

Plan West Ashley

West Ashley Revitalization Commission | 03.08.17

DOVER, KOHL & PARTNERS

t o w n p l a n n i n g



Plan West Ashley: goals

(Starter list included in City RFP, to be refined)

- Encourage **infill development over peripheral expansion** to conserve environmental resources, spur economic investment, repair social fabric, reduce costs, and reclaim abandoned areas
- Incentivize development projects of exemplary location and design throughout West Ashley via **catalytic small area plans**
- Include strategies to focus on **improving the design of development**
- Provide **market driven recommendations** for opportunity sites
- Be connected through meaningful transportation options and land-use patterns that support **mobility, walkability**, livability, and sustainability
- Provide **community services and facilities** that meet the physical, educational, and recreational needs of all

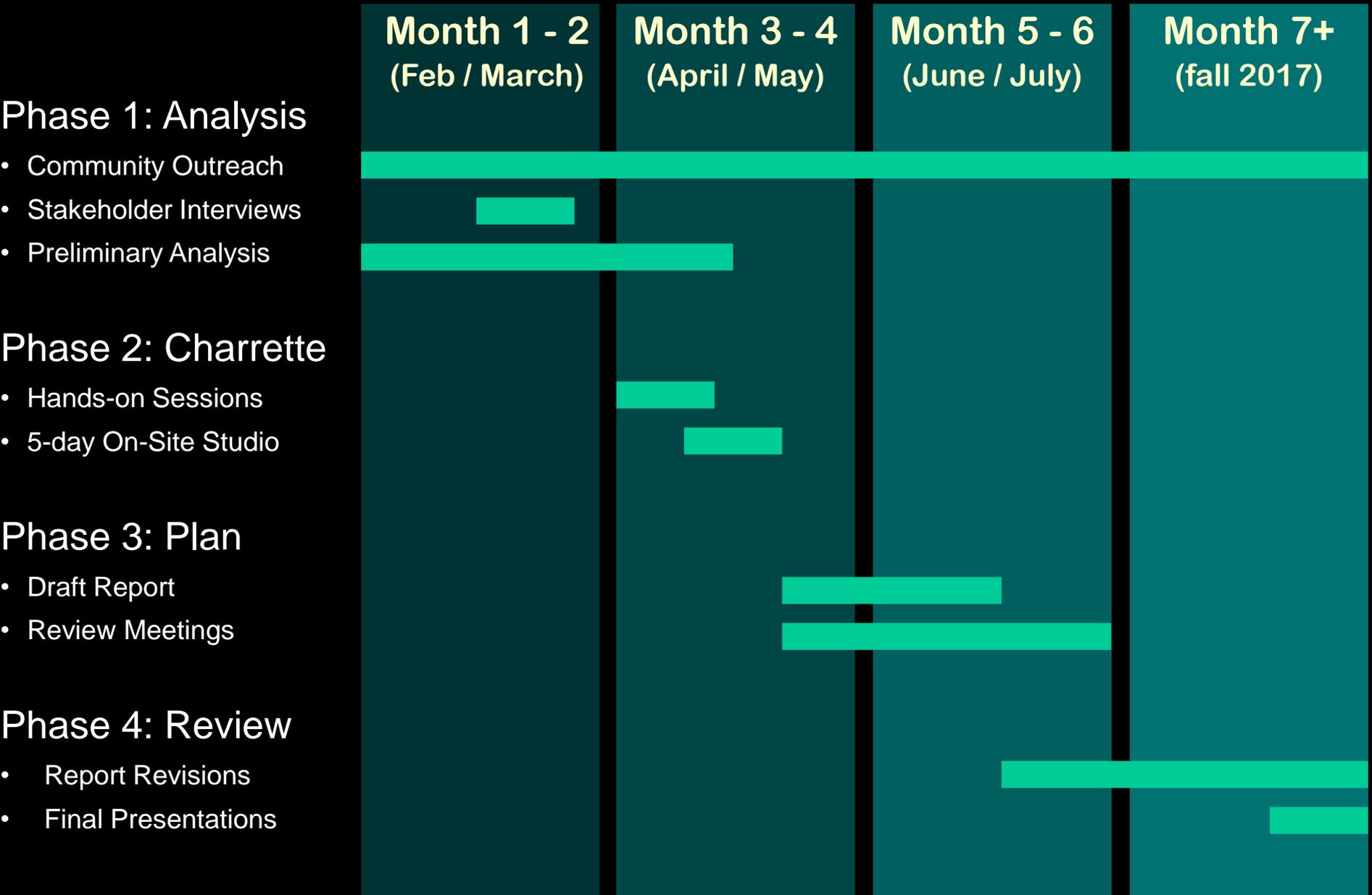
Plan West Ashley: goals

(Starter list included in City RFP, to be refined)

- Provide complete, connected neighborhoods containing **quality, affordable, and accessible housing choices** to serve all income levels and age groups
- Build a foundation for **economic prosperity** that nurtures innovation, attracts national and international talent, offers high-quality infrastructure, improves education and workforce development, and increases tourism
- Improve the overall **physical and mental health** of citizens by increasing the quality of life in the region
- Secure the **viability of environmental resources** for West Ashley's people, flora, and fauna so that future generations may experience a constantly improving, resilient environment
- Provide innovative and **sustainable strategies for stormwater drainage systems**

project update

preliminary schedule



phase 1: create public awareness

SAVE THE DATE

Upcoming Community Workshops for Plan West Ashley

Join your neighbors and help plan for the future of West Ashley at the **Kick-off & Hands-on Design Sessions**:

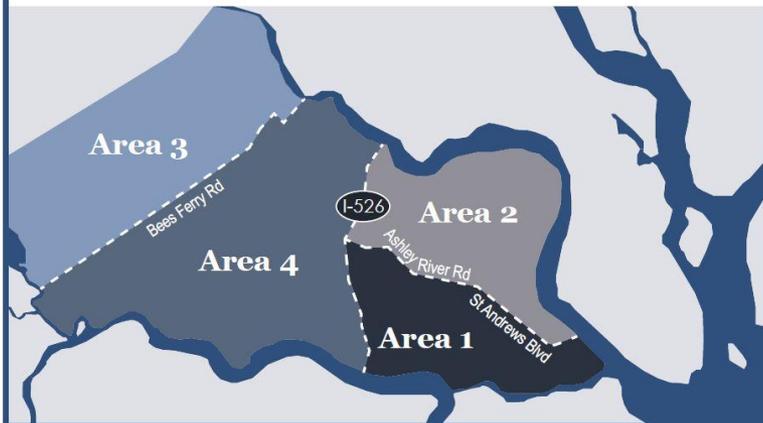
Monday, April 24, 6 - 9pm: **Area 1**

Tuesday, April 25, 6 - 9pm: **Area 2**

Saturday, May 6, 9am - 12pm: **Area 3**

Saturday, May 6, 2pm - 5pm: **Area 4**

You are invited to attend any or all of the above events to share your ideas for West Ashley. Additional opportunities for community participation will include an open planning studio **May 8 – 13**. More information (including meeting locations) coming soon to planwestashley.com.



Plan West Ashley will play a pivotal role in shaping the future of West Ashley's streets, neighborhoods, and public spaces. The Plan will set broad policies and identify specific actions aimed to enhance quality of life and protect the area's historic, cultural and natural environment.

Community participation will be critical to shaping the vision. The process to create the plan will provide multiple opportunities for input, including hands-on community meetings, a week-long open planning studio, and many conversations with stakeholders and community participants. Planwestashley.com will provide project updates and an additional way to interact with your neighbors and share your thoughts. The resulting plan will integrate all of the feedback and information gathered to define goals, objectives, and strategies to achieve the vision for West Ashley.

Plan to participate and share your ideas!

Questions, please contact:

Mandi Herring, West Ashley Project Coordinator
843.973.7249 | herringa@charleston-sc.gov



phase 1: hands-on design sessions

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Tuesday, April 25, 6 - 9pm: **Area 2**

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phase 1: create public awareness



HOME ABOUT RESOURCES EVENTS

ENGAGE

GOALS

PLAN WEST ASHLEY

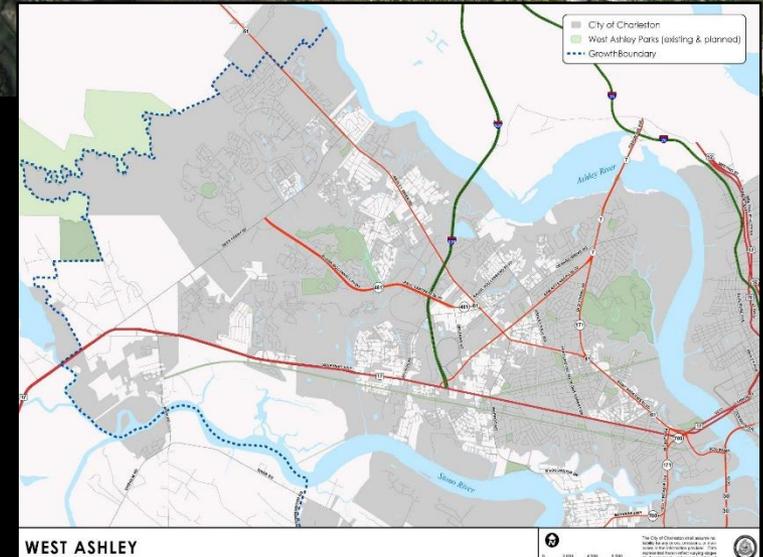
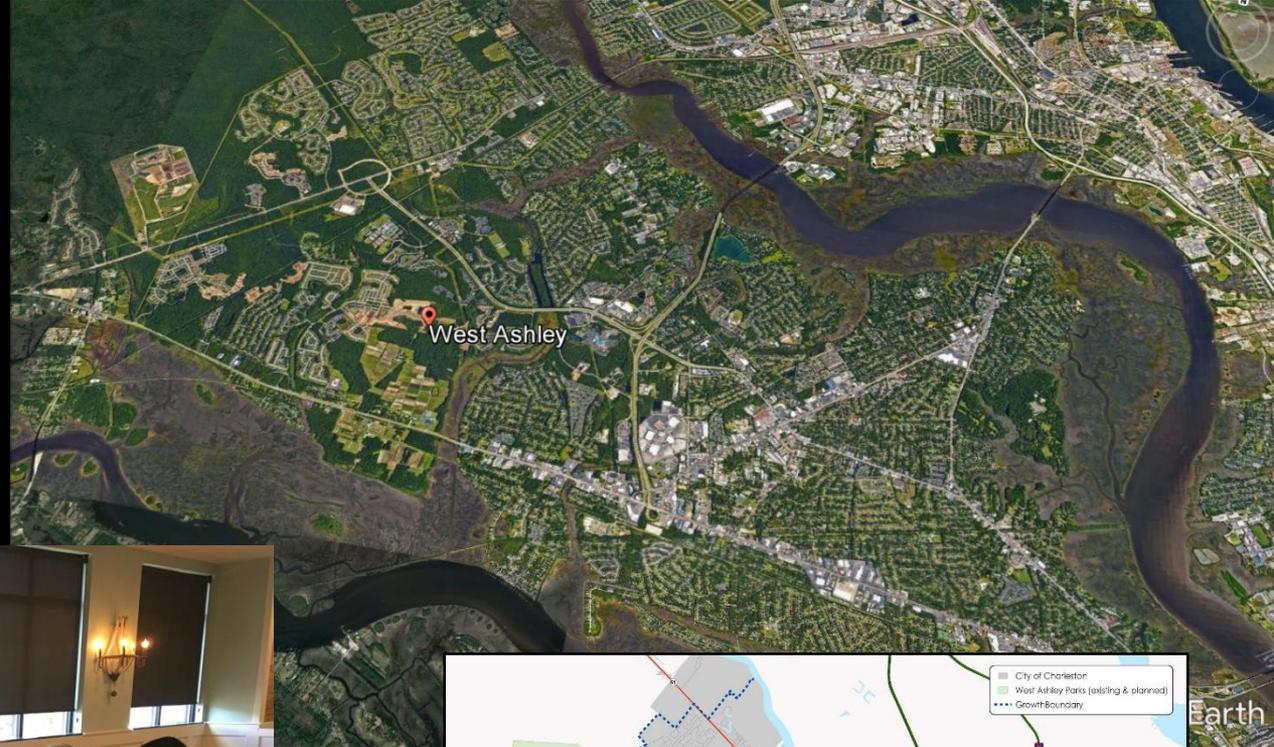
A Better Life, Every Generation

Plan West Ashley will play a pivotal role in shaping the future of West Ashley's streets, neighborhoods, and public spaces. The Plan will set broad policies and identify specific actions aimed to enhance quality of life and protect the area's historic, cultural and natural environment.

Community participation will be critical to shaping the vision. The process to create the plan will provide many opportunities for input, including hands-on community meetings and workshops, a week-long open planning studio, and multiple small group conversations with stakeholders and community participants. This website will supplement in-person meetings, providing background information, project updates, and an additional way to interact with your neighbors and share your

new website this week: planwestashley.com

phase 1: detailed analysis & preparation



review previous plans, **conduct stakeholder interviews**, on-site analysis

phase 2: charrette workshops

Step 1: Kick-off / Hands-on Design Sessions

(Area 1: April 24; Area 2: April 26; Area 3 & 4: May 6)



Step 2: Open Studio / Work-in-Progress

(5 days: on-site design studio: May 8-13;
Community work-in-progress presentation: May 13)



open design studio: May 8-13



open house: mid-week



work-in-progress presentation: May 13

tonight's event

- introductions
- update: the process so far
- draft: plan principles & illustrations
- economics: findings & strategy
- mobility strategy for great streets
- regulatory strategy: initial thoughts
- what happens next



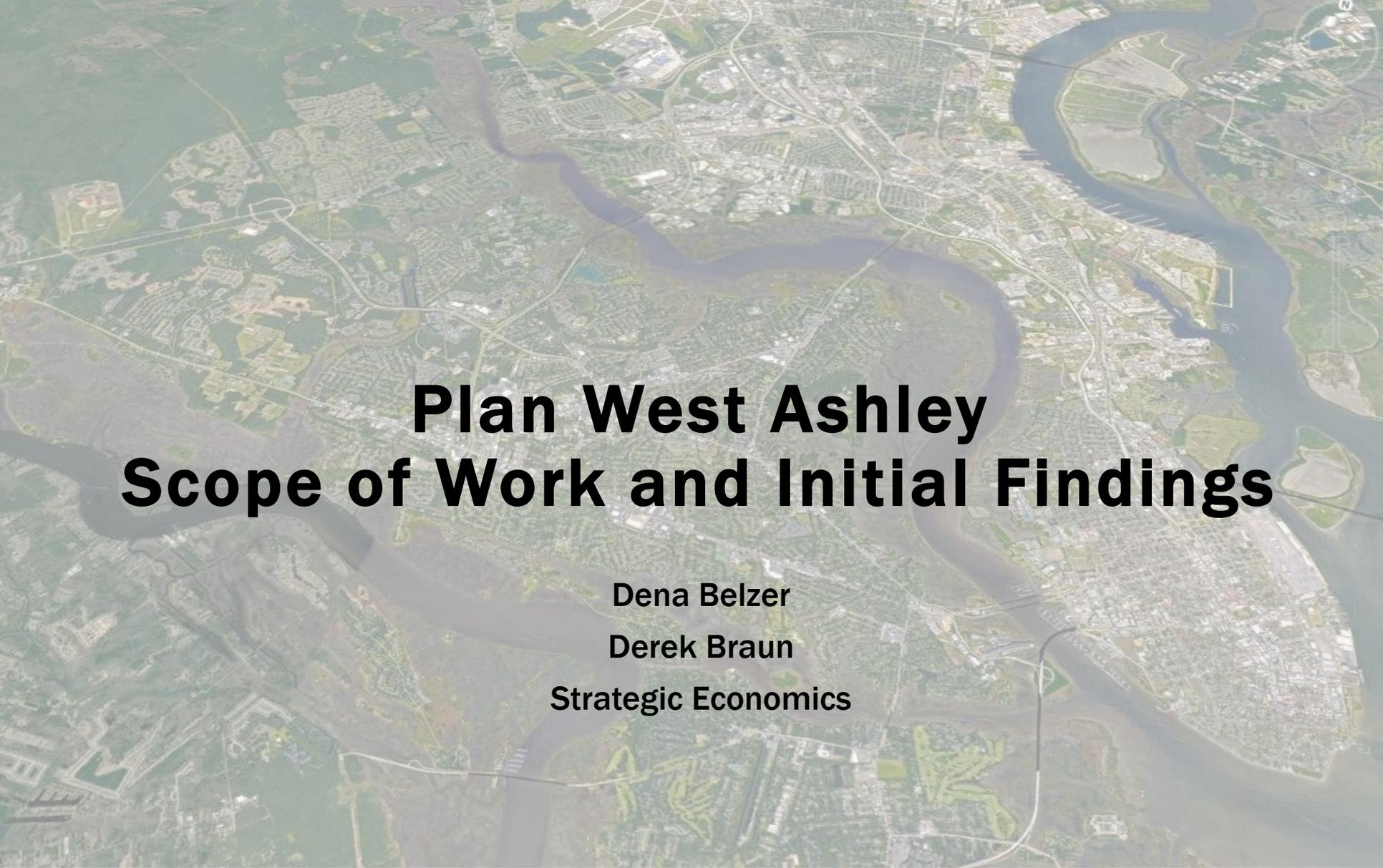
focus areas (draft)

where are focus areas?



to be determined throughout community input sessions; what are your ideas?

**initial economic
observations**



Plan West Ashley Scope of Work and Initial Findings

Dena Belzer
Derek Braun
Strategic Economics



STRATEGICECONOMICS

March 2017

Presentation Overview

Introduction - Market Study Purpose and Focus

Initial Market Findings – Trends Driving Change

- Demand
 - Population
 - Employment
- Supply
 - Housing
 - Retail

Next Steps for the Market Study

Questions for Today's Discussion

Introduction - Market Study Purpose and Focus

Purpose:

- Assess **residential, retail, and office** real estate market conditions and trends
- Inform **market driven strategies** for the Master Plan to foster infill development and economic development in West Ashley

Market Assessment Focus:

- Potential for reinvestment and growth in retail and commercial areas within West Ashley
- Understanding demand for new residential development in infill locations
- Addressing housing affordability concerns

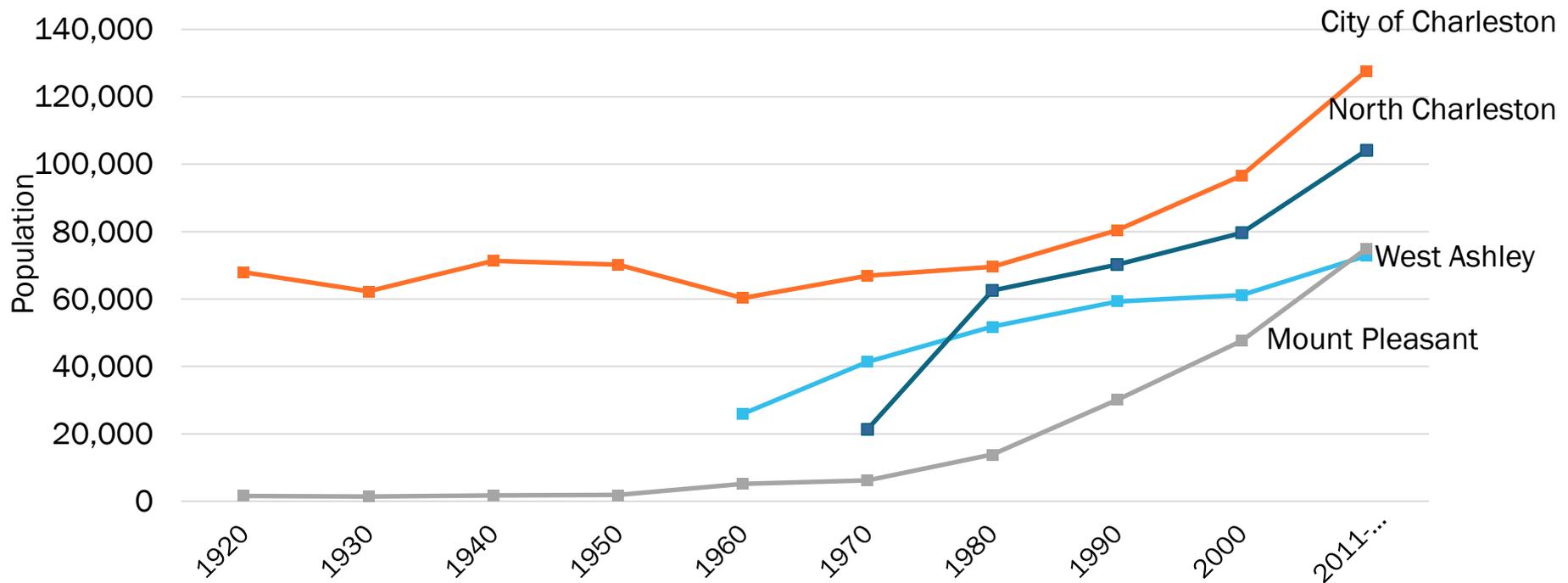


Initial Market Findings – Trends Driving Change **Demand**

Drivers of Change - Demand: Population Growth

- West Ashley grew rapidly between 1960 and 1990
- West Ashley's growth has slowed since 1990, while the City of Charleston's growth rate has increased since the 1980s

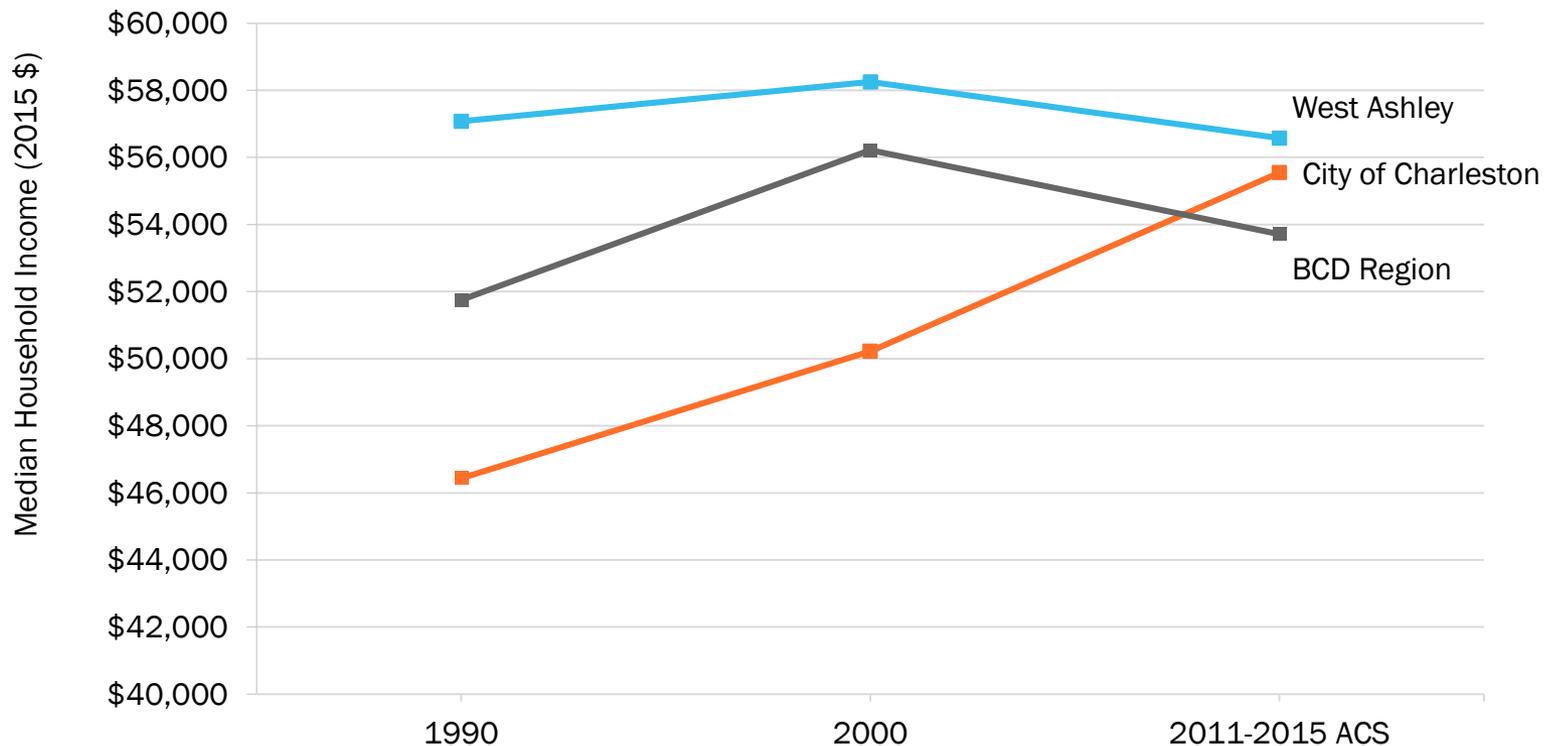
Population Growth in the Charleston Region, 1920-2015



Drivers of Change - Demand: Income

- Growth in median household income in West Ashley lags behind that of the City of Charleston
- However, West Ashley's median household income remains higher than the region and City

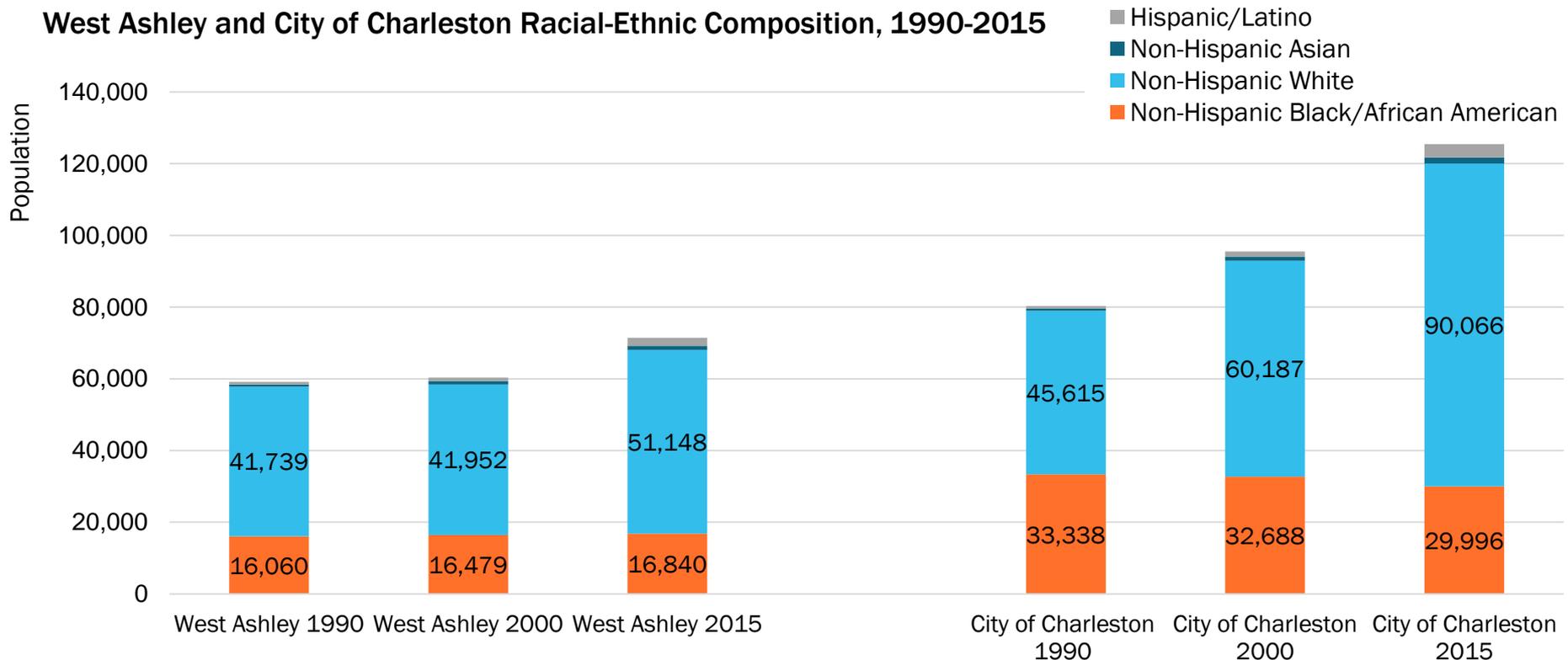
Median Household Income in the Charleston Region, 1990-2015



Drivers of Change - Demand: Race-Ethnicity

- West Ashley's African American population appears stable in absolute numbers, but declining as a share of the population
- The number and share of White residents in West Ashley has increased considerably (x2 in numbers, growing from 57% to 71% of residents)

West Ashley and City of Charleston Racial-Ethnic Composition, 1990-2015



Drivers of Change: Regional Employment

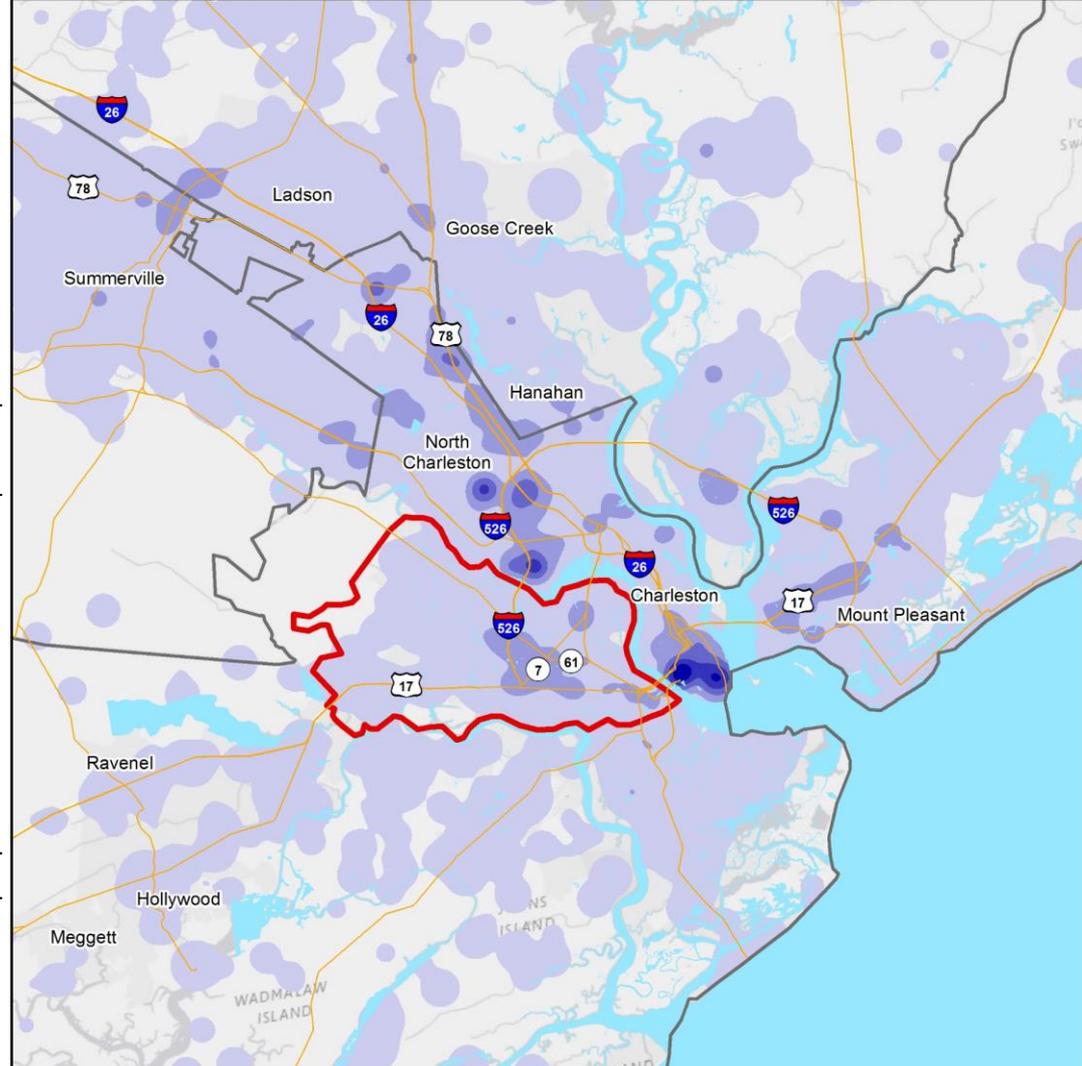
Employment in the BCD Region, 2014

Industry Categories	Primary Jobs**	Percent of Total
Industrial	44,098	15%
Retail & Other Services	42,790	15%
Office	40,881	14%
Health Care & Social Assistance	37,798	13%
Accommodation, Food, Entertainment	37,369	13%
Educational Services	26,969	9%
Government	14,059	5%
Other*	41,956	15%
Total	285,920	100%

Source: LEHD, 2017.

*Other includes NAICS 11, 21, 22, 23 and 56.

**Excludes employment in certain federal department agencies, such as Defense Intelligence Agency, National Security Agency and Central Intelligence Agency.



Berkeley-Charleston-Dorchester Region: Employment Density

Primary Jobs, 2014 (Jobs/square mile)



Sources: LEHD, 2017. Strategic Economics, 2017.

0 3 6 Miles



Drivers of Change: West Ashley Employment

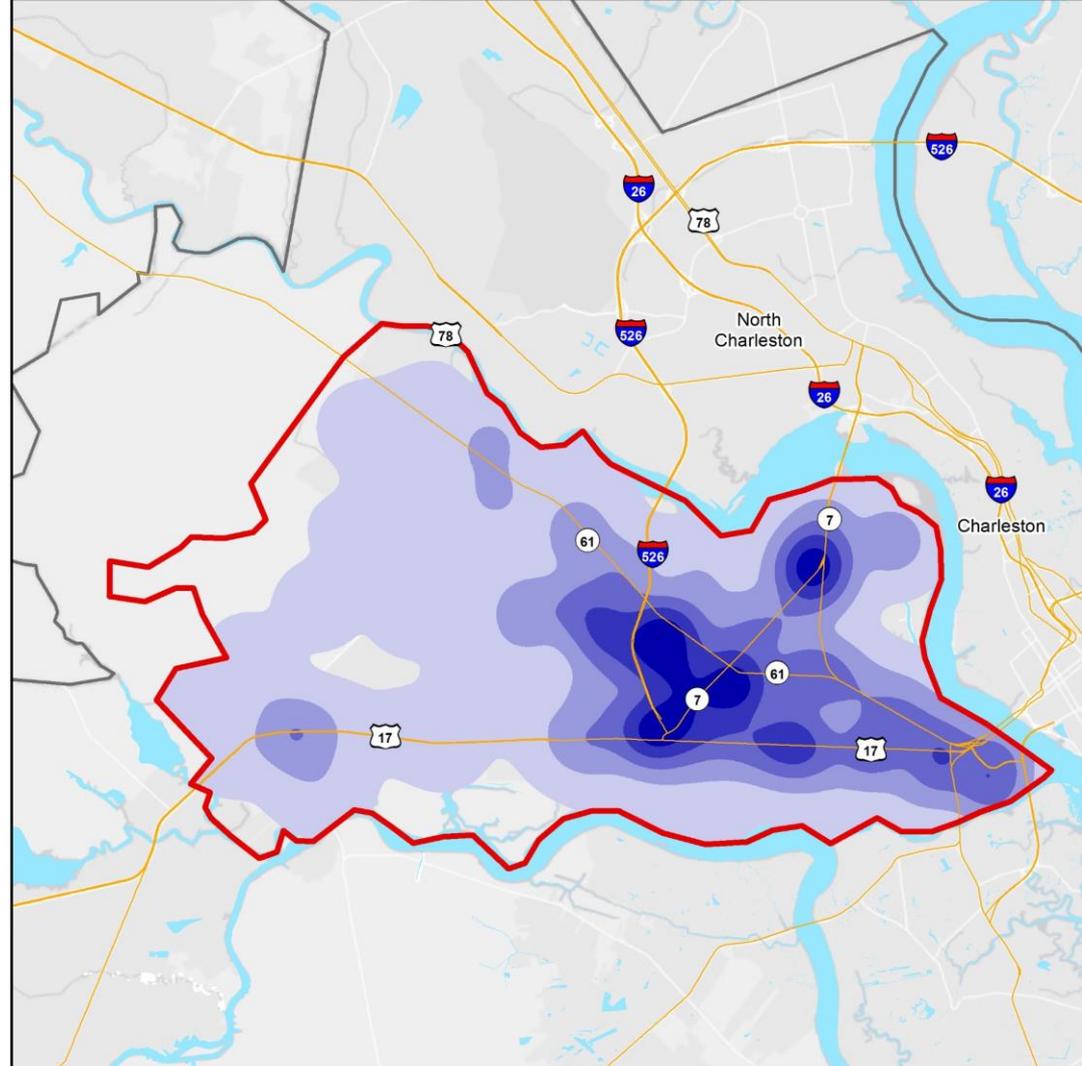
Employment in West Ashley, 2014

Industry Categories	Primary Jobs**	Percent of Total
Industrial	1,237	5%
Retail & Other Services	7,790	29%
Office	3,205	12%
Health Care & Social Assistance	6,194	23%
Accommodation, Food, Entertainment	3,768	14%
Educational Services	410	2%
Government	412	2%
Other	3,999	15%
Total	27,015	100%

Source: LEHD, 2017.

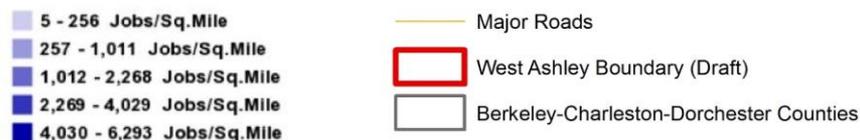
*Other includes NAICS 11, 21, 22, 23 and 56.

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West Ashley Study Area: Employment Density

Primary Jobs, 2014 (Jobs/square mile)



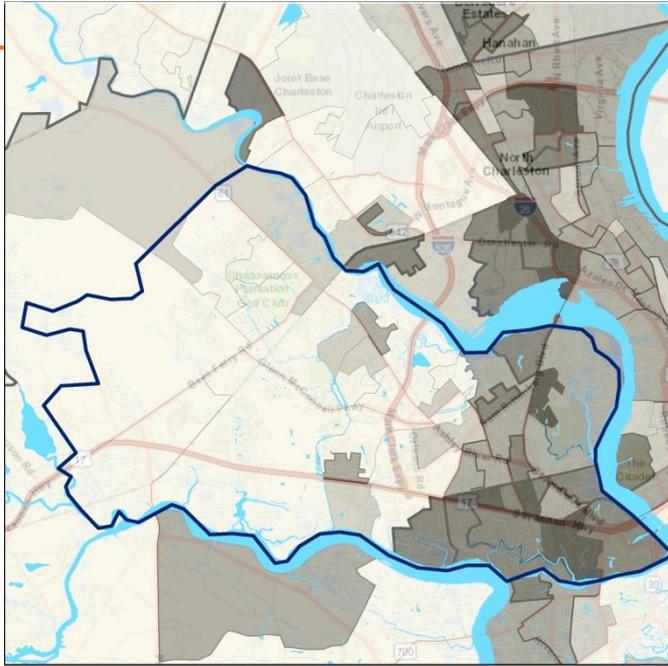


**Initial Market Findings –
Trends Driving Change**

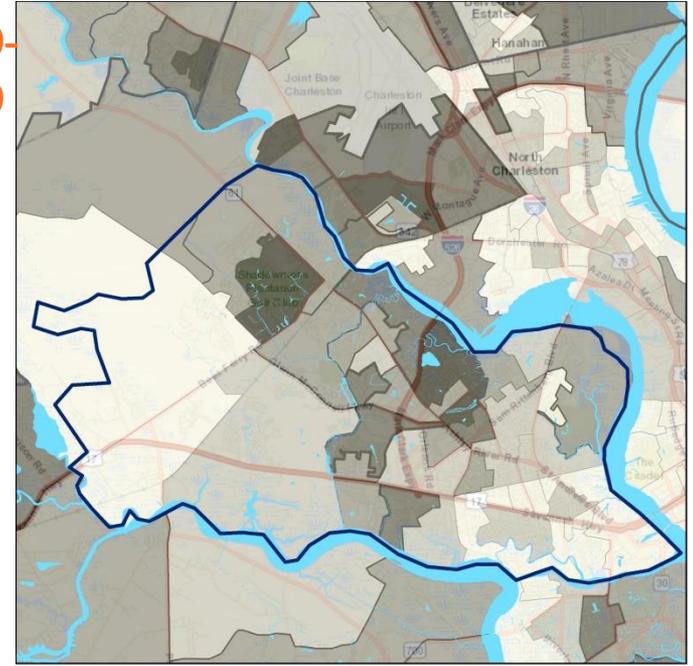
Supply

Housing Supply by Year Built

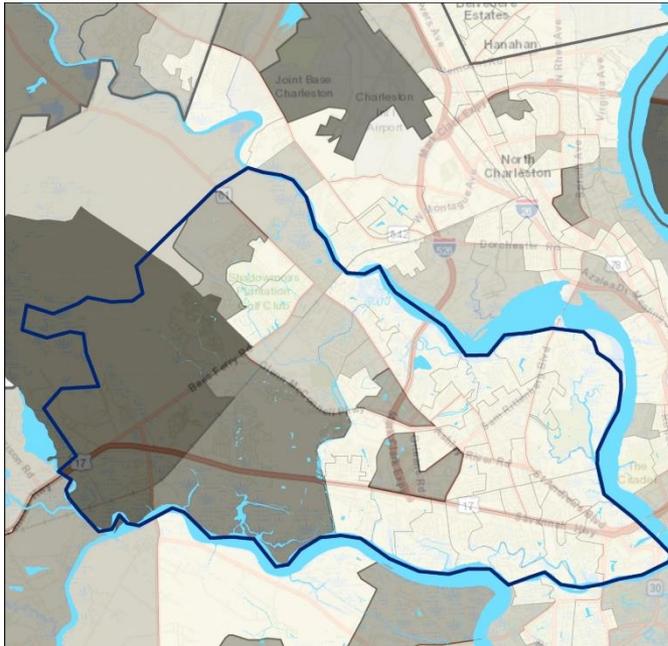
1940-
1969



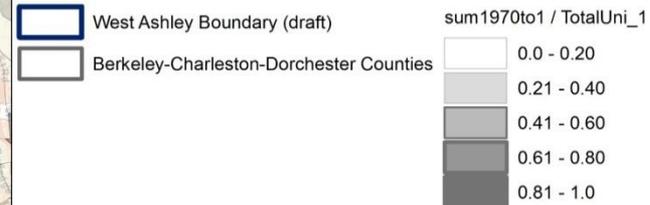
1969-
1999



2000-
later



Berkeley-Charleston-Dorchester Region: Percent Single-Family Detached Units (2015)



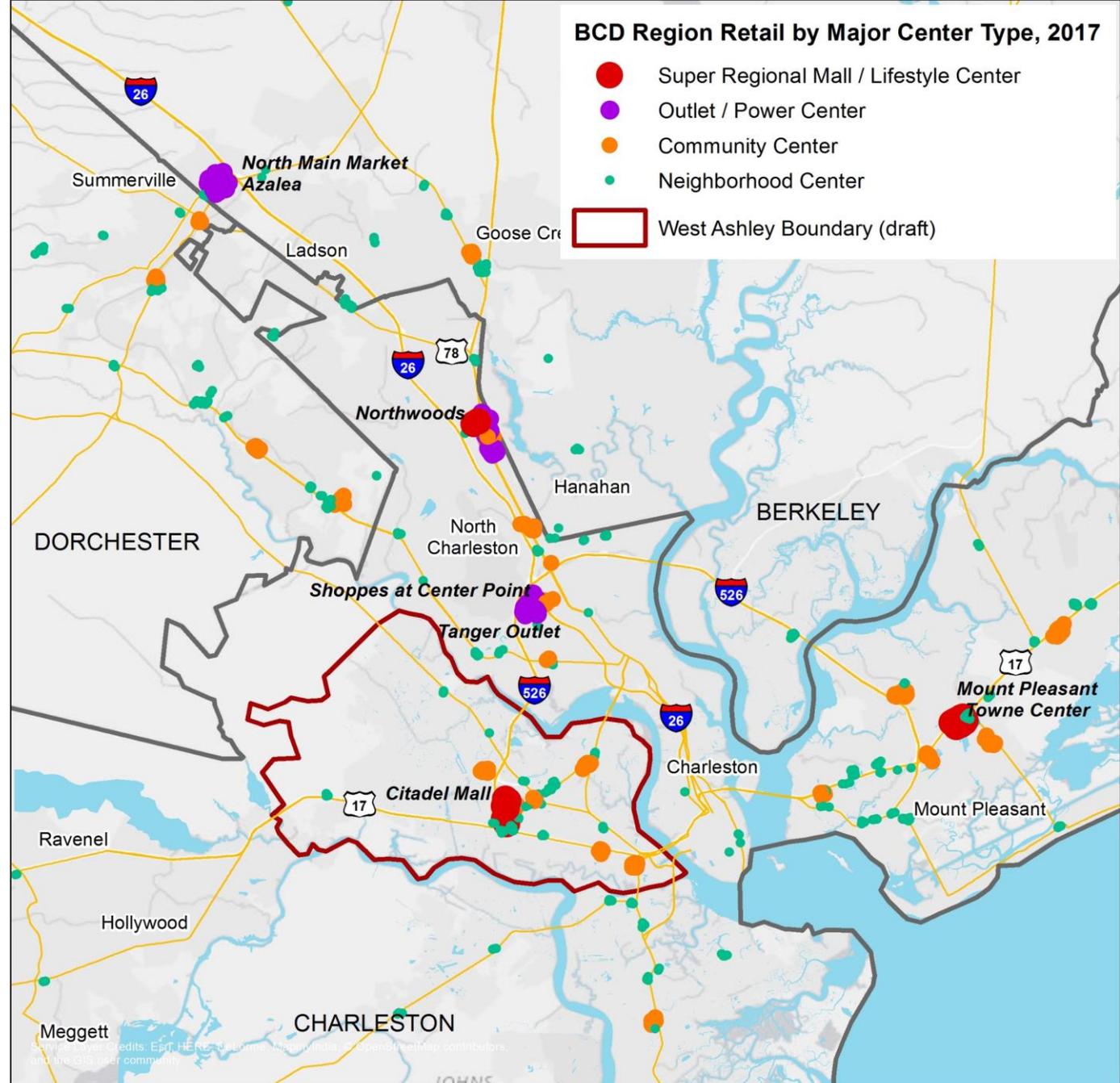
Sources: U.S. Census 2011-2015 ACS 5-year estimates.

0 1 2 Miles



Retail Supply: Center Type

- Total 43 million sq. ft. of retail in BCD region
- Two regional malls
- One lifestyle center
- Many community centers in West Ashley

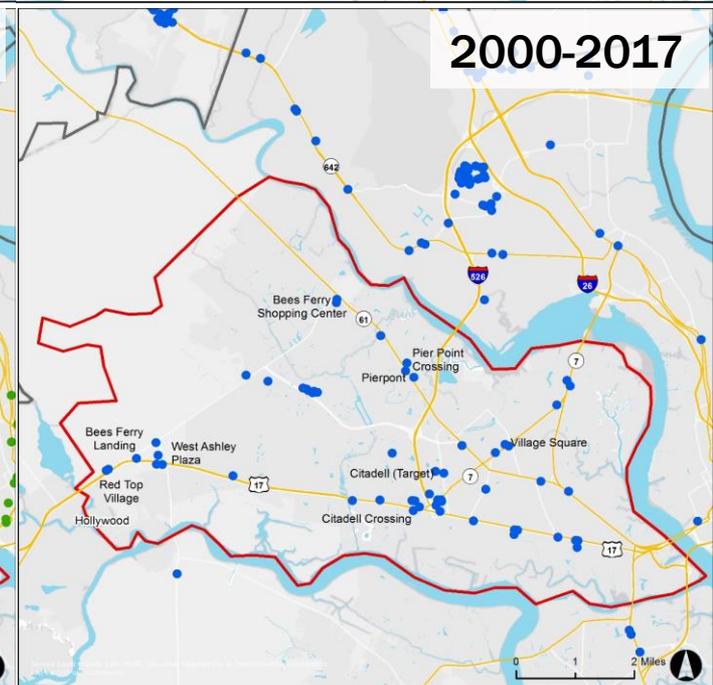
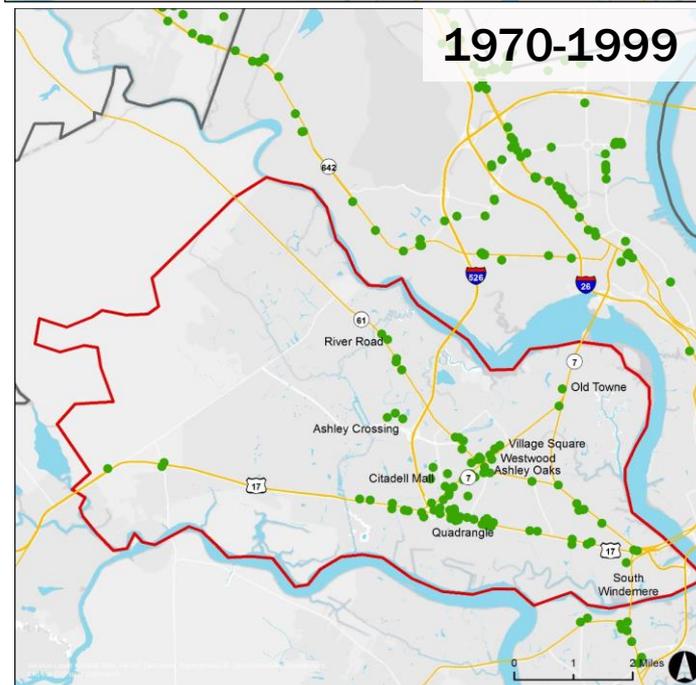
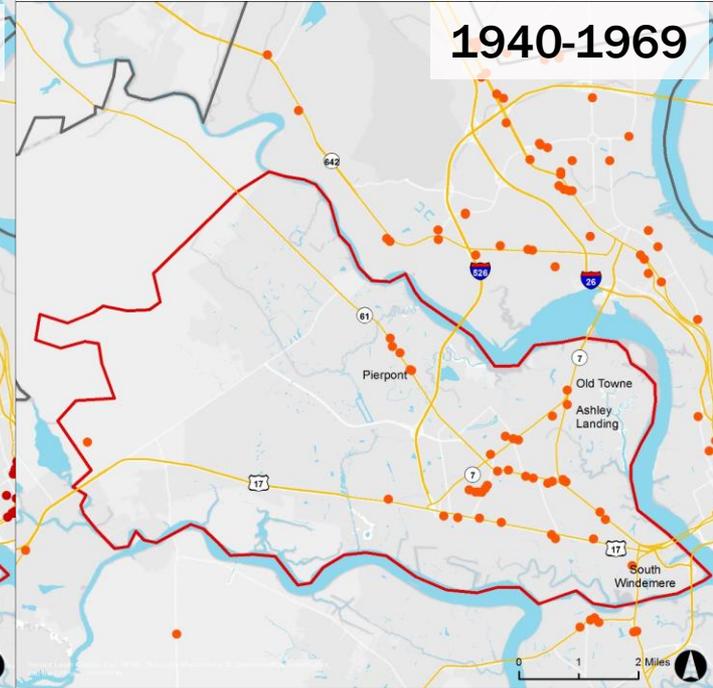
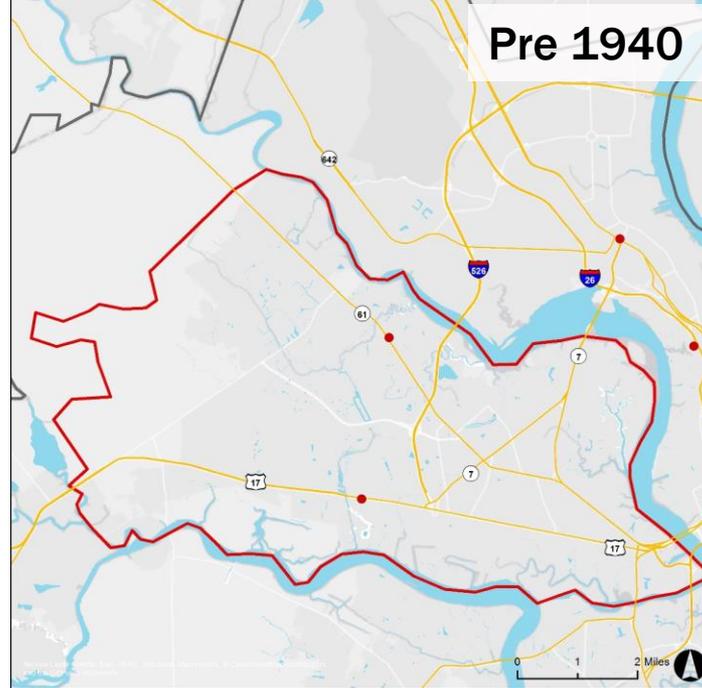


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Sources: CoStar, 2017. Strategic Economics, 2017.

Retail Supply: Year Built, West Ashley

- Retail follows rooftops
- There has not been sufficient population growth in West Ashley since the 1990s to justify a significant increase in new retail space
- New space has been added elsewhere in the region



Preliminary Market Study Findings, Pending Further Analysis

- From 1960 to 1990 West Ashley had very strong household growth
- During this strong growth period, the median household income was also much higher than for the rest of Charleston
- This combined population growth and strong household incomes made West Ashley a very desirable retail location.
- Since population growth has slowed somewhat in West Ashley, while growing elsewhere in the City and the region, retailers are now focusing on other locations, leaving West Ashley with a lot of older retail product not well matched to current community needs

Next Steps for the Market Study

- Collect more detailed information on rents, sales prices, and evolving supply for housing, retail, and office space
- Evaluate specific sites to determine reuse/infill potential
- Identify strategies to incentivize reinvestment in existing places in West Ashley
- Identify strategies to preserve and produce housing that serves all household types
- Prepare the Market Study report with all of the gory details!

Questions for Today's Discussion:

1. Considering your own experience and the “big picture” trends we’ve just discussed, what do you think are the greatest challenges for West Ashley today? Are there specific subareas experiencing unique challenges?
2. What barriers exist to resolving these challenges and bringing about positive change?
3. What do you think are some of the solutions to resolving these barriers?

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THANK YOU