods and traditional retailers. One example is the Garment District, a collection of unique, home grown boutiques.

Boasting a median household income of nearly \$90,000 per year and steady population growth, in recent years the South Johnson County, Kansas sub-market has long represented the Kansas City area's most desirable retail location supporting the highest land values, lease rates and levels of new construction. The 119th Street corridor serves as the primary retail destination with new retail construction in recent years focusing on the 135th Street corridor. By year-end 2012, the South Johnson County sub-market maintained 13.3 million square feet of shopping center space operating at an 88.8 percent occupancy rate. The 1.1 million square foot Corbin Park, which stalled following the developer's bankruptcy, is now being actively leased with a 222,000 square foot Scheel's All Sports scheduled to open by mid-2015. The adjacent PrairieFire mixed-use project is scheduled to commence construction anchored by a 20-screen Cinetopia Theater and Pinstripes, an upscale entertainment and dining venue featuring bocce and bowling.

The Wyandotte County, Kansas retail sub-market occupies the western portion of the Kansas City MSA. After years of stagnant new retail construction activity the Wyandotte County retail market has been reinvigorated by the development of the 400-acre Village West Tourism District at the intersection of Interstates 70 and 435. Village West is anchored by an 186,000 square foot Cabela's and a 712,000 square foot Nebraska Furniture Mart. In October 2005, RED Development opened the initial phase of The Legends at Village West, a 949,524 square foot lifestyle and entertainment center that has since been converted to a value-oriented center. Village West has changed the face of Wyandotte County's retail market by attracting several retailers and restaurants new to the Kansas City market. The Plaza at the Speedway anchored by a Wal-Mart Supercenter and Best Buy has opened immediately north of Village West. By year-end 2012 the Wyandotte County retail sub-market maintained 4.4 million square feet of shopping center space operating at an average occupancy rate of 79.2 percent.

By year-end 2010, the Jackson County, Missouri communities of Lee's Summit, Raymore and Belton supported 5.4 million square feet of shopping center space. In recent years strong population growth in Lee's Summit has fueled escalated retail development activity. During 2009, Macy's and JC Penney opened within the Summit Fair lifestyle center in Lee's Summit. The Raymore and Belton retail markets remain stable. Despite the large increase in retail space the year-end occupancy rate of 87.3 percent.

Conclusions

From 2000 to 2008, a strong local economy marked by population growth and rising income levels fueled a growing and prosperous retail market. Kansas City retail market responded with accelerated new retail construction activity, expansion of a host of big-box retailers and the entry of new retailers to the market. The construction boom produced several significant retail development trends. First, growing income and tourism levels contributed to the proliferation of new destination lifestyle and entertainment centers such as Zona Rosa, The Legends at Village West and the Kansas City Power & Light District. Second, to service a growing population many suburban communities supported accelerated retail construction activity led by power centers and big-box retailers. Third, the decline of first-ring malls provided the opportunity for big-box retailers to penetrate mature urban markets.

During 2009, the Kansas City MSA retail market entered into a correction phase that produced a 50 percent drop in new construction activity, declining average rents and escalating vacancies. The weakening economy prompted most national retailers to dramatically curtail new store development. Due to a weakening national and local economy, taxable retail sales in the Kansas City MSA declined in both 2009 and 2010. By 2011, the local retail market stabilized, supporting a 6.3 percent increase in taxable sales to \$27.17 billion. Local retail sales have continued to rebound, up 4.0 percent in 2012 to \$28.26 billion and 4.3 percent through June 2013.

Overall, Kansas City's retail market for 2013 and beyond is more promising than it has been in many years. Retail sales have rebounded and several long planned retail projects that were shelved during the recession are now on track for construction starts. Retailers new to the Kansas City market are opening their first wave of stores after several years of planning, while others are adding to their store counts for the first time since the recession. Five years of modest new construction, combined with escalating retail space demand, has left a very tight market for quality space.

Competitive Retail Market Conditions

Retail Trade Areas Defined

Within a retail trade area, customers closest to the site will affect the center most strongly, with customer influence diminishing gradually as the distance increases. Trade areas are usually divided into three categories or zones of influence, each of which is defined below.

Primary Trade Area: The primary trade area is the geographical area from which the largest share of repeat sales are derived, as much as 70 to 80 percent. Depending on the size of the shopping center or retailer, the primary trade area can extend in all directions up to seven miles in major markets. For rural markets the primary trade area can be much larger in size.

Secondary Trade Area: The secondary trade area generates about 15 to 20 percent of total sales. In major markets drive-time limits can be set at 15 to 20 minutes, or 7 to 10 miles. For rural markets the secondary trade area can encompass up to a 30 minute drive time.

Tertiary Trade Area: The tertiary trade area forms the broadest area from which customers are drawn. In major markets drive-time from this area to the site can be set at roughly 25 to 30 minutes, or 10 to 15 miles. In rural communities out-of-town visitors generally make up the bulk of the tertiary trade area.

The size and boundaries of a retail trade area are influenced by a variety of factors, including:

- The area's population density and demographic characteristics.
- Size of the shopping center and its tenant mix;
- The number and size of the anchor stores in the market;
- The size and location of the anchor stores nearest "sister" store;
- Location of competitive retail destinations;
- The area's transportation system;
- Site accessibility and travel times;
- Presence such of geographic bodies of water and mountain, and such physical barriers as major freeways.

Based on these factors, for the purpose of this report downtown Parkville's primary market area is defined as the geographic area located within a 10-minute drive time. The secondary market area encompasses a 15-minute drive-time from downtown Parkville. The tertiary market area encompasses the entire Kansas City MSA as well as out-of-town visitors. The primary and secondary market areas are illustrated in the map on the following page.

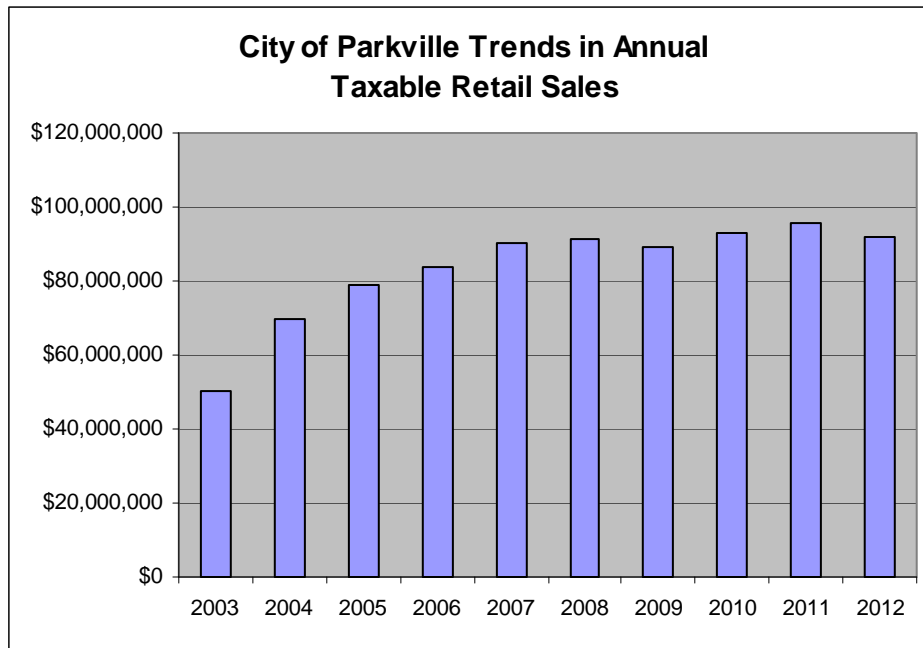
Downtown Parkville's Primary and Secondary Retail Trade Areas



Parkville Retail Sales Trends

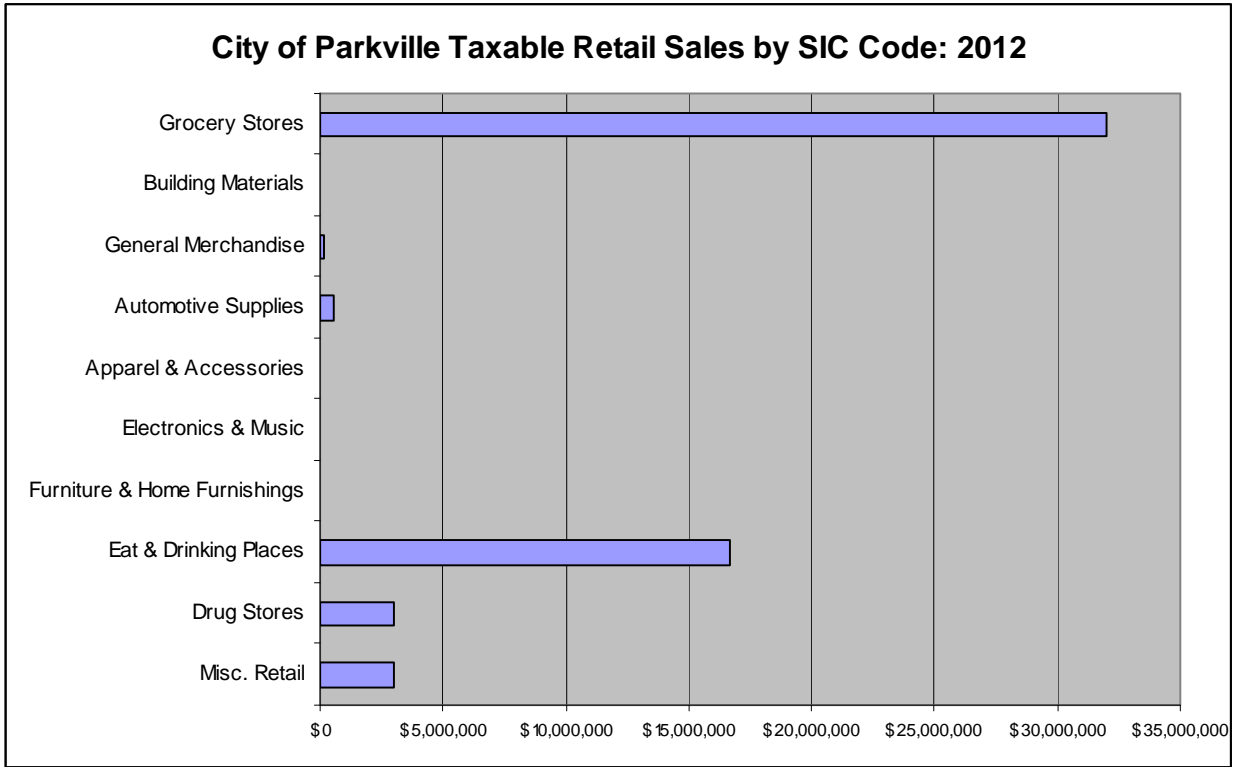
The Missouri Department of Revenue provided annual taxable retail sales for the City of Parkville from 2003 through 2012. As illustrated in the bar chart below, from 2003 through 2007 taxable retail sales for the City of Parkville grew by nearly 80 percent. By 2007 taxable retail sales in Parkville totaled \$90 million, up from \$50.4 million in 2003. Much of the accelerated growth in taxable retail sales was a direct result of the development of Parkville Commons during this 5-year timeframe, adding approximately 200,000 square feet of commercial space to the City's inventory.

Consistent with metro-wide trends, during 2009 taxable sales in Parkville declined as a result of the national recession. This downward trend lasted just one year with taxable sales rebounding 4.3 percent in 2010 to \$93 million. The upward trend in taxable retail sales continued into 2011 increasing by 2.7 percent. Taxable sales digressed in 2012 declining by 3.5 percent to \$92.1 million. For the first half of 2013 taxable retail sales in Parkville were reported at \$45.1 million, down 0.8 percent from the \$45.5 million reported during the first half of 2012. The recent declines in retail sales are an indication that Parkville is suffering from increased competition.



The Missouri Department of Revenue collects sales tax on a wide range of business activities, including construction materials, wholesale trade, lodging and utilities. Therefore, to provide a clear understanding of the level and composition of consumer based retail sales, the bar chart on the following page illustrates taxable retail sales for the City of Parkville for 2012 segmented only by consumer related SIC codes.

During 2012, consumer related retail sales in Parkville were led by grocery stores (\$32.0 million); eating and drinking places (\$16.7 million); drug stores (\$3.0 million); and automotive supplies (\$574,191).



A comparison of the composition of retail sales in the City of Parkville versus Platte County and State of Missouri was provided in an effort to identify potential retail market opportunities. In doing so, per capita retail sales by SIC code were calculated using data from the Missouri Department of Revenue and the U.S. Census Bureau.

The U.S. Census Bureau estimated the July 1, 2012 population at 5,777 for Parkville and 6,021,988 for Missouri. The Missouri Department of Revenue provided calendar year 2012 taxable retail sales by SIC code for the City of Parkville and the State of Missouri. Per capita retail sales by SIC code was calculated by dividing the taxable retail sales by the populations of Parkville and Missouri.

As the table on page 25 illustrates, for calendar year 2012 per capita retail sales for the selected SIC codes totaled \$9,618 for Parkville and \$7,408 for Missouri. The discrepancy stems largely from Parkville’s well above average income levels and out-of-town visitation.

Despite Parkville’s well above average per capita retail sales considerable leakage of retail sales is occurring within several SIC codes. This retail leakage provides the opportunity to support additional retailers in Parkville. In terms of per capita retail sales, those SIC codes suffering from the highest levels of leakage when compared to statewide averages include general merchandise (-\$2,066 per capita); apparel & accessories (-\$363); furniture & home furnishings (-\$290); automotive supplies (-\$169); and appliances (-\$23). Eating & drinking places (+\$1,439) and grocery stores (+\$4,192) in Parkville perform well above average.

**Comparison of Per Capita Retail Sales by SIC Code – 2012
City of Parkville vs. State of Missouri**

SIC Code	Retail Classification	Retail Sales		Per Capita Sales		Difference
		City of Parkville	State of Missouri	Duncan 5,777	Missouri 6,021,988	
520	Building Materials, Hardware & Garden	\$0	\$3,185,956,766	\$0	\$529	-\$529
530	General Merchandise Stores	\$178,667	\$12,627,928,171	\$31	\$2,097	-\$2,066
541	Grocery Stores	\$31,995,549	\$8,110,964,549	\$5,538	\$1,347	\$4,192
553	Automotive Supplies	\$574,191	\$1,618,408,807	\$99	\$269	-\$169
560	Apparel & Accessories	\$0	\$2,188,658,911	\$0	\$363	-\$363
571	Furniture & Home Furnishings	\$81,895	\$1,832,872,394	\$14	\$304	-\$290
572	Appliances	\$0	\$139,821,442	\$0	\$23	-\$23
573	Electronics & Music	\$42,493	\$419,427,498	\$7	\$70	-\$62
581	Eating & Drinking Places	\$16,658,842	\$8,700,826,890	\$2,884	\$1,445	\$1,439
591	Drug Stores	\$3,038,331	\$853,556,022	\$526	\$142	\$384
590	Misc. Retail Stores	\$2,990,351	\$4,930,426,043	\$518	\$819	-\$301
Totals		\$55,560,319	\$44,608,847,493	\$9,618	\$7,408	\$2,210

Source: Missouri Department of Revenue, U.S. Census Bureau and Canyon Research Southwest Inc.

Trade Area Capture

Information about a community's retail trade area can help assess the ability of local merchants to attract and capture the retail business of local residents. The trade area capture ("TAC") is an estimate of the number of people who shop in the local area during a certain period. TAC assumes that local residents will buy goods at the same rate as the state average, and that the only force that causes a variation in spending patterns is income. The formula for calculating TAC is:

$$\text{TAC} = \frac{\text{Community's Actual Retail Sales}}{\text{State Per Capita Sales} \times \text{Community's Per Capita Income} / \text{State Per Capita Income}}$$

If the TAC estimate is larger than the community's population two explanations are possible: 1) the community is attracting customers outside its boundaries or 2) residents of the community are spending more than the state average. If the estimate is smaller than the community's population: 1) the community is losing its customers to other regions for retail purchases or 2) residents of the community are spending less than the state average.

This report calculates the current trade area capture for both Parkville and the primary trade area (10-minute drive time) by researching current population, per capita income and taxable sales statistics.

The U.S. Census Bureau estimated the July 1, 2012 population for the City of Parkville at 5,777 and the Missouri Department of Revenue reported calendar year 2012 taxable sales tax of \$92,062,778.

The Missouri Department of Revenue reported calendar year 2012 taxable retail sales for the state of \$77,155,527,948. The U.S. Census estimated the July 1, 2012 population for Missouri at 6,021,988 residents, yielding per capita sales of \$12,812.

The U.S. Census Bureau reported 2010 per capita income of \$24,724 for the State of Missouri and \$26,646 for the City of Parkville.

$$\text{City of Parkville Trade Area Capture} = \frac{\$92,062,778}{\$12,812 \times (\$26,646 / \$24,724)} = 6,667 \text{ Residents}$$

Using this population and taxable retail sales data the current TAC for the City of Parkville is estimated at 6,667 residents. When compared to the city's actual population of 5,777 suggests considerable retail sales are being captured from outside the city.

According to demographic published by Esri Business Analyst the primary trade area has a population of 49,264 residents, per capita sales of \$31,359 and 2012 taxable sales of \$404.9 million. Applying the same methodology to the primary trade area yields a Trade Area Capture of 24,918 residents, suggesting considerable retail sales leakage and the opportunity to support additional retail development and businesses.

$$\text{Primary Trade Area Capture} = \frac{\$404,922,038}{\$12,812 \times (\$31,359 / \$24,724)} = 24,918 \text{ Residents}$$

Retail Pull Factor

Pull factors (“PF”) measure a community’s ability to attract shoppers, residents and non-residents alike, to make retail purchases within the community. A pull factor is a measure of the strength of a community’s retail trade, based on a comparison of local spending in relation to that of a wider geographic area (e.g. the state), with a measure of 1.0 representing a perfect balance. A pull factor greater than 1.0 indicates that the community is pulling in retail sales from beyond its boundaries and the balance of trade is favorable. Alternatively, a pull factor less than 1.0 indicates that the community is not capturing local shoppers and is experiencing retail sales leakage. Pull factors are calculated by dividing the TAC by the community’s population.

$$PF = \frac{\text{Trade Area Capture}}{\text{Community Population}}$$

The Missouri Department of Economic Development prepared a *Missouri Retail Trade 2010* that estimated the retail pull factor for every county in the state. Parkville is located in Platte County. The report documents the 2010 pull factors for Platte County at 1.44, indicating the county supports retail sales 44 percent above the state-wide average.

The City of Parkville’s current pull factor was calculated by dividing the TAC of 6,667 residents by the City’s July 1, 2012 population of 5,777. The net result is a pull factor of 1.154, suggesting the City of Parkville is capturing retail sales at a rate equivalent to 15.4 percent above the state-wide average. This pull factor is proof that Parkville serves an expanded trade area that encompasses both the Kansas City MSA and out-of-town visitors. However, the well above average pull factor does not suggest that Parkville is over retailled and not capable of supporting additional retailers. Conversely, the pull factor for the primary trade area is estimated at 0.506 (Trade Area Capture of 24,918 residents divided by County resident population of 49,264).

Retail Sales Gap Analysis

The *Retail MarketPlace Report* published by ESRI Business Analyst attempts to identify opportunities for additional retail categories within a specific trade area. Founded in 1969, ESRI is a software development and services company providing Geographic Information System (GIS) software and geodatabase management applications. The company generates accurate and comprehensive demographic, lifestyle segmentation, consumer spending and business data.

ESRI uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity. Retail establishments are classified into 27 industry groups in the Retail Trade sector, as well as four industry groups within the Food Services & Drinking Establishments. The difference between demand and supply within each industry group represents the opportunity gap or surplus available for each retail category in the specified reporting geography. When the demand is greater than the supply there is an opportunity gap for that retail category. A positive value signifies an opportunity gap, while a negative value signifies a surplus.

A 10-minute drive time serves as downtown Parkville’s primary trade area. In an effort to identify retail opportunities by NAICS classification a *Retail MarketPlace Report* was generated for the primary trade area.

Findings of the *Retail MarketPlace Report* support the primary trade area’s current 0.506 pull factor calculated in the previous section. The primary trade area population is estimated to support retail sales of approximately \$625 million. Actual retail sales are estimated at \$404.9 million, yielding a retail pull factor of 0.648 (retail sales 64.8 percent of the Missouri average). The retail sales gap of \$220 million is reduced to approximately \$162.6 million when automobile vehicle and parts sales are removed.

Given the large retail sales gap, the *Retail MarketPlace Report* identifies several retail categories in primary trade area that remain under serviced. As outlined in the table below, retail categories under-supplied include general merchandise stores, grocery stores, clothing stores, full-service restaurants and building materials & supplies stores.

Retail Sales Gap by Retail Classification Primary Trade Area (10-Minute Drive Times)

Retail Classification	Demand - Supportable Consumer Expenditures	Supply - Estimated Actual Retail Sales	Opportunity Gap / (Surplus)
Primary Trade Area – Non Automotive	\$517,914,542	\$355,282,330	\$162,632,212
General Merchandise Stores	\$127,137,700	\$6,254,035	\$120,883,665
Grocery Stores	\$68,763,926	\$49,745,913	\$19,018,013
Clothing Stores	\$23,072,238	\$6,286,395	\$16,785,844
Full-Service Restaurants	\$23,952,067	\$10,222,088	\$13,729,979
Electronics & Appliance Stores	\$16,664,422	\$5,917,440	\$10,746,982
Building Materials & Supplies Stores	\$20,116,814	\$15,112,117	\$5,004,698
Shoe Stores	\$5,091,166	\$643,141	\$4,448,025
Office Supplies Stores	\$4,611,406	\$2,284,254	\$2,327,152

Source: Retail MarketPlace; Esri Business Analyst.

Parkville Retail Market

Parkville supports two principal retail districts, including downtown along Main Streets and Parkville Commons at the intersection of Highways 9 and 45. Each retail district caters to a distinctive market niche with downtown focusing on destination specialty shops and restaurants and Parkville Commons satisfying the daily retail needs of local residents.

Downtown Parkville centers along Main Street and incorporates the 7-block area from McAfee Drive north to 6th Street. Main Street possesses a unique historic character that serves as a customer draw. The principal historic structures occupy a 2-block area on Main Street from the railroad track north to 2nd Street. Government offices in downtown Parkville include a fire station and U.S. Post Office.

The Main Street Parkville Association is a not-for-profit whose principal mission is to preserve the heritage, encourage restoration and new businesses, and promote downtown Parkville. Annual events designed to attract people downtown include the car show which draws 12,000 spectators and the Christmas Parade that brings 10,000 people downtown.

According to the Platte County Assessor records downtown Parkville supports approximately 208,828 square feet of commercial space, including 153,189 square feet of retail space and 54,119 square feet of office space. The ground floor commercial space houses a mix of specialty shops, antique shops and restaurants. Downtown offers a quaint historic charm that is reflected in the predominance of independently-owned businesses. As of the date of this report 13,207 square feet of retail space was available for lease in downtown Parkville, translating to an average vacancy rate of 8.6 percent. Retail lease rates generally range from \$10 to \$13 per square foot. Downtown Parkville's complete inventory of commercial properties is available for review in Exhibit A of the Addenda.

Downtown businesses were inventoried along Main, East and Mill Streets in an effort to quantify the mix of retailers and service businesses. A total of 64 businesses were inventoried, including 40 retailers and 24 professional and personal service businesses. Prominent retail categories include restaurants, art galleries, hair salons, antique shops, home furnishings, and gift and collectible stores. Principal business services operating downtown include banks and financial services, insurance, counseling and marketing.

Parkville Commons is a mixed-use project located at the southwest corner of Highways 9 and 45. The projects totals approximately 250,000 square feet of building area, of which 147,000 square feet is retail space. The retail component is anchored by a 72,000 square foot Price Chopper. Other notable retail businesses include Walgreens, Jimmy Johns, Sonic, Commerce Bank and P&G Hardware. A total of 33 retail and service businesses current operate at Parkville Commons, including 22 retailers and eleven professional and personal service businesses. Parkville Commons' tenant mix is diverse with principal businesses including eating and drinking places, hair salons and financial services.

The matrix on the following page provides a business mix comparison between downtown Parkville and Parkville Commons. Given the tenant mix and market positioning, downtown businesses don't generally compete directly with merchants operating at Parkville Commons.

Business Mix Comparison Downtown Parkville vs. Parkville Commons

Business Type	Downtown Parkville	Parkville Commons	Business Type	Downtown Parkville	Parkville Commons
Retail Businesses			Personal & Professional Services		
Eating & Drinking	7	8	Financial Services	3	3
Banquet Facility	1		Accountant / Tax Services		
Catering	1		Insurance	2	
Bakery	1	1	Real Estate	1	
Ice Cream / Yogurt / Candy	1	1	Architect		
Coffeehouse	1		Travel Agency		
Apparel		1	Bank	1	1
Children's Apparel			Attorney	1	
Formal / Bridal			Hotel / B&B	1	
Shoes			Membership Social Clubs	1	
Jewelry	1		Optical		1
Leather Goods			Dry Cleaners		1
Hair Salons & Spas	5	2	Shoe Repair		
Barber			Physical / Massage Therapy		1
Nail Salon		1	Fitness / Wellness		1
Furniture / Home Furnishings	3		Tanning Salon		
Appliances / Electronics			Healthcare		1
Vacuums			Counseling	2	
Antiques	3		Dentist	1	
Hardware / Lumber		1	Animal Hospital		1
Variety / Thrift Store			Dance Studio	1	
Books			Photography		
Sporting Goods			Marketing	2	
Office Supplies			Car Counselors	1	
Gifts & Collectibles	2		Funeral Home	1	
Florist			Lawn Care & Landscaping	1	
Wine & Spirits	1	1	Printing / Copies		
Cigar & Tobacco Shop	1		Security	1	
Art Gallery	6		Auction House	1	
Art Supplies			Express Delivery Service	1	
Market / Grocery Store		1	Educational Tutoring / Training	1	
Pharmacy / Drug Store		1	Car Wash		1
Bike Shop		1	Auto Repair	1	
Pet Supplies		1			
Frame Shop		1			
Nutrition		1			
Clocks / Watches	1				
Quilting Supplies	1				
Yarn & Bead Supplies	1				
Electric Cigarette	1				
Guitar Studio	1				
Science Store	1				
Totals	40	22	Totals	24	11

The Village at Burlington Creek located on the south side of Highway 45 west of Interstate 29 is a mixed-use project located approximately 3.2 miles northeast of downtown Parkville. Formerly known as Tuileries Plaza, in 2012 NorthPoint Development purchased the property and is transforming the development into an upscale mixed-use project featuring specialty shops, restaurants, office and apartments. The tenant mix has been repositioned and to create an attraction two outdoor sand volleyball courts and an ice rink have been constructed along with an upscale apartment community. The Village at Burlington Creek now houses 37 businesses featuring a mix of restaurants, specialty shops, financial services, healthcare and personal service businesses. Nine restaurants operate at Burlington Creek, the most notable including Bonefish Grill, Taco Bell, Quiznos Subs and Luna Azteca Mexican Grill. A Culvers and Swirl Wine Bar and Shoppe are scheduled to open. Other notable tenants include Mosaic Life Care, Impact Fitness, SportsClips, Epic Bike & Sport and Missouri Western State University.

The Residences at Burlington Creek, a 298-acre luxury apartment community, is now under construction with the initial phases now open and available for lease. Residents of the apartment community will improve the pedestrian vitality of the project's commercial component. The Village at Burlington Creek now poses as considerable competition for specialty shops and restaurants in downtown Parkville and Parkville Commons. In fact, since transformation of The Village at Burlington Creek has commenced taxable retail sales for the City of Parkville have been on the decline. With additional development sites available The Village at Burlington Creek is positioned to become an even greater competitive threat.

In recent years several lifestyle and specialty centers featuring upscale shopping, dining and entertainment have been developed in the Northlands region of the Kansas City MSA, including Briarcliff Village, Zona Rosa and The Shoppes at Boardwalk. The emergence of these shopping centers poses increased competition for downtown Parkville businesses.

In 2007, Briarcliff Development completed Briarcliff Village, a 130,000 square foot lifestyle center housing destination retailers and upscale dining. Nell Hill's, Piropo's and Village Café anchor Briarcliff Village. Located at U.S. 169 and Briarcliff Parkway, Briarcliff Village is 5.3 miles east of downtown Parkville.

Steiner + Associates developed Zona Rosa, an 882,834 square foot lifestyle and destination entertainment center at Interstate 29 and Barry Road anchored by Dillard's, Dick's Sporting Goods, Marshalls Homegoods and Barnes & Noble. Phase 1 opened in 2004 with Phase 2 anchored by a Dillard's store opening in 2008. Zona Rosa features 25 eating and drinking places and such entertainment venues as KC Improv Comedy Club & Dinner Theatre, Bounce House Moonwalks and Maze Craze. Zona Rosa is located approximately 4.8 miles northeast of downtown Parkville.

The Shoppes at Boardwalk are a 122,896 square foot specialty center located at Highway 152 and Ambassador Drive approximately 5.7 miles northeast of downtown Parkville. Notable tenants at The Shoppes at Boardwalk include Houlihan's, Kirklands, C.J. Bank's, Jos. A. Bank, Maurices and Chipotle Mexican Grill.

Over the years downtown Parkville has been positioned as a specialty retail and dining destination offering a quaint, historic setting. However, with just 153,189 square feet of retail space, to remain competitive it is important for downtown Parkville to increase its inventory of commercial space and establish a greater diversity of businesses.

Peer City Downtown Retail Tenant Comparisons

Downtown businesses were inventoried along Main, East and Mill Streets in an effort to quantify the mix of retailers and service businesses. As mentioned earlier in the report, a total of 64 businesses currently operate in downtown Parkville, including 40 retailers and 24 professional and personal service businesses. Prominent retail categories include restaurants, art galleries, hair salons, antique shops, home furnishings, and gift and collectible stores.

Downtown Parkville's business profile was compared to peer city downtowns in an attempt to identify prospective retail and service businesses and development opportunities. Peer cities selected for the analysis include Atchison, Weston, Lee's Summit, Independence and Liberty.

Atchison, Kansas was selected because of its riverfront location, historic character and presence of Benedictine College, railroad track and a farmers market.

Weston, Missouri was selected because of its river location, historic character, status as a tourist destination and presence of a railroad track.

Lee's Summit, Missouri was selected because of its historic character, community's high income levels and presence of a railroad track and a farmers market.

Independence was selected because of its historic character and recent redevelopment and repositioning.

Liberty, Missouri was selected because of its historic character and presence of William Jewell College.

Prior to the business comparison analysis, the demographic trends within a 10-minute drive-time of each peer city downtown are discussed. It is well understood that product preferences vary across different groups of consumers. These preferences relate directly to consumer demographic characteristics, such as population, households, income, age, ethnicity and home ownership. Population and households data assists in quantifying the current market size. Household income data is a good indicator of buying power. Age is an important factor because personal expenditures change as individuals grow older. Data show that ethnicity affects spending habits as much as other demographic characteristics such as income and age. Home ownership directly correlates with expenditures for furniture and home furnishings, appliances and home improvements and.

As outlined in the table on page 33, demographic characteristics within a 10-minute drive-time from downtown Parkville include 49,264 residents, 20,025 households, 12,972 owner-occupied housing units, media household income of \$56,907 and median age of 38.6 years. Whites account for 75.6 percent of the population followed by blacks at 15.2 percent. In terms of population, households, high-income households and median age, downtown Parkville's 10-minute drive-time trade area demographic characteristics are most similar to downtown Liberty, which suggests similarities in tenant mix is possible. With over 26 percent of households within a 10-minute drive-time from downtown Parkville supporting an annual income of \$100,000 or more suggests a market for luxury goods and services.

10-Minute Trade Area Demographics (2012) Downtown Parkville vs. Peer City Downtowns

Demographic Characteristic	Parkville	Independence	Lee's Summit	Liberty
Population	49,264	92,142	81,477	42,598
Households	20,025	38,972	31,099	15,731
Owner-Occupied Housing Units	12,972	24,136	22,720	11,196
Households by Income				
\$15,000 and Less	10.1%	17.1%	11.5%	7.8%
\$15,000 - \$24,999	8.8%	13.2%	9.0%	6.8%
\$25,000 - \$34,999	8.9%	15.1%	11.3%	7.2%
\$35,000 - \$49,999	15.4%	18.6%	16.6%	12.7%
\$50,000 - \$74,999	19.0%	18.7%	22.6%	23.3%
\$75,000 - \$99,999	11.7%	9.0%	13.8%	15.0%
\$100,000 - \$149,999	15.4%	6.1%	12.2%	18.5%
\$150,000 - \$199,999	6.3%	1.4%	2.1%	5.2%
\$200,000+	4.6%	0.8%	0.9%	3.5%
Median Household Income	\$56,907	\$37,251	\$69,466	\$64,166
Population by Age				
0-19	13,180	23,175	23,711	12,708
20-24	2,862	5,835	4,169	2,566
25-34	6,394	12,675	10,065	5,532
35-44	6,347	10,271	11,266	6,307
45-54	7,721	13,207	12,564	6,172
55-64	6,600	11,533	9,450	4,758
65+	6,162	15,446	10,253	4,554
Median Age	38.6	39.3	37.6	35.8
Ethnicity	75.6%	84.9%	85.2%	90.0%
White Only	15.2%	5.5%	9.1%	4.4%
Black Only	0.5%	0.6%	0.3%	0.4%
American Indian Only	2.5%	0.9%	1.5%	1.6%
Pacific Islander Only	0.5%	0.7%	0.1%	0.1%
Some Other Race	2.8%	3.8%	1.1%	1.0%
Two or More Races	2.9%	3.6%	2.5%	2.6%
Hispanic Origin	7.5%	8.7%	4.0%	4.3%

Source: Esri Business Analyst.

The table on page 35 provides a summary of retailers operating stores in the downtowns of each peer city. Based on this comparison analysis and trade area demographics, prospective retail businesses for downtown Parkville have been identified and include:

- Eating & Drinking Places
- Bakery
- Coffeehouse
- Apparel
- Jewelry
- Hair Salon
- Nail Salon
- Furniture & Home Furnishings
- Antiques
- Books
- Sporting Goods
- Gifts & Collectibles
- Florists
- Entertainment
- Art Galley
- Art Supplies
- Bike Shop
- Nutrition & Fitness

The table on page 36 provides a summary of professional and personal service businesses operating in the downtowns of each of the peer cities. Based on this comparison analysis and trade area demographics, prospective retail and service businesses for downtown Parkville have been identified and include:

- Financial Services
- Accounting & Tax Services
- Insurance
- Real Estate
- Architect
- Attorney
- Physical & Massage Therapist
- Fitness & Wellness
- Photographer

Peer City Downtown Retail Tenant Comparisons

Retail Business Type	Parkville	Weston	Atchison	Lee's Summit	Independence	Liberty	Prospective Businesses
Eating & Drinking	7	7	11	10	7	8	X
Banquet Facility	1		1	2			
Catering	1						
Bakery	1		1	2	1	1	X
Ice Cream / Yogurt / Candy	1		1	2	1	1	
Coffeehouse	1		2	2	1	2	X
Apparel		4	2	5	2	4	X
Children's Apparel			1				
Formal / Bridal				2			
Shoes			1			1	
Jewelry	1	1	2	1		2	X
Leather Goods			1				
Hair Salons & Spas	5	3	4	11	2	4	X
Barber			1			1	
Nail Salon				1		1	X
Furniture & Home Furnishings	3	7	3	4	4	2	X
Appliances / Electronics			2				
Vacuums				1			
Antiques	3	5	1	1			X
Hardware / Lumber		1	1	1	1		
Variety / Thrift Store			1	1			
Books				1			X
Sporting Goods				2	1		X
Office Supplies					1		
Gifts & Collectibles	2	6	4	2	5	3	X
Hobby		1					
Party Store						1	
Florist				1		1	X
Entertainment		1	1		2	1	X
Wine & Spirits	1	3		2			
Cigar & Tobacco Shop	1	1		1			
Art Gallery	6	3	1	4	2	1	X
Art Supplies			1				X
Bible Study		1					
Market / Grocery Store			1		1		
Specialty Foods			1				
Pharmacy / Drug Store					1		
Medical Equipment			2				
Bike Shop				1			X
Pet Supplies						1	
Nutrition				1		1	
Clocks / Watches	1			1			
Quilting Supplies	1						
Yarn & Bead Supplies	1				1		
Electric Cigarette	1						
Guitar Studio	1						
Pawn Shop			1		1		
Musical Instruments					1	1	
Science Store	1						
Totals	40	44	48	62	35	37	

Peer City Downtown Professional & Personal Service Tenant Comparisons

Service Business Type	Parkville	Weston	Atchison	Lee's Summit	Independence	Liberty	Prospective Businesses
Financial Services	3		1	3		1	X
Accountant / Tax Services			1	3	1	1	X
Insurance	2		1	4	1	1	X
Real Estate	1		2	3	1		X
Architect				1		1	X
Travel Agency			1	1			
Bank	1		6	2	1	1	
Attorney	1		4	11	4	19	X
Bail Bonds			1			1	
Communications / Technology			2	3			
Newspaper			1	2		1	
Hotel / B&B	1	3			1		
Membership Social Clubs	1	2	1				
Optical			2			1	
Dry Cleaners			1				
Shoe Repair						1	
Physical / Massage Therapy				4	1		X
Fitness / Wellness			5	1	1	2	X
Tanning Salon			1				
Healthcare			9				
Counseling	2						
Dentist	1		1	1			
Animal Hospital							
Dance Studio	1		1	1		1	
Photography			1	5	1	1	X
Marketing	2						
Car Counselors	1						
Funeral Home	1						
Lawn Care & Landscaping	1						
Printing / Copies			1	1	1		
Plumber			1				
Security	1						
Auction House	1						
Express Delivery Service	1						
Educational Tutoring / Training	1			1	1		
Car Wash							
Auto Repair	1	1	1				
Totals	24	6	45	47	14	32	

Retail Space Demand Estimates

In order to quantify downtown Parkville's future retail space needs this section of the report estimates primary trade area purchasing power and retail space demand for the period from 2012 to 2042.

Primary Trade Area Defined

The first step in quantifying retail space demand is to identify downtown Parkville's primary trade area. According to the Urban Land Institute, the retail trade area is the geographic area that provides the majority of the steady customers to support a business.

Within a retailer's trade area; those customers closest to the business have the greatest affect on sales, with customer influence diminishing gradually as the distance increases. Retail trade areas generally consist of three regions, primary, secondary and tertiary. The primary trade area is the geographic area from which the business derives its largest share of repeat sales, drawing 70 to 80 percent of its regular customers. The secondary trade area generates 15 to 20 percent of a business' sales. The tertiary trade area forms the broadest area from which customers are drawn.

For the purpose of this report downtown Parkville's primary trade area is defined as the geographic area located within a 10-minute drive time. Retail sales within the primary trade area are generated by the local population, Kansas City MSA residents visiting Parkville and out-of-town visitors.

Purchasing Power

Local residents account for the bulk of the primary trade area retail sales. A trade area's purchasing power is a function of consumer population and income levels. A trade area's total income is calculated by multiplying the trade area population by the average per capita income. Purchasing power, or total sales potential of the trade area, is then quantified by applying average retail expenditures as a percentage of total income.

Esri Business Analyst estimates the primary trade area 2012 population at 49,264 residents and pre capita income at \$31,359. By multiplying the population by the per capita income yields total personal income for the primary trade area of \$1.54 billion. Supportable retail sales for the primary trade area were estimated by consulting retail sales expenditures data published by the *U.S. Census Bureau Annual Retail Trade Survey* and U.S. Department of Commerce.

As outlined in the table on the following page, for 2009, the U.S. Bureau of Economic Analysis reported the country's personal income at \$12,026 (\$ billions) and disposable income at \$10,924 (\$ billions). Meanwhile, the *U.S. Census Bureau Annual Retail Trade Survey* reported total U.S. retail and food services sales in 2009 of \$4,091.7 (\$ billions), equating to 34.02 percent of total personal income.

Based on the national average for retail and food services sales of 34 percent of total personal income, the primary trade area population is estimated to support approximately \$525.3 million in annual retail expenditures.

**Estimated Total Sales of United States
Retail and Food Services Firms by Kind of Business: 2009**

NAICS Code	Kind of Business	Sales (\$Millions) United States
	Total Retail and Food Services Sales	\$4,091,723
	Total Retail Sales (excl. motor vehicle and parts dealers)	\$3,638,471
441	Motor Vehicle and Parts Dealers	\$676,801
442	Furniture and Home Furnishings Stores	\$86,657
443	Electronics and Appliance Stores	\$98,384
444	Building Materials and Garden Equipment	\$268,206
445	Food and Beverage Stores	\$570,581
4451	Grocery Stores	\$510,555
4452	Specialty Food Stores	\$19,233
4453	Beer, Wine and Liquor Stores	\$40,793
446	Health and Personal Care Stores	\$253,243
4461	Health and Personal Care	\$35,849
44611	Pharmacies and Drug Stores	\$217,394
447	Gasoline Stations	\$388,515
448	Clothing and Accessories Stores	\$204,866
451	Sporting Goods, Hobby, Book and Music Stores	\$81,373
452	General Merchandise Stores	\$592,009
453	Miscellaneous Store Retailers	\$105,366
454	Non-Store Retailers	\$312,470
4541	Electronic Shopping and Mail-order Houses	\$234,667
4542	Vending Machine Operators	\$6,813
4543	Direct Selling Establishments	\$70,990
772	Eating and Drinking Places	\$453,252
	Total U.S. Retail Sales	\$4,091,723
	U.S. Total Personal Income (\$ Millions)	\$12,026,000
	U.S. Total Disposable Income (\$ Millions)	\$10,924,000
U.S. Sales as Percentage of Income		
	Personal Income	34.02%
	Disposable Income	37.46%

Source: U.S. Census Bureau Annual Retail Trade Survey.

The population within a 15-minute drive-time represents downtown Parkville's secondary trade area. Esri Business Analyst estimated the secondary trade area population at 241,529 and a per capita income of \$24,147. By subtracting out the primary trade area, the secondary trade area's purchasing power is \$4.3 billion and supportable retail sales are \$1.46 billion. At a 5.0 percent capture rate captured secondary trade area retail sales are estimated at approximately \$72.9 million.

Residents of the Kansas City MSA and out-of-town visitors represent the tertiary retail trade area. During 2012, the Missouri Department of Revenue reported retail sales for the Kansas City MSA at approximately \$28.26 billion. The primary trade area is estimated to capture \$13.9 million in annual retail sales from the Kansas MSA population residing outside its boundaries.

Visitors have a considerable impact on retail sales in Missouri and the City of Parkville. The *Missouri Division of Tourism FY 2012 Annual Report* estimated visitor expenditures in Platte County at \$271.9 million. Assuming that foodservice, entertainment & recreation and general retail trade accounted for 45 percent of all visitor expenditures, during FY 2012 visitors to Platte County spent an estimated \$122.3 million on retail goods and services. Given the tourist draws of downtown Parkville and Zona Rosa, the primary trade area is estimated to capture 10 percent of Platte County tourism expenditures on retail goods and services, or approximately \$12.3 million.

This analysis estimated 2012 supportable retail sales for the primary trade area totaled \$624.3 million, including \$525.3 million by the local population, \$72.9 million by secondary trade area residents and \$26.2 million by Kansas City MSA residents and out-of-town visitors.

Current Retail Space Demand Estimates

Supportable total retail space for the primary trade area was calculated by dividing estimated annual retail sales captured by standard per square foot retail sales rates.

For 2012, total supportable retail sales for the primary trade area are estimated at \$624.3 million, generated by the local residents, the Kansas City MSA population and out-of-town visitors. Esri Business Analyst reported actual primary retail sales of \$404.9 million, resulting in a retail gap of \$219.4 million.

According to *Dollars & Cents of Shopping Centers*, median sales for open air, convenience, neighborhood and community/super community centers in the Midwest region range from approximately \$152 to \$312 per square foot. Assuming average total retail sales rates of \$225 to \$275 per square foot, the primary trade area's current estimated retail gap of \$219.4 million can support approximately 800,000 to 975,000 square feet of additional occupied retail space.

Future Retail Space Demand Projections

Future growth in retail sales and space demand within the primary trade area will originate from continued growth in population and out-of-town visitors. The table on page 44 provides both total retail sales and space demand projections through 2030 for the primary trade area.

The Missouri Economic Research & Information Center projects the Platte County population to reach 114,904 by 2030, an increase of 25,940 residents or 22.6 percent from 2010. The 2010 population of the Kansas City MSA of over 1.9 million is projected to reach 2.45 million by 2030, an increase of 27.4 percent. Based on these projected population growth rates, from 2012 through 2030 the primary trade area population is estimated to increase by 25 percent, or 12,316 new residents. The primary trade area's current per capita income of \$31,359 is forecast to increase at an annualized rate of 2.0 percent, resulting in a per capita income of \$44,788 by 2030. By multiplying the increase in population of 12,316 residents by the per capita income of \$44,788 yields total personal income of approximately \$551.6 million. Based on the national average for retail and food services sales of 34 percent of total personal income, by 2030 the primary trade area population is estimated to support an additional \$187.5 million in retail expenditures.

During 2012 the population within a 15-minute drive-time of downtown Parkville contributed an estimated \$72.9 million in retail sales for the primary trade area. Through 2030 retail sales from originating from within a 15-minute drive-time are forecast to increase at an average annual rate of 2.0 percent, reaching \$104.1 million by 2030. The growth in retail sales from 2012 to 2030 is estimated at approximately \$31.2 million.

For 2012, Kansas City MSA residents and out-of-town visitors to the primary trade area are estimated to contribute retail sales of approximately \$26.1 million. Throughout the projection period retail sales from Kansas City MSA residents and out-of-town visitors are forecast to increase at an average annual rate of 2.0 percent, reaching \$37.3 million by 2030. From 2012 to 2030 the growth in retail sales originating from Kansas City MSA residents and out-of-town visitors is estimated at approximately \$11.2 million.

By 2030, based on continued growth in the resident population and out-of-town visitation total retail sales for the primary trade area are estimated to increase by \$230 million. At average retail sales rates of \$321 to \$393 per square foot (escalated at 2.0 percent annually from 2012 to 2030) this level of retail sales can support an estimated 585,000 to 716,000 square feet of additional retail space through 2030.

To conclude, downtown Parkville's primary trade area captures retail sales from the primary and secondary resident populations, the entire Kansas City MSA and out-of-town visitors. The primary trade area's current estimated retail gap of \$219.4 million can support approximately 800,000 to 975,000 square feet of additional occupied retail space. Growth in population, incomes and out-of-town visitation through 2030 is projected to generated an increase in primary trade area retail sales of \$230 million annually, sufficient to support an additional 585,000 to 716,000 square feet of retail space. At a 7.5 percent capture, through 2030 downtown Parkville is estimated to absorb 103,875 to 126,825 square feet of retail space.

Retail Space Demand Estimates; 2012 - 2030 Downtown Parkville's Primary Trade Area

Retail Sales Formula	2012	Growth 2012-2030
Primary Trade Area Supportable Retail Sales		
Resident Population	49,264	12,316
Per Capita Income	\$31,359	\$44,788
Total Personal Income	\$1,544,869,776	\$551,613,615
% Income Spent of Retail Goods & Services	0.34	0.34
Supportable Primary Trade Area Retail Sales	\$525,255,724.00	\$187,548,629
Secondary Trade Area Supportable Retail Sales		
	\$72,884,627	\$31,212,568
Tertiary Trade Area Supportable Retail Sales		
Metropolitan Kansas City MSA Population	\$13,900,000	\$5,952,623
Out-of-Town Visitors	\$12,233,685	\$5,239,030
Total Supportable Retail Sales		
	\$624,274,036	\$229,952,850
Less: Primary Trade Area Actual Retail Sales	(\$404,922,038)	
Potential Capture of Additional Retail Sales	\$219,351,998	\$229,952,850
Supportable Additional Retail Space (Sq. Ft.)		
@ 225/SF	974,898	
@ 250/SF	877,408	
@ \$275/SF	797,644	
Supportable Retail Space (2012 - 2030)		
@ 321/SF		716,364
@ 357/SF		644,126
@ \$393/SF		585,122

Source: Canyon Research Southwest, Inc.

Evaluation of Prospective Retail Sites

A key in improving the business climate in downtown Parkville will be to increase the inventory of commercial space and level of business and customer activity. Prospective commercial development sites evaluated in this section of the report include: 1) surface parking lot on the east side of Main Street south of the rail road track; 2) east side of Highway 9 from 1st Street north to 6th Street; and 3) west side of Highway 9 from 1st Street north to 6th Street.

The surface parking lot bound by the rail road track to the north, McAfee Street to the south, East Street to the east and Main Street to the west is owned by the City of Parkville. The property is rectangular in shape and is estimated at approximately 2.2 acres.

The prospective development sites located on the east side of Highway 9 from 1st Street north to 6th Street consists of nine individual parcels totaling approximately 3.66 acres. Existing land uses include a U.S. Post Office, former restaurant, two single family homes, Glen's Automotive, Four Seasons Lawn & Landscape and vacant land.

The prospective development sites located on the west side of Highway 9 from 1st Street north to 6th Street consists of twelve individual parcels totaling approximately 1.07 acres. Existing land uses include the French Bee Bakery, parking lot, nine single family homes and a 4-unit apartment building.

Downtown Parkville's three prospective commercial development sites were evaluated for their ability to support future retail development based on the following site selection criteria: visibility; accessibility; traffic volumes; parcel size requirements; level of direct competition and trade area demographics.

Visibility and Exposure

Visibility and exposure have a significant influence on a retail business' achievable retail sales volumes. All shopping center types and freestanding retailers should possess visibility via a major arterial street. National and regional big-box retailer, restaurant, convenience store and bank chains require major arterial frontage. Exposure is measured by the level of vehicular traffic past the retail property. The most desirable commercial properties benefit from highway or major arterial visibility and high adjacent traffic counts.

Properties along Highway 9 offer excellent major arterial visibility, satisfying the site exposure requirement of prospective shopping center and freestanding retailer sites. The property on Main Street also offers excellent visibility.

The vehicular traffic counts on arterials that flow past a commercial property are important when evaluating a potential retail development site, as higher traffic counts generally result in increased exposure and higher retail sales volumes. According to the Missouri Department of Transportation, during 2011 average daily traffic counts on Highway 9 were reported at 13,821 vehicles west of Interstate 635 and 10,550 vehicles south of Highway 45. These traffic volumes provide sufficient exposure to support retail uses.

The Missouri Department of Transportation did not report traffic counts on Main Street past the prospective development site, though given the level of surrounding development and the fact that Main Street terminates at the Missouri River, modest traffic counts are likely.

Accessibility

The larger the retail format the larger the serviced trade area. The Parkville transportation network features a mix of highways and major arterial streets as well as convenient proximity to Interstates 29, 435 and 635.

The properties located along Highway 9 benefit from superior direct site access as well as the connection with Highway 45 and Interstate 635.

The Main Street site possesses direct access from a major arterial street as well as regional access from Highway 9. The modest traffic counts on Main Street are representative of the reduced accessibility.

Parcel Size and Dimensions

Viable retail development formats for downtown Parkville’s prospective development sites include strip centers, freestanding shop space and mixed-use structures. Site requirements for major retail development formats as defined by the *International Council of Shopping Centers* are summarized in the table below.

Site Requirements by Shopping Center Format

Shopping Center Format	Building Area (Sq. Ft.)	Land Area (Acres)	Anchor Ratio*	Primary Trade Area**
Strip Center	5,000 - 25,000	1 to 3	0%	1-2 Miles
Neighborhood Center	30,000 - 100,000	5 to 12	30-50%	2-3 Miles
Community Center	100,000 - 350,000	10 to 40	40-60%	3-6 Miles
Super Community Center	250,000 - 500,000	25 to 50	50-70%	5-7 Miles
Power Center	250,000 - 600,000	25 to 80	75-90%	5-10 Miles
Lifestyle Center	300,000 - 700,000	30 to 80	75-90%	5-10 Miles
Notes: *Denotes the share of a shopping center's total space occupied by anchor tenants.				
**The geographic area from which 60 to 80% of the shopping center's sales originate.				
Source: International Council of Shopping Centers				

Strip shopping center sites typically range in size from 1 to 3 acres, requires a rectangular shape and an orientation towards the most prominent adjacent arterial. Freestanding pads sites capable of accommodating restaurant, convenience store and bank branch uses generally occupy 1.0+ acres. Individual “downtown” multi-story commercial buildings on zero lot line parcels can be constructed on lots as small as 0.07 acres. Mixed-use, multi-story structures could be built on lots as small as 0.25 acres.

The prospective development site located on the east side of Highway 9 from 1st Street north to 6th Street collectively totals approximately 3.66 acres and possesses the necessary dimensions to support strip center, freestanding retailer, downtown-style commercial buildings or mixed-use development.

The prospective development site located on the west side of Highway 9 from 1st Street north to 6th Street consists of twelve individual parcels totaling approximately 1.07 acres. Given the small lots, shallow lot depths and predominance of existing single family housing, potential retail formats include freestanding, single tenant buildings. The renovation and adaptive re-use of the existing single family homes for commercial use is a likely redevelopment format.

The surface parking lot bound by the rail road track to the north, McAfee Street to the south, East Street to the east and Main Street to the west is owned by the City of Parkville. The property is rectangular in shape and is estimated at approximately 2.2 acres, possessing the necessary site characteristics to support strip center, freestanding retailer, downtown-style commercial buildings or mixed-use development.

Trade Area Demographics

The extent and composition of retail sales are driven largely by population, age and income levels. The immediate trade area surrounding a retail business or shopping center has the greatest influence on retail sales. Therefore, the demographics of the [population surrounding downtown Parkville have a direct impact on the volume and composition of retail sales.

This report has defined the primary trade area for downtown Parkville as the geographic area within a 10-minute drive-time with the 15-minute drive-time making up the secondary trade area. Current primary and secondary trade area demographics are summarized in the table on the following page.

The primary trade area supports 49,264 residents and a median household income of \$56,907. The large adolescent and young adult population is sufficient for supporting the sales of such consumer goods as apparel and accessories; groceries; sporting goods; music; home electronics; eating and drinking places; and general merchandise. The large population ages 25 to 44 are in their principal consumer years, favors the consumption of hardware; furniture and home furnishings; home electronics; department stores; and eating and drinking places. The large senior population generates demand for medical goods and services. Over one-third of trade area households earn \$35,000 to \$74,999 per year which is attractive to category specific, big-box retailers. Meanwhile, 26.3 percent of primary trade area households earning \$100,000 and over per year represents a large potential market for luxury goods, entertainment and personal services.

The secondary trade area supports 241,529 residents and a median household income of \$43,114. The secondary trade area also possesses a large adolescent, young adult, family-age adults and senior population that generate demand for a wide range of retail goods and services.

These trade area consumption patterns and demographic characteristics bode well for the potential of both the City of Parkville and the downtown business district to support a diverse retail market.

Primary and Secondary Trade Area Demographics - 2012

Demographic Characteristic	Primary Trade Area	Secondary Trade Area
Total Population	49,264	241,529
Households	20,025	97,675
Population by Age		
0-9	6,472	36,144
10-19	6,708	30,853
20-24	2,862	17,349
25-34	6,394	39,237
35-44	6,347	30,789
45-54	7,721	32,954
55-64	6,600	27,342
65+	6,162	26,861
Median Age	38.6	34.2
Household Income		
Less than \$15,000	10.1%	16.1%
\$15,000 - \$24,999	8.8%	12.3%
\$25,000 - \$34,999	8.9%	11.6%
\$35,000 - \$49,999	15.4%	16.1%
\$50,000 - \$74,999	19.0%	18.9%
\$75,000 - \$99,999	11.7%	9.2%
\$100,000 - \$149,999	15.4%	10.2%
\$150,000 - \$199,999	6.3%	3.5%
\$200,000+	4.6%	2.3%
Average Household Income	\$76,683	\$58,720
Median Household Income	\$56,907	\$43,114
Per Capita Income	\$31,359	\$24,147

Source: ESRI Business Analyst

Direct Competition

In recent years several lifestyle and specialty centers featuring upscale shopping, dining and entertainment have been developed in the Northlands region of the Kansas City MSA, posing increased competition for downtown Parkville businesses. The most notable new retail competition includes the Villages at Burlington Creek, Briarcliff Village, Zona Rosa and The Shoppes at Boardwalk. Each shopping center is located less than six miles from downtown Parkville.

The Village at Burlington Creek is the closest competitor to downtown Parkville located just over three miles to the northeast on Highway 45. The property was purchased in 2012 and since the tenant mix has been repositioned to include specialty shops, restaurants and financial, healthcare and personal service businesses. Nine restaurants operate at Burlington Creek, the most notable including Bonefish Grill, Taco Bell, Quiznos Subs and Luna Azteca Mexican Grill. A Culvers and Swirl Wine Bar and Shoppe are scheduled to open. The Village at Burlington Creek represents formidable competition to downtown Parkville.

Conclusions

The historic character of downtown Parkville along with its mix of independently owned specialty shops and restaurants collectively serve as a tourism draw. Principal advantages of downtown as a retail location include its status as a specialty retail and dining destination, affordable building rents and property values, historic character, major community events and cooperative marketing and promotions.

A key in improving the business climate in downtown Parkville will be to increase the inventory of commercial space and level of business and customer activity. Prospective commercial development sites include: 1) surface parking lot on the east side of Main Street south of the rail road track; 2) east side of Highway 9 from 1st Street north to 6th Street; and 3) west side of Highway 9 from 1st Street north to 6th Street.

Based on standard site selection criteria, all three prospective downtown sites are viable retail development sites. Of the three, the superior site is located on the east side of Highway 9 north of 1st Street. This site offers superior access, visibility, exposure and the size to facilitate the development of several retail formats. The site on the west side of Highway 9 also boasts superior access, visibility and exposure; however, its smaller size and shallow lot depth place constraints on the supportable types of retail formats. Development of Highway 9 from 1st to 6th Streets would provide a much needed highway entry window for downtown and facilitate a broader range of goods and services businesses. Development of this section of Highway 9 would also provide a “bridge” more effectively connecting downtown Parkville with Park University.

The surface parking lot bound by the rail road track to the north, McAfee Street to the south, East Street to the east and Main Street to the west is ideal for extending commercial development on Main Street south of the rail road track as well as increase the inventory and critical mass of commercial space in the downtown core. The best suited retail development formats include downtown-style commercial buildings or mixed-use development.

Conclusions

Parkville supports two principal retail districts, including downtown along Main Streets and Parkville Commons at the intersection of Highways 9 and 45. Each retail district caters to a distinctive market niche with downtown focusing on destination specialty shops and restaurants and Parkville Commons satisfying the daily retail needs of local residents.

From 2003 through 2007 taxable retail sales for the City of Parkville grew by nearly 80 percent, reaching \$90 million. Consistent with metro-wide trends, during 2009 taxable sales in Parkville declined as a result of the national recession. Taxable sales rebounded 4.3 percent in 2010 to \$93 million. The upward trend in taxable retail sales continued into 2011 increasing by 2.7 percent. Taxable sales digressed in 2012 declining by 3.5 percent to \$92.1 million. For the first half of 2013 taxable retail sales in Parkville were down 0.8 percent over the first half of 2012. The recent declines in retail sales are an indication that Parkville is suffering from increased retail competition.

The inventory of ground floor retail space in downtown Parkville totals approximately 153,189 square feet, housing a mix of restaurants, art galleries, hair salons, antique shops, home furnishings, and gift and collectible stores. Parkville Coffeehouse, Rock Canyon Pizza, French Bee Bakery and the Farmers Market are major generators of customer traffic in downtown Parkville. Downtown offers a quaint historic charm that is reflected in the predominance of independently-owned businesses. As of the date of this report 13,207 square feet of retail space was available for lease in downtown Parkville, translating to an average vacancy rate of 8.6 percent. Lease rates for commercial space generally range from \$10 to \$13 per square foot.

Given downtown Parkville's historic character, unique tenant mix and central location businesses benefit from an expanded retail trade area. The primary market area encompasses the geographic area located within a 10-minute drive time with the secondary market area expanded to include a 15-minute drive-time. The tertiary market area incorporates the entire Kansas City MSA as well as out-of-town visitors.

Parkville's current pull factor of 1.154 suggests the City of Parkville is capturing retail sales at a rate equivalent to 15.4 percent above the state-wide average. This pull factor is proof of Parkville's high income levels and the ability of businesses to attract customers from outside the city. However, the well above average pull factor does not suggest that Parkville is over retailled and not capable of supporting additional retail space. Conversely, the estimated pull factor for the primary trade area of 0.506 indicates considerable leakage and the opportunity to support additional retail sales.

Downtown Parkville's modest inventory of retail space places a constraint on the ability to attract additional businesses and generate increased customer volumes and retail sales. A key in improving the business climate in downtown Parkville will be to increase the inventory of commercial space and level of business and customer activity. Prospective commercial development sites include: 1) surface parking lot on the east side of Main Street south of the rail road track; 2) east side of Highway 9 from 1st Street north to 6th Street; and 3) west side of Highway 9 from 1st Street north to 6th Street.

All three prospective downtown sites are viable retail development sites. Of the three, the superior site is located on the east side of Highway 9 north of 1st Street. This site offers superior access, visibility, exposure and the size to facilitate the development of several retail formats. The site on the west side of Highway 9 also boasts superior access, visibility and exposure; however, its smaller size and shallow lot depth place constraints on the supportable types of retail formats. Commercial development of Highway 9 from 1st to 6th Streets would provide a much needed highway entry window for downtown and facilitate a broader range of goods and services businesses. Development of this section of Highway 9 would also provide a “bridge” more effectively connecting downtown Parkville with Park University.

The surface parking lot bound by the rail road track to the north, McAfee Street to the south, East Street to the east and Main Street to the west is ideal for extending commercial development on Main Street south of the rail road track as well as increase the inventory and critical mass of commercial space in the downtown core. The best suited retail development formats include downtown-style commercial buildings or mixed-use development.

At a floor-to-area (“FAR”) of 0.25 to 0.40, the three prospective development sites could add approximately 75,000 to 120,000 square feet of new retail space. The current retail gap for downtown Parkville’s primary trade area of \$219.4 million can support approximately 800,000 to 975,000 square feet of additional occupied retail space. The primary trade area is forecast to generate demand for an additional 585,000 to 716,000 square feet of retail space by the year 2030. At a 7.5 percent capture, through 2030 downtown Parkville is estimated to absorb 103,875 to 126,825 square feet of retail space.

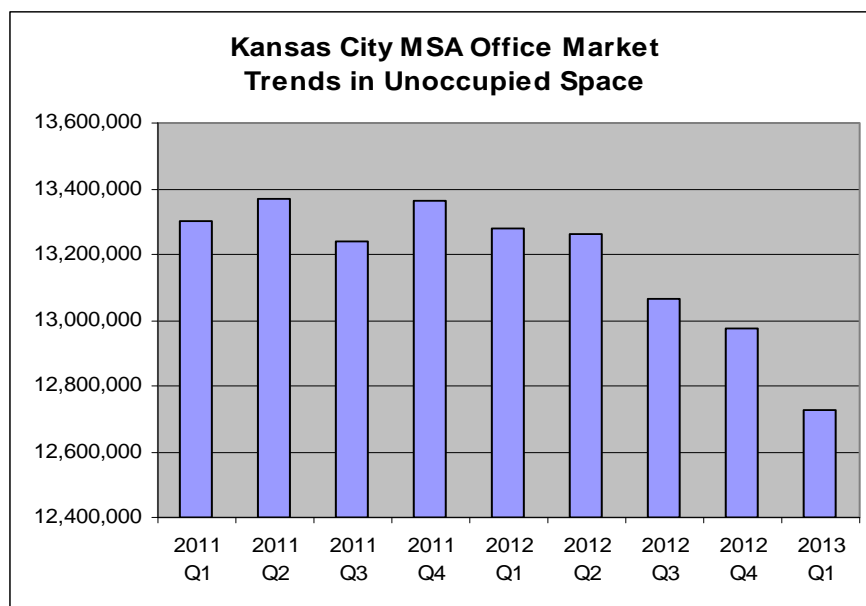
OFFICE MARKET ANALYSIS

This portion of the study evaluates directly competitive office market conditions impacting downtown Parkville, Missouri, by identifying downtown’s mix of office-related tenants and existing inventory of professional and medical office space. The study also forecasts Parkville’s long-term need for additional office space to determine the ability of the city to accommodate future office development as well as evaluated prospective development sites.

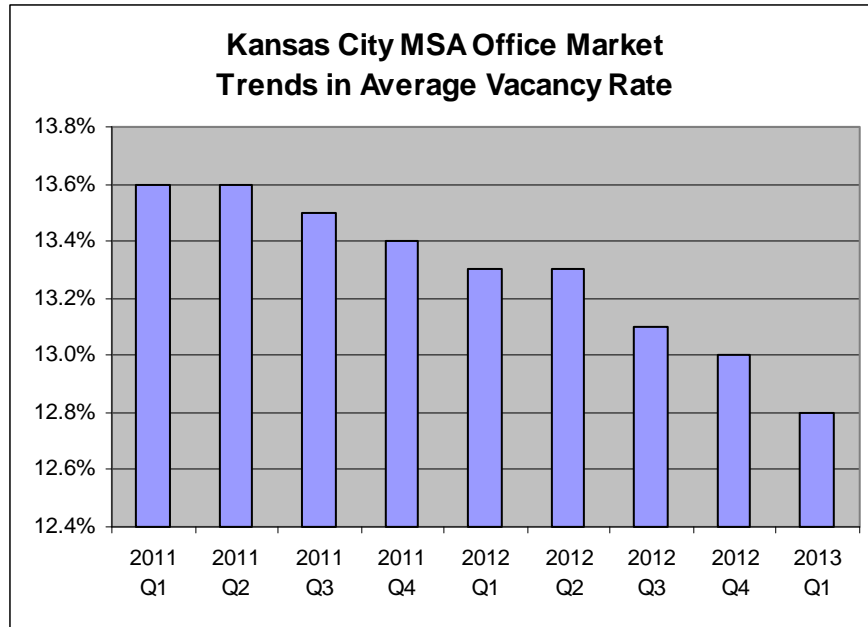
Metropolitan Kansas City Office Market

According to the *Kansas City Metro Area Office Market Report* published by Colliers International, as of the first quarter 2013 the Kansas City MSA office market consisted of 99.7 million square feet of leasable space in 1,879 properties. The current mix of office space includes 25.9 million square feet of Class “A” space, 59.8 million square feet of Class “B” space and 14.0 million square feet of Class “C” space. The urban office market supports 35.5 million square feet of office space and includes Downtown Kansas City with 27.4 million square feet of space and the Plaza/Midtown with 8.1 million square feet. The suburban market occupies 64.3 million square feet of office space led by South Johnson County (26.0 million square feet), North Johnson County (10.6 million) and Kansas City North (9.2 million square feet). The largest concentrations of suburban office space are located in areas possessing high income and education levels as well as freeway access.

As of the first quarter 2013, a reported 12.7 million square feet of office space was unoccupied in the Kansas City market yielding an average vacancy rate of 12.8 percent. Since the first quarter 2011 the Kansas City office market has remained overbuilt with the inventory of unoccupied space ranging from 12.7 million to 13.4 million square feet. The supply of unoccupied space peaked during the fourth quarter 2011 and has declined each of the past five quarters.



Net office space absorption over the past two years has rebounded in response to improving national and local economies. During 2011 net absorption of office space in the Kansas City market was reported at 572,320 square feet. Net absorption remained positive during 2012 with 544,663 square feet. During the first quarter 2013 net absorption totaled 248,847 square feet, up from -16,247 square feet during the first quarter 2012. The steady absorption and modest new construction has produced a gradual improvement in the vacancy rate from a high of 13.6 percent during the second quarter 2011 to 12.8 percent by the first quarter 2013.



As of the first quarter 2013, the 25.9 million square feet of Class “A” was operating at an average vacancy rate of 14.0 percent and average lease rate of \$19.70 per square foot. Nearly 1.6 million square feet of Class “A” was under construction. The 59.8 million square feet of Class “B” space was operating at an average vacancy rate of 13.0 percent and average lease rate of \$16.62 per square foot. The 14.0 million square feet of Class “C” space was operating at an average vacancy rate of 9.2 percent and average lease rate of \$12.80 per square foot.

Kansas City MSA Office Market Market Results by Product Class; 2013 Q1

Class	Inventory Sq. Ft.	Vacant Space	% Vacant	Net Absorption	U/C Sq. Ft.	Average Rent
A	25,920,284	3,635,474	14.0%	65,352	1,592,000	\$19.70
B	59,805,105	7,792,170	13.0%	142,307	56,190	\$16.62
C	14,049,839	1,297,371	9.2%	41,188	0	\$12.80
Totals	99,775,228	12,725,015	12.8%	248,847	1,648,190	\$17.11

Source: Colliers International.

Consistent with the past few quarters, several companies announced moves that involve relocation across the state line. The majority of recent tenant migration has involved moving from Missouri to Kansas as a result of the competitive tax incentives being offered in Kansas.

As the office market rebounds asking rental rates continue to increase. South Johnson County remains the hottest submarket where asking rents remain firm. Despite still high vacancy rates within the CBD, asking rates have started to rebound. As occupancy rates have improved over the past year landlords have begun to rein back tenant concessions and discounted lease rates.

During the first half of 2012 several new office buildings began construction as major local employers sought first generation office space to meet their needs. New office construction included Cerner Corporation’s 660,000 square foot Continuous Campus in Kansas City, Kansas; AMC Entertainment’s 127,000 square foot headquarters in Leawood, Kansas and the 150,000 square foot Teva Neuroscience building in Overland Park. As all of these projects continue towards their anticipated delivery dates, no additional construction announcements were made during the first quarter 2013. At the close of the first quarter 2013, nearly 1.6 million square feet of office space was under construction in the Kansas City area.

Competitive Office Market

This section of the report addressed competitive office market conditions directly impacting downtown Parkville, including an overview of the Kansas City North submarket, inventory of office space in downtown Parkville and a peer city downtown office tenant comparison.

Kansas City North Submarket

The Kansas City North submarket includes the portion of the Kansas City area situated north of the Missouri River. According to the *Kansas City Metro Area Office Market Report* published by Colliers International, as of the first quarter 2013 the Northland submarket consisted of 219 office property supporting a total inventory of 9.2 million square feet of leasable space. The current mix of office space includes 874,403 square feet of Class “A” space, 6.9 million square feet of Class “B” space and 1.5 million square feet of Class “C” space.

Kansas City North Submarket Market Results by Product Class; 2013 Q1

Class	Inventory Sq. Ft.	Vacant Space	% Vacant	Net Absorption	U/C Sq. Ft.	Average Rent
A	874,403	38,154	4.4%	0	0	\$21.90
B	6,894,852	1,045,963	15.2%	-17,767	0	\$16.16
C	1,475,613	171,927	11.7%	12,704	0	\$13.26
Totals	9,244,868	1,256,044	13.6%	-5,063	0	\$15.94

Source: Colliers International.

The principal locations for professional office space in the Kansas City North submarket are within the master planned business parks of Briarcliff and Tiffany Springs, both of which are located adjacent to freeways. Briarcliff located at the intersection of Highways 9 and 169 is considered the submarket's premier office location offering Class "A" space within a 238-acre upscale mixed-use development featuring specialty retail, full-service hotel, luxury apartments and custom homes. Briarcliff's inventory of Class "A" office space totals approximately 546,000 square feet operating at a 98 percent occupancy rate and an average lease rate of \$25.00 per square foot.

As of the first quarter 2013 the Kansas City North submarket operated at an above market average vacancy rate of 13.6 percent with nearly 1.3 million square feet of unoccupied office space. Class "A" space was operating at a 4.4 percent vacancy rate, followed by Class "C" space at 11.7 percent and Class "B" space at 15.2 percent. No new office space was under construction. The average lease rate of \$15.94 per square foot is up from \$15.77 per square foot during the second quarter 2012.

Given the large inventory of unoccupied office space and below metro norm lease rate, no near-term new speculative office construction in the Kansas City North submarket is warranted. Any new office development will be driven by the needs of specific tenants.

Downtown Parkville Office Market

Despite a highly education population no traditional office park has been developed in Parkville. Professional and personal service firms are generally located within commercial space at Parkville Commons and in individual buildings in downtown Parkville.

The current inventory of professional and medical space in downtown Parkville was compiled by consulting property records published by the Platte County Assessor as well as interviews with property owners. According to these sources a total of 14 properties located in downtown Parkville support approximately 54,119 square feet of office space. English Landing accounts for nearly 70 percent of downtown Parkville's inventory of office space. Much of downtown's inventory of office space is second floor space over ground floor retail. The table on the following page identifies existing office properties in downtown Parkville.

A reported 3,000 square feet of second floor office space is currently available for lease at English Landing for \$13.00 per square foot, translating into an average vacancy rate of 5.5 percent. The average rent for office space in downtown Parkville is \$12.00 per square foot. Professional businesses operating in downtown Parkville include financial services, insurance, real estate, attorney, counseling and dentist.

Two parcels remain available for future development at English Landing, each capable of supporting the construction of a 2-story, 12,000 square foot retail/office building.

Elsewhere in Parkville two notable projects are designed for future office development. National Village located along Highway 45 is zoned mixed-use and designed for 2- and 3-story commercial buildings adjacent to the golf course. The 37-acre Parkville Connection located just south of Parkville Commons is designed for 96,000 square feet of office and retail space.

Downtown Parkville Office Space Inventory

Property Address	# of Floors	Building Area	Office Space
102 Main Street	2	2,400	1,200
104 Main Street	2	2,720	2,720
106 Main Street	2	1,408	704
201 Main Street	1	6,000	3,000
301 Main Street	2	2,000	1,000
304 Main Street	1	1,403	1,403
407 Main Street	2	2,720	2,720
8 East Street	2	3,800	1,900
306 East Street	2	1,924	1,924
160-180 Main Street	1 & 2	20,121	10,060
170 English Landing Drive	2	12,000	6,000
171 English Landing Drive	2	12,000	6,000
173 English Landing Drive	2	19,137	9,568
180 English Landing Drive	2	12,000	6,000
Total Office Space			54,199

Source: Platte County Assessor and Canyon Research Southwest, Inc.

In addition to traditional professional office space in downtown Parkville, Park University operates Parkville Commercial Underground that offers approximately 385,000 square feet of leasable warehouse and office space. Opened in 1996, Parkville Commercial Underground is the only underground business park in Platte County. The facility now has 18 commercial tenants, including restaurant accounting professionals, light manufacturers, an engineering firm, wine wholesalers, an electronics manufacturer and companies that provide medical records storage and data warehousing.

Property amenities include 11- to 13-foot ceiling heights, loading docks, air conditioning, security and underground parking. Utility cost savings can be as much as 65 percent since heating and cooling occur naturally. Lease rates are much lower than surface rates, ranging from \$3.00 to \$6.00 per square foot gross depending on the use and tenant build-out. The Parkville Commercial Underground can accommodate large tenants with 35,502 square feet of space current available for lease, including 5,502 and 30,000 square foot suites. Tenants can benefit from a direct relationship with Park University, a unique arrangement not offered by traditional speculative office space.

The Parkville Commercial Underground is considered unconventional office space and isn't viewed as directly comparable to existing office space in the core of downtown Parkville. New conventional office space built in downtown Parkville won't be considered directly competitive given the nature, design and large suite sizes offered at the Parkville Commercial Underground. Given that downtown office space and the Parkville Commercial Underground service distinctive markets they could both co-exist and support each other.

Peer City Downtown Service Business Tenant Comparisons

Downtown businesses were inventoried along Main, East and Mill Streets in an effort to quantify the mix of retailers and service businesses. A total of 24 professional, medical and personal service businesses currently operate in downtown Parkville. The largest professional firm is EShipping which is located within the English Landing Center and employs 90 workers.

Downtown Parkville's business profile was compared to peer city downtowns in an attempt to identify prospective professional and personal service businesses and development opportunities. Peer cities selected for the analysis include Atchison, Weston, Lee's Summit, Independence and Liberty.

The table on page 55 provides a summary of professional, medical and personal service businesses operating in the downtowns of each peer city. Based on this comparison analysis, prospective service businesses for downtown Parkville have been identified and include:

- Financial Services
- Account & Tax Services
- Insurance
- Real Estate
- Architect
- Attorney
- Physical & Massage Therapy
- Fitness/Wellness
- Photography

Peer City Downtown Service Business Tenant Comparisons

Service Business Type	Parkville	Weston	Atchison	Lee's Summit	Independence	Liberty	Prospective Businesses
Financial Services	3		1	3		1	X
Accountant / Tax Services			1	3	1	1	X
Insurance	2		1	4	1	1	X
Real Estate	1		2	3	1		X
Architect				1		1	X
Travel Agency			1	1			
Bank	1		6	2	1	1	
Attorney	1		4	11	4	19	X
Bail Bonds			1			1	
Communications / Technology			2	3			
Newspaper			1	2		1	
Hotel / B&B	1	3			1		
Membership Social Clubs	1	2	1				
Optical			2			1	
Dry Cleaners			1				
Shoe Repair						1	
Physical / Massage Therapy				4	1		X
Fitness / Wellness			5	1	1	2	X
Tanning Salon			1				
Healthcare			9				
Counseling	2						
Dentist	1		1	1			
Animal Hospital							
Dance Studio	1		1	1		1	
Photography			1	5	1	1	X
Marketing	2						
Car Counselors	1						
Funeral Home	1						
Lawn Care & Landscaping	1						
Printing / Copies			1	1	1		
Plumber			1				
Security	1						
Auction House	1						
Express Delivery Service	1						
Educational Tutoring / Training	1			1	1		
Car Wash							
Auto Repair	1	1	1				
Totals	24	6	45	47	14	32	

Forecast Office Space Demand

Professional office space demand projections for both Platte County and the City of Parkville through the year 2030 provide an understanding of future market conditions directly impacting the feasibility of new office space development in downtown Parkville.

The demand for professional office space is closely correlated with expansion in office space using employment sectors. Future demand for professional office space was forecast utilizing an occupational employment-driven model. This model was designed using the variables of increased employment in categories of economic activity typically associated with demand for office space and average space requirements per employee. A share of regional demand is assigned to the submarket (and specific project) on the basis of location, competition, access, project scale, etc.

The U.S. Department of Labor defines office employment as jobs in the information, financial activities, and professional and business services industries. According to the *County Business Pattern* published by the U.S. Census Bureau, as of July 2011 employment in Platte County for the office using sectors of information; finance, insurance and real estate; professional, scientific and technical services; administrative and support services; and management was reported at 10,989 jobs, or 29.1 percent of total employment. Meanwhile, health and social assistance sector employment in 2011 was reported at 3,292 jobs, or 8.7 percent of total employment.

Platte County Employment Trends by Sector; 1998-2011

Industry Classification	2011	1998	Change
Total Employment	37,732	33,722	4,010
Construction	1,052	1,319	-267
Manufacturing	2,420	2,160	260
Wholesale trade	1,665	2,090	-425
Retail trade	6,076	2,677	3,399
Transportation and warehousing and utilities	2,348	6,394	-4,046
Information	487	433	54
Finance, insurance, real estate and rental and leasing	4,107	5,022	-915
Professional, scientific and technical services	1,583	999	584
Administrative and support and waste management services	3,810	2,410	1,400
Management of companies	1,002	787	215
Health and social assistance	3,292	2,182	1,110
Educational services	1,785	1,646	139
Accommodation and food services	6,028	3,718	2,310
Other services (except public administration)	1,708	1,386	322

Source: U.S. Census Bureau.

According to the *County Business Pattern*, total employment for Platte County rose from 33,722 jobs in 1998 to 37,732 jobs by 2011, an increase of 4,010 jobs, or 11.9 percent. Total employment in Platte County increased at an average annual rate of 0.9 percent from 1998 to 2011. With the continued expansion of the Kansas City MSA, in the future employment growth for Platte County is anticipated to accelerate.

From 1998 through 2011, total employment for office using sectors in Platte County increased by 1,338 jobs, or 13.9 percent. Meanwhile, healthcare-related employment increased by 1,110 jobs, or 50.9 percent.

Based upon historic employment trends and population projections published by the U.S. Census Bureau and Missouri Economic Research & Information Center, job growth for Platte County is projected at 6,100 total jobs from 2012 to 2030. Office-related employment is forecast to account for 30 to 35 percent of total job growth. These capture rates translate into office-related employment growth of 1,830 to 2,135 jobs from 2013 through 2030.

Office space demand created by the future growth in office-related employment was forecast by applying standard job creation ratios outlined in the *Development Impact Assessment Handbook* published by the Urban Land Institute (“ULI”) and per capita space requirements currently being supported in the Kansas City office market. The *Development Impact Assessment Handbook* publishes a job creation rate of 1.0 job per 250 square feet of office space. Meanwhile, the Kansas City MSA currently supports 87.1 million square feet of occupied office space and 254,464 office-related jobs, translating into a per capita job creation rate of 1.0 job per 342 square feet of office space, which includes vacant space. Therefore, this report utilized the more conservative per capita job creation rate of 1.0 job per 250 square feet of occupied office space. These job creation rates account for both owner-occupied and speculative office space.

Based on this employment-driven model, from 2013 through 2030, Platte County is estimated to absorb approximately 457,500 to 533,750 square feet of professional office space. Parkville’s ability to capture office space demand will be based on further population growth and the population’s high education levels. Downtown Parkville is forecast to capture 15 percent of Platte County’s office-related employment growth through 2030. Therefore, downtown Parkville is estimated to absorb 68,625 to 80,000 square feet of professional office space through the year 2030.

Office Space Demand Projections Platte County, Missouri; 2013-2030

Timeframe	Office - Related Job Growth	Space Conservative	Demand Optimistic
2013 – 2030	1,830 – 2,135	457,500	533,750
Totals		457,500	533,750
Annual Average		25,417	29,653

Source: Canyon Research Southwest, Inc.

Evaluation of Prospective Office Sites

A feasible office building site possesses the following characteristics: excellent location and access; proximity to a large and diverse labor pool; appropriate parcel size and shape; and compatibility with surrounding land uses. Suburban office development tends to gravitate to convenient freeway locations and/or mixed-use environments that provide the needed support services (i.e., restaurants, retail goods, lodging and entertainment) and prestigious business image. Standard site selection criteria utilized by office developers and tenants are summarized in the table below.

Standard Office Site Selection Criteria

Site Characteristics
Zoning compliance
Parcel size and dimensions
Availability of utilities and information technology
Site visibility and exposure
Context of adjacent land uses
Proximity to freeways, major arterials, public transportation and airport
Proximity to customers
Proximity to downtown or mixed-use urban environment
Availability of parking
Presence of existing office development
Safe neighborhood
Land and off-site infrastructure costs
Achievable rental rates
Local Amenities
Community identity and image
Availability of a diverse labor force
Proximity to executive housing
Availability of support services such as banks, post office, office supply stores, etc.
Availability and quality of restaurants, hotels and off-site meeting space
Proximity to fitness centers and other recreational amenities
Accessibility to day care services

Parkville’s competitive advantages in supporting future professional office development include its highly educated population; convenient access to a large and diverse labor force; supply of executive housing; high quality of life; availability of support services and availability of suitable development sites. Parkville’s competitive disadvantages include its small size, absence of an Interstate freeway and a modest inventory of existing office space.

Prospective office development sites in downtown Parkville evaluated in this section of the report include: 1) surface parking lot on the east side of Main Street south of the rail road track; 2) east side of Highway 9 from 1st Street north to 6th Street; and 3) west side of Highway 9 from 1st Street north to 6th Street.

The downtown area serves as Parkville's primary office location supporting approximately 54,000 square feet of professional and medical office space. As a prospective location for future office development downtown Parkville offers the following favorable location characteristics: 1) historic character of Main Street; 2) adequate zoning and public infrastructure; 3) an established identity; 4) presence of a downtown Post Office and Park University; 5) close proximity to executive housing and 6) convenient regional access via Interstates 29, 435 and 635.

As a prospective location for future office development downtown Parkville is hampered by the absence of direct highway access and exposure, modest availability of business support services (i.e., lodging, meeting space, banks, restaurants, day care and office supply stores), small inventory of existing office stock, modest rental rates and limited availability of development sites.

Rental rates for existing office space in downtown Parkville are affordable which may hamper near-term financially feasible office development. With a limited inventory of vacant land, prospective development sites will have to be manufactured by purchasing and redeveloping underutilized properties.

Main and McAfee Streets

The surface parking lot bound by the rail road track to the north, McAfee Street to the south, East Street to the east and Main Street to the west is owned by the City of Parkville. The property is rectangular in shape and is estimated at approximately 2.2 acres.

As a prospective office development site the surface parking lot on the northeast corner of Main and McAfee Streets offers the following favor site characteristics: 1) adequate parcel size and dimensions; 2) availability of infrastructure; 3) major arterial access and visibility; 4) proximity to English Landing; 5) ability to accommodate on-site parking; 6) Main Street address and 7) location within an urban mixed-use setting.

The Parkville Master Plan designates the site for Parks & Open Space. Therefore, future office use of the site will require an amendment to the Master Plan and a zoning change. The site is also located within the flood plain which will require site and building modifications.

East Side of Highway 9

The prospective development sites located on the east side of Highway 9 from 1st Street north to 6th Street collectively consist of nine individual parcels totaling approximately 3.66 acres. Existing land uses include a U.S. Post Office, former restaurant, two single family homes, Glen's Automotive, Four Seasons Lawn & Landscape and vacant land.

As a prospective office development site the properties located on the east side of Highway 9 between 1st and 6th Streets offer the following favor characteristics: 1) adequate zoning compliance; 2) adequate parcel size and dimensions to support large-scale mixed-use development; 3) availability of infrastructure; 4) access and visibility via Highway 9; 5) proximity to Park University; and 6) ability to accommodate on-site parking.

The Parkville Master Plan designates the site as a Mixed-Use District which legally permits professional and medical office uses.

A portion of the site is located within the flood plain which will require site and building modifications.

West Side of Highway 9

The prospective development site located on the west side of Highway 9 from 1st Street north to 6th Street consists of twelve individual parcels totaling approximately 1.07 acres. Existing land uses include the French Bee Bakery, parking lot, nine single family homes and a 4-unit apartment building.

As a prospective office development site the properties located on the west side of Highway 9 between 1st and 6th Streets offer the following favor characteristics: 1) adequate zoning compliance; 2) availability of infrastructure; 3) access and visibility via Highway 9; 4) proximity to Park University; and 5) ability to accommodate on-site parking.

The Parkville Master Plan designates the site as a Mixed-Use District which legally permits professional and medical office uses.

The street right-of-way patterns and shallow lot depths for the properties fronting the west side of Highway 9 will limit the potential to accommodate large-scale mixed-use development. Likely development scenarios include the adaptive re-use of the existing residential structures or razing current structures to facilitate the construction of single-tenant commercial buildings or multi-family housing.

The portion of the site located south of 3rd Street is within the flood plain which will require site and building modifications.

Conclusions

Over the coming years as Parkville continues to grow the demand for professional office space will materialize. As a professional office location downtown Parkville benefits from its historic character, adequate zoning and public infrastructure, established identity, presence of Park University, close proximity to executive housing and convenient regional access via Interstates 29, 435 and 635.

Three prospective future office development sites have been identified for downtown Parkville, including: 1) surface parking lot on the east side of Main Street south of the rail road track; 2) east side of Highway 9 from 1st Street north to 6th Street; and 3) west side of Highway 9 from 1st

Street north to 6th Street. Each prospective development site is within the flood plain which will require site and building modifications. The properties along the east side of Highway 9 are viewed as the premier location, benefitting from excellent highway access and exposure, location adjacent to Park University and the ability to accommodate large-scale, mixed-use development.

Conclusions

Despite a highly educated population no office park has been developed in Parkville. Professional and personal service firms are generally located within commercial space at Parkville Commons and in individual buildings in downtown Parkville. As a professional office location downtown Parkville benefits from its historic character, adequate zoning and public infrastructure, established identity, presence of Park University, close proximity to executive housing and convenient regional access via Interstates 29, 435 and 635.

The current inventory of professional and medical space in downtown Parkville totals just 54,119 square feet. A total of 24 professional, medical and personal service businesses currently operate in downtown Parkville, led by financial services, insurance, real estate, attorney, counseling and dentist. English Landing accounts for nearly 70 percent of downtown's inventory of office space. Much of downtown's inventory of office space is second floor space over ground floor retail. A reported 3,000 square feet of second floor office space is currently available for lease at English Landing for \$13.00 per square foot, translating into an average vacancy rate of 5.5 percent. The average rent for office space in downtown Parkville is \$12.00 per square foot.

According to the *County Business Pattern* published by the U.S. Census Bureau, as of July 2011 employment in Platte County for the office using sectors of information; finance, insurance and real estate; professional, scientific and technical services; administrative and support services; and management was reported at 10,989 jobs, or 29.1 percent of total employment. From 1998 through 2011 office-related employment in Platte County increased by 1,338 jobs, or 13.9 percent.

From 2013 through 2030, Platte County is estimated to absorb approximately 457,500 to 533,750 square feet of professional office space. Parkville's ability to capture office space demand will be based on further population growth and the population's high education levels. Parkville is forecast to capture 15 to 20 percent of Platte County's office-related employment growth through 2030, translating into the absorption 68,625 to 106,750 square feet of professional office space.

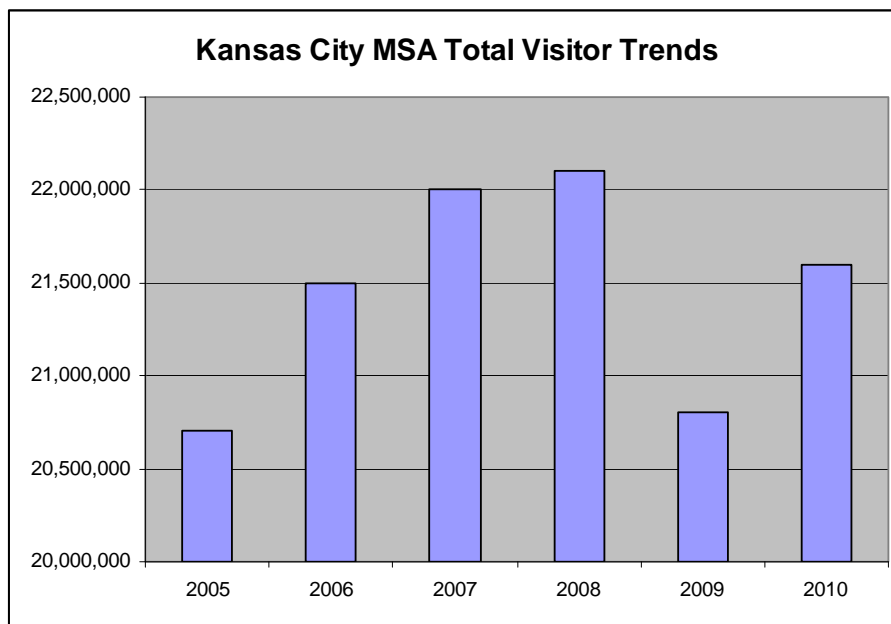
Three prospective future office development sites were identified in downtown Parkville, including: 1) surface parking lot on the east side of Main Street south of the rail road track; 2) east side of Highway 9 from 1st Street north to 6th Street; and 3) west side of Highway 9 from 1st Street north to 6th Street. Each prospective development site is within the flood plain which will require site and building modifications. The properties along the east side of Highway 9 are viewed as the premier location, benefitting from excellent highway access and exposure, location adjacent to Park University and the ability to accommodate large-scale, mixed-use development.

HOTEL MARKET ANALYSIS

Existing lodging in downtown Parkville, Missouri is limited to the Main Street Inn. This section of the report evaluates the market potential for developing additional hotel properties in downtown Parkville, Missouri. Tourism and competitive hotel market trends are discussed.

Kansas City Tourism Market Overview

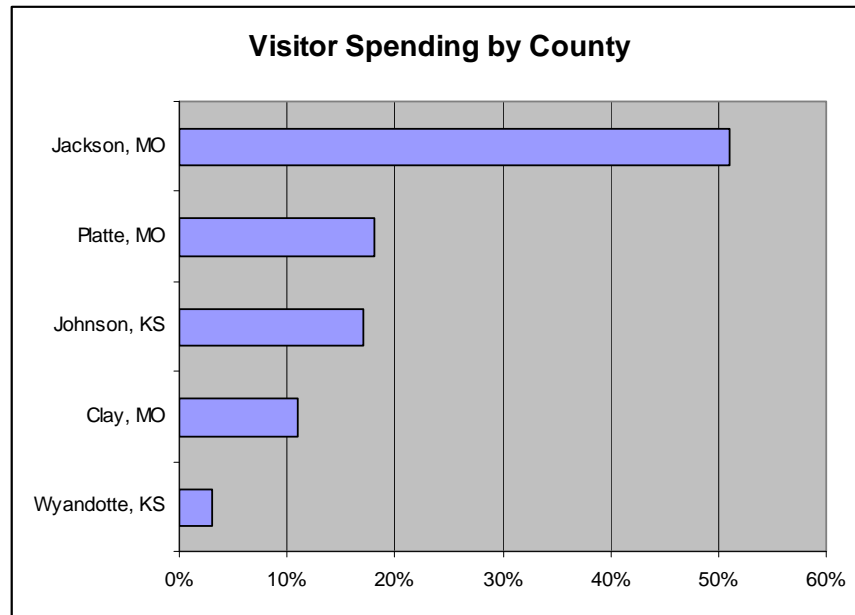
Parkville is located within the Kansas City MSA which consists of the Counties of Jackson, Clay, Platte, Johnson and Wyandotte. According to the Kansas City Convention & Visitors Bureau out-of-town visitation to the Kansas City area grew steadily from 2005 to 2008 reaching a high of 22.1 million visitors. Due largely to a weakening national economy, out-of-town visitation declined by 5.9 percent in 2009 to 20.8 million visitors. In 2010, out-of-town visitation to the Kansas City MSA rebounded to an estimated 21.6 million visitors, up 3.7 percent from 2009. As the national economy improves both leisure and business travel to the Kansas City MSA is expected to continue to improve.



During 2010, out-of-state (defined as living outside of Kansas and Missouri) and international visitors accounted for an estimated 52.6 percent of all visitors to the Kansas City area. Leading places of origin for visitors to Kansas City included Oklahoma (6.0%); Nebraska (5.1%); Iowa (5.1%) and Texas (4.8%).

According to the *2010 Economic Impact Study & Visitor Profile* prepared by Reach Market Planning, during 2010 tourism expenditures in the Kansas City MSA increased by 6.1 percent to \$2.57 billion. Tourism expenditures for the year were led by lodging at \$728 million, food and beverage at \$596 million, shopping at \$492 million and recreation at \$341 million.

During 2010 the State of Kansas captured just 20 percent of total visitor spending in the Kansas City MSA with Missouri communities garnering 80 percent. Jackson County, Missouri captured 51 percent of total visitor spending for 2010, or \$1.34 billion. Parkville is located in Platte County, Missouri which garnered 17.9 percent of total visitor spending, or \$478.7 million.



Tourism’s total economic impact in 2010 on the Kansas City MSA was estimated at \$4.3 billion. Jackson County accounted for half of tourism’s local economic impact with \$2.2 billion, followed by Platte County at \$762 million (18%), Johnson County at \$731 million (17%), Clay County at \$484 million (11%) and Wyandotte County at \$144 million (3%).

According to the *2010 Economic Impact Study & Visitor Profile* prepared by Reach Market Planning, during 2010, nearly 18 million leisure travelers visited the Kansas City MSA with more than 8.6 million staying overnight. Kansas City also hosted 1.25 million overnight business travelers. The average per person expenditure of an overnight business traveler to Kansas City was \$208 per day compared with \$110 daily per overnight leisure traveler. The average length of stay was 2.98 nights with the overnight market growing more affluent with younger middle-to-upper class families and affluent older adults. For overnight leisure travelers the average party size was 2.73 persons, including 2.14 adults and 0.59 children. Families accounted for an estimated 30 percent of all travel parties to Kansas City. The average age of a visitor to Kansas City was 44.5 years. An estimated 84 percent of overnight leisure travelers arrived to Kansas City by automobile while 47 percent stayed in a hotel.

Kansas City is a regional tourist and family destination boasting a wide selection of shopping and dining and host of sporting, gaming, recreational and cultural attractions. Major family and cultural venues include Worlds of Fun/Oceans of Fun theme park, the Science City at Union Station, Kansas City Zoo, Nelson-Atkins Museum of Art and American Jazz Museum. During the first half of 2012, both Sea Life Kansas City Aquarium and Legoland Discovery opened within Crown Center. Major attractions operating in the Kansas City MSA are listed in the table on page 64.

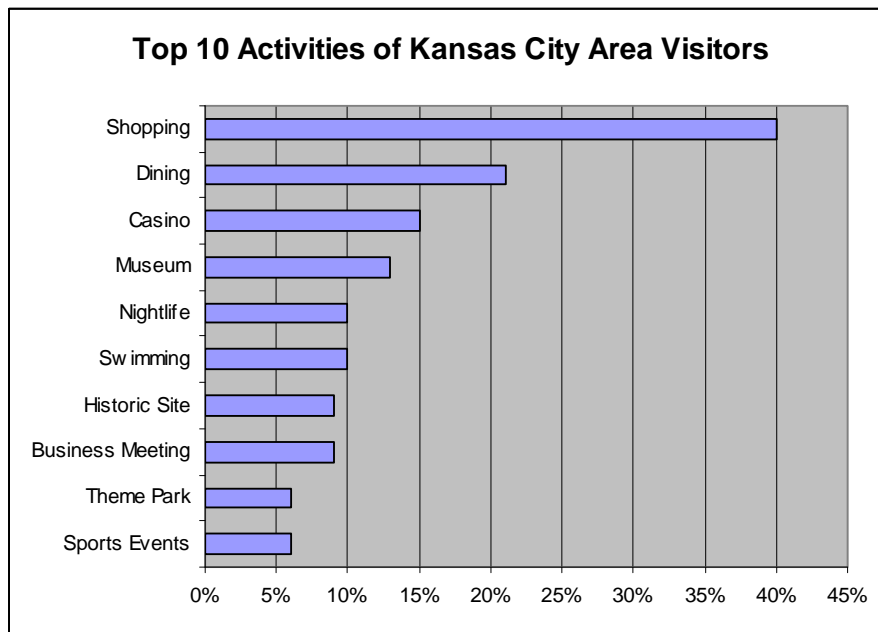
In recent years several high-profile entertainment attractions constructed in the Kansas City MSA have produced a measurable increase in tourism visitation. New tourism attractions on the Missouri side include the \$325 million Kauffman Center for the Performing Arts, \$200 million expansion to the Nelson-Atkins Museum of Art and 18,500-seat Sprint Arena and adjacent Kansas City Power & Light District featuring a nine-block area of downtown with restaurants, entertainment venues, shopping and offices. The Sealife Aquarium and LegoLand Discovery Center opened in 2012 at Crown Center.

New tourism attractions on the Kansas side of the metropolitan area include Schlitterbahn Vacation Village and Village West.

Kansas City Area Major Attractions

Attraction	Location
Art & Cultural Attractions	
American Heartland Theatre & Coterie Theatre	Kansas City, Missouri
Kansas City Repertory Theatre	Kansas City, Missouri
Kauffman Center for the Arts	Kansas City, Missouri
Kemper Museum of Contemporary Art	Kansas City, Missouri
Lyric Theatre (Kansas City Ballet)	Kansas City, Missouri
Nelson-Atkins Museum of Art	Kansas City, Missouri
Nerman Museum of Contemporary Art	Overland Park, Kansas
Family Attractions	
Kansas City Zoo	Kansas City, Missouri
Oceans of Fun / Worlds of Fun	Kansas City, Missouri
Schlitterbahn	Kansas City, Kansas
Science City @ Union Station	Kansas City, Missouri
Sports Venues	
Arrowhead Stadium (Kansas City Chiefs)	Kansas City, Missouri
Community America Park (Kansas City T-Bones)	Kansas City, Kansas
Explorers Stadium (Kansas City Explorers)	Kansas City, Missouri
Independence Events Center (Missouri Mavericks)	Independence, Missouri
Kansas Speedway	Kansas City, Kansas
Kauffman Stadium (Kansas City Royals)	Kansas City, Missouri
Livestrong Sporting Park (Sporting KC)	Kansas City, Kansas
National Collegiate Basketball Hall of Fame	Kansas City, Missouri

According to the *2010 Economic Impact Study & Visitor Profile* prepared by Reach Market Planning, the top activities of overnight leisure visitors to Kansas City included shopping (40%); dining (21%); casino (15%); museum (13%); and nightlife (10%). The high visitor counts, tourist characteristics and preferred activities provide the opportunity for the Kansas City MSA to support upscale retail, restaurants, entertainment venues and attractions.



People living in Kansas and Missouri account for more than 45 percent of all annual overnight tourism to the Kansas City area, followed by Nebraska residents at 11 percent and Iowa residents at 7 percent. Oklahoma and Texas each provide approximately 4 percent of overnight visitation. Overall, about one-third of overnight visitors originate between 200 and 300 miles away and over one-third travel more than 500 miles. Families account for 30 percent of travel volume to the Kansas City area. **These visitation patterns bode well for the opportunity of downtown Parkville to attract out-of-state visitors, particularly heritage tourists.**

Competitive Hotel Market

As stated earlier in the report, existing lodging in downtown Parkville, Missouri is limited to the Main Street Inn, a 4-room bed & breakfast located at 504 Main Street. Given the presence of Park University and the tourism draw of downtown Parkville, this section of the report provides a survey of existing hotels operating in Northwest Kansas City north of the Missouri River. The table on the following page provides an inventory of existing hotels in the competitive market area segmented by product type (i.e., full-service, extended stay, limited-service, etc.).

Thirty-one hotel properties operate within Northwest Kansas City totaling 3,851 guest rooms. The competitive hotel properties are located primarily at major Interstate 29 interchanges in close proximity to the Kansas City International Airport and cater to leisure and business travelers.

Inventory of Northwest Kansas City Hotels

Hotel Property	Year Built	# of Rooms	Pool	Fitness Center	Meeting Space	Business Center	Dining	Daily Rate
Full-Service Hotels								
Marriott Kansas City Airport	1974	384	X	X	5,400 SF	X	X	\$159
Hilton Kansas City Airport	1973	347	X	X	21,000 SF	X	X	\$119
Embassy Suites Kansas City Airport	1989	237	X	X	10,656 SF	X	X	\$179
Holiday Inn Kansas City Airport	2006	141	X	X	1,550 SF	X	X	\$82
Four Points by Sheraton	1974	200	X	X	5,000 SF	X	X	\$99
Extended Stay/All Suites Hotels								
Marriott Residence Inn	2007	152	X	X	3,000 SF	X		\$159
Hyatt Place	1999	134	X	X	1,586 SF	X		\$107
Drury Inn & Suites	1998	122	X	X	1,822 SF	X		\$130
Homewood Suites	1997	116	X	X	1,657 SF	X		\$139
Candlewood Suites	2010	88		X		X		\$83
Extended Stay America	1997	109						\$51
Extended Stay America @ Tiffany Springs		89	X	X				\$60
Limited-Service Hotels								
Fairfield by Marriott	1996	129	X	X	563	X		\$119
Hampton Inn	1987	120	X	X	625	X		\$119
Holiday Inn Express	1997	109	X	X	1,200 SF	X		\$111
La Quinta		80	X	X	312 SF	X		\$83
Marriott Courtyard Kansas City Airport	1990	149	X	X	5,368	X		\$129
Marriott Courtyard @ Briarcliff	2012	134	X	X		X		\$139
Quality Suites		73		X	195 SF	X		\$65
Economy/Budget Hotels								
Best Western		80	X	X	1,200 SF	X		\$75
Comfort Inn	2010	85	X	X	308 SF	X		\$70
Days Inn	2000	51	X			X		\$45
Econo Lodge	1988	59						\$45
Microtel	1999	82			X	X		\$45
Motel 6 Kansas City North		85	X					\$52
Sleep Inn	1997	104	X	X		X		\$55
Super 8 Kansas City Airport	1987	41				X		\$49
Super 8 Platte City		45	X			X		\$50
Super 8 Riverside		48	X		X	X		\$60
Specialty Hotels								
Argosy Casino Hotel & Spa		258		X	X	X	X	\$124
Total Guest Rooms		3,851						

Source: Canyon Research Southwest, Inc.; October 2013.

Northwest Kansas City has five full-service hotels totaling 1,306 guest rooms. The competitive hotels are all located near the airport and include the Embassy Suites, Four Points, Hilton, Holiday Inn and Marriott brands. Current base daily rates range from \$82 to \$179. Full-service hotels are generally upscale full-service facilities with a large volume of full-service accommodations and a variety of on-site amenities such as an on-site restaurant and lounge, meeting space and conference facilities, fitness center, business center and swimming pool. Full-service hotels cater primarily to business and group travelers.

Eight extended stay hotels are located within Northwest Kansas City totaling 810 guest rooms. Candlewood Suites and Extended Stay America are modest properties garnering current daily rates of \$51 to \$83. Homewood Suites and Residence Inn by Marriott are higher quality hotels catering to business travelers and supporting current daily rates of \$139 to \$159. Extended stay hotels provide a residential-like living environment aimed at business travelers on extended assignments, families in the midst of relocation and others in need of temporary housing. Hotels offer such residential amenities as a full kitchen, living area and laundry facilities. Such property amenities as swimming pools, meeting space and business center are seldom offered by extended stay hotels. Discounts are generally offered for extended stays, generally beginning at one week.

Seven limited-service hotels are located within Northwest Kansas City totaling 794 guest rooms. Limited-service hotel brands include Fairfield by Marriott, Hampton Inn, Holiday Inn Express, La Quinta, Marriott Courtyard and Quality Suites. Current base daily rates range from \$65 to \$139. Limited service hotels often lack an on-site restaurant but in return may offer a limited complimentary food and beverage service such as a continental breakfast. In today's market a limited service hotel's range of amenities might include a business center, a fitness room, guest laundry facilities, a market pantry, an indoor and/or outdoor pool and whirlpool, and a small meeting room.

Northwest Kansas City has ten budget/economy hotels totaling 680 guest rooms. Hotel properties range in size from 41 to 104 rooms. The competitive hotels include a Best Western, Comfort Inn, Days Inn, EconoLodge, Microtel, Motel 6, Sleep Inn and Super 8. Current base daily rates range from \$45 to \$75. Economy and budget hotels are small to medium-sized properties that offer a very limited amount of on-site amenities and often only offer basic accommodations with little to no services. Budget and economy hotels cater to budget-minded travelers seeking a "no frills" accommodation.

The 258-room Argosy Casino Hotel & Resort and 48-room Super 8 Riverside are the closest hotel properties to downtown Parkville, both located just five miles to the southeast at the intersection of Interstate 635 and Highway 9 in Kansas City.

The Argosy Casino Hotel & Resort caters to leisure and business travelers by providing five restaurants, meeting facilities, spa, gaming and entertainment. The Super 8 Riverside is a budget/economy hotel located adjacent to the Argosy Casino. Property amenities are limited to an outdoor pool, guest laundry, meeting room and business services.

Earlier in the report several peer city downtowns were evaluated to assist in identifying potential businesses for downtown Parkville. Of the peer cities selected only Weston and Independence possessed hotels. Hotels in Weston, Missouri include the historic 47-room Saint George Hotel opened in 1845, 4-room Weston Landing and 4-room Hatchery House B&B. Downtown

Weston's ability to generate hotel room demand stems from its rural destination location, many festivals and presence of such attractions as the Weston Brewing Company and Pirtle Winery. Ophelia's Restaurant & Inn is an 8-room boutique hotel operating in downtown Independence, Missouri.

Evaluation of Prospective Hotel Sites

This section of the report evaluates the potential of downtown Parkville to facilitate future hotel development. Given the site requirements for major chain hotels two prospective sites were considered, including: : 1) surface parking lot on the east side of Main Street south of the rail road track and 2) east side of Highway 9 from 1st Street north to 6th Street.

A. Is the site accessible from major highways and arterial roadways?

Freeway and/or major arterial street access is particularly important for budget, economy and limited-service hotels, providing for convenient access and visibility by guests and the ability to capture drive-by traffic. Access is less critical for full-service, luxury and boutique hotels as they tend to be destination locations.

The Main Street site's access and visibility via a major arterial is insufficient to accommodate development of a budget, economy or limited-service hotel. Given the low traffic counts on Main Street and the fact it dead-ends at the Missouri River, a boutique hotel is the most viable format.

The Highway 9 site offers improved access and visibility via a highway. However, Highway 9 serves as more of a commuter roadway than for transient out-of-town traffic.

B. Is the potential hotel site near and accessible to hotel room demand generators?

A feasible hotel site is located in close proximity to room demand generators. Potential room demand generators include freeways, employment centers, sporting venues, tourist destinations and recreational facilities.

Lodging demand for both prospective sites will originate from two sources, including out-of-town visitors to downtown Parkville and Park University in the form of off-campus students, parents, visiting professors and guests to campus events.

Park University is a private institution of higher education based in Parkville, Missouri and has 40 campus center locations in 20 states, including three campuses in the Kansas City area (downtown Kansas City, Independence and Parkville) and a campus center in Austin, Texas. Most of the satellite campuses are on or near United States Air Force bases. Park University also offers classes online. Sixty-three undergraduate, Graduate and professional degree programs are offered in liberal arts and sciences, public affairs, music, business and education. Enrollment at Park University's Parkville campus is approximately 1,700 students with approximately 22,000 students enrolled in the extended system and online. The university has a significant economic impact of Parkville and the greater Kansas City area with an annual operating budget of

approximately \$100 million. One of the principal goal's in Park University's new Master Plan is to support enrollment of 2,150 students with 750 students living on-campus.

C. Is the potential hotel site in close proximity to existing hotel properties?

The closest concentration of hotel rooms to downtown Parkville includes 28 properties totaling 3,454 guest rooms along the Interstate 29 corridor in Northwest Kansas City. These hotels cater primarily to business and leisure travelers. The closest hotels to downtown Parkville include the Argosy Casino Hotel & Spa and Super 8 at Interstate 635 and Highway 9 approximately five miles to the east.

D. Are the site's physical characteristics suitable for hotel development?

Both prospective sites offer sufficient infrastructure and land area to support development of an economy, budget, extended-stay, limited-service and boutique hotel. Development of a full-service hotel would require additional land area. Both sites are located within the flood plain with mitigation required to facilitate hotel development.

The Main Street site also is located within historic downtown Parkville, providing a unique atmosphere for a hotel. A major detriment to the Main Street site is its proximity to the railroad line whose 50+ daily trains generate significant noise and vibration.

A principal advantage of the Highway 9 site is its location adjacent to Park University. The size of the site will also permit for the planning and development of a vibrant mixed-use environment suitable for hotel uses. A mix of retail, entertainment, academic, employment and residential uses would generate on-site lodging demand.

Given the proximity to the railroad line the Main Street site was discounted as a potential location for future hotel development. The Highway 9 site possesses the necessary location and site characteristics to support future hotel development, but its dependence on Park University as a lodging demand generator and location on a secondary highway reduces its market feasibility to a B-rated location. Its presence within a mixed-use project would improve the feasibility of future hotel development. Prospective property types include a limited-service or boutique hotel.

Conclusions

Kansas City is a regional tourist and family destination supported by a wide selection of shopping and dining and host of sporting, gaming, recreational and cultural attractions. In 2010, 21.6 million out-of-town visitors to the Kansas City MSA spent \$2.57 billion with a total economic impact of \$4.3 billion. Tourism expenditures for the year were led by lodging at \$728 million, food and beverage at \$596 million, shopping at \$492 million and recreation at \$341 million. Parkville is located in Platte County which garnered 18 percent of total visitor spending.

Given its historic character and mix of independently-owned specialty shops, downtown Parkville serves as a heritage tourism destination. Heritage tourism targets older, affluent travelers. According to the *2010 Economic Impact Study & Visitor Profile* prepared by Reach

Market Planning, nearly 18 million leisure travelers visited Kansas City, the average age of a visitor to Kansas City was 44.5 years, and top activities for leisure travelers included shopping (40%); dining (21%); casino (15%); museum (13%); nightlife (10%) and historic sites (9%). These visitation patterns bode well for the opportunity of downtown Parkville to attract out-of-state visitors, particularly heritage tourists.

Existing lodging in downtown Parkville, Missouri is limited to the Main Street Inn, a 4-room bed & breakfast. Of the peer cities selected only Weston and Independence support downtown hotels. Hotels in Weston, Missouri include the historic 47-room Saint George Hotel opened in 1845, 4-room Weston Landing and 4-room Hatchery House B&B. Downtown Weston's ability to generate hotel room demand stems from its rural destination location, many festivals and presence of such attractions as the Weston Brewing Company and Pirtle Winery. Ophelia's Restaurant & Inn is an 8-room boutique hotel operating in downtown Independence, Missouri.

Thirty hotel properties operate within Northwest Kansas City totaling 3,757 guest rooms. The competitive hotel properties are located primarily at major Interstate 29 interchanges in close proximity to the Kansas City International Airport and cater to leisure and business travelers. The inventory of hotels by type includes three full-service hotels (968 rooms); eleven limited-service hotels (1,391 rooms); ten budget/economy hotels (586 rooms) and a 258-room casino resort hotel. The closest hotels to downtown Parkville include the Argosy Casino Hotel & Spa and Super 8 at Interstate 635 and Highway 9 approximately five miles to the east.

The downtown Parkville site located on the east side of Highway 9 between 1st and 6th Streets possesses the necessary location and site characteristics to support future hotel development, but its dependence on Park University as a lodging demand generator and location on a secondary highway reduces its market feasibility to a B-rated location. Its presence within a mixed-use project would improve the feasibility of future hotel development. Prospective property types include a limited-service or boutique hotel

RESIDENTIAL MARKET ANALYSIS

This section of the report evaluates the market potential to support future construction of residential housing in downtown Parkville. Included is an overview of the Parkville single family housing market, survey of competitive apartment properties, housing demand estimates and a site evaluation.

Parkville Single Family Housing Market

The *Multi-Family Market* published by Cassidy Turley Commercial Real Estate Services and the Home Builders Association of Greater Kansas City were consulted to identify historic and current rental apartment market trends within the Kansas City MSA.

New Residential Construction Activity

The table below summarizes annual trends in new residential construction permit activity for the City of Parkville from 2002 through August 2013. Over the past decade new residential housing construction activity has followed a cyclical pattern, influenced by general economic conditions, population growth and the availability of mortgage financing. From 2003 through August 2013 the City of Parkville issued building permits for a total of 450 new single family homes.

**Trends in New Housing Construction
City of Parkville; 2002 – August 2013**

Year	# of Permits	Valuation	Average Valuation
2002	96	\$29,782,570	\$310,235
2003	58	\$20,806,186	\$358,727
2004	58	\$20,388,847	\$351,532
2005	51	\$21,160,657	\$414,915
2006	36	\$11,625,104	\$322,920
2007	14	\$7,380,000	\$527,143
2008	7	\$3,790,000	\$541,429
2009	11	\$3,152,220	\$286,565
2010	10	\$3,498,965	\$349,897
2011	21	\$5,392,749	\$256,798
2012	48	\$12,347,359	\$257,237
2013 YTD	40	\$10,928,558	\$273,214
Totals	450	\$150,253,215	\$333,896

Source: City of Parkville.

Peaks in new residential construction occurred in 2002 with the issuance of permits for 96 single family homes valued at \$29.8 million. Reflective of the national housing bust and economic recession, new residential construction in Parkville declined steadily since 2006 to a low of just

seven new single family homes in 2008 valued at \$3.79 million. Starting in 2009 new single family construction has been on the rebound reaching 48 permits valued at \$12.3 million in 2012. Through August 2013, year-to-date new single family construction was reported at 40 dwelling units valued at \$10.9 million.

Since 2002, the 450 single family homes permitted for construction in Parkville possess an average construction valuation of \$333,896. Average construction valuation peaked at \$541,429 in 2008. Since 2011 the value of new home construction has averaged just over \$263,000, suggesting smaller homes are now being built when compared to prior to the national recession.

Since 2000 the bulk of new residential construction in Parkville has occurred within the master planned residential communities of The National (236 homes), Riss Lake (206 homes) and Riverhills (54 homes).

New Single Family Permitting Trends Major Residential Communities

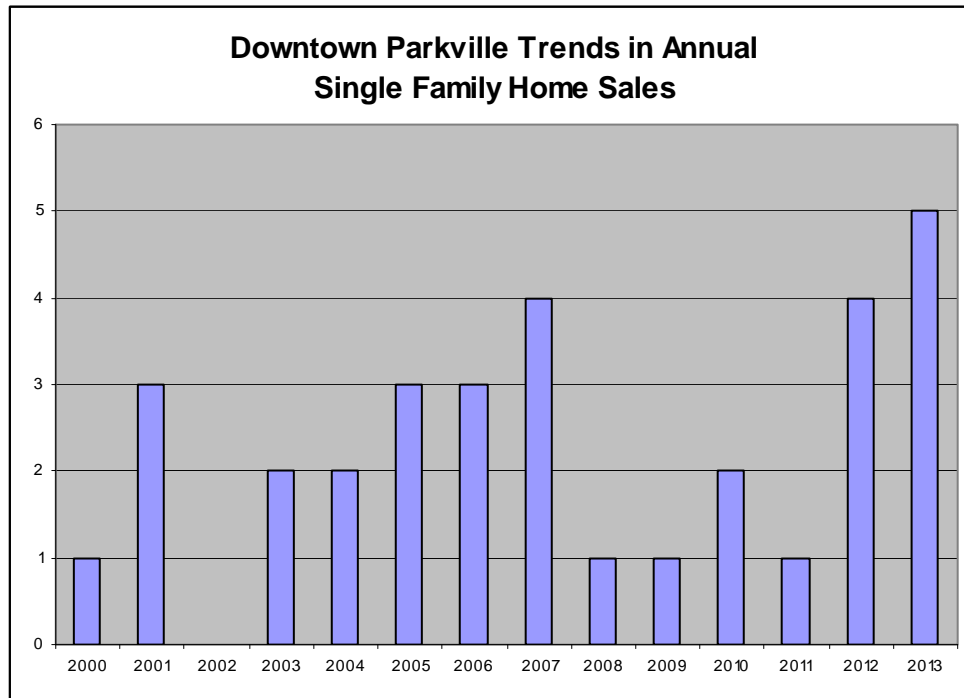
Year	# of Permits			Total Permits
	National	Riss Lake	River Hills	
2000	38	43	19	100
2001	32	40	10	82
2002	20	28	17	65
2003	30	19	2	51
2004	31	14	3	48
2005	24	18	1	43
2006	15	15	1	31
2007	8	1	0	9
2008	4	1	0	5
2009	4	3	0	7
2010	4	4	0	8
2011	9	4	0	13
2012	12	10	0	22
2013 YTD	5	6	1	12
Totals	236	206	54	496

Source: City of Parkville.

Since 2000, The National has supported the highest level of new single family home construction in Parkville with a reported 236 dwelling units issued building permits. The majority of single family home construction occurred prior to the start of the national housing slump in 2007. Since 2007, just 46 single family homes at The National have been issued building permits, though since 2011 new home construction has rebounded slightly. Homes built prior to 2007 were valued at an average of approximately \$650,000. Homes built since 2007 are generally smaller and support an average value of approximately \$450,000. A reported 40 improved lots are available for new home construction. Raw land available for future residential development at The National can support an estimated 480 single family and cluster homes.

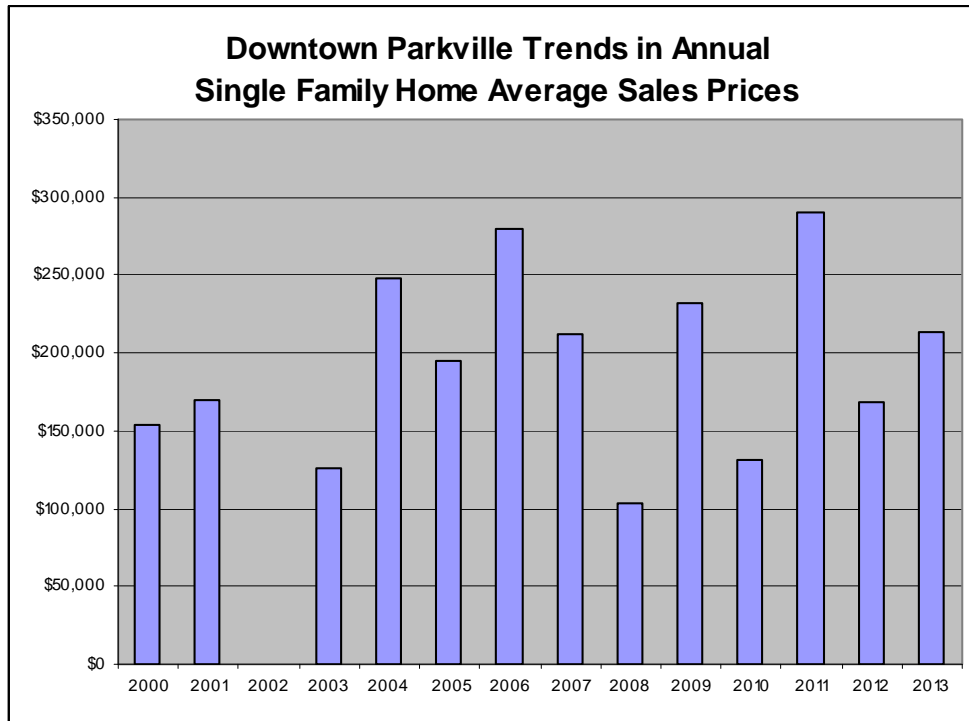
Downtown Parkville Sales Trends

Sales transactions reported by the Multiple Listing Service were consulted in an effort to quantify the sales velocity and pricing of single family homes in downtown Parkville. As illustrated in the bar chart below, since 2000, a reported 32 single family homes were sold in downtown Parkville. Consistent with national housing trends, home sales in downtown Parkville peaked from 2005 to 2007. In the aftermath of the national housing slump home sales in Parkville dropped off from 2008 through 2011. During 2012 home sales rebounded with four transactions reported. Home sales continued to escalate into 2013 with five transactions reported year-to-date.



The bar chart on the following page illustrates annual trends in the average sales price of single family homes in downtown Parkville. As can be seen, given the wide range in home sizes and modest volume of single family home sales since 2000, the average sales price fluctuates considerably from year-to-year. Since 2000, single family homes in downtown Parkville have sold for an average price of just over \$197,000. To illustrate the desirability of the downtown Parkville for-sale housing market, since 2000 the reported average sales price equates to 96.4 percent of the original asking price. In many cases during the height of the housing boom homes sold for above the asking price.

The average sales price for a home in downtown Parkville peaked in 2006 at \$280,000 and again in 2011 at \$290,000. During 2012 and year-to-date 2013 nine single family homes have sold in downtown Parkville, or over 28 percent of all home sales since 2000. Thus, recent sales activity is a good indication of home values. During 2012, four homes sold ranging in price from \$118,000 to \$279,500, averaging \$167,750. Thus far in 2013 a reported five homes sold for \$130,000 to \$265,000, averaging \$213,700. These recent trends suggest demand for single family homes in downtown Parkville is on the rise, resulting in escalating property values.



Single family lots due remain available for new home construction though site and topographical issues hamper the utility of most lots. According to the City of Parkville, since 2000 a total of five building permits have been issued for new home construction in downtown Parkville.

Competitive Apartment Market

Northlands Market Overview

The *Multi-Family Market* published by Cassidy Turley Commercial Real Estate Services divides the Kansas City MSA apartment market into five regions, including Johnson County, KS; Jackson County, MO; Country Club Plaza; Northland and Wyandotte County, KS. Parkville is located within the Northland region. The table on page 75 outlines year-end 2012 apartment market conditions by property class for each of Kansas City’s five sub-regions.

Over the past two years apartment market conditions in the Northlands region have improved marked by increased occupancies and rental rates as well as reduced rental concessions. From year-end 2010 to year-end 2012 the average occupancy rate for apartments in the Northlands region remained healthy, improving slightly from 92 percent to 93 percent. The Northlands’ occupancy rate mirrored the metropolitan average.

From year-end 2010 to year-end 2012 the average rental rate in the Northlands increased from \$0.74 per square foot to \$0.76 per square foot. The average rent for Class “A” properties escalated from \$0.88 per square foot to \$0.99 per square foot. The improving market conditions have resulted in the decline in rental concessions. At year-end 2012, 52 percent of apartment properties in the Northlands offered rental concessions, down from 75 percent at year-end 2010.

Kansas City MSA Apartment Market Year-End 2012

Sub-region Property Class	Occupancy Rate		Average Rent	Properties	2012
	Year-End	Year-End		Offering	Construction
	2010	2012		Concessions	Permits
Johnson County, KS					
Class A	95%	94%	\$0.96	60%	548
Class B	94%	95%	\$0.87	43%	0
Class C	92%	94%	\$0.74	65%	0
Totals	94%	94%	\$0.88	55%	548
Jackson County, MO					
Class A	91%	95%	\$0.98	47%	69
Class B	92%	93%	\$0.84	70%	307
Class C	87%	91%	\$0.68	59%	0
Totals	90%	92%	\$0.78	60%	376
Country Club Plaza, MO					
Class A	97%	97%	\$1.42	0%	0
Class B	93%	97%	\$1.13	0%	0
Class C	92%	96%	\$1.02	17%	0
Totals	94%	97%	\$1.23	8%	0
Northland					
Class A	93%	94%	\$0.99	42%	298
Class B	94%	93%	\$0.75	36%	0
Class C	90%	92%	\$0.65	50%	0
Totals	92%	93%	\$0.76	46%	298
Wyandotte County, KS					
Class B	89%	98%	\$0.88	0%	377
Class C	89%	88%	\$0.78	48%	0
Totals	89%	89%	\$0.79	41%	377
Other Metro Areas					
					30
Kansas City MSA Totals					
Class A	94%	94%	\$0.98	52%	1292
Class B	93%	94%	\$0.84	46%	307
Class C	90%	92%	\$0.70	55%	0
Totals	92%	93%	\$0.83	52%	1629

Source: Cassidy Turley Commercial Real Estate Services.

Improving market conditions in the Northlands have created the opportunity to facilitate feasible new construction. At year-end 2012 the 298-unit Residences at Burlington Creek was under construction within the Burlington Creek development on Highway 45 just east of Parkville. Development of this Class “A” apartment community is relevant to downtown Parkville given its close proximity and upscale orientation.

Competitive Apartment Market Survey

In an effort to identify competitive market conditions impacting downtown Parkville, a survey was completed of existing large-scale apartment communities within Parkville, Missouri. Since the Parkville apartment market is small the competitive survey was expanded to include Riverside and Kansas City along Interstate 29 from the Missouri River north to Highway 152.

As summarized in the table on the following page, the competitive survey identified 17 large-scale apartment communities supporting a total inventory of 4,074 dwelling units. Apartment properties range in size from 68 to 624 dwelling units. The northernmost apartment properties are the newest and are Class “A” boasting luxury interior features, a wide range of community amenities and above average rental rates. The 263-unit Briarcliff City is a recently built luxury apartment community located five miles east of downtown Parkville. Briarcliff City garners well above average rental rates and is currently fully leased. In 2008, 73 luxury apartment units were built within the Zona Rosa lifestyle center, offering residents a mixed-use urban environment.

Just two large apartment properties were identified in Parkville, including the 68-unit Windscape Apartments and 244-unit Links of Parkville (built in 1972) that are Class “B” or “C” properties. Park Village is a senior apartment community and was excluded from the competitive survey.

As of the date of this report the total inventory of 4,074 apartment units was operating at a healthy cumulative occupancy rate of 94 percent which compares favorably to the metropolitan Kansas City average of 93 percent.

Average monthly rents by unit type are \$511 or \$1.02 per square foot for studios; \$804 or \$1.09 per square foot for one bedroom models; \$693 or \$0.76 per square foot for two bedroom/ one bath models; \$1,181 or \$1.00 per square foot for two bedroom/ two bath models and \$1,080 or \$0.93 per square foot for three bedroom models. The average per square foot rent of \$0.97 is 16.9 percent above the metro average of \$0.83 per square foot.

Competitive Apartment Properties Average Monthly Rents by Unit Type

Unit Type	Average Unit Size	Rental Rate Range	Average Rent	
			Monthly	Sq. Ft.
Studio	501	\$435 - \$735	\$511	\$1.02
1 Bedroom / 1 Bath	735	\$450 - \$1,335	\$804	\$1.09
2 Bedroom / 1 Bath	911	\$500 - \$1,399	\$693	\$0.76
2 Bedroom / 2 Bath	1,080	\$599 - \$1,648	\$1,181	\$1.00
3 Bedroom / 2 Bath	1,274	\$575 - \$1,749	\$1,180	\$0.93
Totals	925		\$914	\$0.97

Survey of Competitive Apartment Properties – Northwest Kansas City

Property Name Address	# of Units	Unit Type	Unit Sq. Ft.	Monthly Rent	Rent Per Sq. Ft.
Parkville					
Windscape Apartments 9151 NW 57th Street	68	2 Bedroom/1 Bath	750	\$500	\$0.67
		2 Bedroom/1 Bath	820	\$550	\$0.67
Links of Parkville 11107 NW Mema	244	1 Bedroom/1 Bath	762 - 783	\$450-\$605	\$0.59-\$0.77
		2 Bedroom/1 Bath	902 - 1,235	\$599-\$975	\$0.66-\$0.79
		2 Bedroom/2 Bath	1,005 - 1,075	\$599-\$705	\$0.60-\$0.66
		3 Bedroom/2 Bath	1,292 - 1,585	\$699-\$1,095	\$0.54-\$0.69
Competitive Market Area					
Briarcliff City 3880 N. Mulberry Drive - KC	263	1 Bedroom/1 Bath	749 - 858	\$1,029-\$1,149	\$1.34-\$1.40
		2 Bedroom/2 Bath	1,004 - 1,134	\$1,399-\$1,529	\$1.29-\$1.42
		3 Bedroom/2 Bath	1,279 - 1,330	\$1,649-\$1,749	\$1.29-\$1.32
The Province at Briarcliff 1282 NW Vivion Road - KC	120	1 Bedroom/1 Bath	662 - 883	\$924-\$1,174	\$1.15-\$1.33
		2 Bedroom/2 Bath	921 - 1,241	\$1,113-\$1,304	\$1.05-\$1.12
		3 Bedroom/2 Bath	1,282 - 1,362	\$1,445	\$1.06-\$1.13
Zona Rosa 8787 NW Prairie View Road - KC	73	1 Bedroom/1 Bath	518 - 938	\$735-\$1,150	\$1.23-\$1.42
		2 Bedroom/2 Bath	958 - 1,415	\$975-\$1,695	\$1.10-\$1.32
Chateau D'Mons 4405 NW D'Mons - Riverside	60	1 Bedroom/1 Bath	750	\$610	\$0.81
		2 Bedroom/1 Bath	1,000	\$690	\$0.69
		2 Bedroom/2 Bath	1,150	\$765	\$0.67
Rivermont 4423 NW Hon Drive - Riverside	108	1 Bedroom/1 Bath	750	\$460	\$0.61
		2 Bedroom/1 Bath	870 - 980	\$500-\$530	\$0.54-\$0.58
		2 Bedroom/1 Bath	1,050	\$520-\$530	\$0.50-\$0.51
El Chaparral 4921 NW Gateway - Riverside	230	Studio	458	\$445	\$0.97
		1 Bedroom/1 Bath	640	\$455-\$499	\$0.71-\$0.78
		2 Bedroom/1 Bath	850 - 900	\$525-\$630	\$0.62-\$0.70
Northcrest Apartments 5101 NW Gateway Ave. - Riverside	151	Studio	509	\$435-\$450	\$0.86-\$0.88
		1 Bedroom/1 Bath	673 - 715	\$475-\$499	\$0.70-\$0.71
		2 Bedroom/1 Bath	760 - 864	\$550-\$625	\$0.72
Willow Lake 6002 NW Prairie View - KC	132	1 Bedroom/1 Bath	650	\$505-\$535	\$0.78-\$0.82
		2 Bedroom/1 Bath	816	\$624-\$654	\$0.77-\$0.80
Northland Passage 6360 N. London Avenue - KC	596	1 Bedroom/1 Bath	547 - 742	\$551-\$861	\$0.88-\$1.16
		2 Bedroom/2 Bath	863 - 1,005	\$758-\$899	\$0.79-\$0.98
		3 Bedroom/2 Bath	1,223	\$1,012-\$1,074	\$0.83-\$0.88

Survey of Competitive Apartment Properties (Continued)

Property Name Address	# of Units	Unit Type	Unit Sq. Ft.	Monthly Rent	Rent Per Sq. Ft.
Hunters Glen	253	Studio	506	\$485-\$515	\$0.96-\$1.02
6201 NW 70th Street - KC		1 Bedroom/1 Bath	621	\$525-\$555	\$0.85-\$0.89
		2 Bedroom/1 Bath	865	\$590-\$685	\$0.68-\$0.79
		2 Bedroom/2 Bath	950	\$645-\$685	\$0.68-\$0.72
		3 Bedroom/2 Bath	1,127	\$745-\$785	\$0.66-\$0.70
Brentwood Manor	120	1 Bedroom/1 Bath	634	\$475	\$0.75
7024 N. Dawn Drive - KC		2 Bedroom/1 Bath	803	\$520	\$0.65
		3 Bedroom/1 Bath	998	\$575	\$0.58
The Crossing at Barry Road	624	1 Bedroom/1 Bath	647 - 785	\$687-\$1,031	\$1.06-\$1.31
7831 NW Roanridge Road - KC		2 Bedroom/1 Bath	954	\$778-\$1,184	\$0.82-\$1.24
		2 Bedroom/2 Bath	1,069 - 1,476	\$805-\$1,569	\$0.75-\$1.06
The Vintage at Zona Rosa	308	1 Bedroom/1 Bath	708 - 993	\$650-\$919	\$0.90-\$0.96
		2 Bedroom/2 Bath	1,076 - 1,148	\$944-\$1,049	\$0.88-\$0.92
		3 Bedroom/2 Bath	1,351	\$1,259-\$1,300	\$0.93-\$0.96
Riverstone	324	1 Bedroom/1 Bath	598 - 952	\$825-\$1,335	\$1.21-\$1.52
8940 N. Shannon Avenue - KC		2 Bedroom/2 Bath	1,087 - 1,277	\$1,278-\$1,648	\$1.15-\$1.29
		3 Bedroom/2 Bath	1,305	\$1,683	\$1.29
The Lakes	400	1 Bedroom/1 Bath	540 - 800	\$515-\$750	\$0.89-\$1.16
7301 N. Donovan - KC		2 Bedroom/2 Bath	912	\$690-\$825	\$0.76-\$0.91
Total Apartment Units	4,074				

Source: Canyon Research Southwest, Inc.; October 2013.

To conclude, in recent years several large-scale Class “A” apartment communities have been built in Northwest Kansas City in the vicinity of Interstate 29 and Highway 152. The newer apartment communities support luxury amenities and well above average rents. Briarcliff City and Zona Rosa illustrate the demand for luxury and urban style apartment living in the Northlands. Therefore, the existing apartment properties are classified as Class “B” and “C” offering dated design, modest community amenities and unit features, and below market rents. Despite the offering of lower grade product the surveyed properties are currently operating at a very healthy cumulative vacancy rate of 2.7 percent. *The low vacancy rates despite inferior, older product bodes well for the opportunity of the Huron Hill site to be well received into the market.*

Anticipated Additions to Supply

In an effort to identify future additions to the competitive rental housing supply within and near Parkville, apartment properties currently under construction or approved for future development were identified. As of the date of this report one large-scale apartment property was under construction with three sites planned for the future development of 362 apartment units.

Northpoint Development is now under construction on The Residences at Burlington Creek, a 298-acre luxury apartment community at 6000 NW 63rd Street with the initial phases now open and available for lease. Community amenities include elevators, controlled access buildings, clubhouse, fitness center, resort style pool, garages and covered parking. Eleven, 1- and 2-bedrooms models are available ranging in size from 766 to 1,529 square feet of livable area.

Four parcels remain available for future development within Parkville Commons, designed to accommodate the construction of a total of 62 apartment units.

The 20-acre Limestone Hill neighborhood within The National is zoned for apartments capable of supporting up to 170 dwelling units.

A development site along the south side of Highway 9 in the Briarcliff master planned community is planned for 130 apartment units. Site work is currently underway.

Housing Demand Estimates

The Missouri Economic Research & Information Center projects the Platte County population to reach 114,904 by 2030, an increase of 25,940 residents from 2010. Based on recent population growth rates, Parkville is forecast to capture approximately 10 percent of the county population growth. By 2030, the City of Parkville population is estimated at 8,148, an increase of 2,594 residents from 2010. This continued population growth will fuel demand for residential housing.

The 2010 Census reported Parkville's average household size of 2.62 persons. By applying the current average household size, Parkville's forecasted population increase through 2030 of 2,594 residents will occupy an estimated 990 housing units.

According to the 2010 Census, Parkville's housing stock totaled 1,818 dwelling units, of which 97.91 percent were occupied. The breakdown of occupied dwelling units included 1,420 owner-occupied (80%) and 360 renter-occupied (20%). Based on Parkville's current housing stock mix, through 2030 demand for rental apartments is estimated at 200 units.

These housing demand estimates exclude the housing needs for students of Park University. Enrollment at Park University's Parkville campus is approximately 1,700 students, with over 35 percent international. The recent completion of the 250-bed Copley Quad, along with Chestnut Hall and Dearing Hall, brought the on-campus housing capacity to 350 beds. The new Park University Master Plan calls for 2,150 students by 2017 with 750 students living on campus. Therefore, over the next five years the University is planning on constructing new residence halls

with approximately 400 new beds. The current and planned on-campus housing will leave approximately 1,400 students residing off campus.

Evaluation of Prospective Residential Sites

Prospective apartment development sites evaluated in this section of the report include: 1) surface parking lot on the east side of Main Street south of the rail road track; 2) east side of Highway 9 from 1st Street north to 6th Street; and 3) west side of Highway 9 from 1st Street north to 6th Street. These sites were evaluated for their ability to facilitate development of apartments based on the following site criteria: physical attributes of the site; visibility and exposure; access; proximity to housing demand generators and services; and trade area demographics.

Physical Attributes

A potential large-scale apartment site should be fully serviced utilities available. Also, a rectangular shape is desirable to promote efficient land planning.

All three prospective sites are fully-serviced with utilities, are relatively flat and are impacted by the flood plain. Both the site along the east side of Highway 9 and the Main Street site possess sufficient land area to support development of an apartment community or a mixed-use project with residential over ground floor commercial space. As a residential location the Main Street site suffers from its proximity to the railroad track which is a constant source of noise and vibration.

Visibility and Exposure

Potential large-scale apartment sites should possess visibility via a major arterial so that an adequate marketing window can be provided. High traffic counts past the site also improve the site's market exposure.

Both sites along Highway 9 offer excellent major arterial visibility, satisfying the site exposure requirement of large-scale apartment communities. According to the Missouri Department of Transportation, during 2011 average daily traffic counts on Highway 9 were reported at 13,821 vehicles west of Interstate 635 and 10,550 vehicles south of Highway 45. These traffic volumes provide sufficient exposure for rental apartment use.

The Main Street site offers visibility via a major arterial, but is hampered by limited exposure and traffic counts.

Accessibility

Regional, local and on-site vehicular access is important when assessing a prospective large-scale apartment site.

The Parkville transportation network features a mix of highways and major arterial streets as well as convenient proximity to Interstates 29, 435 and 635.

The two prospective sites along Highway 9 benefit from superior direct site access as well as the connection with Highway 45 and Interstate 635.

The Main Street site benefits from major arterial street ingress and egress as well as regional access from the nearby Highway 9.

Proximity to Housing Demand Generators and Services

Close proximity to such housing demand generators as employment centers, colleges and urban cores is critical when evaluating a potential apartment site. Northwest Kansas City employment and Park University represent the primary sources of housing demand for downtown Parkville. Considerable office and retail development exists along the Interstate 29 corridor and the 500-acre Riverside Horizons in the neighboring community of Riverside is a growing employment center. The nearly 2,200 students, faculty and staff of Park University represent a potential source for housing demand in downtown Parkville. Most students and employees of the university can't afford to live in Parkville, but demand does exist if quality rental housing was available.

Availability of Community Services

A prospective large-scale apartment site should afford convenient access to such community services as shopping, dining, entertainment, recreation and schools.

Shopping, dining, entertainment, recreation and schools are conveniently located in close proximity to the three prospective downtown Parkville development sites. Grocery and drug stores are located at the intersection of Highways 9 and 45. Parkville and the nearby Burlingon Creek, Briarcliff Village and Zona Rosa developments house a wide selection of shopping, dining and entertainment venues.

Trade Area Demographics

Apartment renters tend to be young adults with moderate incomes. According to Esri Business Analyst, the market area with a 10-minute drive-time of downtown Parkville supports a large young adult population with 9,256 residents, or 18.8 percent of the population between the ages of 20 and 34 years. Nearly 18 percent of the market area population possesses an annual income between \$15,000 and \$34,999. This large group of young adults represents the primary target market for new rental housing in downtown Parkville. Moreover, singles comprise nearly 30 percent of all household within a 10-minute drive-time of downtown Parkville. These market area demographics suggest a large pool of prospective renters is available from which downtown Parkville can attract tenants.

Conclusions

Given the proximity to the railroad line the Main Street site was discounted as a potential location for future apartment development. The site along the east side Highway 9 possesses the necessary location, size and site characteristics to support future multi-family use. The presence of the White Aloe Branc along the site's eastern border will create attractive open space and a unique setting for apartment living. Prospective property types include a large-scale apartment

community or a mixed-use project with residential over ground floor commercial space. The site along the west side of Highway 9 lacks the size or depth to accommodate large-scale apartment development, but smaller 2- to 4-unit apartment buildings are potential uses.

Primary sources of apartment housing demand available to the prospective apartment site in downtown Parkville include existing and future employers in Northwest Kansas City as well as Park University students, faculty and staff. The primary tenant profile will be young adults aged 20 to 35 years old with young families representing a secondary source of tenant demand.

Conclusions

Parkville is a growing suburban community that benefits from convenient access to downtown Kansas City, Missouri; several employment centers; and a wide array of retail, dining, entertainment and cultural options. Household income levels in Parkville are among the highest in the Kansas City MSA; and, thus the city has supported high-end new home construction in such premier communities as The National and Riss Lake.

Consistent with national trends, single family home construction in Parkville peaked from 2002 through 2006 with a total of 263 permits issued. Due to local job losses and tighter lending practices new home construction remained at very low levels through 2010. By 2011, the Parkville new housing market began to recover and by 2012 permit levels were nearing pre-recession levels. Through August 2013, year-to-date new single family construction activity continued to escalate and is on pace to total 50 to 60 permits for the year.

Over the past decade the average construction valuation for new single family homes in Parkville peaked at \$541,429 in 2008. Since 2011 the value of new home construction has averaged just over \$263,000, suggesting smaller homes are now being built when compared to prior to the national recession.

Parkville is located within the Northland region. Over the past two years apartment market conditions in the Northlands region have remained healthy marked by increased occupancies and rental rates as well as reduced rental concessions. By year-end 2012 the average occupancy rate for apartments in the Northlands region reached 93 percent, resulting in a significant decline in rental concessions. The improving market conditions have warranted new construction with 298 units under development by year-end 2012.

New residential construction is expected to continue in Parkville, prompted by continued employment and population growth within the Kansas City MSA as well as the ongoing expansion of Park University. Through 2030, local employment and population growth is forecast to generate demand for 990 new housing units in Parkville, including 790 owner-occupied units and 200 rental units.

Most Park University students and employees don't live in Parkville for a variety of reasons including high housing values and the lack of quality rental housing. Park University estimates on-campus housing demand for 400 additional students through 2017, bringing the total on-campus resident population to 750 students. The current and planned on-campus housing will leave approximately 1,400 students living off campus. However, a large percentage of Park

University's students are commuters for reasons such as residing with family, location of employment, lifestyle and others. Regardless, the large number of students living off campus represents a potential market for rental housing in Parkville. The downtown area could capture a modest portion of students residing off campus assuming adequate and affordable housing is available.

The site along the east side Highway 9 is the superior location for future apartment development in downtown Parkville, possessing the necessary location, size and site characteristics. Prospective development formats include a large-scale apartment community or a mixed-use project with residential over ground floor commercial space.

Recent home sales velocity and pricing trends suggest downtown Parkville is a desirable for-sale single family housing market. Vacant lots remain available in downtown Parkville for future single family home construction, though the rolling topography poses challenges. The historic character of the existing residential neighborhoods surrounding downtown's commercial district should be maintained and enhanced. New construction or additions should be compatible with existing housing.

STUDY RECOMMENDATIONS

Based on the study findings, potential commercial and residential development opportunities are identified for downtown Parkville. Study recommendations include the following:

- Identify market niche strategy for downtown Parkville;
- Quantify the supportable inventory of new commercial space and housing units in the City of Parkville and downtown Parkville through 2030;
- Identify prospective commercial and housing development opportunities for downtown Parkville. Issues such as potential redevelopment sites, historic preservation, density, development formats and integration with surrounding land uses will be discussed.
- Identify prospective retail and professional business types suitable for expansion into downtown Parkville;
- Suggest supportive infrastructure improvements needed to accomplish commercial and residential development;
- Identify potential development incentives needed to attract desired commercial and residential development and indicate level of public support by incentive. Identify additional public initiatives needed to support future redevelopment efforts; and
- Benchmarking of strategic goals and objectives should be discussed.

Downtown Parkville's Market Niche

A niche is a specialization that allows a downtown to gain dominance in specific categories of the retail market. Niche strategies help a downtown compete in the local and regional retail market. Successful downtowns often support more than one market niche. These downtowns also benefit from an expanded trade area as their specialization draws customers from outside the community. Once a niche is established, other businesses are often attracted to the downtown in hopes of catering to the same targeted consumer segments. A strong downtown niche provides consumers a large selection, though within a limited range of merchandise and services.

A niche can be based on a certain type of consumer who works, resides in, or visits a community's downtown. Examples of these consumer-based niches include:

- College students
- Retirees
- Heritage tourists
- Local residents
- Ethnic groups
- Out-of-town visitors and tourists
- Office workers
- Artists and crafters

- Government users
- Medical facility users

Some downtowns develop a niche focusing on particular goods and services. Examples of niches based on categories of goods and services include:

- Home furnishings
- Pamper niches
- Antiques
- Arts and crafts
- Children's products
- Food-for-the-home
- Jewelry
- Entertainment and culture
- Restaurants

Downtown Parkville is already a destination benefitting from an existing branding and market niche. Main Street's historic character and predominance of independent merchants sets downtown Parkville apart from other commercial districts. Prominent retail categories include restaurants, art galleries, hair salons, antique shops, home furnishings, and gift and collectible stores. **Downtown's survival and redevelopment hinges on expanding the current market niches, introducing new market niches and provide consumers a larger selection of merchandise and services.**

Downtown Parkville's principal assets in expanding on current niches or establishing new niches include the historic character of Main Street; hosting of major festivals; farmers market; proximity to Park University; Missouri River and riverfront park; Parkville's high income levels; convenient access to the metropolitan area; and Kansas City's large tourism market.

Suitable consumer-based niches for downtown Parkville include heritage tourists/retirees, out-of-town visitors, local residents and ethnic groups (35% of Park University students are international). Park University represents a secondary niche, do primarily to its small student and employee population and small number of on-campus residents. Some communities with colleges and universities have successfully targeted the student population. Smaller communities with commuter campuses similar to Park University tend to have more difficulty developing this niche. Even as the campus population grows only a small segment of downtown businesses will likely attract considerable sales associated with Park University. Most successful "College Town" retail districts support a mix of restaurants, nightclubs, apparel and college bookstores.

Existing goods and services niches in downtown Parkville suitable for expansion include restaurants, entertainment/culture, antiques, home furnishings, arts and crafts, and gifts and collectibles. Improving the selection of merchandise within these goods and services niches will generate increased customer traffic and sales. What is needed is to create larger "clusters" and a critical mass of commercial space.

An untapped market niche for downtown Parkville is the visitors to English Landing Park. The planned construction of a new waterfront County park at the foot of Main Street will include a marina/boat ramp and introduce an entirely new potential customer base. Recreation-based

niches could play a growing role in downtown Parkville's business mix. Potential recreation-based niches include a bicycle shop, yoga studio, fitness center, runner's shoe store, kayak rentals, pet store, and bait and tackle shop.

To facilitate the growth of recreation-based niches, pedestrian and vehicular linkages along Main Street between the Missouri River and the core of downtown must be established. This could be accomplished through street improvements, a landscaped pedestrian corridor, the construction of new commercial buildings south of the railroad track and relocation of the existing farmers market to the current location of a baseball field southeast corner of Main and McAfee Streets. This strategy would also increase the economic impact on downtown businesses from major events hosted at the English Landing Park.

Forecast Demand for Commercial Space and New Housing

Demand for commercial space and new housing in downtown Parkville through 2030 has been forecast and quantified.

The current retail gap of downtown Parkville's primary trade area within a 10-minute drive-time estimated at \$219.4 million per year can support approximately 800,000 to 975,000 square feet of additional occupied retail space. Growth in population, incomes and out-of-town visitation through 2030 is projected to generate an increase in primary trade area retail sales of \$230 million annually, sufficient to support an additional 585,000 to 716,000 square feet of retail space. At a 7.5 percent capture, through 2030 downtown Parkville is estimated to absorb 103,875 to 126,825 square feet of retail space.

Based on an employment-driven model, from 2013 through 2030, Platte County is estimated to absorb approximately 457,500 to 533,750 square feet of professional office space. Parkville's ability to capture office space demand will be based on further population growth and the population's high education levels. Downtown Parkville is forecast to capture 15 percent of Platte County's office-related employment growth through 2030. Therefore, downtown Parkville is estimated to absorb 68,625 to 80,000 square feet of professional office space through the year 2030.

New residential construction is expected to continue in Parkville, prompted by continued employment and population growth within the Kansas City MSA as well as the ongoing expansion of Park University. Through 2030, local employment and population growth is forecast to generate demand for 990 new housing units in Parkville, including 790 owner-occupied units and 200 rental units. Most Park University students and employees don't live in Parkville due to high housing values and the lack of quality rental housing. Park University estimates on-campus housing demand for 400 additional students through 2017, bringing the total on-campus resident population to 750 students. The current and planned on-campus housing will leave approximately 1,400 students to secure housing off campus. This represents a large potential market for rental housing in Parkville.

Prospective Development Opportunities

A key in improving the business climate in downtown Parkville will be to increase the inventory of commercial space and level of business and customer activity. Higher density, mixed-use development should be encouraged. This development format promotes increased density, security, pedestrian activity and business activity. Increasing the housing stock through “infill” development will be a key component in enhancing the pedestrian activity and economic vitality of downtown. A mix of attached housing catering to students and young adults is recommended along with in-fill single family housing within the neighborhoods surrounding the central business district. Second floor residential over commercial space should be encouraged.

Prospective commercial development sites evaluated in this report include: 1) surface parking lot on the east side of Main Street south of the rail road track; 2) east side of Highway 9 from 1st Street north to 6th Street; and 3) west side of Highway 9 from 1st Street north to 6th Street.

The 2.2-acre surface parking lot bound by the rail road track to the north, McAfee Street to the south, East Street to the east and Main Street to the west is ideal for extending commercial development on Main Street south of the rail road track as well as increase the inventory and critical mass of commercial space in the downtown core. The best suited development formats include downtown-style, mixed-use commercial buildings supporting retail and office uses. Two-story buildings are appropriate on the western portion of the site fronting Main Street with surface or structured parking on the eastern half. Assuming a zero setback on Main Street the site could accommodate an estimated 50,000 to 70,000 square feet of commercial space.

Development of Highway 9 from 1st to 6th Streets would provide a much needed highway entry window for downtown and facilitate a broader range of goods and services businesses. Development of this section of Highway 9 would also provide a “bridge” more effectively connecting downtown Parkville with Park University.

The prospective development site located on the east side of Highway 9 from 1st Street north to 6th Street consists of nine individual parcels totaling approximately 3.66 acres. Existing land uses include a U.S. Post Office, former restaurant, two single family homes, Glen’s Automotive, Four Seasons Lawn & Landscape and vacant land. This site is considered downtown’s premier development site offering superior access, visibility, exposure and the size to facilitate the development of several commercial formats. The most appropriate development format is 2- and 3-story mixed-use structures supporting retail, office and residential uses. Assuming a “Main Street” design the site could accommodate an estimated 240,000 to 280,000 square feet of building area. The mix of space would be approximately half commercial and half residential, with the inventory of housing totaling approximately 125 to 175 dwelling units.

The prospective development site located on the west side of Highway 9 from 1st Street north to 6th Street consists of twelve individual parcels totaling approximately 1.07 acres. Existing land uses include the French Bee Bakery, parking lot, nine single family homes and a 4-unit apartment building. The street right-of-way patterns and shallow lot depths for the properties fronting the west side of Highway 9 will limit the potential to accommodate large-scale mixed-use development. Likely development scenarios include the adaptive re-use of the existing residential structures or razing current structures to facilitate the construction of single-tenant commercial buildings or multi-family housing.

Prospective Downtown Businesses

Downtown Parkville's business profile was compared to peer city downtowns in an attempt to identify prospective retail and service businesses and development opportunities. Peer cities selected for the analysis include Atchison, Weston, Lee's Summit, Independence and Liberty.

Based on the peer city downtown business and trade area demographic comparison analysis as well as downtown Parkville's current market niches, prospective retail businesses for downtown Parkville include:

- Eating & Drinking Places (emphasis on ethnic foods)
- Bakery
- Coffeehouse
- Apparel
- Jewelry
- Hair Salon
- Nail Salon
- Furniture & Home Furnishings
- Antiques
- Books
- Sporting Goods
- Gifts & Collectibles
- Florists
- Entertainment/Cultural
- Art Galley
- Art Supplies
- Bike Shop
- Nutrition & Fitness

Potential recreation-based niches associated with English Landing Park and the Missouri River include a bicycle shop, yoga studio, fitness center, runner's shoe store, kayak rentals, pet store, and bait and tackle shop.

Future office demand will be generated through continued population growth led by personal/professional services and healthcare. Prospective personal and professional services firms include banking and financial services, accounting and tax services, insurance, real estate, architect, legal, technology, physical and massage therapist, fitness and wellness.

Public Infrastructure

To improve the ability of downtown Parkville to support commercial and residential development additional public infrastructure and façade improvements should be considered.

Streetscape improvements to Main Street south of 2nd Street include new pavement, curbing, gutters, sidewalks, historic street signs, period street lights, seating, trash cans, banners, planters and public restrooms.

Street improvements to East Street (Highway 9) between 1st and 6th Streets would improve traffic patterns and create viable redevelopment opportunities. Potential street improvements would include two lanes of traffic, bicycle lanes, on-street parking, curbing, gutters, sidewalks, landscaping, historic street signs, period street lights and a round-about at the intersection of 1st and East Streets. An iconic monument, sculpture or landscaping or the round-about would create a unique entryway into downtown.

Ample public parking in downtown Parkville is currently available at the south end of Main Street. Parking on the north end of Main Street is limited to on-street parking. Demolition of the existing commercial structure at the northeast corner of 2nd and Main Street for conversion to a surface lot would increase the inventory of parking space at the north end of Main Street and improve the commercial viability of properties north of 2nd Street.

Gateway features on Main and East Streets leading into downtown would establish boundaries for the downtown business district as well as create a sense of arrival and place. This can be accomplished through streetscape improvements and monument signs.

Historic markers could be erected in downtown identifying historic places and events in Parkville's history. Self guided or docent guided tours of downtown and local historical landmarks should be considered. This strategy would assist in promoting heritage tourism.

Economic Incentives

When used with private funding sources, government financing/incentive programs greatly enhance a real estate project's financial feasibility. To generally qualify for government incentives, a project must serve a public purpose, stimulate economic growth and conform to local planning and development guidelines. Downtown commercial and mixed-use development generally meets all three requirements, providing goods and services to often under-served residential areas, offering opportunities for employment, increasing the community's tax base and meeting all local requirements for zoning and construction.

Development incentives in downtown Parkville should be utilized to attract new development and businesses. Incentives may include infrastructure as well as direct subsidies. Tax increment financing would be preferred over creation and implementation of specific incentive districts such as a Business Improvement District. Potential applications include using tax increment financing to fund streetscape and off-site infrastructure improvements to Main and East Streets. It should be noted that tax increment financing should only be utilized to facilitate real development deals (i.e., a specific business plans to construct a facility), but not as a tool to foster speculative future development (i.e., construct infrastructure with the hopes of stimulating economic development).

The buildings on Main Street between the railroad track and 2nd Street possess a historic character; however, the district is not on the National Register of Historic Places. It is recommended that the historic portion of downtown Parkville seek historic district designation. Doing so will add to the historic identity of downtown, enhance heritage tourism and promote property investment through use of federal historic tax credits. Nomination to the National Register of Historic Places does not place restrictions on the use or physical appearance of properties in the district. However, for those properties seeking the 20 percent federal tax credit

the National Park Service must review the rehabilitation work proposed by to ensure that it complies with the Secretary of the Interior's standards for rehabilitation.

Building improvements are usually the first visible evidence of positive economic change in a traditional commercial district. During the early years of a downtown revitalization program, though, business and property owners may be reluctant to make substantial capital investments in building improvements. A matching fund façade improvement grant program should be implemented in downtown Parkville to assist in enhancing the physical appearance of buildings as well as return buildings to their original historic character.

Benchmarking of Strategic Goals and Objectives

Statistical data can be used to establish goals and measure progress (“benchmarking”) of the *Downtown Parkville Master Plan*. Metrics can be used to compare downtown Parkville's performance over time and to determine whether goals are being met. They can also be used in comparison with high performing peer city downtowns as a basis for refining strategic goals and objectives.

Statistical indicators for measuring performance can take many formats, including: 1) demographics; 2) employment; 3) investment; 4) housing; 5) retail and office space; 6) arts and entertainment; 7) lodging; 8) restaurants and 9) transportation and safety.

From a market perspective the goal of the *Downtown Parkville Master Plan* is to improve the competitiveness of downtown and ensure long-term prosperity. Principal objectives in meeting this goal include expanding downtown's market niche and selection of goods and services; increasing business activity and retail sales; increasing the housing stock; promoting private sector investment; and business retention and expansion. Therefore, pertinent statistical indicators to measure the future performance of downtown Parkville include:

Employment Indicators

- Total downtown employment and growth
- Employment by sector

Investment Indicators

- Private and public sector investment dollars
- Total square footage of newly constructed buildings
- Total construction costs of newly constructed and renovated buildings
- Projects in the pipeline
- Increase in property tax base

Housing Indicators

- Number of newly constructed housing units
- Residential vacancy rates
- Average apartment rental rate
- Sales velocity and average pricing of single family home sales

Commercial Space Indicators

- Average vacancy rate

- Average rental rate
- Net space absorption
- Tenant movement into and out of downtown
- Growth in annual retail sales and number of retail establishments

Restaurant Indicators

- Annual restaurant sales and growth rate
- Restaurant composition by sector (i.e., casual, fine dining, café, bar, etc.)
- Restaurant composition by style of restaurant
- Total seating capacity

Transportation and Safety Indicators

- Total number of parking spaces
- Vehicular traffic counts at key intersections
- Pedestrian counts
- Per capita crime rate

ADDENDA

EXHIBIT A

Downtown Parkville Commercial Building Inventory

Street Number	Street Name	Number of Stories	Building Current Use	Build Area (Sq. Ft.)	Retail Space	Office Space
2	Main Street	1 & 2	Restaurant	7,150	7,150	
5 & 7	Main Street	1	Retail Store	5,940	5,940	
8	East Street	2	Multi Tenant Retail/Office	3,800	1,900	1,900
10	Main Street	1	Retail Store	4,540	4,540	
11	Main Street	1	Meeting Hall	3,200	3,200	
15	Main Street	1	Restaurant	1,600	1,600	
13	Main Street	1	Retail	1,200	1,200	
16	Main Street	2	Retail Store	4,216	4,216	
2	West 1st Street	2	Restaurant	5,070	5,070	
100	Main Street	2	Restaurant	2,400	2,400	
101	Main Street	2	Retail/Apartments	3,040	1,520	
102	Main Street	2	Retail & Office	2,400	1,200	1,200
103	Main Street	2	Restaurant	2,720	2,720	
104	Main Street	2	Office	2,640		2,640
105	Main Street	1	Retail Store	1,360	1,360	
106	Main Street	2	Retail/Office	1,408	704	704
107	Main Street	2	Retail	2,440	2,440	
109	Main Street	1	Retail - 1 Vacant Space	3,080	3,080	
112	Main Street	2	Retail/Restaurant	4,000	4,000	
113	Main Street	1	Retail Store	1,312	1,312	
115	Main Street	1	Retail Store	2,912	2,912	
201	Main Street	1	Retail/Office	6,000	3,000	3,000
207	Main Street	1	Vacant Commercial	3,004	3,004	
301	Main Street	2	Retail/Office	2,000	1,000	1,000
303	Main Street	1	Retail	630	630	
304	Main Street	1	Office	1,403		1,403
401	Main Street	2	Funeral Home	6,500	6,500	
405	Main Street	1	Commercial	1,975	1,975	
407	Main Street	2	Dental Office	2,720		2,720
12	East Street	1	Retail	2,400	2,400	
2	2nd Street	1	Former Restaurant	10,680	10,680	
200	East Street	1	Vacant Commercial	1,123	1,123	
303	East Street	1	Automotive Repair	1,500	1,500	
306	East Street	2	Office	1,924		1,924
404	East Street	1	Converted House	1,364	1,364	
405	East Street	1	Retail	2,000	2,000	
9	1st Street	1	Multi Tenant Retail	2,400	2,400	
12	1st Street	1	Bank Branch	6,159	6,159	
5	Mill Street	1	Retail	4,000	4,000	
106	Mill Street	1	Retail	1,286	1,286	
100	Main Street	2	Restaurant	1,825	1,825	
160-180	Main Street	1 & 2	Retail/Office	20,121	10,061	10,060
160	English Landing Dr.	2	Restaurant	6,249	6,249	
170	English Landing Dr.	2	Retail/Office	12,000	6,000	6,000
171	English Landing Dr.	2	Retail/Office	12,000	6,000	6,000
173	English Landing Dr.	2	Retail/Office	19,137	9,569	9,568
180	English Landing Dr.	2	Retail/Office	12,000	6,000	6,000
Total Space				208,828	153,189	54,119

EXHIBIT B

Canyon Research Southwest, Inc., Client List

CLIENT LIST

During its period of operation, Canyon Research Southwest, Inc. has provided real estate consulting services for a number of leading organizations including:

Abigail Properties
Appraisal Technology, Inc.
Arizona State Land Department
Aspen Enterprises
Bain & Company, Inc. (Boston, Massachusetts)
Bashas' Markets
Belz-Burrow (Jonesboro, Arkansas)
Biskind, Hunt & Taylor, PLC
Bridgeview Bank Group
Browning-Ferris Industries
Burch & Cracchiolo PA
Cass County, Missouri
Cavan Real Estate Investments
D.J. Christie, Inc. (Overland Park, Kansas)
Church of Jesus Christ of Latter Day Saints
Circle G Development
City of Belton, Missouri
City of Fenton, Missouri
City of Glendale Economic Development Department
City of Independence, Missouri
City of Lee's Summit, Missouri
City of Liberty, Missouri
City of Osage Beach, Missouri
City of Mesa Economic Development Department
City of Mesa Real Estate Services
City of Phoenix Economic Development Department
City of Phoenix Real Estate Department
City of St. Charles, Missouri
City of Tucson Community Services Department
City of Warsaw, Missouri
Dial Realty (Omaha, Nebraska and Overland Park, Kansas)
Danny's Family Car Wash
Diamond Ventures (Tucson, Arizona)
DMB Associates
DMJM Arizona Inc.
EDAW, Inc. (Denver, Colorado)
Engle Homes
Frontera Development, Inc.
Gilded Age (St. Louis, Missouri)
W.M. Grace Development
Greystone Group (Newport Beach, California)
Hanford/Healy Advisory Company
Heritage Bank (Louisville, Colorado)
Holiday Hospitality Corporation (Atlanta, Georgia)
Canyon Research Southwest, Inc.

Jorden & Bischoff, PLC
JPI Development
Kaiser Permanente (Oakland, California)
Landmark Organization (Austin, Texas)
Lee's Summit Economic Development Council (Lee's Summit, Missouri)
Lewis and Roca
Lowe's Companies, Inc. (West Bloomfield, MI)
Lund Cadillac
Marriott International, Inc. (Washington, D.C.)
AJ Martinez & Associates (Prescott, Arizona)
MCO Properties
Meritage Homes
Metropolitan Housing Corporation (Tucson, Arizona)
Monterey Homes
Mountain Funding (Charlotte, North Carolina)
Navajo Nation Division of Economic Development
Opus Northwest Corporation
Opus West Corporation
Pederson Group, Inc.
Phelps Dodge Corporation
Piper Jaffray (Kansas City, Missouri)
Pivotal Group
Pulte Home Corporation
Pulte Homes of Greater Kansas City
Pyramid Development (St. Louis, Missouri)
Ralph J. Brekan & Company
RED Development (Kansas City, Missouri)
R.H. Johnson & Company (Kansas City, Missouri)
Richmond American Homes
River Run Development (Boise, Idaho)
Royal Properties (Champaign, Illinois)
Salt River Project
Steiner + Associates, Inc. (Columbus, Ohio)
Summit Development Group (St. Louis, Missouri)
SWD Holdings (San Francisco, California)
The Innova Group Tucson (Tucson, Arizona)
The University of Arizona Department of Economic Development (Tucson, Arizona)
The University of Arizona Medical Center (Tucson, Arizona)
Trammell Crow Residential
Union Homes (Salt Lake City, Utah)
Unified Government of Wyandotte County and City of Kansas City, Kansas
Wal-Mart, Inc. (Bentonville, Arkansas)
Waste Management
Wells Fargo Bank NA
Weststone Properties
Wolfswinkel Group
Yavapai-Apache Nation (Camp Verde, Arizona)
Zaremba Group (Atlanta, Georgia)

EXHIBIT C

Resume of Eric S. Lander, Principal
Canyon Research Southwest, Inc.

EDUCATION

In May, 1981, Mr. Lander received a B.S. in Marketing from the Arizona State University College of Business Administration. He attended Arizona State University from September 1977 to May 1981, and received honors status for his superior cumulative grade point average. During this time, he was an active member of the Marketing Club and National AMA as well as a participant in several research projects involving both local and national firms. In May, 1992, Mr. Lander received a Masters in Real Estate Development and Investment from New York University, graduating with honors.

BUSINESS EXPERIENCE

Canyon Research Southwest, Inc.

President (October 1984 to Present)

Established Canyon Research Southwest, Inc. as a multi-disciplined real estate consulting firm designed to provide comprehensive research and analysis to the development, financial, investment, and municipal communities. Responsibilities include direct marketing, project management, staffing, and client relations. The firm has performed in excess of 400 major consulting assignments with over 75 local and national clients. Fields of expertise include market and feasibility analysis of large-scale master planned communities, freeway oriented mixed-use projects, retail centers, office complexes, business parks, and hotels. Additional services include fiscal impact studies, property valuation, and development plan analysis.

Mountain West Research

Associate (December 1988 to January 1990)

Senior Consultant (October 1983 to October 1984)

Mr. Lander assisted in managing the Commercial Real Estate Services Division of Mountain West, Arizona's largest real estate and economic development consulting firm. Responsibilities included direct marketing, personnel management, client relations, and consulting on large-scale commercial, office, industrial, and hotel projects. Also contributed to several real estate publications and assisted in the management and marketing of the firm's commercial, office, and industrial (COI) data base.

Iloff, Thorn & Company

Marketing Assistant (January 1982 to December 1983)

Joined Iloff, Thorn & Company during its infancy and became solely responsible for providing in-house marketing support services to its commercial real estate brokers. These services included demographic research, office/industrial/retail market studies, raw land sales packages, site selection analysis, client relations, and property research. Major accomplishments included establishing and implementing office and industrial absorption studies, devised central office market and available raw land files, and organized the development of an industrial/retail map. Also, during this time, Mr. Lander obtained a real estate sales license and became involved in commercial brokerage activities.

RANGE OF EXPERIENCE

In 1987, Mr. Lander, in cooperation with the Drachman Institute of Regional Land Planning, published a working paper titled "Land Development as Value Added in the Development Process and Appropriate Criteria to Rank Sites for Selection of Master Planned Satellite Communities." Since the publication of this working paper, Mr. Lander has conducted numerous market feasibility studies on existing and proposed, large-scale, master planned communities in the Southwestern United States, totaling over 80,000 acres. The working paper was also evaluated and utilized by such prestigious universities as Harvard, M.I.T. and the University of North Carolina as part of their Masters program in Real Estate, City and Regional Planning, and Business.

Mr. Lander is an instructor with the Commercial Real Estate Institute, teaching classes in Market Analysis, Commercial Property Valuation and Land Valuation.

Developed a model designed to evaluate and rank the development potential of freeway interchanges. The methodology for ranking freeway properties is based on a list of 25 criteria which provide a framework to efficiently compare the strengths and weaknesses of various freeway sites. Seven (7) criteria have been established which apply to metropolitan area economic base and real estate market, five (5) criteria evaluate the region influenced by the presence of the freeway in question, and thirteen (13) interchange and site-specific criteria are aimed at determining future real estate development opportunities. This model has been utilized in evaluating freeway-oriented, mixed-use projects anchored by regional malls, business parks, office complexes, and hotels.

Mr. Lander has provided consulting services on downtown redevelopment and historic preservation efforts. Recent examples include a heritage tourism study for the Erie Canal terminus in Buffalo, New York; evaluation of potential office, retail, hotel and arena development in the downtown areas of Glendale and Mesa, Arizona; retail market evaluation and redevelopment plan for downtown Warsaw, Missouri; a downtown master plan for downtown Lee's Summit, Missouri; and a redevelopment plan for the 24 Highway Corridor in Independence, Missouri.

Mr. Lander has conducted *TIF and TDD Revenue Projections* for a variety of large-scale retail projects in Missouri and Kansas. Tax Increment Financing and Transportation Development Districts are government-backed funding mechanisms designed to finance project-specific public infrastructure improvement. Funding is provided via the issue and sale of bonds. In the case of Tax Increment Financing the bonds are repaid with incremental increases in property tax and sales tax revenue generated by the designated redevelopment area. Transportation Development Districts involve the levy of an additional sales tax on businesses operating within the redevelopment area.

Mr. Lander has conducted *STAR Bond Feasibility and Market Studies* on several proposed developments in Kansas, including the Kansas City Tourism District, Legends at Village West, Kansas City Research & Medical Campus, and Rosedale Station Shopping Center. The *Market Study* evaluates the market positioning, market demand, short-term development potential, and economic impact for the proposed Redevelopment District. Meanwhile, the *Feasibility Study* provides a STAR Bond revenue vs. costs comparison to determine the ability of the Redevelopment District to cover debt service for the projected STAR Bond obligations throughout the bond maturity period.



APPENDIX E: Historic District Report



Appendix E

Historic District Report

E.1 Historic District Report

The Parkville Downtown Core has sufficient historic integrity to satisfy a preliminary Determination of Eligibility (DOE) which is the first step toward the creation of a downtown historic district. A downtown historic district would assist the community of Parkville to by attracting new businesses, as well as providing incentives for the rehabilitation of these historic properties.

The downtown could be listed on the National Register as a historic district or could be locally recognized as a historic district through city ordinance. A conservation district or planned zoning ordinance are other ways to protect the historic character of the area and promote the rehabilitation of existing properties. These mechanisms are accomplished through increased awareness and approval of the property owners and community and by approval by the City of Parkville through the ratification of a city ordinance.

A variety of funding strategies for rehabilitating existing properties are available depending on the route chosen. These include state and federal historic tax credit programs if listed on the National Register (either individual properties or as a historic district) and low interest loans or grants from a variety of public and non-profit sources. The City of Parkville may also consider adopting tax abatement incentives for approved property improvements within the downtown. Regardless of funding strategy, rehabilitation of existing properties would need to follow the Secretary of the Interior's Standards for Rehabilitation, especially if funding is from a governmental entity. These standards will be defined in the next section.

A previous study (Parkville Master Plan) which looked at Parkville as a whole, specifically discussed the importance of historic preservation within the downtown core. The historic preservation priorities listed within this study were confirmed in this study through community involvement and outreach activities



Fig. E.1 - View of Main Street looking South (SRJA, 2012).

These priorities include:

- Maintaining an active historic preservation committee to assist with documenting Parkville’s history and preserving its historic character
- Preserving structures on the National Register of Historic Places, including the Benjamin Banneker School, MacKay Hall, Waddell “A” Truss Bridge, and Washington Chapel C.M.E. Church
- Creating and implementing standards that require new development and major redevelopment in and around the historic downtown core to blend with and enhance the area’s historic character
- Preparing building rehabilitation strategies for existing historic properties
- Adopting a planned zoning district or overlay district to preserve the character of the residential area in and around downtown to coincide with similar planned zoning/overlay district for the commercial Old Town District.

Another study performed within the downtown core is the Livable Communities Study which was completed in 2012. The character of downtown Parkville was discussed in the report and a preliminary proposed commercial district was outlined on the Historic Downtown Core Map.

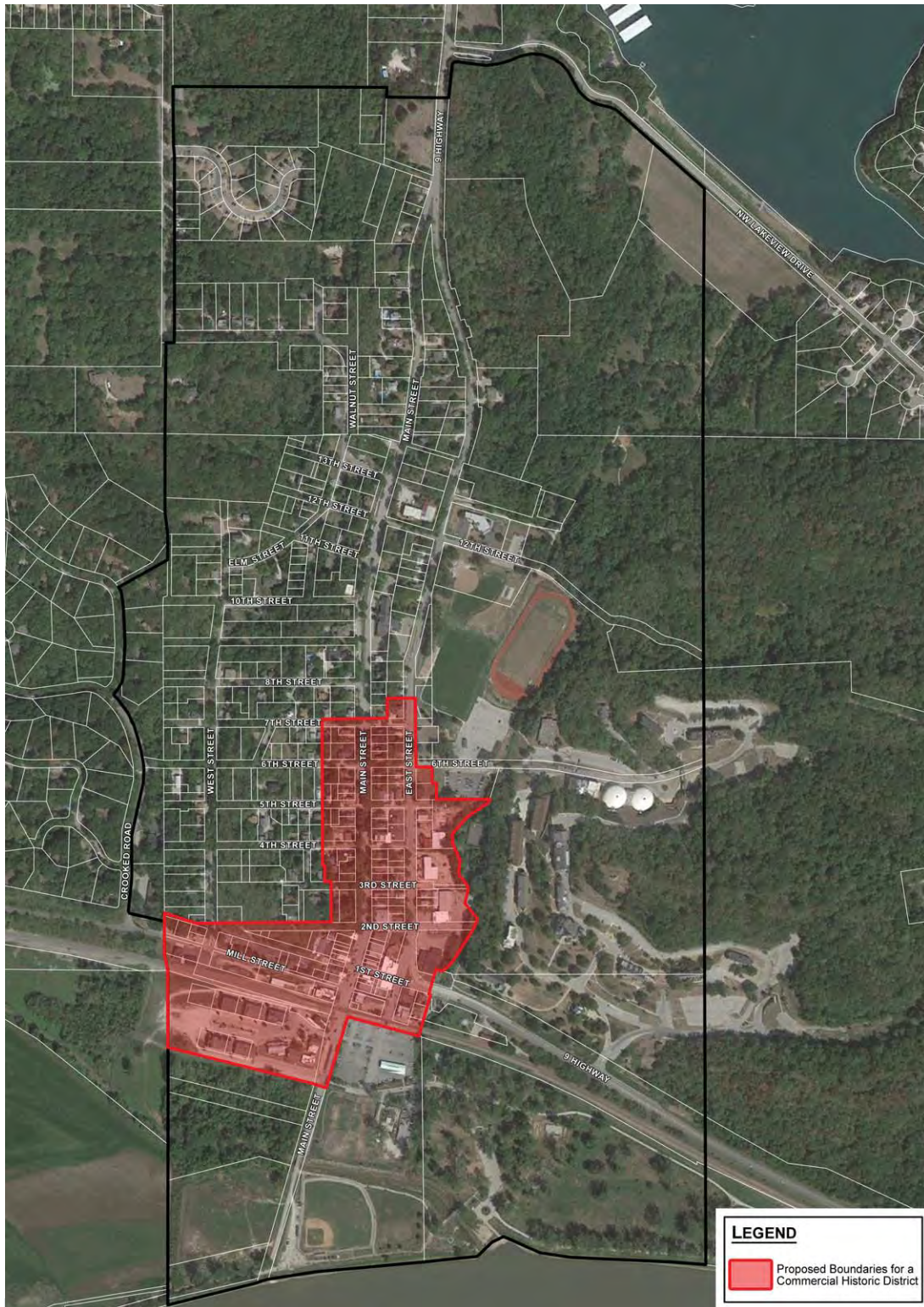


Fig. E.2 – Proposed commercial district outlined in blue dashed line on the Historic Downtown Core Map (TranSystems, Inc. and SRJA, 2012).

National Register vs. Local Historic District

National Register Listing

A National Register historic district includes individual buildings, structures, sites, and objects as well as historic districts that are considered to be significant in American history, architecture, engineering, archaeology, and culture and recognizes the significance of these historic resources in a community.

Frequently Asked Questions	National Register of Historic Places
What is the National Register of Historic Places?	The National Park Service, through the Missouri Department of Natural Resources, oversees the National Register, which is a Federal list of districts, sites, buildings, structures, and objects significant in American history, architecture, archaeology, engineering, and culture. <u>Typically, buildings are evaluated for their age, integrity and significance. Meaning, buildings which are 50 years of age or older which retain the architectural character of the way it looked in the past; and those buildings not 50 years of age which are associated with a culturally significant person or event can be listed on the National Register.</u> http://www.nps.gov/nt/
Is there a benefit to being on the register?	Yes , owners may be eligible for a <u>20% Federal Historic Rehabilitation Tax Credit</u> for income-producing properties that can be combined with a <u>25% Missouri Historic Rehabilitation tax credit</u> . The Missouri tax credit applies to owner-occupied property as well. <u>There is also a 10% tax credit available for the rehabilitation of non-historic buildings placed in service before 1936.</u> The building must be rehabilitated for non-residential use. There is no formal review process for rehabilitations of non-historic buildings. http://www.nps.gov/tps/tax-incentives.htm
Do all buildings in historic districts have to be historic (50 years of age or older, or culturally significant)?	No , historic districts often include non-historic (<i>non-contributing</i>) properties. Owners of these properties are however <u>not</u> eligible for State or Federal Historic Tax Credit incentives.
Do I have any say as to whether my property is included in a historic district?	Yes , before designation all owners have the opportunity to concur with or object to listing at public hearings at the City of Parkville and the Missouri Advisory Council on Historic Preservation. <u>Designation is not permitted if the majority of property owners submit objections.</u>
Do I have to restore my property to its "original" appearance?	No , owners of private property listed in the National Register have no obligation to restore their property.
Do I have to maintain my property?	No , owners of private property listed on the National Register have no obligation to maintain their property.
What might happen to the value of my property?	Because National Register properties have some protection and tax incentives available, owners may be more inclined to make improvements to their properties, and this may <u>increase the value of all property in a given district.</u>
Where can I go for assistance?	State Historic Preservation Office P.O. Box 176 Jefferson City, Missouri 65102 Phone: (573) 751-7858 Website: http://www.dnr.mo.gov/shpo

Fig. E.3 – National Register of Historic Places Frequently Asked Question (SRJA, 2013).

National Register Listing Does:

- Identifies significant properties and districts for general planning.
- Analyzes and assesses the historic character and quality of the district.
- Designates historic areas based on uniform national criteria and procedures.
- Provides a limited degree of protection from the effects of federally assisted undertakings.
- Makes available specific federal and state tax incentives for preservation purposes.
- Qualifies property owners for federal and state grants for preservation purposes, when funds are available.

National Register Listing Does Not:

- Restrict the use or disposition of property or obligate private property owners to make revisions in any way.
- Require conformance to design guidelines or preservation standards when a property is rehabilitated unless specific preservation incentives (tax credits, grants) are involved.
- Affect state and local government activities.
- Does not prevent the demolition of historic buildings and structures within designated areas.

Local Historic Designation

A local historic district is a geographically definable area which contains structures, sites, or works of art which have special historical or aesthetic value; represent one or more styles of architecture typical of one or more eras in the history of the municipality, county, state, or region; and cause that area to constitute a visibly perceptible section of the community.

The creation of design guidelines protects the significant properties and the historic character of the district. It provides a community with the means to make sure that growth, development, and change take place in ways that respect the important architectural, historical, and

environmental characteristics within and encourages sensitive development.

Local Historic Districts Do:

- Protects a community's historic properties through a design review process.
- Protects the historic character and quality of the defined area with specific design controls.
- Provides no tax incentives for preservation purposes unless such are provided by local tax law.

Local Historic Districts Do Not:

- Qualify property owners for federal or state grants for preservation purposes.
- Restrict the use of the property or require property owners to make improvements to their property.
- Require review of proposed demolitions within designated areas.

The Parkville downtown core, as defined in Figure E.2, retains a significant amount of historic character and integrity and is our opinion that it meets the criteria for a preliminary Determination of Eligibility (DOE) which is the first step toward being listed on the National Register of Historic Places. If the city and citizens do not wish to be listed on the NR, it is recommended that the downtown core be recognized at the local level as a historic district or a special zoning area which in turn requires some additional design consideration and conformance with design guidelines. This process is not unlike residential neighborhoods/developments which have Home Owners' Associations which have guidelines for exterior renovations.

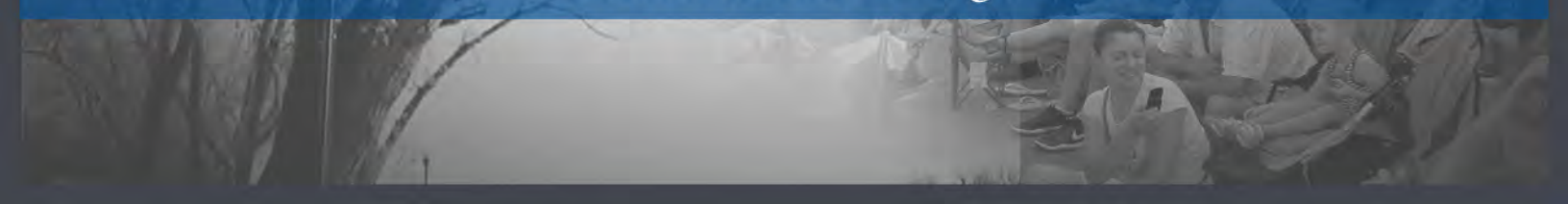
Frequently Asked Questions	National Register	Local Historic Designation
What are the National and the Parkville Historic Registers?	The National Park Service, through the Missouri Department of Natural Resources, oversees the National Register, which is a Federal list of districts, sites, buildings, structures, and objects significant in American history, architecture, archaeology, engineering, and culture.	A Historic Preservation Commission established by Parkville, Missouri oversees the Local Historic Designation process and register of properties, which includes a list of districts, sites, buildings, structures, and objects significant in Parkville history.
Is there a benefit to being on a historic register?	Yes , owners may be eligible for a 20% Federal Historic Rehabilitation Tax Credit for income-producing properties that can be combined with a 25% Missouri Historic Rehabilitation Tax Credit. The Missouri tax credit applies to owner-occupied property as well.	Yes , the design review process encourages quality design for proposed alterations to listed properties and gives any person or neighborhood a forum to comment on changes to their neighborhood.
Can my property be on both registers?	Yes , an owner of a property that is both locally designated and listed in the National Register may take advantage of Federal and state tax incentives and are expected to conform to national and local historic preservation standards.	
Do I have to be on the Local Historic Register before I can be on the National Register?	No , a property may be listed on <u>either register or both</u> . The local register and the National Register use the same criteria to evaluate historic properties. The two historic registers are designed to compliment each other by providing unique benefits and tools to protect historic properties.	
Do all buildings in historic district have to be historic?	No , historic districts often include non-historic (<i>non-contributing</i>) properties. Owners of these properties are currently not eligible for state or Federal tax credit incentives.	No , historic districts often include non-historic (<i>non-contributing</i>) properties. However, changes to these properties are still subject to design review and approval by the Historic Preservation Commission so that proposed changes are compatible with the character of the historic district/neighborhood.

Frequently Asked Questions	National Register	Local Historic Designation
Do I have any say as to whether my property is included in a historic district?	Yes , before designation all owners have the opportunity to concur with or object to listing at public hearings with the Historic Preservation Commission and the Missouri Advisory Council on Historic Preservation. <u>Designation is not permitted if the majority of property owners submit objections.</u>	Yes , before designation all owners have the opportunity to concur with or object to listing at public hearings with the Historic Preservation Commission and the City Planning Commission and the City Council. <u>Designation is not permitted if the majority of property owners submit objections.</u>
Do I have to restore my property to its "original" appearance?	No , owners of private property listed in the National Register have no obligation to restore their property. Features that were not existing do not have to be replicated and new 'historic looking' features should not be added as the alterations should not create a sense of 'false historicism'.	No , any changes present at the time the property is designated may remain. Any future exterior alterations will have to follow the <u>Secretary of Interior's Standards for Rehabilitation</u> . http://www.nps.gov/tps/standards/four-treatments/treatment-rehabilitation.htm
Do I have to maintain my property?	No , owners of private property listed on the National Register have no obligation to maintain their property.	Yes , the Ordinance requires that designated properties be kept in good repair.
What might happen to the value of my property?	Because National Register properties have some protection and tax incentives available, owners may be more inclined to make improvements to their properties, and this may <u>increase the value of all property in a given district.</u>	Because the local register properties have some protection through design review, owners may be more inclined to make appropriate improvements to their properties, and this may <u>increase the value of all property in a given district.</u>
Where can I go for assistance?	State Historic Preservation Office P.O. Box 176 Jefferson City, Missouri 65102 Phone: (573) 751-7858 Website: www.dnr.mo.gov/shpo/index.html	City of Parkville 8880 Clark Avenue Parkville, Missouri 64152 Website: http://parkvillemo.gov/

Fig. E.4 – National Register vs. Local Historic Designation (SRJA, 2013).



APPENDIX F: A Preliminary Commercial Rehabilitation Design Guideline



Appendix F

A Preliminary Commercial Rehabilitation Design Guideline

F.1 Secretary of the Interior's Standards for Historic Properties

The following information is from the National Park Service, Technical Preservation Services website (<http://www.nps.gov/tps/standards.htm>).

The Standards are a series of concepts about maintaining, repairing, and replacing historic materials, as well as designing new additions or making alterations. The Guidelines offer general design and technical recommendations to assist in applying the Standards to a specific property. Together, they provide a framework and guidance for decision-making about work or changes to a historic property.

The Standards offer four distinct approaches to the treatment of historic properties - preservation, rehabilitation, restoration, and reconstruction with Guidelines for each.

Preservation focuses on the maintenance and repair of existing historic materials and retention of a property's form as it has evolved over time.

Rehabilitation acknowledges the need to alter or add to a historic property to meet continuing or changing uses while retaining the property's historic character.

Restoration depicts a property at a particular period of time in its history, while removing evidence of other periods.

Reconstruction re-creates vanished or non-surviving portions of a property for interpretive purposes.

Most properties within the Parkville Downtown will utilize the rehabilitation guidelines to make improvements; an approach that allows for updates and changes to meet today's needs while retaining the historic character of the building. Historic resources are found both above and below grade. The majority of the downtown has not been explored from an archeological perspective. When beginning a new construction project or one that will require extensive work, it is highly recommended to hire qualified professionals with experience in restoration of historic buildings.



Fig. F.1 - View looking southwest at English Landing Center. When planning new development, consider the resources above and below grade. (SRJA, 2013).

Standards for Rehabilitation

1. A property will be used as it was historically or be given a new use that requires minimal change to its distinctive materials, features, spaces, and spatial relationships.
2. The historic character of a property will be retained and preserved. The removal of distinctive materials or alteration of features, spaces, and spatial relationships that characterize a property will be avoided.
3. Each property will be recognized as a physical record of its time, place, and use. Changes that create a false sense of historical development, such as adding conjectural features or elements from other historic properties, will not be undertaken.
4. Changes to a property that have acquired historic significance in their own right will be retained and preserved.

5. Distinctive materials, features, finishes, and construction techniques or examples of craftsmanship that characterize a property will be preserved.
6. Deteriorated historic features will be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature will match the old in design, color, texture, and, where possible, materials. Replacement of missing features will be substantiated by documentary and physical evidence.
7. Chemical or physical treatments, if appropriate, will be undertaken using the gentlest means possible. Treatments that cause damage to historic materials will not be used.
8. Archeological resources will be protected and preserved in place. If such resources must be disturbed, mitigation measures will be undertaken.
9. New additions, exterior alterations, or related new construction will not destroy historic materials, features, and spatial relationships that



Fig. F.2 – View of residential houses as private offices along Main Street looking south. (SRJA, 2013).

characterize the property. The new work will be differentiated from the old and will be compatible with the historic materials, features, size, scale and proportion, and massing to protect the integrity of the property and its environment.

10. New additions and adjacent or related new construction will be undertaken in such a manner that, if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired.

F.2 Preliminary Rehabilitation Guidelines

Key Goals of the Guidelines:

- Provide a means to identify and preserve the distinctive character of Parkville that represent the city's culture and history.

- *The guidelines inventory the existing historic structures and identify the noted architectural styles.*
- Foster civic pride.
- Conserve and improve property values within the designated area.
- Protect the historic aesthetics of the city for local residents as well as tourists, visitors, shoppers and utilize this image to promote business, commerce, and industry to generate an economic benefit to the City.
- Encourage preservation and rehabilitation of existing built resources and prevent future urban blight.
- Provide *recommendations and ideas* for rehabilitation and new construction.



Fig. F.3 – View of east side of Main Street (SRJA, 2013).

Elements of design that are typically addressed in the guidelines are:

1. Building Massing and Scale (including screening of utilities and systems equipment)
2. Alignments and setbacks along the street
3. Patterns / decorative elements
4. Proportion of the structures relative to the existing historic fabric
5. Materials (often differing between Commercial and Residential)
6. Colors
7. Signage and lighting

General Maintenance

Regular, routine maintenance is important to keep the overall appearance and quality of the downtown core. Many buildings in the downtown require maintenance beyond typical yearly maintenance. Building maintenance is the responsibility of the property owner. Owners are encouraged to review buildings and the surrounding property on a yearly basis and to perform repairs as they should arise. The City is responsible for the upkeep of the street and sidewalk maintenance; however, planters and hanging baskets, snow removal and building maintenance are the responsibility of the property owner. The City will review the condition of a structure that is deemed a dangerous building that poses a threat to public health and safety.



Fig. F.4 – View of faded painted signs and stained glass transom window with a deteriorated, filmy protective glazing and trim. (SRJA, 2013).

Typical maintenance items to be inspected on a yearly basis include:

- Roofing (check for ponding water; inspect flashing, chimneys, parapets, and parapet caps; clean out gutters and downspouts)
- Exterior Walls (check for brick spalling, mortar missing, cracking, and stone deterioration; clean dirt and debris from exterior; check siding for warping, cracks, open seams; check for air/moisture infiltration, peeling paint/discoloration)
- Windows (check for air gaps/leaks, broken glazing, broken seals on insulated glazing, wood rot, peeling paint/discolored metal, weatherstripping, caulking, window operation)
- Doors (public entry steps or walkway paving condition, check for air gaps/leaks, broken glazing, broken seals on insulated glazing, wood rot, peeling paint/discolored metal, weatherstripping, operation)
- Signage/Details (faded graphics, peeling paint, check hanging supports/fasteners, check for fabric fading/tears and clean dirt and debris from fabric awnings, check lighting both external and internal for signage, peeling paint/discolored metal, caulking)
- Lighting (check function of lights, replace light bulbs with bulbs that match in wattage and color temperature, broken glazing, peeling paint/discolored metal)
- Foundation (check for cracks, water infiltration, material crushing/crumbling, movement)

Architectural Elements & Materials

NPS Technical Preservation Briefs should be consulted for appropriate treatments for guidance on specific materials and methods for preserving, rehabilitating and restoring historic buildings in ways that are consistent with their historic character. These materials are available both online and in print upon request.

<http://www.nps.gov/tps/how-to-preserve/briefs.htm>

1. Cleaning and Water-Repellent Treatments for Historic Masonry Buildings
2. Repointing Mortar Joints in Historic Masonry Buildings
3. Improving Energy Efficiency in Historic Buildings
4. Roofing for Historic Buildings
5. The Preservation of Historic Adobe Buildings
6. Dangers of Abrasive Cleaning to Historic Buildings
7. The Preservation of Historic Glazed Architectural Terra-Cotta
8. Aluminum and Vinyl Siding on Historic Buildings: The Appropriateness of Substitute Materials for Resurfacing Historic Wood Frame Buildings
9. The Repair of Historic Wooden Windows
10. Exterior Paint Problems on Historic Woodwork
11. Rehabilitating Historic Storefronts
12. The Preservation of Historic Pigmented Structural Glass (Vitrolite and Carrara Glass)
13. The Repair and Thermal Upgrading of Historic Steel Windows
14. New Exterior Additions to Historic Buildings: Preservation Concerns
15. Preservation of Historic Concrete
16. The Use of Substitute Materials on Historic Building Exteriors
17. Architectural Character—Identifying the Visual Aspects of Historic Buildings as an Aid to Preserving their Character
18. Rehabilitating Interiors in Historic Buildings—Identifying Character-Defining Elements

19. The Repair and Replacement of Historic Wooden Shingle Roofs
20. The Preservation of Historic Barns
21. Repairing Historic Flat Plaster—Walls and Ceilings
22. The Preservation and Repair of Historic Stucco
23. Preserving Historic Ornamental Plaster
24. Heating, Ventilating, and Cooling Historic Buildings: Problems and Recommended Approaches
25. The Preservation of Historic Signs
26. The Preservation and Repair of Historic Log Buildings
27. The Maintenance and Repair of Architectural Cast Iron
28. Painting Historic Interiors
29. The Repair, Replacement, and Maintenance of Historic Slate Roofs
30. The Preservation and Repair of Historic Clay Tile Roofs
31. Mothballing Historic Buildings
32. Making Historic Properties Accessible
33. The Preservation and Repair of Historic Stained and Leaded Glass
34. Applied Decoration for Historic Interiors: Preserving Historic Composition Ornament
35. Understanding Old Buildings: The Process of Architectural Investigation
36. Protecting Cultural Landscapes: Planning, Treatment and Management of Historic Landscapes
37. Appropriate Methods of Reducing Lead-Paint Hazards in Historic Housing
38. Removing Graffiti from Historic Masonry
39. Holding the Line: Controlling Unwanted Moisture in Historic Buildings
40. Preserving Historic Ceramic Tile Floors
41. The Seismic Retrofit of Historic Buildings: Keeping Preservation in the Forefront
42. The Maintenance, Repair and Replacement of Historic Cast Stone
43. The Preparation and Use of Historic Structure Reports
44. The Use of Awnings on Historic Buildings: Repair, Replacement and New Design
45. Preserving Historic Wooden Porches
46. The Preservation and Reuse of Historic Gas Stations
47. Maintaining the Exterior of Small and Medium Size Historic Buildings



Fig. F.5 – View of an existing storefront in downtown Parkville. (SRJA, 2013).



Fig. F.6 – An idea of what a new storefront would look like. (SRJA, 2013).

Massing/Scale

- The appearance of new construction should complement adjacent historic structures without replicating them. A new building should appear new, while taking into consideration the qualities of the historic context.
- Size, scale, mass, proportion, pattern and alignment are all important factors to consider with new construction.
- Mass is the relationship between size and form. Height, width and depth all contribute to the volume of a building, which, in combination with form, creates mass. The commercial buildings in the downtown core are similar in mass, which make them relate to each other. A building with volume and form that does not relate to its surroundings distracts from the streetscape, creating a rift in the streetscape.
- They key to achieving this balance is in the size of the structure (height, width and depth) in addition to the overall form of the structure and setbacks of the structure. New design should relate to the existing buildings and materials but not directly copy.

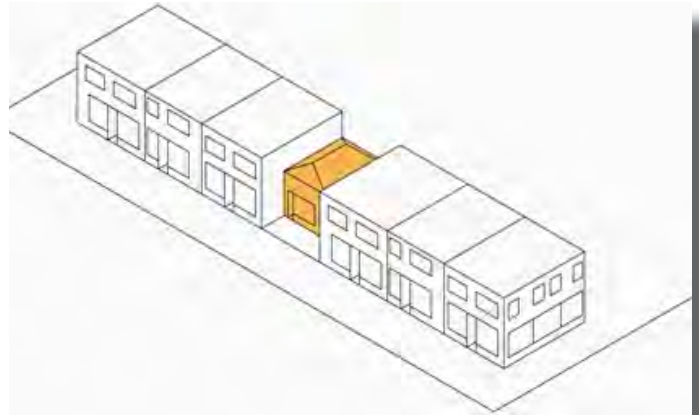


Fig. F.7 – Incompatible infill construction within the existing streetscape in terms of massing, scale and setbacks. (SRJA, 2013).

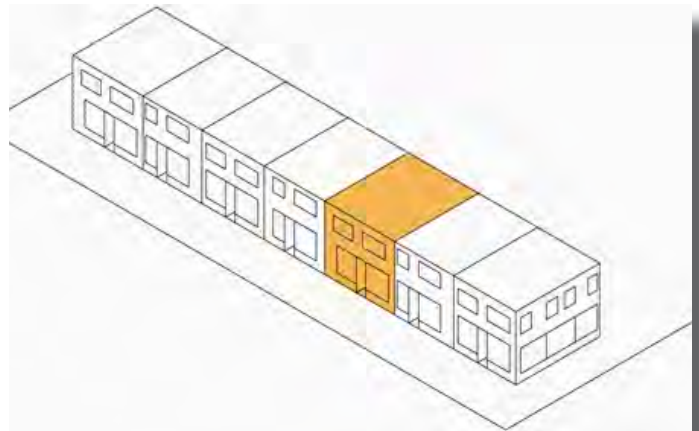


Fig. F.8 – Compatible infill construction within the existing streetscape with appropriate massing, scale and setbacks. (SRJA, 2013).



Fig. F.9 – Example of an incompatible infill (center structure) utilizing materials that do not relate to the brick neighboring commercial structures. This infill also does not match in color nor in the pattern (repetitive elements of the windows and storefronts) or massing (height) of the adjacent buildings. (SRJA, 2013).



Fig. F.10 – View of Main Street and the variety of building massing in Parkville. (SRJA, 2013).

Storefronts

- Historic glass storefronts are an important character-defining element of commercial buildings in the downtown core. Storefronts were traditionally designed to draw attention to the merchant’s goods and services. They served as signage, advertisements and welcomed shoppers into the building.
- A typical storefront is made up of a series of components including the display windows, doors, transom windows, divided window mullions, signage, and corner posts. Retention of each of these components is key to maintaining the historic look and charm of any commercial building.
- Preserve historic storefronts when possible. If one element of a storefront is damaged, have only that part replaced. Replace any deteriorated materials with new, exterior grade materials matching the size, texture color, durability and materiality of the original.
- When replacement is the only option, the design of the new storefront should be sympathetic to the proportions of the building and the original design. Consult historic photographs for ideas about what the new storefront could look like.
- Do not replace storefronts with a system that gives a false historical appearance or one that is inappropriate for the style or age of the building.
- Replacement glass should have the same reflective characteristics of the traditional historic glass. Tinted or glass with reflective coatings should be avoided.

Parts of a Storefront



Fig. F.11 – Storefront terminology diagram. (SRJA, 2013).



Fig. F.12 – An example of a highly complex storefront system added after the building was built. This storefront does not relate to the other structures within the downtown. (SRJA, 2013).



Fig. F.13 – View of a successfully restored storefront. (SRJA, 2013).

Signage

Signage plays a major part in defining the businesses and the historic character of a downtown. New signage should not detract from the architectural character or buidligh massing. Simple sings for wayfinding and identification of a historic building or district are encouraged. Signage types include, but are not limited to: painted wood signs, screenprinted/vinyl lettering on storefront windows, flag/blade signs, hanging signs, banners and surface mounted signage which can include painted signs on a substrate or individual pinned letters.

- Commercial signage and historic markers help to define the location and identity of a historic building.
- Historic markers help tell the story of a building, site, or district through a brief narrative. Signage denoting the location of a business or a historic resource should be kept to a minimum so as not to detract from the building's or district's architectural features.
- New signage and historic markers should be unobtrusive; relating to, rather than obscuring the design elements of the building or site. Use signs that are appropriate in size, scale, and color to historic buildings. Signs should be made to a pedestrian scale rather than automobiles.
- Sign materials should complement those found on buildings found throughout the downtown.
- Attach signs to windows or sign friezes above storefronts. The signage should be attached to the building in a way that is reversible, without causing damage to the building.
- Signage printed on fabric awnings are also recommended.
- Avoid signs that are too large in relationship to the size of the building or that obscure character-defining elements. Avoid roof-mounted signs. They are often difficult to read from pedestrian level and alter the rooftop continuity of the surrounding buildings.

- Internally illuminated signs and modern materials such as plastic are generally not appropriate.
- Accent lighting used to illuminate signs should be installed in a manner that minimizes visibility of the light fixture and does not result in glare. Up-lighting of monument signage should not spill onto neighboring properties.



Fig. F.14 – Example of a hanging flag/blade sign. (SRJA, 2013).



Fig. F.15 – Example of a Historic Parkville marker. (SRJA, 2013).



Fig. F.16 – Examples of screen printed vinyl graphic applied to a storefront window and hanging signage both interior and exterior. (SRJA, 2013).



Fig. F.17 – Example of a neon blade sign and signage in windows. (SRJA, 2013).



Fig. F.18 – Example of historic signage on the main entry to a building downtown. Historic signage such as this should be retained. (SRJA, 2013).



Fig. F.19 – Example of an appropriate canopy with signage. (SRJA, 2013).

Awnings (fabric, wood or steel)

Awnings can be an attractive element in a streetscape when they are made of a compatible, durable material and appropriate design. They provide shade, shelter, and a point of reference. Additionally, awnings can create continuity in a streetscape as well as a sense of human scale.

Lighting

Lighting in the commercial core is important for the safety and security of patrons. Streetlights are located along the sidewalks downtown which are reminiscent of the historic fixtures which used to line the street and have accessories for hanging flags and hanging pots. Building lighting is also important for safety but also serves as a way to differentiate an individual building from the overall streetscape. Lighting can highlight the architectural features of a building and/or illuminate the business signage. New lighting should not detract or compete with the architectural character of the building. Lighting examples include, but are not limited to: pole mounted, wall mounted sconces and ceiling mounted fixtures.

- Wall or ceiling-mounted light fixtures at a recessed entrance are appropriate for providing additional lighting at entrances. To light a secondary entrance to an upper level, a wall-mounted fixture placed above or beside the door is appropriate.
- Do not permanently remove or alter original lighting fixtures. Do not replace historic fixtures with new “updated” fixtures unless historic fixtures are no longer repairable.
- Choose a fixture that is appropriate for the building age. A Colonial-style carriage lamp, for example, on a 1930’s bungalow is inappropriate. Without documentation, it is not appropriate to install period light fixtures that will create a false sense of history.
- Make sure the fixture is an appropriate size for the building. Do not place a very large fixture next to a secondary entrance or a very small, residential type fixture next to a storefront



Fig. F.20 & F.21 – Views of street lights in the downtown core. (SRJA, 2013).

Fig. F.22 – Example of new wall sconce lighting located on either side of the main entry door on this restored building downtown. (SRJA, 2013).



Brick

Brick and stone are enduring materials and are associated with buildings of a permanent nature and is a common material found throughout the downtown area. Buildings are not 'maintenance free' and the same is true for masonry buildings which require cyclical maintenance. Typical maintenance of masonry structures includes mortar repairs (repointing), masonry cleaning and installation of caulking at weather sensitive openings (windows, doors and roofing parapet caps).

The mortar used should be softer than the brick or stone used. Mortar is meant to take the brunt of damage from the elements before the brick or stone is damaged. Mortar should be inspected and repaired with material matching the original in color, texture, joint tooling (profile), composition and strength where it has cracked or washed out. Mortar testing is highly recommended to better understand the composition or 'recipe' of the various components which make up mortar. These components include: sand, lime, portland cement which are mixed with water in varying proportions to create one of the five mortar types.

A note of caution, buildings constructed prior to about 1920 did not utilize portland cement as part of the mortar mix. If new mortar is harder than the brick or stone it is applied to, permanent damage could be done to the building by not allowing the brick to expand, contract and move naturally. Be sure to consult with a qualified professional who is familiar with traditional mortar mixes, have a mortar test performed and contract with a contractor with experience working with historic masonry prior to the initiation of work.

- Never sandblast a masonry building. Abrasive cleaning of any kind damages and erodes the weathering surface of all masonry.
- Masonry should always be able to breathe; allowing moisture to pass from the inside of the building to the outside. Masonry penetrating sealants or water repellants should only be considered on severely deteriorated brick or stone. If a penetrating water repellent is needed, the product selected should be breathable in order to ensure that moisture is not trapped on the inside of a building.

- Cleaning masonry is usually not necessary unless dirt, mildew, and debris are causing damage or is unsightly. In any case, the goal should not be to make the masonry look new. If necessary, clean masonry using the gentlest means possible, starting with water and a soft bristle brush. Prior to cleaning, select an inconspicuous area to test to ensure that no permanent damage will be done.



Fig. F.23 – View of dirty stone cornice with open mortar joints in need of repointing. (SRJA, 2013).



Fig. F.24 – View of a masonry wall in need of repointing and cleaning. Note the cracked mortar and bricks extending from the left corner of the window up to the corner of the parapet. (SRJA, 2013).

Siding & Trim

Siding includes a variety of profiles and can be made of many materials. Typical siding profiles include, but is not limited to: clapboard, bevel, tongue and groove, shiplap, channel rustic, board and batten and shingles. Materials can include: wood, fiberglass, vinyl, aluminum, steel, wood composite or cementitious products. The term synthetic siding refers to the man-made products listed above (vinyl, aluminum, steel, fiberglass, wood composites, or cementitious products). Once new siding is applied over the original cladding, it is difficult to assess on-going maintenance and water infiltration issues.

- It is not considered appropriate to apply siding to a building that was not originally sheathed in siding or to cover traditional wood or masonry with new, contemporary siding as it can significantly change the appearance of the facade of a historic building.
- Care should be taken when concealing wood siding with synthetic siding materials as moisture can be trapped between the layers causing deterioration which cannot be seen.

- It is recommended to remove synthetic siding that has been applied to a building inappropriately. Siding removal should begin in an inconspicuous location to ascertain if the siding can be removed without damaging the materials underneath.
- Do not remove character defining elements from a building. Deteriorated siding, trim or decorative elements should be repaired when possible or replaced with in-kind materials, and painted or finished to match the original materials.
- Where there is evidence of missing decorative detailing, replacement elements should be reconstructed to match the original. Reference historic photographs, ghost lines or paint lines where details were removed.
- Use of synthetic materials, in lieu of wood, are acceptable when there is no original siding or trim present or on new additions and for new construction.



Fig. F.25 – View of the gap between the wood board and batten siding which has been installed over a layer of stucco which has been applied to the upper half of the masonry façade. (SRJA, 2013).



Fig. F.26 – View of vinyl siding applied to the exterior of a building. The vinyl siding is dirty and has evidence of vines which grew across the entire façade at one time. (SRJA, 2013).

Stucco

Stucco is a plaster-like mix applied to the exterior of a building. Traditionally it was utilized on Mediterranean-inspired, Art Deco and Moderne architectural building styles. Additionally, stucco was used on the side and rear elevations of commercial buildings as a way to stabilize deteriorated masonry or to update the appearance of the structure. Original stucco features are important to retain and should therefore not be concealed with wood, masonry or synthetic siding. If stucco was added inappropriately and masks historic architectural features or was utilized to create architectural details that were not originally present, it is encouraged but not required to carefully remove the stucco in order to expose the historic facade.

- Do not remove stucco from a building that was installed to mask damaged masonry, unless it is intended that the underlying masonry will be restored to its original appearance.
- Existing stucco areas with signs of deterioration should be patched to match original stucco as closely as possible in appearance and texture.
- If stucco is to be painted, the selected product should be ‘breathable’ in order to allow moisture from the interior of the building to evaporate naturally and not become trapped within the wall assembly which over time will cause deterioration to the stucco and the substrate it is installed upon.

Fig. F.27 – View of two buildings with non-original stucco applied to the sides of the buildings in downtown. (SRJA, 2013).



Fig. F.28 – View of stucco applied to the side of a masonry building with a painted mural. (SRJA, 2013).

Fig. F.29 – View of stucco system known as EFIS which has a layer of rigid foam insulation which has been applied to the exterior of the building. If the stucco layer is removed, the historic building façade could be restored. (SRJA, 2013)

