



Garden City Downtown Market Study **FINAL**

Presented to:

Garden City Downtown Vision
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I. EXECUTIVE SUMMARY AND RECOMMENDATIONS

This market study for Garden City Downtown Vision provides an economic and demographic framework of the region, city, and downtown; case studies of comparable downtowns, and an analysis of commercial and residential market opportunities. It also includes recommendations for the downtown and the Garden City Downtown Vision organization that are based on data analysis, observation, interviews, and feedback received during site visits.

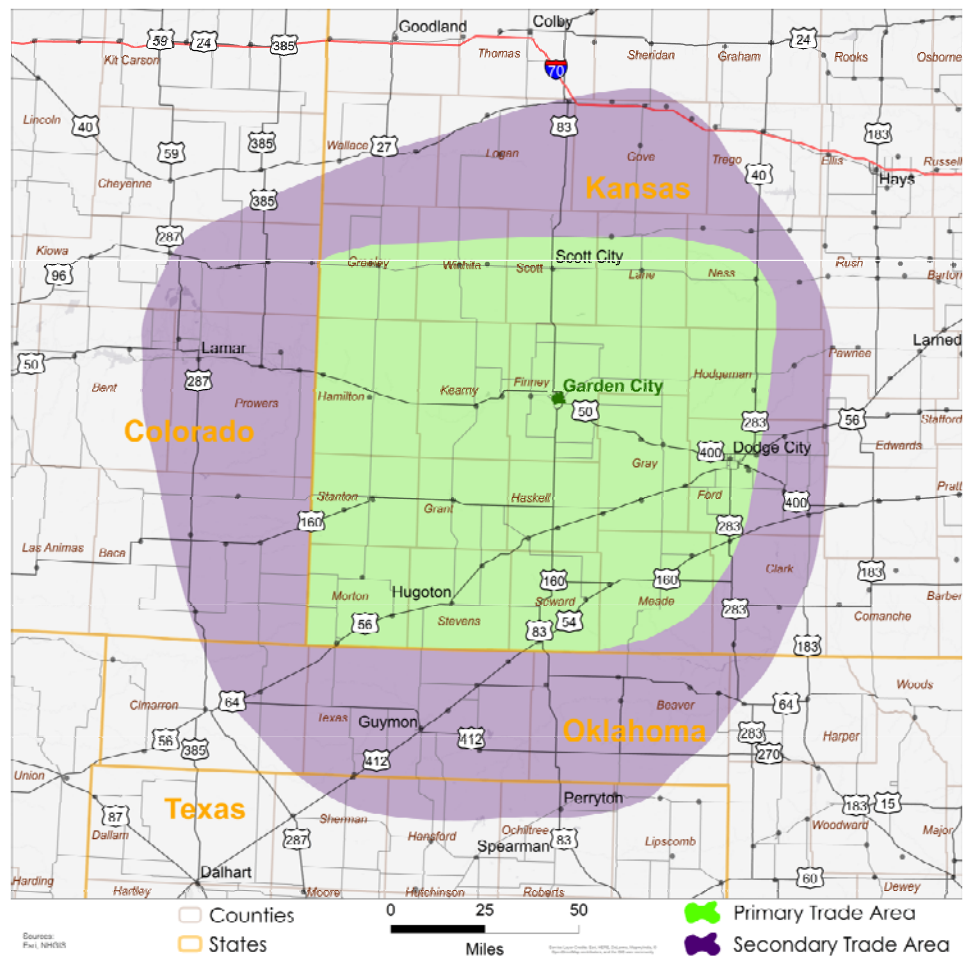
Economic and Demographic Framework

Trade Areas

A retail market or trade area is the area from which a project will draw the majority of its retail customers. The Primary Trade Area for Downtown Garden City is shown in green in Figure 1. To the west and south, it extends to the state border. To the north and east, it extends to just north of Scott City and to just east of US 283 from Ness to south of Dodge City.

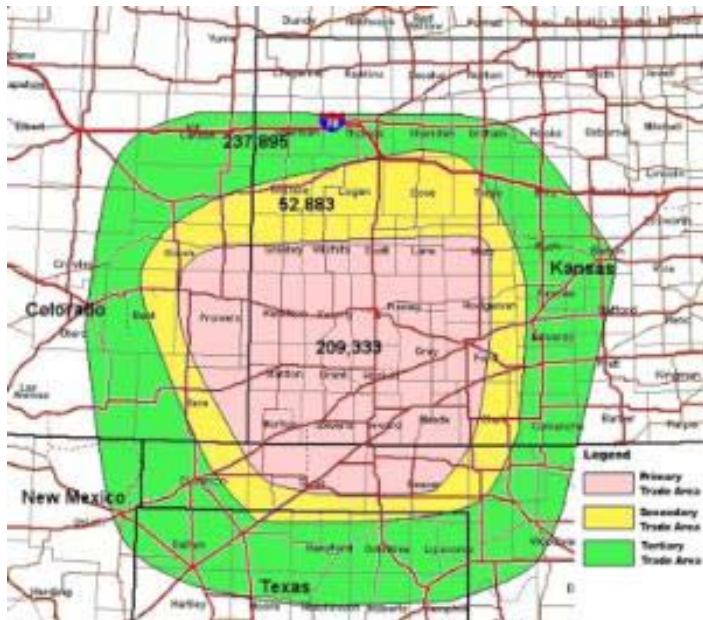
The very large Secondary Trade Area is shown in purple. It extends further through Kansas, parts of Colorado, Oklahoma, and Texas. While additional potential spending is available from this area, Downtown Garden City is not the primary retail service center for households in the purple area as there are other retail options available and other small downtowns. Households in this area may travel to Garden City for special events or specialized services at which time, they may also do a little shopping, eat at a local restaurant, etc. Downtown Garden City has the potential to capture a portion of spending in this area.

Figure 1
Garden City Primary and Secondary Trade Areas



Source: ArLand

Figure 2
City of Garden City Primary, Secondary, and Tertiary Trade Areas



Source: City of Garden City

Figure 2 shows the Primary, Secondary, and Tertiary Trade Areas for the City of Garden City attractions, services, medical, and regional retail providers. The Secondary and Tertiary Areas extend past I-70 to the north, into Colorado to the west, New Mexico, and Northern Texas as well as to others parts of Kansas.

Demographic Characteristics

Demographic characteristics are important in setting the framework for an area's economic potential. The analysis focuses on households adjacent to downtown in a $\frac{1}{4}$ and $\frac{1}{2}$ mile radius, the City of Garden City, and the Primary and Secondary Trade Areas.

- Recent estimates show that Garden City is one of the more populous communities in the state, with more than 31,000 residents, which represents about 22% of the Primary Trade Area's population and 14% of the Secondary Trade Area.
- About 10% of the city's population, or about 2,500 residents, live within a half mile of downtown. Fewer than 600 people live within a quarter mile of downtown. The population close to downtown tends to have a higher percentage of Latino and Hispanic households (61%), are more likely to rent, and have lower median household incomes than the City. Many live in the historic housing stock surrounding the downtown.
- Garden City's population is generally younger than the Primary and Secondary Trade Areas, with a higher percentage of the population in the coveted millennial category (age 25-34) and lower percentage of the population aged 65+ than the Primary and Secondary Trade Areas.

- Almost 50% of Garden City’s population identifies as being Hispanic or Latino, which is higher than the 45% and almost 42% in the Primary and Secondary Trade Areas, respectively.
- Educational attainment in downtown and the City lag the State. About 33% of the adult population in downtown has not graduated from high school while 29% of the adult population in Garden City has less than a high school education. Only 10% of adult residents in the State of Kansas have not graduated from high school.
- Household incomes are lower downtown than in the city, with median household incomes around \$42,000. Garden City’s median household incomes of about \$49,000 and average household incomes of just under \$66,000 are lower than the Primary and Secondary Trade Area incomes of about \$68,000.
- About 60% of occupied housing units in Garden City are owned, whereas about 68% of occupied units are owned in the Primary and Secondary Trade Areas. About 54% of occupied downtown housing area units are owned.
- Average annual employment in Finney County increased by about 1,200 jobs between 2005 and 2015. The largest jobs gain of 450 jobs was in Accommodation and Food Services. In percentage terms, Educational Services grew at the highest rate of any industry during this period, followed by Arts, Entertainment, and Recreation.

Case Studies

The case studies examine Hays, Salina, and Topeka, Kansas, as well as Louisville, Colorado. While the case study summaries describe the background in detail, there are several themes that emerged from the studies.

- *Major Transportation Corridors:* all three Kansas communities are located on/adjacent to Interstate 70. Louisville, Colorado, is adjacent to US 36 which links the City of Denver with the City of Boulder, Colorado. All four locations benefit greatly from being on these major transportation corridors.
- *Downtown Business Diversity and Downtown Events:* all four downtowns are home to a diverse mix of business types, including places to eat and drink, places to shop, and a wide variety of service-related businesses. Each community has a downtown organization (volunteer-based in Louisville) that actively promotes their downtown through a wide-variety of downtown events, many of which are regional draws.
- *Public Visioning and Planning:* all four cities have long histories of developing public visions and plans for their downtowns that seek to capitalize on the future and not recreate the past. The sustained focus of the public sector on their downtowns has provided a solid foundation for private investment in these areas. However, it’s important to note that revitalization of each downtown has taken many years. In many cases, big plans were made ten to twenty years ago, with only portions coming to fruition since the Great Recession.

- *Downtowns Need to Change:* Downtown Topeka's Redevelopment Plan encapsulates the recognition that Downtowns are no longer regional retail centers. "The goal was not to recreate downtown precisely as it was in the 1940s and 1950s - few, if any, downtowns are likely to be regional retail centers again - but they can still fill the role of the entire city's common neighborhood, with its own unique character defined by the architecture of its remaining old structures. The avenues chosen to revitalize downtowns around the country are varied, but most involve dining and entertainment districts that also soon include specialty and boutique retail....." (2000 Downtown Topeka Redevelopment Plan).
- *Unique Catalysts:* each community has developed in its own unique way through a combination of public and private efforts.
 - Downtown Louisville's success is tied to its excellent geographic location, very high household incomes, and downtown events that catalyzed additional private investment.
 - Downtown Hays' success is tied to a small group of concerned and dedicated citizens who raised enough money to buy multiple downtown buildings and provide them to a private firm to rehabilitate and lease.
 - Downtown Salina has seen some revitalization, yet its continued success hinges on the success of the ambitious Salina 2020 effort, a large public/private partnership.
 - Downtown Topeka and North Topeka's success is tied to the fact that it is a larger metropolitan area near Kansas City. It is the location for many government offices, and provides a wide-array of economic incentives to spur private investment.

Residential Market Analysis

- According to the 2017 Finney County Community Housing Assessment Team Study (CHAT), the downtown housing market is self-sustaining and well positioned to absorb a substantial number of units, in part through rehabilitating existing units or converting space for residential use.
- According to interviews with City officials, however, all of the available second story residential spaces that have the potential in downtown to be converted have already been converted. Identifying housing ripe for rehabilitation right outside of the downtown core in downtown-adjacent neighborhoods or locations for adding multifamily units would help bring more households to the downtown area.
- Despite the addition of 413 residential units over the past seven years, the Garden City housing market continues to tighten due to underproduction. Underproduction can be attributed to many variables, including the cost of public infrastructure, land prices, the inability of buyers to obtain financing, and potentially the 2010 Census undercount.
- An estimated 1,643 residential units are needed from 2017 to 2030, or an average of about 117 units per year. Construction activity would have to double from recent rates to meet estimated demand, a scenario that seems unlikely given recent trends. A portion of this demand could be met in the downtown area.

Commercial Market Analysis

- In the last five years, taxable retail sales in a few key retail categories in Garden City increased from \$396 million to \$486 million, an overall 20% increase in sales in these categories, partially due to new retail at Schulman Crossing.
- The location of new retail and restaurant offerings closer to the major highways are attracting people away from the downtown core, and unless there is a special event, or a need for specialized services, these customers may not make it to downtown.
- Downtown retailers estimate that at least 50% of their revenues are from households in the Primary Trade Area (outside of the City of Garden City).
- Comparing demand and supply for the City indicates the regional nature of the trade area.
- In order to survive, downtown retailers need to continue to draw households from the Primary and Secondary Trade Areas.
- The strongest future demand for downtown is in the Eating and Drinking category. Other categories showing demand on a regional basis include:
 - Eating and Drinking
 - Miscellaneous Retail (gift shops, antiques, used merchandise, etc.)
 - Furniture and Home Furnishings
 - Electronics and Appliances
 - Sporting Goods, Hobby
 - Clothing and Clothing Accessories
- There is local demand for groceries. However in the downtown area, given the demographics of the surrounding area, any grocery store would need to stock items geared to Hispanic households and have price points appropriate for the local population. There is also local demand for additional health and personal care services.
- The demographic analysis indicates that 60% of the households surrounding downtown are either Hispanic / Latino. There is a small cluster of Hispanic-oriented businesses on 8th Street, responding to the needs of the immediate neighborhood.
- Retail is changing in downtown Garden City. Juice providers, fitness centers, pet grooming / boarding are all interested in a downtown location. While not traditional “retail”, they do provide an important role in bringing people to the downtown area. Some also typically have a small section of their businesses devoted to retail.
- There is office demand in the market currently and there are office uses which occupy prominent locations along Main Street. There are also a number of government offices in the downtown area, although off of Main Street. Daytime employment plays an important role

in keeping downtown Garden City active. They can also play a role in sponsoring downtown events.

Downtown Recommendations

- *Focus on Restaurants and Multifunctional Uses for Downtown Garden City*
Expanded restaurant options would greatly enhance downtown's draw. While competition may be a concern, expanding the number of restaurant options would help bring more people downtown and provide a broader array of choices. Restaurant uses require convenient parking. A parking strategy in combination with an outreach / incentive restaurant strategy would be helpful to attracting restaurants.
- *Expand Nightlife*
Expanding the number of restaurants as well as bringing in activities such as microbreweries, taverns, small music venues, comedy clubs, etc. would help expand nightlife.
- *Continue and Enhance Downtown Vision Events*
The large number of events serve a purpose of broadening downtown's appeal. Events should aim to serve different groups of people at different times of the year.
- *Broaden the Downtown Market*
Downtown merchants tend to focus their merchandise and marketing efforts on the regional trade area outside of the immediate Garden City market. There is a market in Garden City which is younger and more diverse and which is slated to grow at a faster rate than the surrounding regional area.
- *Expand the Ideal Tenant Mix*
Retail has changed along with shopping habits. Expand the definition of the ideal tenant to include services such as fitness, pets, and personal care.
- *Refocus Efforts on the Windsor Hotel and the State Theater*
They are prominent downtown buildings. At a minimum, cleanup and activation of the ground floor would help eliminate a negative impression at the gateway to downtown.
- *Expand Downtown Residential*
There is a huge housing need and most of the downtown second story units have been rehabilitated. Expanding the rehabilitation program to include the single family residential neighborhoods surrounding downtown and expanding the potential location of downtown housing to include edges of downtown should be pursued.
- *Reexamine Incentive Programs*
There are a number of incentive programs for the downtown area. Reexamine and refocus incentive programs in areas that the City Commission agree on, i.e. restaurant incentives can be developed if that becomes an agreed-upon goal. Business stakeholders have mentioned a tentative interest in a Business Improvement District.
- *Reexamine Basics*
Basic issues such as store hours, customer service, parking management, the street environment, internet presence all need to be addressed with downtown merchants and the Downtown Vision board. These issues need to be revisited by downtown organizations from time to time. The last license plate survey of Garden City retailers took place in 2011. This should be updated soon and on a regular basis going forward.

II. ECONOMIC AND DEMOGRAPHIC FRAMEWORK

2.1 Trade Areas

Garden City, Kansas, is a regional destination and commercial hub located within Finney County in the southwestern quadrant of the state of Kansas. It is located at the intersection of US 400 and US 83; Kansas State Highway 156 begins in the city and runs east/northeast to Larned, Kansas. The Arkansas River runs roughly from west to east just south of the city's southern boundary.

Downtown Garden City

This market analysis focuses on downtown Garden City, which is situated near the southern end of the city along Main Street. More specifically, the 2013 Downtown Master Plan identified an expanded, new downtown boundary, shown in Figure 3 which encompasses an area bounded on the south by Maple Street and the north on Kansas Avenue. Downtown's western boundary is between North 9th Street and North 10th Street; its eastern boundary is between North 6th Street and North 7th Street.

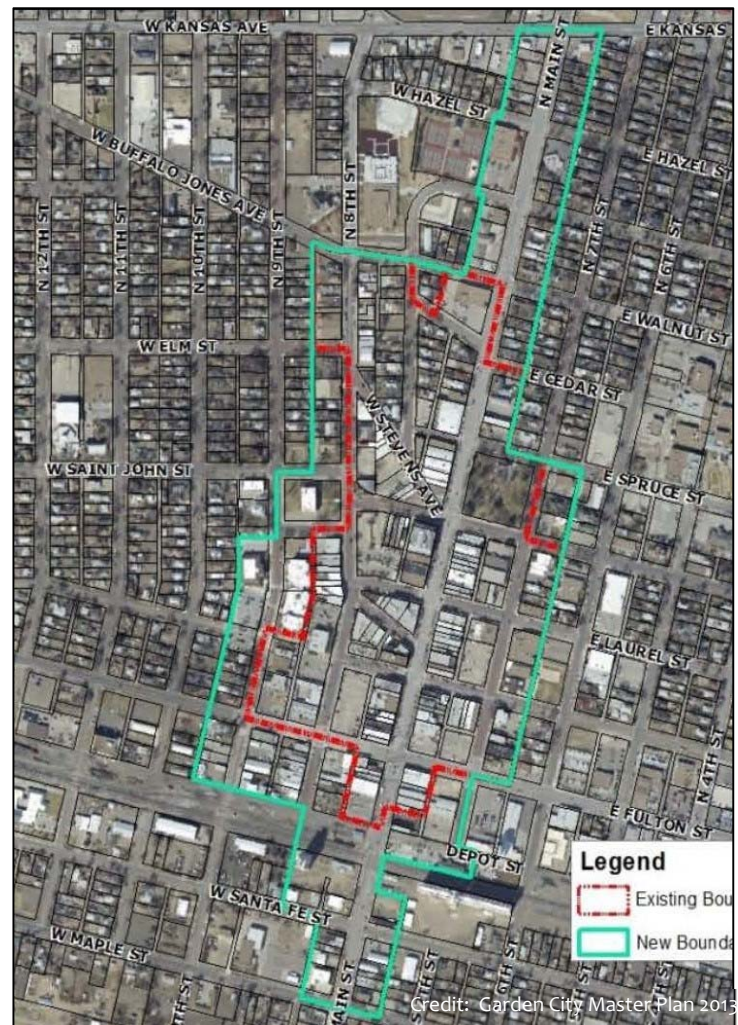
Primary Trade Area

Trade areas are dynamic and can change as a function of the type and supply of competing shopping locations. In the previous downtown analysis conducted in 2009, the Primary Trade Area, where 70% or more of the customers are drawn was wide ranging, extending into Colorado to the west.

In 2011, the City of Garden City conducted a license plate survey of three of the City's largest retailers: Sam's Club, Home Depot and Target. The survey was conducted during the afternoon and evening hours on a Friday and Saturday in September when 575 cars were surveyed.

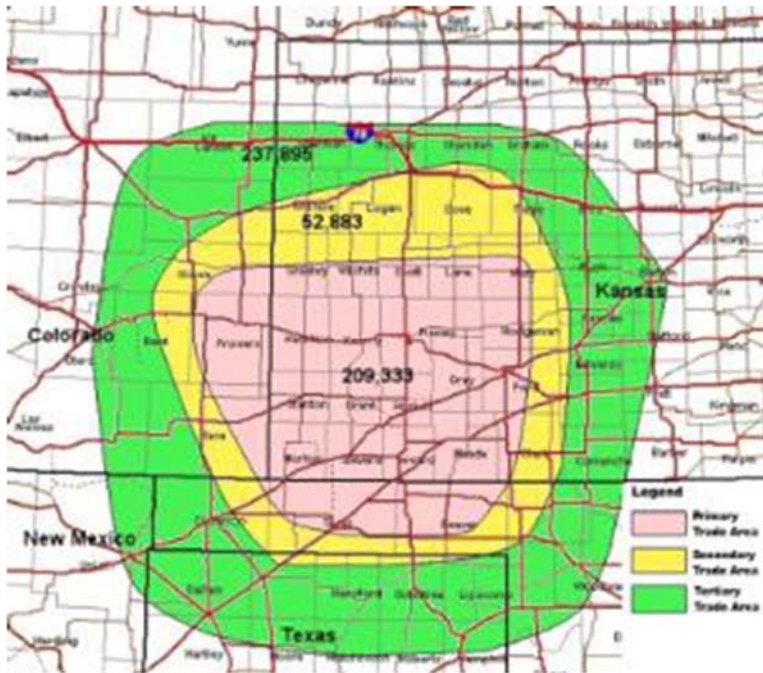
Finney County accounts for approximately half of shoppers while 24% to 28% of shoppers originate from the surrounding Kansas counties. There is also a relatively low percentage of license plates from Colorado and Oklahoma (less than 5%).

Figure 3
Downtown Garden City



Source: City of Garden City

Figure 5
City of Garden City Primary, Secondary, and Tertiary Trade Areas



Source: City of Garden City

Figure 5 shows the Primary, Secondary, and Tertiary Trade Areas for the City of Garden City attractions, services, medical, and regional retail providers. It extends past I-70 to the north, into Colorado to the west, New Mexico, and Northern Texas as well as to others parts of Kansas.

2.2 Population and Household Characteristics

This section compares demographic characteristics most relevant to downtown Garden City, including the City of Garden City, the Primary and Secondary Trade Areas.

Population and Households

Garden City is one of the more populous communities in the state, with more than 31,000 residents and over 10,500 households. (Table 1). The estimated population of Garden City in 2017 represents about 22% of the population in the Primary Trade Area and about 14% of the Secondary Trade Area. Since 2010, the populations of Garden City and the trade areas have remained relatively constant.

Table 1
Population and Households 2017

	Garden City	Primary Trade Area	Secondary Trade Area
Persons	31,020	143,969	215,073
Households	10,751	50,052	77,236
Persons / Households	2.89	2.88	2.78

Source: Claritas, Finney County 2017 Draft CHAT, ArLand

Garden City's population is generally younger and more diverse. In percentage terms, it has a higher percentage of the population with an advanced degree, yet also those without at least a high school education. Garden City's household size is slightly larger than the Secondary Trade Area, and almost identical to the Primary Trade Area. Median and average incomes in Garden City are lower than in the trade areas, and a higher percentage of the population rents than owns.

Age Distribution

Garden City's age distribution is similar to that of the Primary and Secondary Trade Areas, with minor differences (Figure 6). The city's median age of 31.4 is slightly younger than the Primary and Secondary Trade Areas, which are 32.8 and 34.0, respectively. The percentage of the city's population in the coveted millennial category (age 25-34) is higher than the trade areas, and the percentage of the population age 65+ is lower than the trade areas.

Figure 6
Population by Age 2017



Source: Claritas, ArLand

Race/Ethnicity

Garden City is more diverse than the Primary and Secondary Trade Areas (Table 2). About 29% of the city's population is non-white, whereas the trade areas are about 23% and 22%, respectively. The percentage of the city's population that identifies as Hispanic or Latino is almost 50%, a higher percentage than the 45% and almost 42% in the Primary and Secondary Trade Areas, respectively. The Hispanic or Latino population in the city and trade areas is also significantly higher than that of the state, which is just over 11% (US Census ACS 2011-2015).

Table 2
2017 Estimated Population by Race/Ethnicity

Race/Ethnicity	Garden City	Primary Trade Area	Secondary Trade Area
White	71.0%	76.7%	77.8%
Black	4.0%	2.4%	2.2%
American Indian	0.9%	1.0%	1.0%
Asian/Pacific Islander	6.2%	2.4%	2.1%
Other / Two or more	17.8%	17.5%	16.9%
Hispanic or Latino*	49.7%	45.0%	41.6%

Source: Claritas, ArLand

* can be of any race

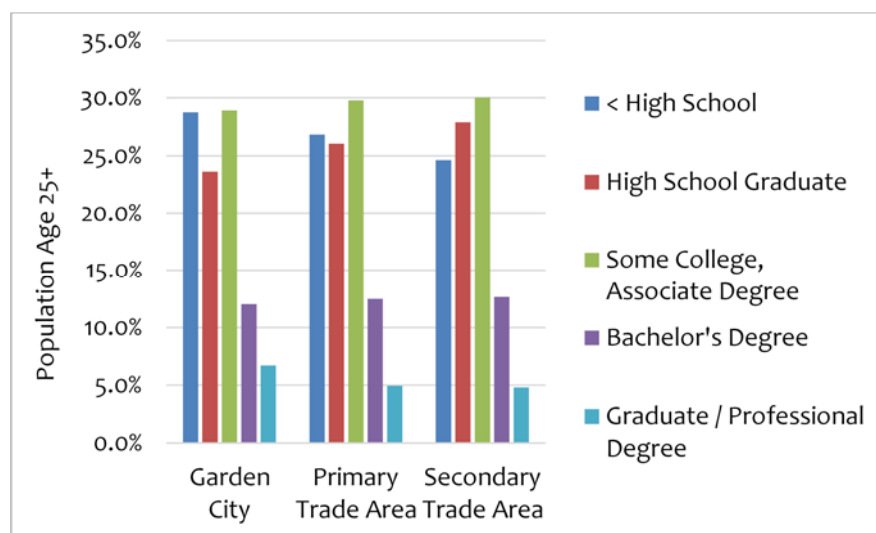
Educational Attainment

In terms of educational attainment, the city and trade areas lag the nation and the State of Kansas in some ways, yet lead in others.

In 2015, 88% of adults (age 25+) in the United States were at least high school graduates, 33% had a bachelor's degree or more education, and 12% had an advanced degree (US Census 2015).

Recent estimates for the same categories in Kansas are 90%, 31%, and 11%, respectively (US Census ACS 2011-2015).

Figure 7
Educational Attainment, 2017



Source: Claritas, ArLand

About 71% of Garden City's adult population has at least graduated from high school, which is lower than the Primary Trade Area (73.2%) and Secondary Trade Area (75.4%). However, the percentage of

adult residents with Graduate / Professional Degrees is higher in Garden City than in the Primary and Secondary Trade Areas (Figure 7).

Household Size

The average household size of 2.82 persons in Garden City is slightly higher than the Secondary Trade Area (2.73) and almost identical to the Primary Trade Area (2.83)

Household Income

As seen in Table 3, the median household income in the Primary Trade Area is about \$4,300 higher than that of Garden City, which represents about a 9% difference. Average household income in Garden City is also lower than the trade areas. The median household income in Garden City is about \$50,000.

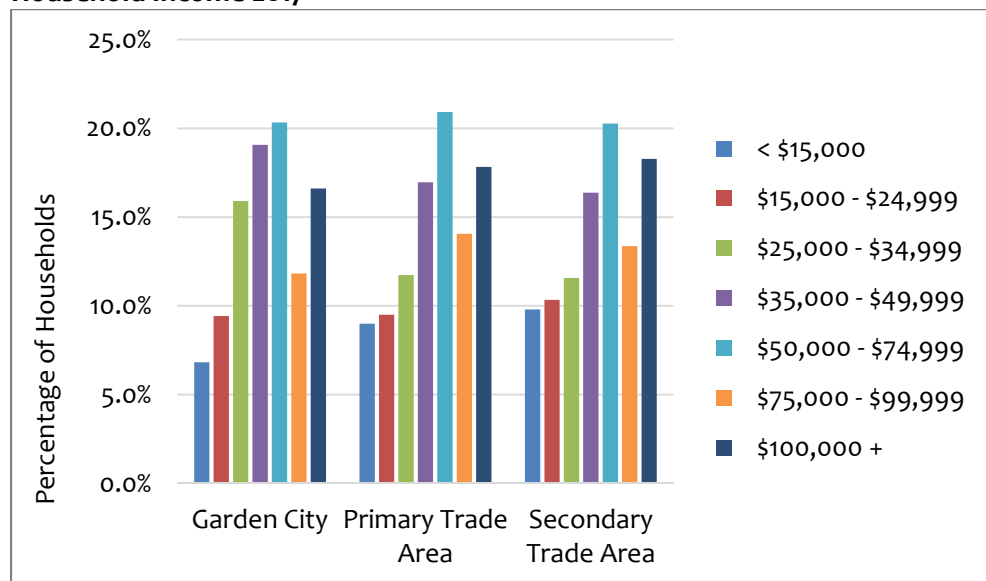
Table 3
Median and Average Household Income 2017

	Median HH Income	Avg HH Income
Garden City	\$49,033	\$65,921
Primary Trade Area	\$53,358	\$68,093
Secondary Trade Area	\$52,363	\$67,521

Source: Claritas, ArLand

The percentage of Garden City households with household incomes under \$25,000 per year is lower than in the trade areas. Garden City has a higher percentage of households in the \$25,000 to \$50,000 range than the trade areas. About 35% of Garden City households fall into this income range, yet only about 28%-29% of trade area households do. The Primary and Secondary Trade Areas have a higher percentage of households in the higher income brackets as seen in Figure 8.

Figure 8
Household Income 2017



Source: Claritas, ArLand

Housing Tenure

Of those housing units that are occupied, Garden City has a lower ownership rate and larger percentage of the population that rents, than in the trade areas. Almost 40% of Garden City housing units are rented, while in the Primary and Secondary Trade Areas, about 1/3rd of units are rentals.

Table 4
Occupied Housing Units by Tenure 2017

	Owner Occupied	Renter Occupied
Garden City	60.5%	39.5%
Primary Trade Area	67.4%	32.6%
Secondary Trade Area	68.1%	31.9%

Source: Claritas, ArLand

2.3 Employment

Average annual employment in Finney County increased by about 1,200 jobs between 2005 and 2015 as shown in Table 5. The industry that witnessed the largest change in employment during this time was Accommodation and Food Services, which increased by more than 450 jobs. This sector was followed by Wholesale Trade and Manufacturing, at 281 and 239 jobs respectively. In percentage terms, Educational Services grew at the highest rate of any industry during this period, followed by Arts, Entertainment, and Recreation.

Table 5
Finney County Annual Average Employment by Industry (2005-2015)

	2005	2010	2015	Change (2005-2015)	CAGR [1] (2005-2015)
Agriculture, Forestry, Fishing & Hunting	559	472	551	-8	-0.1%
Mining	280	294	306	26	0.9%
Utilities	250	274	329	79	2.8%
Construction	743	761	889	146	1.8%
Manufacturing	3,524	3,756	3,763	239	0.7%
Wholesale Trade	585	769	866	281	4.0%
Retail Trade	2,436	2,407	2,639	203	0.8%
Transportation and Warehousing	439	517	473	34	0.7%
Information	231	197	164	-67	-3.4%
Finance and Insurance	439	436	428	-11	-0.3%
Real Estate and Rental and Leasing	190	177	145	-45	-2.7%
Professional and Technical Services	335	337	261	-74	-2.5%
Management of Companies and Enterprises [2]	NA	38	59	21	9.2%
Administrative and Waste Services	381	223	391	10	0.3%
Educational Services [2]	NA	11	21	10	13.8%
Health Care and Social Assistance	1,736	2,021	1,805	69	0.4%
Arts, Entertainment, and Recreation	114	90	246	132	8.0%
Accommodation and Food Services	1,181	1,357	1,638	457	3.3%
Other Services, Ex. Public Admin	537	469	406	-131	-2.8%
Total Government	3,284	3,487	3,113	-171	-0.5%
Total, All Industries	17,272	18,093	18,490	1,218	0.7%

Source: Kansas Department of Labor, QCEW Multiple Industries, ArLand

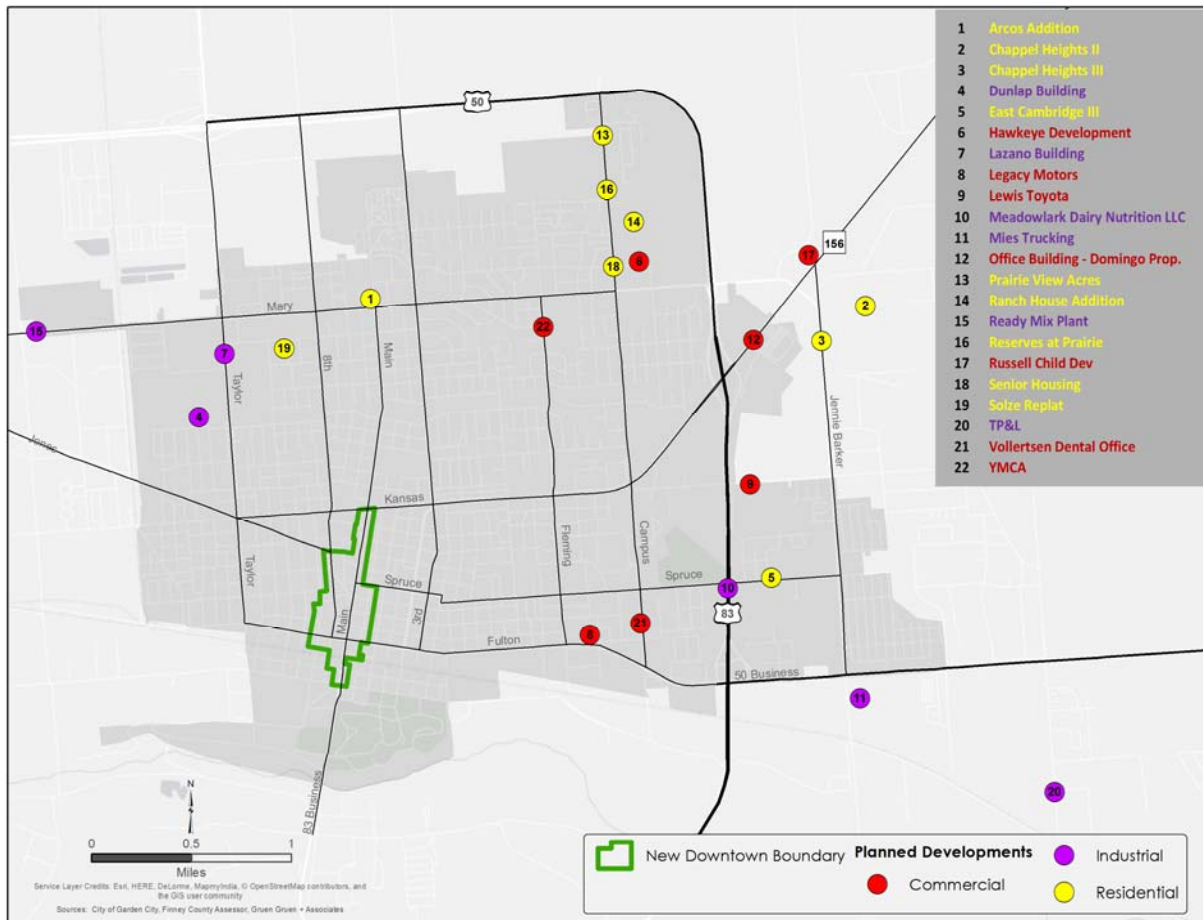
[1] Compound Annual Growth Rate

[2] Change and CAGR represent 2010 to 2015. 2005 data is unavailable.

Major employers in Finney County include Tyson Fresh Meats, Unified School District #457 (USD #457), St. Catherine Hospital, and the Garden City Community College. Tyson is estimated to be the largest employer in the county, followed by USD #457. The top 20 employers account for about 45% of jobs in the county as of 2015. In Downtown Garden City, major employers include Finney County and the City of Garden City which employ about 600 persons overall.

2.4 Planned Developments

Figure 9
Planned Developments in Garden City, June 2017



Source: City of Garden City, ArLand

Figure 9 shows the planned developments in Garden City as of June 2017. There is a mix of residential, commercial and industrial development planned, although most of the development is planned at the City's periphery and along the primary thoroughfares surrounding the City. There is no new planned development in or near downtown.

III. CASE STUDIES

The following section discusses case studies of four downtowns that have all revitalized through a variety of public and private planning and investment. Three of the case studies are in Kansas – Hays, Salina, and Topeka. The fourth case study is Louisville, Colorado, which is between Boulder and Denver, Colorado along US 36.

3.1 Downtown Louisville, Colorado

Background/Location

The City of Louisville, Colorado, is located northwest of Denver and southeast of Boulder along US 36 (Denver Boulder Turnpike) in Boulder County. Louisville was established in 1878 as a coal mining community; the last mine closed in 1955. The Boulder Turnpike (US 36) opened in 1952, connecting



Denver and Boulder, sparking the growth of major retail centers near highway exits. Sam's Club and Home Depot opened in the mid-1990's near the McCaslin Boulevard exit in Centennial Valley, which solidified Louisville as a regional retail center, yet increased pressure on downtown. The Colorado Technology Center (home to about 85 businesses) came online in the lead up to the turn of the century, adding to the town's economic vitality and commercial tax base.

The city's population declined slightly between 2000 and 2010, but has grown by over 1,000 in the past five years to almost 20,000. The population has also been getting older and wealthier over time, as many people with means that are priced out of living in Boulder, Colorado, have found Louisville a great alternative. In 2015, the median household income in Louisville was estimated to be just over \$91,000 per year. The median age of the population was 42.7, a sizeable increase from 36 in 2000. Recent estimates suggest that about 89% of workers living in Louisville are employed outside of town, with many commuting to nearby Boulder, Denver, or surrounding communities.

Today, Louisville is a small-town community that is generally suburban in nature. In addition to the two employment centers listed above, its historic downtown core is the third employment center in town and home to a variety of local businesses. It is about a twenty-one-acre area centered on Main Street and Front Street, between South and Pine Streets. Over the past 10-15 years downtown has witnessed a resurgence due to a combination of public and private investment, which is summarized below.

Role of Public Sector

The city has played a role in the downtown's revitalization in many ways. Generally, these can be lumped into two large categories: 1) historic preservation, and 2) planning/zoning/public investment

Historic Preservation

The City established a Downtown Improvement Task Force in the early 1990's, which created an Old Town Overlay in 1995 to protect against insensitive new construction in the oldest residential areas of Louisville. To further support downtown revitalization, the Louisville Historic Preservation Commission was established in 2002, which approved a historic preservation ordinance in 2005. Louisville opted for a voluntary landmark designation to strike the appropriate balance between honoring historical and architectural significance and respecting personal property rights. That same year, the city was recognized by the National Park Service and History Colorado as a Certified Local Government, gaining access to additional funding streams and technical assistance services through that program. In 2008, Louisville citizens voted to establish the Historic Preservation Fund (HPF), supported by a 1/8% sales tax, in effect from 2009 through 2018. The HPF serves to provide preservation and restoration grants for landmarked residential and commercial buildings. Building on previous efforts, the 2015 Preservation Master Plan is a comprehensive guide for the Preservation Program, with the goal of promoting public awareness of preservation and encouraging voluntary preservation efforts, among others.

Planning/Zoning/Public Investment

Lack of available parking in Downtown Louisville was noted by Mark Zaremba, President of the Board of Directors of the Downtown Business Association, as the greatest current business challenge in downtown. The 1999 Downtown Framework Plan stated that creation of an improvement district to fund construction of parking facilities should precede any further public investments. In response to a lack of downtown parking, the city constructed (bond project) a 32,500-square foot, two-story library with an 84-space underground parking garage right downtown. Opening in 2006, the library helped activate downtown.

In 2003, the Highway 42 Revitalization Area Framework Plan was completed calling for a transit oriented, mixed-use development around a potential commuter rail station that would benefit downtown due to its proximity. In 2006, the city council approved an urban-renewal plan for the approximately 230-acre Highway 42 Revitalization Area adjacent to downtown. New zoning and design guidelines were adopted for this area in 2007, which allowed for a mix of uses. A few years later, in 2010, a Downtown Parking and



Source: Downtown Louisville. www.downtownlouisvilleco.com

Pedestrian Action Plan was adopted to better manage both on-street and off-street parking. The city's comprehensive plan was updated in 2013, which called for a mix of land uses in the Downtown/Highway 42 Revitalization District urban center, and policy and infrastructure improvements that would enable the area to "evolve as one." Although a rail stop in this area remains uncertain, development of Downtown East Louisville or DELO is underway immediately east of downtown. Townhomes are in place and at completion, this project will be comprised of 32,000 square feet of commercial space and almost 200 residential units. Another project, DELO Plaza, will add another 22,000 square feet of commercial space to the revitalization area.

Role of Business Association and Arts District

The Louisville Downtown Business Association is an all-volunteer organization, primarily responsible for maintaining the downtown streetscape, lighting and other amenities. The association began holding the Street Faire in 2002, which is a series of concerts held downtown on Friday nights during the summer. Although it had humble beginnings, over time it began drawing thousands of residents and visitors from the metropolitan region to downtown, and is credited with playing a role in downtown's resurgence. The Street Faire is the association's primary source of revenue, with additional funding coming from membership dues. During the Street Faire and other summer events, on-street parking is converted to outdoor seating and gathering space to support local businesses and vendors.



Source: Daily Camera. Louisville News. http://www.dailycamera.com/louisville-news/ci_25625440/louisville-officials-residents-meet-about-impacts-street-faire

New retail businesses began locating downtown following the success and visibility the Street Faire provided, including prominent arts related businesses like the Creative Framing Art Gallery, Walnut Gallery, and Dana V Music. Then in 2009, a group of galleries and arts related businesses formed the Louisville Art District and began hosting First Friday Art Walks once a month. The art walk is ongoing and continues to draw residents and visitors downtown once a month. The city's vibrant arts scene is comprised of

numerous individuals and organizations, including the City's Cultural Arts and Special Events office, which continue to enhance the role this sector plays in the city's future. As a testament to the importance of the arts and culture in Louisville, the city recently (April 2017) adopted a Cultural Arts Master Plan, which outlines strategies and action items for integrating the arts, culture and humanities with community design, economic development, and education.

Economic Development Tools Utilized

Multiple economic development tools utilized within Louisville are outlined below.

- Business Assistance Program: building permit fee rebates, construction use tax rebates, sales/use tax rebates.
- Tax increment financing: an urban-renewal plan was approved by the city council in 2006 for the approximately 230-acre Highway 42 Revitalization Area adjacent to downtown, allowing use of this tool.
- Green Business Recognition Program: public recognition (City Council, window decals, press release, special celebration) of businesses for their investments and contributions to conserving energy, water, reducing waste, and providing transportation options.

Table 6
Downtown Louisville Events

January	February		March	April	May	June
WinterSkate	First Friday Art Walk WinterSkate		First Friday Art Walk	First Friday Art Walk	First Friday Art Walk	First Friday Art Walk Taste of Louisville Farmer's Market Downtown Street Faire
July	August		September	October	November	December
First Friday Art Walk Farmer's Market Independence Day Parade and Fireworks Downtown Street Faire	First Friday Art Walk Farmer's Market Downtown Street Faire		First Friday Art Walk Farmer's Market Labor Day Parade	First Friday Art Walk Farmer's Market	First Friday Art Walk WinterSkate Downtown Carriage Rides	Parade of Lights WinterSkate Downtown Carriage Rides

Table 7
Downtown Louisville Businesses

Places to Eat/Drink	Places to Shop
12Degree Brewing	Assorted Goods & Candy
740 Front	By Chance
Bittersweet Café and Confections	Certified Inspector Store
B.O.B.S. Diner	Creative Framing Art Gallery
Casa Alegre	Dona Laurita Gallery
Double Happy	Eleanor and Hobbs
Empire Lounge and Restaurant	Eric Olson Master Jeweler
Gravity Brewing	Eyeworks
Henry's Bar & Grill	FingerPlay Studio
Lucky Pie Pizza & Taphouse	Found Underground Consignment
Lulu's BBQ	Little Horse Vintage and Books
Moxie Bread Company	Mountain High Appliance
Pica's Taqueria Louisville	My Saving Grace
/pÔr/ Wine House	Mudslingers Pottery School and Gallery
Precision Pours	Nettie's Creations
Sushi Yoshi	Nina's Flowers & Gifts
Sweet Cow Ice Cream	Old Friends
The Huckleberry	Pitter Patter
The Melting Pot	The Book Cellar
Vic's Espresso	The Singing Cook
Waterloo	The Walnut Gallery
Zucca Italian Ristorante	Wildwood Guitars

Services	
Achtermann Chiropractic and Massage	Law Offices of Dominick M. Saia
Allstate Insurance: Chad Thielen	Louisville Chamber of Commerce
Amterre Property Group	Louisville Historical Museum
Andrew Williams Designs	Louisville Public Library Foundation
Center Stream Pilates	Louisville Realty Associates
CenterStage Theatre Co./Tapestry Theatre Co.	Louisville Tire and Auto Care
Chase Bank/ATM	Main Street Piano Studio
Colorado Real Estate Services	MaryLynn Gillaspie Photography
Dana V. Music	Massage Therapy for the Body and Soul
Dave DiOrio – State Farm Insurance Agent	McGinty Co. (<i>visual communications</i>)
Deb-K Stylist	Randall C. Bartlett, CPA, PC
DK Healer: Integrated Massage Therapy	Salisbury Properties
E and L Team at RE/MAX of Boulder	Spencer Fane
Eyeworks	State Farm Insurance
Figure Yoga	Staufer Team Real Estate
Fox Property Management	The Galvis Group Real Estate
Front Porch Lutherie (<i>musical instrument repair</i>)	Tienken & Associates, P.C.
Front Street Hair Studio	Trailhead Wealth Management, LLC
Hair Culture	Trivium Salon
Hartronft Associates, P.C.	VOLTAGE Advertising + Design
Hurth, Sisk, & Blakemore LLP	Wild Turtle Healing
Jeremy Carlson Design	Yoga Junction
K&T Gas	Zaremba Graphic + Web Solutions

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3.2 Downtown Hays, Kansas

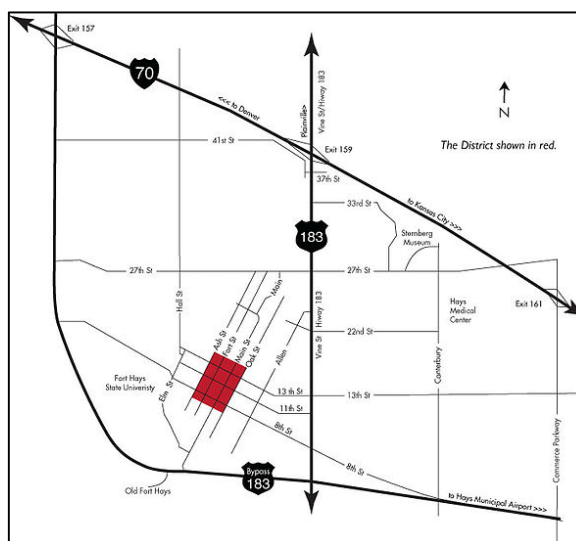
Background/Location

Hays, Kansas, incorporated in 1885, is the county seat of Ellis County. It is located on Interstate 70 at the junction with US Highway 183. By car, it is about three hours west of Topeka, Kansas, and five hours east of Denver, CO. Its roots are tied to the history of Fort Hays, which became a State Historic Site in 1967 and remains a popular tourist destination. The city was founded when rail reached its location in 1867; its railroad roots can still be seen today, with rail tracks bisecting the south end of the city. Today, Hays is the education, commercial, and employment hub of northwest Kansas. It is home to numerous higher education institutions, including Fort Hays State University, the Hays Medical Center, a regional airport with daily service to Denver, Colorado, and a mix of businesses. Oil and gas extraction and agriculture remain prominent sectors of the area's economy.

The city's population of about 21,000 has grown at a compound annual growth rate of about 2.7% over the past 15 years. There are just under 15,000 students enrolled at Fort Hays State University, although the number of students on campus is just under 5,000, with many more attending virtually or in China. Median annual household income has also increased since 2000 to the most recent estimate of about \$43,000. Over time, the city has seen an increase in the percentage of the population that identifies as Hispanic or Latino, and has also seen a slight uptick in its median age, which is now about 30.

Auto-oriented commercial development is located along US Highway 183, which runs north-south through town. Downtown Hays is located west of US Highway 183 and is centered on Main Street, which used to be named Chestnut Street. Downtown Hays was once a district characterized by high vacancy rates, deteriorating buildings, and a lack of investment. Today, it is home to unique retailers, art galleries, professional service businesses, etc. Its revitalization over the past 15 years was not by chance, but rather the result of a concerted effort by a group of citizens and the community at large, the city, private developers, and the Downtown Development Corporation. A summary of important aspects of this revitalization are included below, along with a list of downtown events and businesses.

Figure 10
Historic Downtown Hays, Kansas



Source: <https://www.downtownhays.com>

Role of Public Sector

The City of Hays has played a role in facilitating downtown revitalization through tax abatement and facilitating public planning processes, as well as through the provision of funds, in-kind labor, and cooperation to the Downtown Hays Development Corporation.

In 2009, the city's Neighborhood Revitalization Plan went into effect. This allowed for the provision of tax abatement for new construction and rehabilitation projects in the downtown district,

intended to facilitate private investment downtown. A few years later, in 2012, the community outlined their vision for downtown in the Comprehensive Plan. Future land uses for the downtown district focused on a mix of uses, with residential uses above commercial or office uses. The plan also stated that historic preservation is of significant value, and noted incentives such as historic tax credits. It also called for consideration of a convention center and adjacent lodging downtown, which has not yet come to fruition, and for improved public gathering spaces downtown. The plan discussed Pavilion Square, a project envisioned to consist of an expansion of an existing park into a versatile public facility with an outdoor shelter and indoor space to house a public market. This project is underway and discussed below.

Although the Chestnut Street Historic District was listed on the National Register of Historic Places in 2008, grants and historic tax credits have not been utilized in a concerted manner. As of early 2017, Hays allows liquor sales on Sunday. Although bars were already able to serve on Sunday, this change could benefit sales tax revenue downtown, albeit not significantly.

Role of Downtown Hays Development Corporation and Private Developer

Although a business improvement district was in place in the past, there is no taxing district downtown today. The creation of the Downtown Hays Development Corporation (DHDC), and the inception of downtown revitalization, can be traced to a group of interested citizens who organized themselves to turn downtown around. The original task force turned into the 13-member DHDC board of directors. A private developer with downtown investments in place, and a desire to see downtown revitalized, was approached with a proposition and an agreement was reached. The agreement was that if enough money could be raised to purchase key buildings downtown, the private developer would rehabilitate the buildings and seek tenants to occupy them. In the end, through a grassroots effort, \$750,000 of private funds was raised to purchase seven downtown buildings. The buildings were then gifted to the private developer who gutted them, brought them back to life with the assistance of a Housing and Urban Development grant, and filled them with tenants. This effort is credited with turning downtown around from a blighted area to a vibrant downtown district that is the number one visitor attraction in town. Today, the DHDC markets downtown, advocates for businesses in the district, and continues to serve as a driving force for downtown revitalization. The private developer is still a major downtown property owner.



Source: <https://www.downtownhays.com>

DHDC funding currently comes from the City of Hays to pay for salaries and office space, private partnership funds for marketing and beautification projects, and through two events held by the DHDC – Brews on the Bricks and Wines and Steins. The DHDC also runs the Downtown Hays Market, a farm and arts market held each Saturday from May to October. The market does not charge vendor fees or place restrictions on the type of vendors, a recent change that has proven beneficial in increasing vendor participation to about 20-30 vendors each week. A fundraising event, the Farm-to-Fork dinner, is held to raise marketing dollars and ensure the continuation of no vendor fees. The DHDC also helps market events organized by the Hays Arts

Council, including the four art walks held downtown each year. They also distribute a weekly newsletter to over 1,500 subscribers.

As envisioned in the 2012 Comprehensive Plan, the DHDC is currently involved with the development of the Downtown Pavilion project. The DHDC has secured all funding for the project, which is estimated to cost \$200,000. A large portion of project funding comes in the form of a \$100,000 grant from the Dane G. Hansen Foundation. Through a partnership with Fort Hays State University, students in the Applied Technology Construction Management Program will provide labor, with additional in-kind labor and cooperation from the City of Hays. The project entails extending the Union Pacific Park and constructing a 40x80-foot open air pavilion and public restrooms. The pavilion will serve as a great public gathering space that could be used for a variety of events, concerts, etc., and may become the new home of the Downtown Hays Market.

Today, downtown plays a significant role in the city's economy, contributing about 13% of the city's annual sales tax collections, on average.

Economic Development Tools Utilized

- Neighborhood Revitalization Program: tax abatement for qualifying properties
- Housing and Urban Development Grant

Table 8
Downtown Hays Events

January	February	March	April	May	June
			Brews on the Bricks Spring Art Walk	Downtown Hays Market	Downtown Hays Market Summer Art Walk Wild West Festival
July	August	September	October	November	December
Downtown Hays Market Bargains on the Bricks Thunder on the Bricks Downtown Hays Sidewalk Sale	Downtown Hays Market Fall Art Walk	Downtown Hays Market Wines and Steins March to Main	Downtown Hays Market	Frost Fest	Frost Fest (including parade) Winter Art Walk

Downtown Hays Businesses

According to the DHDC, there are just under 400 businesses downtown. The list of downtown businesses below accounts for most of the non-service related businesses, which are more difficult to track.

Table 9
Downtown Hays Businesses

Places to Eat/Drink	Places to Shop
Augustine's Bakery	711 Studio - Michael Jilg
Cancun Mexican Grill	8 th Street Liquor
Chinese Food Express	Artist's at Work Studio
Indigo by Jasmine	Be Made (unique gifts)
Gella's Diner & Lb. Brewing Co.	Bella Luna Maternity & Baby
Lomato's Pizza	Bruce Burkholder Studio
Gutch's Bar & Grill	Chestnut Street Kitchens + Floral
On the Rocks Bar & Grill	Couture for Men & Women
The Paisley Pear Café	CS Post & Co.
The Golden Q Sports Bar & Grill	Diamond R Jewelry
Breathe Coffee House	Em 'n Me Antiques
Taco Shop	Goodwin Sporting Goods
The Press Handcrafted Sandwiches	Gypsyrose
The Golden Griddle	Indigo by Jasmine
Sake2Me Sushi Rolls	Kuhn's Diamond Jewelers
Sweet Zoo	Lilly and Marie (<i>women's clothing</i>)
Pizza Management Co.	Moss-Thorns Gallery of Art
TK's Smokehaus	Pulse Medical Apparel
Toby Jugs	Refine (<i>women's clothing</i>)
Brass Rail	Regal Audio-Video
Daylight Donuts	S & W Supply (<i>auto parts</i>)
Chuck's	Scrub N (<i>medical uniforms</i>)
Sip N' Spin	Simply Charmed
Wild Rose	Something Blue
Soda Shoppe Café	Stone Gallery
	Tang's Chinese Market
	The Arc of Central Plains
	The Blue Heron Boutique
	The Furniture Look
	The Madd Matter Frame Shop and Gallery
	The Paisley Pear
	Tiger Book Shop

Services

8th Street Laundry Services
Adams Brown Beran & Ball CHTD
AFLAC
Aikido of Northwest Kansas
All Seasons Plumbing, Heating, & AC
American Family Insurance - Whitey Kohl
American Heritage - Progressive Agent
American Red Cross Blood Center
Anderson & Wichman Attorneys At Law
Andre Tax & Accounting
Astra Bank
Becky's School of Dance
Biker Insurance Agency, Inc.
Blue Cross Blue Shield of Kansas
Body Shoppe Salon
Body + Soul Day and Med Spa
Boone Law Office
Brundgardt Hower Ward Elliott & Pfeifer L.C.
Casa of the High Plains, Inc.
Casual Graphics
Catholic Charities
Coldwell Banker
Commerce Bank
Community Assistance Center
Congressman Jerry Moran
Desbien Designs
Downing-Nelson Oil Company
Downtown Hays Development Corporation
Downtown Welcome Center
Dreher Shop
Dreiling Bieker & Hoffman LLP
Elements of Massage
Ellis County Abstract and Title Co.
Everyday You Photography
Fantasy Graphics and Tattoo Studios
First Call For Help
First Care Clinic

Services

Fraternity of Eagles
G & J Management
Glass Man Bird Brown & Powell
Global 3D Art
Good Samaritan Society
Hadley Center & NCK Tech Culinary Arts
Hair Repair Salon
Hays Arts Council
Hays Car Care
Hays Community Theatre
Hays Daily News
Hays Fire & Rescue Sales & Service, L.L.C.
Hays Med Psychiatry
Hays Phone Doctor
Hays Veterans Clinic
Hertel Therapeutic Service
High Plains Mental Health Center
J Studio and Salon
Jackie Creamer's The Dance Studio
James Motor Company
Jayson Creative
Jeter Law Firm, LLP
Julisa Haines Photography
Kansas Natural Gas, Inc.
Kansas Next Step
Kaylene Brin, PA
KVC Wheatland Psychiatric Hospital
Liberty Four Square Church
Living Savior Evangelical Lutheran Church
Main Street Gym
Master Cleaners
Med-Op
Megan Colson Photography
Moores Tours International, Inc.
My Masterpiece
Nex-Tech
Northwestern Printers
Northwestern Signs & Awards

Services

Nurturing Hope and Counseling
Oil Company of America
Oller Law Firm
Park Avenue Salon
Pizza Hut Management
Platinum Group
Pools Plus Inc.
Pottery Works
R & R Auto Repair
Randy Mader Insurance
Realty Executives of Hays
Redz Design Studio
Salon Muah
Salon Ten o Seven
Sanctuary Friends Network
Screenprint Specialties
Simply LLC
Smokey Hill Woodcrafters
Smoky Hill Education Service Center
Smoky Hill Foundation
State Glass Co, Inc.
Stromgren Athletics, Inc.
Styles Dance Centre
The Fox Pavilion
The Meckenstock Group
The Tactical Experience
Top Notch Cleaners
Tracy Perrett Photography
Turning Point Professional Counseling Services
Ultimate Massage
United Way of Ellis County
Wasinger Brothers Plumbing
Ways of Harmony
Wedding Connections
Werth Wealth Management
Woods & Starr Associates

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3.3 Downtown Salina, Kansas

Background/Location

Salina, Kansas, is located about 110 miles west of Topeka, Kansas, just east of the Interstate 70 and Interstate 135 interchange. The city was founded in 1858 by a group from Lawrence, Kansas. It served as a location to obtain provisions for fortune seekers heading to the Rocky Mountains to mine for gold soon thereafter. The city continued to expand following the arrival of the Kansas Pacific Railroad in 1867, and the city's railroad roots are still very visible today. Rail tracks run through town from west to east, south of Interstate 70.

The city's population has increased over the past decade and a half, although only by a few thousand people. The population is estimated to be about 47,800. The city's median age has also increased gradually over this time to about 37 years of age. Median household income has increased from about \$36,000 in 2000 to about \$44,700 as of 2015, a 1.4% compound annual growth rate. The percentage of the population that identifies as Hispanic or Latino has also increased over the past fifteen years, from 6.7% in 2000 to 11.4% as of 2015.

Downtown Salina has become one of a few mixed-use areas in the city, and "represents a concentration of development that supports a varied and large employment base while addressing the needs of the local, community and regional markets through its offering of goods and services (Comprehensive Plan 2010). The development of downtown has been a joint effort between the public sector, Salina Downtown, Inc., private developers, and the community. In general, standard tools, such as a business improvement district and tax incentives have been utilized. However, the Salina 2020 project, an ongoing public/private partnership, is anticipated to further enliven downtown. The public and private role in downtown development is discussed, and a list of downtown events and businesses is provided.

Role of Public Sector

The public sector has played a role in facilitating downtown development in a few primary ways. The first is through the Neighborhood Revitalization Plan and Program, which the city began in 1996. This program provides property tax rebates for eligible residential and commercial/industrial rehabilitation and new construction projects. The rebate is for all or a portion of the incremental increase in property taxes paid due to a higher assessed valuation resulting from the improvements for a period of up to ten years. The purpose is to "make certain projects financially feasible, thus bringing investments to the revitalization area that otherwise might not occur" (NRA Brochure).

The second is through the city's planning efforts, which includes the 2010 Comprehensive Plan. The community's goals for downtown, as outlined in the plan, were, among others, to maintain downtown as the urban center of Central Kansas, encourage a mix of uses (including housing), increase the accessibility and visibility of downtown to visitors, encourage infill development, and to encourage downtown to be a "park once" destination. Actionable goals included creation of a Downtown Arts Master Plan and implementation of a river trails system along the old Smoky Hill River channel.

The third is the Salina Arts & Humanities Department, a city department, which produces, among other programs, the Smoky Hill River Festival, the Horizons Grants Program, Community Art & Design, and a poetry series. In collaboration with Salina Downtown, Inc., the department puts on Friday Night Live, which is live performance/music every Friday evening at a downtown business.

Smoky Hill River Festival, held every summer, is hailed as the Midwest's premier arts festival featuring music, art, and food, and attracting about 63,000 attendees as of 2014. The Community Art & Design program began in 2000, and formal policy was adopted in 2006 to "facilitate the infusion of artists, and art and design projects in selected City projects" (Salina Arts & Humanities).

Finally, the city provides funding to Salina Downtown Inc., a nonprofit organization devoted to enhancing downtown.

Role of Business Association and Art and Cultural Attractions



Credit: Salina Downtown, Inc.

Salina Downtown Inc. (SDI) was established in 1975 as a nonprofit merchant's association and was one of the first business improvement districts in Kansas. The business improvement district is comprised of 31 blocks and is primarily funded through tax collections on district businesses. Funds collected from events organized by SDI help cover event costs, with excess funds going to programming. Additional SDI operating funds are provided by the City of Salina.

SDI is involved in a multitude of programs and efforts to promote and facilitate development and business activity downtown. Among these is the Façade Improvement Program, provision of New Business Recruitment Loans, and Cluster Marketing Grants. According to SDI, the Façade Improvement Program is funded by the City of Salina and focuses on improving the exterior of existing buildings and constructing new commercial buildings

through mini grants (up to \$3,499 per award) and forgivable loans (up to \$15,000 per award). A revolving loan fund is used for New Business Recruitment within the district for loans up to \$5,000. Up to \$1,000 single grant requests, which require a two-to-one match, can be made for Cluster Marketing to simultaneously market multiple downtown businesses.

Salina's varied art and cultural venues not only serve residents, but also draw out-of-town visitors. Downtown venues include the Stiefel Theatre, Smoky Hill Museum, and Salina Art Center. The theater is an almost 1,300 seat venue that had almost 40,000 attendees in 2014. The Smoky Hill Museum reflects the struggles and vision of the people of the Smoky Hills region and Salina and is a big downtown draw, with about 35,000 attendees in 2014. Finally, the Salina Art Center, founded in 1978, is home to art exhibits, a cinema, live/work space for art residencies, etc.

Salina 2020 (Public/Private Partnership)

On the heels of an agreement to build a downtown Field House through a public/private partnership, another, albeit much larger, effort was proposed by a group of private citizens and business people. This led to the formation of Salina 2020, Inc., a Kansas for-profit corporation formed in 2014 as the Master Developer of an approximately \$154 million downtown redevelopment project financed through a combination of private investment, local and state economic development incentives, and City of Salina funding. However, in this case, the Master Developer is not obligated, nor will it, design, construct, complete, own, operate, or maintain any of the project components. The City and Master Developer will jointly assign control over project components to third parties.



Credit: STAR Bond Project

The plan seeks to create a tourist destination with a mix of athletic, entertainment, museum, and lodging uses. The feasibility study for the district estimated that once built-out and stabilized, the district would attract about 488,000 annual visitors, including approximately

258,150 visitors from over 100 miles away, incremental taxable retail sales of \$33.8 million annually, and an annual economic impact of \$66 million on the State of Kansas. The Salina City Commission voted unanimously in January 2017 to approve an agreement with Salina 2020 and various financing tools. The Field House is one of the first projects underway and is anticipated to be completed in 2017.

Salina 2020 Financing Tools	Salina 2020 Summary Project List
<ul style="list-style-type: none"> • STAR Bonds • Tax Increment Financing (property tax only) • Community Improvement District – Downtown, Hotel, Alley (new sales tax rate) • Industrial Revenue Bonds (IRB) • Neighborhood Revitalization Program • Private Funds • Public Funds 	<ul style="list-style-type: none"> • Field House • Car Museum • Alley Project (bowling/entertainment) • Hotel Project • Market Rate Apartments • Old Chicago Project • Stiefel Theatre Improvements • Streetscape & Public Infrastructure Improvements

Economic Development Tools Utilized (excluding Salina 2020)

- Neighborhood Revitalization Program
- Business Improvement District
- Façade Loan Program
- New Business Recruitment Loans
- Cluster Marketing Grants

Downtown Salina Events

The list of events below does not represent all events downtown in any given year, but does represent the larger events put on or promoted by Salina Downtown, Inc.

Table 10
Downtown Salina Events

January	February	March	April	May	June
		St. Patrick's Day Pub Crawl	Spring Poetry Series	Friday Night Live Downtown Farmers Market	Friday Night Live Downtown Farmers Market Smoky Hill River Festival
July	August	September	October	November	December
Friday Night Live All American Fourth and Play Day in the Park Downtown Farmers Market	Friday Night Live Downtown Farmers Market	Friday Night Live Street Fair Downtown Farmers Market	Halloween Pub Crawl	Christmas Festival	

Downtown Salina Businesses

A list of many, albeit not all, downtown businesses is included below. Recent estimates suggest that about 55% of downtown commercial space is devoted to retail establishments.

Table 11
Downtown Salina Businesses

Places to Eat/Drink	Places to Eat/Drink
Ad Astra Books and Coffee House	Martinelli's Little Italy
Big Nose Kate's	Paramount Bar
Blue Skye Brewery & Eats	Rendezvous Bar
Carol Lee Donuts	Santa Cruz Burrito
Coop's Pizzeria	Scheme Restaurant & Bar
Corkie's Diner	Sonic Drive-In
Cozy Inn	Taco John's
Dairy Queen / Orange Julius	
Heart of Dixie	

Places to Shop

2nd Chances
Ad Astra Books & Coffee House
Auld Lang Syne, Antiques and Collectibles
Bargain Basket
Connected-A Fair Trade Store
Dollar General
Eccentricity Too
Flipping Fabulous
Iron Street Coffee Roaster
Laura's Antiques
Midwest Music Inc.
On the Pot
PB&J
Penny Layne

Services

A-1 Mini Storage
Abner's Auto
Abracadabra Salon & Day Spa
Accessible Home Care
Achterberg Angell & Craft, LLC
Action Travel
Advanced Services, Inc.
American Legion
Ash Enterprises Inc.
Assurance Partners
AT&T
Atlas Optical
B & K Bonding
Bank of Kansas City Mortgage
Bennington State Bank
Bieberly Architects
Blue Heaven Studio
Bruce H. Wyatt
Busboom & Rauh Construction
Central Leasing Systems
Central National Bank
City Plumbing Company, Inc.

Places to Shop

Prairieland Market
Quilting Station
Rebecca Jane's
Salina Vapor
Salvation Army Thrift Store
Streit Sandblasting
Sweet On You
The AVON Store
The Flower Nook
The Market Shop
Vernon Jewelers of Salina
Whiskey Road Antiques & Collectibles
Young's Bridal Shop

Services

Clark Mize & Linville
Clubine & Rettele, Chartered CPA
Community Access Television
Complete Surveillance
Consolidated Printing & Stationary
Copeland Insurance
Cox Communications
Daniel K Diederich Law
Design Central, Budget Furniture
Doc's Barber Shop
Document Resources, Inc.
Downtown Auto Service
Eagle Communications
Earles Engineering and Inspections, Inc.
Edward Jones
Electronics of Salina
Expressions Salon & Spa
Extraordinary Events
Fades and Blades Barber Shop
Farm Bureau Financial Services
Fee Insurance Group Inc.

Services

File Safe, Inc.
Financial Management GP, LLC
Firefly Hair & Nail Salon
First Asset Financial, Inc.
First Bank Kansas
Friends of The River Foundation
Gasoline Alley
Gentle Touch Chiropractic
George Easter Tax Consultant
Greater Salina Community Foundation
Hampton & Royce, L.C.
Hays Academy of Hair Design
Hello Kira Dance Studio
Hettenbach & Langdon
Integral Consulting Services LLC
Iron Street Tattoo and Body Piercing
ISG Technology, Inc.
JMS Financial Services
KAKE TV
Kansas Broadband Internet
KC & G Business Appraisal
KCVS
Kennedy Berkley Yarnevich &
Williamson Chartered
Key Office
KIT Support Systems
L & L Advisors
Law Office of Robert L. German
Manley Structural Engineers
Marsha Hoffhines - State Farm
Mckenna Law Office PA
Meier's Moving and Storage
MetLife Auto & Home - Deana Garnett
Michael A. Montoya, P.A.
Michael Olson Accounting & Tax
Service
Midwest Regional Agency, Salina
Modern Woodmen of America

Services

Murphey Mediation
Neustrom Patrik Attorney
Next Level Fitness
Norton, Wasserman, Jones & Kelly, LLC
Pathway Financial Solutions
Peaceful Body Wellness Retreat
Pennington Chiropractic
People's National Home Bank
Raymond James Financial Services
Ray's Truck & Auto Repair
Rocking M Media
Rose Hill Bank
Ryan Mortuary & Crematory
Safelite Auto Glass
Salina Art Center
Salina Art Center Cinema
Salina Auto Parts
Salina Blueprint
Salina Community Theatre
Salina Journal
Shannons Stars Twirling Club
Sheahon Jack
Shear Revolution
Smoky Hill Museum
Stiefel Theatre for the Performing Arts
Sunflower Bank
Super Wash & Detail
Sure Check Brokerage
Tamara Howe School of Dance
Team Employment, LLC
The Arnold Group
The Bank of Tescott
The Mortgage Company
The Wild Hair Salon
Thrivent Financial
UMB Bank
United Capital Management - Ks
Web Creations & Consulting

Services

Wells Fargo Advisors

William R. Lorson

Wishon Heating & Air

Wyatt & Davidson LLC

You and Your Surroundings (*salon*)

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3.4 Downtown Topeka, Kansas

Background/Location

Topeka, Kansas, was founded in 1857 and is both the seat of Shawnee County and the state capital. It is located about 65 miles west of Kansas City, Missouri, on Interstate 70. Most of the city lies south of Interstate 70 and north of the city's southern ring road, Interstate 470. Interstate 335 from Wichita, Kansas, terminates in Topeka. Downtown Topeka is located just south of the Kansas River, with the core downtown district (central business district) situated west and south of Interstate 70 as it jogs through the heart of downtown. Downtown is home to the State Capitol building, various state government office buildings, and a diverse mix of businesses.

The estimated population in Topeka's city limits is about 128,000, or about 5,000 higher than in the year 2000. The metropolitan area, however, is much more populous, with an estimated population of about 234,000, which represents about 8% of the state total. The city's population is predominantly white, with about 14% of the population identifying as Hispanic or Latino, a figure that has increased in the past fifteen years. Other changes over time include the fact that the city's median household income has gone from about \$36,000 in 2000 to over \$42,000 in recent estimates.

The city's development over time is storied, beginning with an Oregon Trail river crossing and a long railroad history. The city is still home to one of the largest railroad shops in the world, owned by Burlington Northern Santa Fe. At the dawn of the 21st century, downtown Topeka was a place with vacant office space and store fronts. "An expensive streetscaping program failed to attract investors," and improvement was perceived to be out of reach. Much has changed since then due to the concerted efforts of the public and private sectors. In addition, the area just north of downtown, now referred to as NOTO, or North Topeka, has experienced its own revitalization. Both areas in the heart of the city have benefited from a variety of public plans, policies, and incentives to spur private redevelopment. Downtown Topeka, Inc. has raised funds to produce downtown events, as well as promote, maintain, and clean the downtown area. The private sector has also played an important role, deploying capital to rehabilitate buildings and invest in downtown businesses. The summary below highlights some of the work that has led to the transformation of downtown and NOTO, a summary of incentives and funds utilized, and a list of major downtown events.

Role of Public Sector

The public sector has facilitated public planning processes regarding downtown, enhanced infrastructure/streetscapes, and provided incentives. The story of downtown's turnaround appears to begin with the Historic North Topeka Revitalization Plan in 1999. This plan was for the area north of the river, now referred to as NOTO, or North Topeka. It was quickly followed by the Downtown Topeka Redevelopment Plan in 2000. The 2002 Economic Development Plan for Topeka/Shawnee County, an element of the Comprehensive Metropolitan Plan 2025, included downtown revitalization as a goal. A streetscape improvement plan for Kansas Avenue was completed in 2012. The next year, the city

"The goal was not to recreate downtown precisely as it was in the 1940s and 1950s - few, if any, downtowns are likely to be regional retail centers again - but they can still fill the role of the entire city's common neighborhood, with its own unique character defined by the architecture of its remaining old structures. The avenues chosen to revitalize downtowns around the country are varied, but most involve dining and entertainment districts that also soon include specialty and boutique retail. Those developments are typically followed by urban housing. Whenever downtowns are safe, clean, pretty, and full of activity at all hours of the day, many people want to live in or near them" (2000 Downtown Topeka Redevelopment Plan).

completed the Historic North Topeka East Neighborhood Plan for the area just north of the river. The future land use map envisioned open space along the waterfront with a mix of uses adjacent to the open space, with residential uses to the north. In sum, the vision for the area was that of a destination where people want to live with a renewed, user-friendly waterfront. The same year, the Neighborhood Revitalization Plan was put in place, allowing the city to incentivize redevelopment in the “revitalization area,” which includes downtown and North Topeka, through the provision of property tax rebates to property owners for qualifying improvements.

In 2015 the 2025 Land Use and Growth Management Plan was updated to 2040. This plan noted that in addition to being the region’s office, employment, and commercial center, Downtown should be redeveloped for a mix of uses, including retail and residential. It clearly stated the critical importance of residential development, including medium and high-density residential and loft conversions over ground floor uses. Last year the city changed its downtown base zoning to better accommodate a mix of uses, and completed infrastructure/streetscape improvements along Kansas Avenue.

The public sector is also involved in regulating and incentivizing historic preservation. The Historic Preservation Plan adopted in 2014 lists the encouragement and facilitation of private sector investment in downtown historic buildings as a priority for action to help make the Kansas Avenue streetscape infrastructure improvement effort a success. It also mentions that linking the Capitol Area, or central business district, to North Topeka, is in the interest of the city, businesses, and residents. Even more recently, in the fall of 2016, the city developed Downtown Topeka Historic District Guidelines. There are three historic districts downtown listed on the National Register of Historic Places – South Kansas Avenue Commercial Historic District, Mill Block Historic District, and Church of the Assumption Historic District – and the goal of the design guidelines is essentially to ensure replication of what is currently there in terms of setbacks, massing, etc.

Role of GO Topeka, Downtown Topeka, Inc. and the North Topeka Arts District

GO Topeka implements an economic development strategic plan on behalf of the city of Topeka and Shawnee County. GO Topeka contracts with the Joint Economic Development Organization (city and county) on an annual basis to carry out the economic development program. The organization receives \$5 million annually from sales tax proceeds and additional funds from private investors. Privately raised funds, for example, paid for pocket parks as part of the Kansas Avenue streetscape improvements. Examples include a pocket park sponsored by Security Benefit and Burlington Northern Santa Fe.

The downtown business improvement district, established by city ordinance in 1986, has been administered by Downtown Topeka, Inc. since 1995. The 230 members of the district are assessed based on their square footage to fund the organization’s efforts to encourage the growth of business, governmental services, and cultural entertainment “in the heart of” Topeka and Shawnee County through promotion, event underwriting (see events below), and general downtown maintenance and cleaning, among other items. The Downtown Topeka Foundation is the fundraising arm, raising and expending monies to preserve, restore and improve various aspects of downtown. The foundation raised, for example, on the order of \$3.8 million to help pay for pocket parks, pavilions, statues, etc., as part of the Kansas Avenue streetscape improvements.

Through about 2010, NOTO was not desirable by most. The art district notes that businesses other than bars and adult clubs didn’t want to be there and locals didn’t want to visit due to crime, etc. However, plans were being developed to turn that around. The Historic North Topeka Revitalization

Plan was in place in 1999, and 5-year strategic plan was developed by the North Topeka Business Alliance, Inc. in 2006, which outlined key strategies for the riverfront, Topeka Boulevard, and the North Kansas Avenue Corridor. In addition, private investment was slowly occurring. Buildings were being purchased by investors and the negative aspects of the area began to subside. Following the top request of a 2010 survey being “an arts district” and additional work, the NOTO Arts District was born in 2011 with three businesses getting started that year, and another twelve the following year. Today, it is home to local art galleries, shops, and restaurants. A North Topeka Arts District Revitalization Plan was completed last year that included design concepts for building and streetscape enhancements, sculpture gardens, public spaces, development sites, and small and large-scale placemaking and public art projects.

Local Economic Development Tools

There are many tools available for use in Topeka at the local, state, and federal level. Only local tools are summarized herein, as state and federal tools are not unique to Topeka.

Neighborhood Revitalization Program – the city’s planning department administers this program, which provides a 10-year tax rebate incentive up to 95% to property owners for making major improvements that raise the appraised value of residential property by 10% and of commercial property by 20%. A total of \$114 million has been invested downtown since the program’s inception in 1995.

Historic Preservation Grants - This monetary grant award is intended to benefit public heritage tourism and promote Topeka as a place to work and live by assisting in funding the restoration of key historic sites and promoting these projects through monies from the City of Topeka’s one-percent Transient Guest Tax Fund. Downtown projects that have utilized these grants include the Jayhawk Theater, Historic Constitution Hall, and the Great Overland Station, considered to be a catalytic project in NOTO.

Downtown Topeka Redevelopment Incentive Grant Program – designed to encourage residential and commercial improvements of buildings in the Capital City Business Improvement District. Funding is provided by the City of Topeka and administered by Downtown Topeka, Inc. The total amount of grant funding available is currently about \$300,000 per year, with a maximum of \$50,000 for any one project.

Fee Reductions and Waivers – The reduction and waiver amounts vary, but include reduced building permit fees, reduced plan review fees on building project reviews, reductions in sewer and water rates (up to 25%), and reductions in storm water fees (up to 40%). Such incentives do not appear to be common downtown.

Community Improvement District (CID) – Such a district is a discrete area of the City that taxes itself to provide services above those available to the city-at-large. The only CID in downtown Topeka is the Cyrus Hotel. A 1% sales tax on people who eat or stay there will help offset the cost of construction.

Citywide Half-Cent Street Sales Tax – a voter-approved half-cent sales tax is dedicated to street maintenance and repair (not just downtown) and cannot be used for new street construction. The tax sunsets in 2019 and collects approximately \$14.7 million per year. This helped finance eligible portions of the recently completed Kansas Avenue infrastructure/streetscape improvements.

The Topeka/Shawnee County Small Business Incentive (administered by GO Topeka) – this is a matching incentive program that assists with employee development, equipment purchases, as well as construction and marketing.

- Small Business Construction and Renovation Incentive - This incentive includes up to half of expenses up to \$5,000 for the enhancement of an existing business or the construction of a new property.
- Marketing Incentive - This is a one-time \$750 per business incentive to help promote small businesses through advertising/marketing (website, newspaper, magazine, radio, television, banners, signs, etc.)

Community Development Financing Institutions (CDFI) – The Topeka/Shawnee County First Opportunity Fund provides loans to entrepreneurs, especially low-income entrepreneurs and other business owners who do not have access to conventional financing due to business stage or size, insufficient or flawed credit history, use of proceeds or type of business, and location of the business. The maximum loan amount is \$10,000.

Downtown Topeka Events

Downtown Topeka, Inc. produced 28 different events in 2016 with over 100,000 attendees, according to their annual report. The list of events below is not exhaustive, but provides a summary of major downtown events, as well as the First Friday Artwalk in NOTO.

Table 12
Downtown Topeka Events

January	February	March	April	May	June
First Friday Artwalk	First Friday Artwalk	First Friday Artwalk St. Patrick's Day Parade	First Friday Artwalk Bridge2Bridge 5k	First Friday Artwalk	First Friday Artwalk Tap That - A Capital City Brew Festival Second Saturday Concert Series Brown Bag Concerts (every Wednesday) Movie on the Lawn
July	August	September	October	November	December
First Friday Artwalk Freedom Festival Second Saturday Concert Series Brown Bag Concerts (every Wednesday)	First Friday Artwalk Cruisin' the Capitol Car Show Second Saturday Concert Series Brown Bag Concerts (every Wednesday)	First Friday Artwalk TouchATruck a Celebration of Labor Second Saturday Concert Series Brown Bag Concerts (every Wednesday) Movie on the Lawn	First Friday Artwalk Capital City Jazz and Food Truck Festival BOO IT Downtown Candy Crawl	First Friday Artwalk Tower & TOUGH Tower Runs Topeka Veteran's Day Parade Small Business Saturday Miracle on Kansas Avenue Parade & Activities	First Friday Artwalk

Downtown Topeka Businesses

There are an estimated 800 businesses in the business improvement district. The percentage mix of business types is unknown.

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IV. RESIDENTIAL MARKET ANALYSIS

Today, the most successful downtowns are diverse in terms of what they offer. Communities have reimagined their downtowns as multi-use, multi-functional places that offer specialty retail shops, restaurants, art, entertainment, recreation, offices, loft apartments and condos. They also attract multiple generations. Downtowns are **no longer** the retail hubs they once were.

The most successful downtowns have reinvented themselves in order to stand out and appeal to various market segments. They often appeal to different markets at different times of the day, week and even year. It is important for downtown and the market segments it attracts, to remain varied, flexible, and diverse into the future. The case studies previously profiled highlighted the diversity of services that downtowns offer and the potential diverse market segments it attracts.

Interviews with various stakeholders in Garden City indicated a strong nostalgia for what downtown Garden City once was. However, in order to move into the future, the downtown strategy will need to evolve to mirror changing times. The following section is an analysis of the residential market followed by an analysis of the commercial market potentials appropriate for downtown.

The 2015 American Community Survey estimated a supply of over 9,600 housing units in Garden City, as seen in Table 13. The very low 2015 vacancy rate suggests a tightening of the housing supply relative to demand.

4.1 Residential Supply

Table 13
Garden City Housing Occupancies

	-- 2000 --		-- 2010 --		-- 2015 [1] --	
	Number	%	Number	%	Number	%
Owner-Occupied	5,751	62%	5,495	61%	5,584	60%
Renter-Occupied	3,587	38%	3,576	39%	3,699	40%
Total Occupied	9,338	100%	9,071	100%	9,283	100%
Vacant	569	6%	585	6%	360	4%
Total	9,907		9,656		9,643	

Source: U.S. Census Bureau

[1] ACS 5-year estimates

The vacancy rate is well below the 5% “equilibrium” rate for housing, which is the minimum rate at which households and families can move with relative ease within a market. This suggests that new construction is not keeping pace with demand.

Just over 4% of the City’s housing stock or 413 residential units was constructed in the years 2010 through 2016, as seen in Table 14. About 75% of these were single-family units, which includes about 90 duplex units. The other 25% were multi-family units.

Table 14
Garden City Construction Activity (2010-2016)

Year	Single Family Units [1]	Multi-Family Units	Annual Total
2010	11	10	21
2011	11	35	46
2012	21	3	24
2013	67	48	115
2014	26	9	35
2015	127	0	127
2016	45	0	45
Total	308	105	413

Source: Draft Finney County CHAT Update, May 2017

[1] includes duplexes and manufactured units

Such figures may appear to represent relatively robust construction activity over the past seven years, particularly because activity in 2013 and 2015 outperformed activity in the early 2000s. The reality is that this only represents about 59 units constructed per year on average, which is far lower than what is demanded based on population projections in the updated CHAT report.

Supply issues are evident not only based on the figures above, but because the number of home listings has been very low, which reinforces the notion that those looking for housing are lacking sufficient choice in the market.

A variety of issues contribute to the underproduction of housing, which include the following:

- The inability of many to satisfy credit and underwriting standards are placing them in the rental market.
- The cost of public improvements, high land prices, and construction costs in general are a barrier to private investment.
- The 2010 Census undercount, which showed a shrinking population, may have indicated to developers that the Garden City market is too risky for large capital outlays.

4.2 Residential Demand

The Finney County CHAT Update (2017) estimates that 1,030 units would be needed in Garden City from 2017 to 2025, and an additional 612 from 2025 to 2030 in order to meet housing needs. In total, the estimated demand for residential housing units is 1,643, or about 117 per year, through 2030. This estimate assumes a compound annual population growth rate of 0.75%, accounts for recent construction activity, assumes an increase in the vacancy rate over time, and makes assumptions about household income in the future. The previous CHAT completed in 2014 estimated that 97 residential units would be needed per year from 2015 to 2024.

Based on a review of income distributions relative to housing affordability ranges in the updated CHAT report, there is a relative shortage of for sale units above \$150,000 and rental units from \$1,250+ per month. Given that new construction costs are likely more than \$130,000 per unit, meeting

higher end housing demand will likely be addressed by the market. The larger challenge is meeting demand for units in the lower price or rental tiers, which represents a large number of units through 2030.

4.3 Downtown Residential Demand

As has been the case for a number of years, downtown residential is doing well, albeit somewhat limited. The CHAT study acknowledges that the continuing high occupancy of the Warren Building and other more recent projects demonstrate the market for quality, market-rate rental housing in downtown. Because downtown residential can achieve rents in the \$1-\$1.25 per square foot range, with incentives and gap financing, these projects are self-sustaining. The Warren Building has 21 units ranging in size from 325 to 1,100 square feet.

According to the CHAT, downtown property managers are convinced that a substantial number of additional units can potentially be absorbed in the downtown market. According to the City, however, all of the potential residential units (on second floors and above) that can be gleaned from the existing downtown buildings have been converted. The challenge is identifying new locations for downtown residential.

4.4 Current Downtown Residential Characteristics

Table 15
Downtown Area Residential Household Characteristics

	Quarter Mile Radius	Half Mile Radius	Garden City
Persons	589	2,516	31,020
Households	137	587	10,750
Persons per Household	2.77	2.79	2.89
Educational Attainment			
High School Graduate or Higher (%)	66.6%	67.2%	71.3%
Bachelor's Degree or Higher (%)	12.8%	13.5%	18.7%
Housing Tenure			
Owner Occupied (%)	53.7%	53.7%	60.5%
Renter Occupied (%)	46.3%	46.3%	39.5%
Incomes			
Average Household Income	\$54,748	\$54,004	\$65,921
Median Household Income	\$42,134	\$41,487	\$49,033
Race/Ethnicity			
% of Population White	74.6%	74.1%	71.0%
% of Population Non-White	25.4%	25.9%	29.0%
% of Population Hispanic or Latino	61.7%	61.4%	49.7%

Source: Claritas, ArLand

Table 15 shows household characteristics of residents within a ¼ and ½ mile radius of the center of downtown (Main Street and Laurel). The population immediately adjacent to downtown is estimated to be just under 600 residents (1/4 mile radius). The area within a half mile radius of downtown has about 2,500 residents, or about 10% of the city’s population. A map of the area covered is shown in Figure 11.

The population closer to downtown tends to have a higher percentage of Latino and Hispanic households, more likely to rent, have lower median household incomes than the City, and have smaller households than the rest of Garden City. Many live in the historic housing stock surrounding the downtown.

Figure 11
¼ and ½ Mile Radius from Downtown (Laurel and Main)



Source: Claritas, ArLand

4.5 Residential Summary

In general, the major housing issue in Garden City is that the private market is not constructing enough units to meet demand. Based on the need for 117 units per year on average through 2030, the market would need to double its average annual construction over the past seven years to meet estimated demand projections going forward. The CHAT notes the lack of Community Housing Development Organizations or nonprofit community development corporations in Finney County to assist in preventing deterioration of existing housing stock and to build new residences.

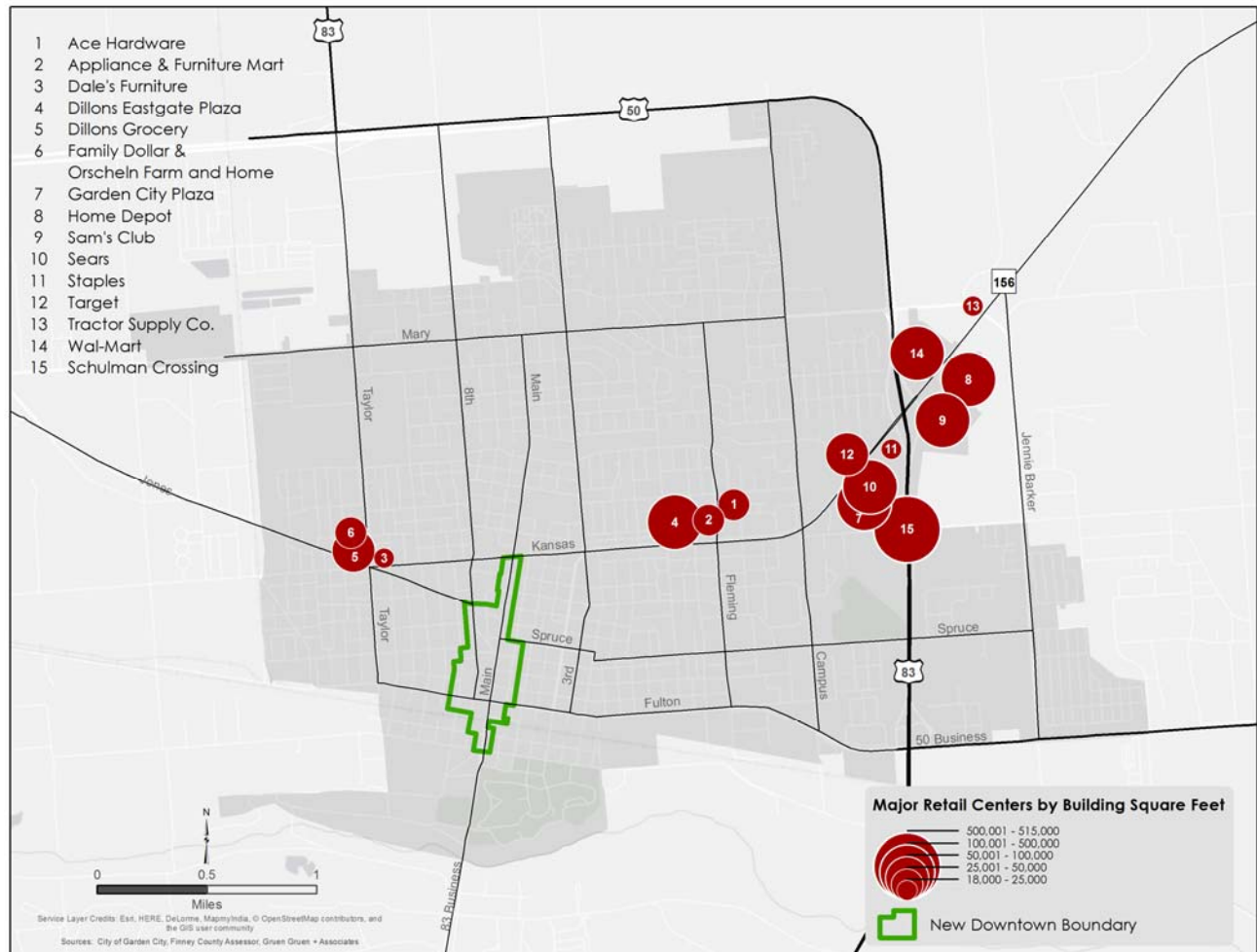
The CHAT has recommended that there be a continued focus on downtown, and on adaptive reuse and new construction around the Main Street core.

V. COMMERCIAL MARKET ANALYSIS

5.1 Retail Supply

There is approximately 1.35 million square feet of major retail space in Garden City outside of downtown distributed as shown in Figure 12.

Figure 12
Major Retail Centers



Source: City of Garden City, Gruen + Gruen, ArLand

Garden City has Wal-Mart, Target, Sam's Club, and Home Depot which brings in shoppers from outside of Garden City.

A relatively new retail addition to Garden City is Schulman Crossing, which is a 500,000 square feet retail hub located at the northeast corner of the U.S. Highway 83 Bypass and Schulman Avenue. The project brought in Menard's, Dick's, Hobby Lobby, TJ Maxx, Ross Dress for Less, Petco, ULTA, CATO Fashions, and Mattress Hub. There are restaurants, hotel and water park. All of this activity has helped solidify Garden City's broad Secondary Trade Area.

In the last five years, taxable retail sales in Garden City increased from \$396 million to \$486 million, an overall 20% increase in sales in categories shown in Table 16. The sporting goods category grew the most at 39.7% or at a consolidated average rate of 5.2% annually. The new Dick's Sporting Goods at Schulman Crossing was part of this increase. Health and personal care also grew by a substantial percentage. Food Service and Drinking Places grew by 12.1% on an average annual basis as did Building Materials and Garden Supplies.

Table 16
Taxable Sales in Garden City, 2012-2016

	2012 Taxable Sales	2013 Taxable Sales	2014 Taxable Sales	2015 Taxable Sales	2016 Taxable Sales	2012-2016 CAGR
<i>Convenience Goods</i>						
Grocery Stores [1]	\$38,362,239	\$40,782,412	\$42,498,328	\$43,229,256	\$39,947,881	1.0%
Health & Personal Care Stores [1]	\$4,458,338	\$4,366,751	\$5,468,507	\$7,349,095	\$7,856,560	15.2%
<i>Shopper's Goods</i>						
General Merchandise Stores [1]	\$144,622,145	\$144,591,074	\$147,307,981	\$148,001,905	\$151,078,742	1.1%
Furniture & Home Furnishings Stores [1]	\$5,087,919	\$5,096,710	\$5,173,992	\$6,039,258	\$5,394,552	1.5%
Clothing and Clothing Accessories [1]	\$21,745,651	\$22,179,329	\$26,098,453	\$30,965,948	\$31,542,539	9.7%
Sport. Goods, Hobby, Book, & Music [2]	\$3,756,261	\$3,899,008	\$8,789,327	\$14,614,656	\$14,288,349	39.7%
Miscellaneous Store Retailers [2]	\$15,258,474	\$15,656,429	\$17,171,656	\$17,417,073	\$14,878,957	-0.6%
<i>Food Services & Drinking Places</i>						
Food Service and Drinking Places [2]	\$36,703,382	\$49,617,039	\$53,996,648	\$56,874,627	\$58,012,485	12.1%
<i>Durable Goods</i>						
Motor Vehicles & Parts Dealers [2]	\$66,896,595	\$70,991,902	\$78,039,914	\$81,533,852	\$80,079,376	4.6%
Building Materials & Garden Supplies [1]	\$53,123,954	\$65,177,240	\$70,831,454	\$72,096,121	\$73,828,707	8.6%
Electronics & Appliance Stores [1]	\$6,945,251	\$9,527,683	\$9,231,503	\$8,895,497	\$9,129,607	7.1%
Total	\$396,960,209	\$431,885,577	\$464,607,764	\$487,017,287	\$486,037,755	5.2%

Source: Kansas Department of Revenue, ArLand

[1] estimates based on Garden City share of Finney County sales tax revenues

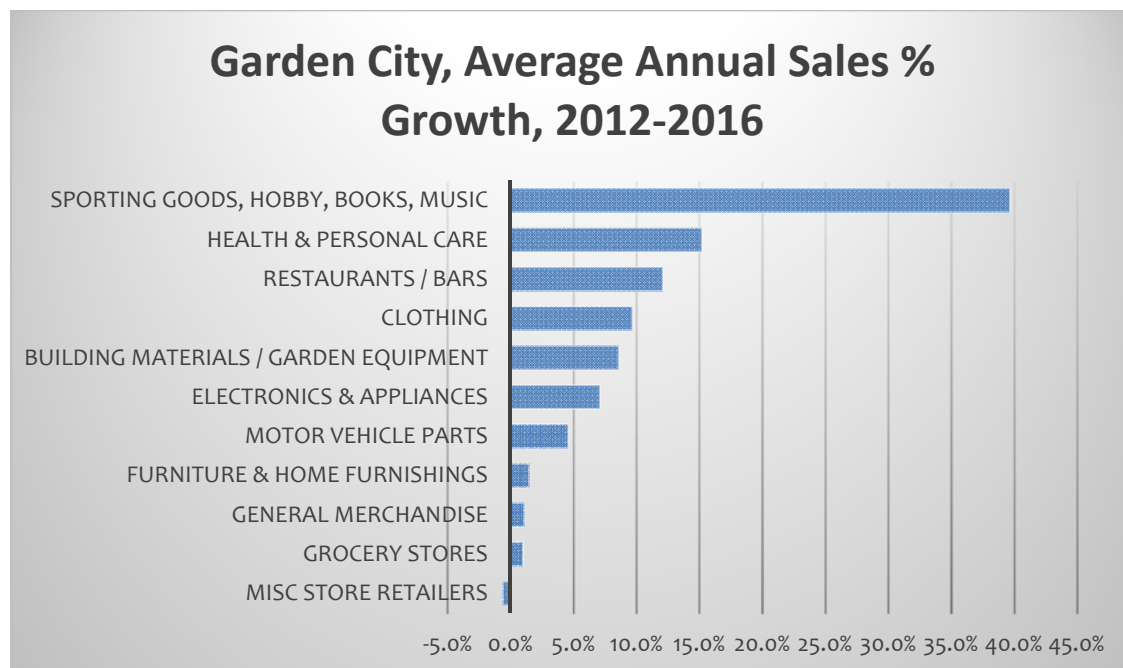
[2] actuals for Garden City

The most discernible increase is in those categories represented by new retail at Schulman Crossing.

Figure 13 shows the categories that have grown at the greatest rate in Garden City between 2012-2016 and then compares them to 2015-2016 trends in the US. While not a direct apples to apples comparison, it shows some interesting trends. Health and Personal Care is an area where growth is being seen both locally and nationally. Another interesting phenomenon is that sales at restaurant / bars in Garden City are greater than sales growth at grocery stores. In the US as a whole, this trend is also being seen.

While most categories are doing well in Garden City, the only category that didn't see growth is the Miscellaneous Retail category, which includes store types like gift shops, which are typically found in downtowns.

Figure 13
Garden City Annual Retail Sales Growth vs. the U.S., 2012-2016



Source: City of Garden City, CBRE, ArLand

On a nationwide basis, the returning housing market is driving the sales of Building Materials and Garden Supplies, as well as Furniture and Furnishings. The greatest sales growth nationally is in e-commerce, which covers a wide number of categories. General merchandise and Electronic and Appliances are both categories which have seen recent decreases, due to the closing of department

stores, such as Sears. While there are stores that sell Electronics and Appliances, increasingly electronics sales are taking place over the internet.

While Garden City has seen increased sales, this hasn't resulted in greater synergy for downtown. If anything, the greater retail and restaurant offerings in other parts of the City have become even more compelling and attractive to out-of-town visitors.

5.2 Retail Demand

In order to estimate retail potentials, we calculate an estimate of demand. Retail demand is calculated by:

- Estimating households and incomes in the trade area in order to derive the total household income potentially available for retail expenditures.
- Based on current expenditure patterns, calculating the income percentage spent in retail categories by residents within the trade area. This results in estimated dollar demand by retail category.
- By comparing estimated demand (both current and future) to Garden City sales by retail category, unmet retail demand is calculated by:
 - Subtracting supply from demand to obtain an estimate of unmet demand; and
 - Incorporating sales per square foot averages by retail category in order to estimate the approximate square footage of unmet retail demand.

Table 18 shows the estimated number of households in Garden City and indicates that approximately \$700 million of household incomes is generated currently in the City by Garden City households. In the Primary Trade Area, there is \$3.5 billion in household incomes. In the Secondary Trade Area (which also includes Garden City and the Primary Trade Area), there is \$5.4 billion in household incomes currently estimated. Incomes are conservatively forecast to grow based on forecast growth in population and households.

Table 17
Total Household Incomes in Garden City Trade Areas

Garden City	2017	2022	2027	10 Year Change	Average Annual Growth Rate
Households	10,751	11,160	11,585	834	0.75%
Average Household Income	\$66,000	\$66,000	\$66,000		
Total Household Income (\$000s)	\$709,566	\$736,577	\$764,616		
Primary Trade Area	2017	2022	2027	10 Year Change	Average Annual Growth Rate
Households	51,688	52,145	52,593	905	0.17%
Average Household Income	\$68,000	\$68,000	\$68,000		
Total Household Income (\$000s)	\$3,514,784	\$3,545,877	\$3,576,330		
Secondary Trade Area	2017	2022	2027	10 Year Change	Average Annual Growth Rate
Households	78,872	79,608	80,197	1,325	0.17%
Average Household Income	\$68,000	\$68,000	\$68,000		
Total Household Income (\$000s)	\$5,363,296	\$5,413,361	\$5,453,402		

Source: ArLand, Claritas

Table 18
Garden City Retail Demand

Category	% Retail Expenditures [1]	Demand (retail potential)	Est. Sales	Current Retail Void (\$)	Est. Sales / s.f. [2]	Current Retail Void (s.f.)	Additional Demand from Household Growth (s.f.) (Buildout)	Total Demand Buildout
<i>Convenience Goods</i>								
Grocery Stores, Specialty Foods, Beer	7.26%	\$51,488,969	\$39,947,881	\$11,541,088	\$450	25,647	0	25,647
Wine & Liquor								
Health & Personal Care Stores	3.11%	\$22,080,612	\$7,856,560	\$14,224,052	\$300	47,414	0	47,414
<i>Shopper's Goods</i>								
General Merchandise Stores	7.47%	\$53,003,965	\$151,078,742	(\$98,074,778)	\$450	--	0	--
Furniture & Home Furnishings Stores	1.01%	\$7,171,029	\$5,394,552	\$1,776,477	\$300	5,922	0	5,922
Clothing and Clothing Accessories	1.90%	\$13,463,111	\$31,542,539	(\$18,079,429)	\$300	--	0	--
Sport. Goods, Hobby, Book, & Music	1.05%	\$7,466,785	\$14,288,349	(\$6,821,564)	\$200	--	0	--
Miscellaneous Store Retailers	1.24%	\$8,774,699	\$14,878,957	(\$6,104,258)	\$200	--	0	--
<i>Food Services & Drinking Places</i>								
Eating & Drinking Places	5.52%	\$39,192,948	\$58,012,485	(\$18,819,537)	\$350	--	0	--
<i>Durable Goods</i>								
Motor Vehicles & Parts Dealers	1.04%	\$7,402,690	\$80,079,376	(\$72,676,686)	\$300	--	0	--
Bldg Mater., Garden Equip. & Supply	5.07%	\$35,983,520	\$73,828,707	(\$37,845,187)	\$300	--	0	--
Electronics & Appliance Stores	0.98%	\$6,988,050	\$9,129,607	(\$2,141,557)	\$250	--	0	--
	35.66%	\$253,016,378	\$486,037,755	(\$233,021,377)		78,982	0	78,982

Source: Claritas, Census of Retail Trade for CO, ULI, ArLand, Gruen Gruen + Associates

[1] Demand percentages based on national and state averages

[2] National averages per Urban Land Institute, research and retailer interviews

Table 19 shows the retail demand model based on households and incomes in Garden City only. The demand column indicates the potential demand based on incomes and the percentage of incomes typically spent in these retail categories. In most categories, sales outpace demand, indicating the regional nature of retail sales in Garden City. The biggest category where there is an “inflow” of spending from outside of the Garden City area is the General Merchandise category which is typically represented by stores like Wal Mart and Target.

Locally, there is demand in the following categories:

- Grocery Stores, Specialty Foods, Beer, Wine and Liquor: 26,000 square feet
- Health and Personal Care: 47,000 square feet

The Building Materials and Garden Supply also generates significant dollars from outside of Garden City as does the Eating and Drinking Places category. It demonstrates that people come into the City, also, for Restaurants and Entertainment already.

The final column indicates the growth in demand over 10 years based on population and household growth. Based on the relatively low forecast growth rate, that number doesn’t grow in the next 10 years.

Table 19
Retail Demand in the Primary and Secondary Trade Areas

Category	% Retail Expenditures [1]	Demand (retail potential)	Est. Sales	Current Retail Void (\$)	Est. Sales / s.f. [2]	Current Retail Void (s.f.)	Additional Demand from Household Growth (s.f.) (Buildout)	Total Demand Buildout
<i>Shopper's Goods</i>								
General Merchandise Stores	7.47%	\$151,124,412	\$151,078,742	\$45,669	\$450	101	0	101
Furniture & Home Furnishings Stores	1.01%	\$20,445,970	\$5,394,552	\$15,051,418	\$300	50,171	0	50,171
Clothing and Clothing Accessories	1.90%	\$38,385,896	\$31,542,539	\$6,843,356	\$300	22,811	0	22,811
Sport. Goods, Hobby, Book, & Music	1.05%	\$21,289,229	\$14,288,349	\$7,000,880	\$200	35,004	0	35,004
Miscellaneous Store Retailers	1.24%	\$25,018,340	\$14,878,957	\$10,139,383	\$200	50,697	0	50,697
<i>Food Services & Drinking Places</i>								
Eating & Drinking Places	5.52%	\$111,746,570	\$58,012,485	\$53,734,085	\$350	153,526	0	153,526
<i>Durable Goods</i>								
Electronics & Appliance Stores	0.98%	\$19,924,263	\$9,129,607	\$10,794,657	\$250	43,179	0	43,179
		\$387,934,680	\$284,325,231	\$103,609,448		355,388	0	355,388

Source: Claritas, Census of Retail Trade for CO, ULI, ArLand, Gruen Gruen + Associates

[1] Demand percentages based on national and state averages

[2] National averages per Urban Land Institute, research and retailer interviews

Table 20 shows retail demand in the Primary and Secondary Trade Areas compared to estimated sales in Garden City, but only for those categories with regional demand characteristics. Building Materials have been deleted because the store types are exemplified by Home Depot and Menards which are large box stores. It shows that General Merchandise demand and supply at relative equilibrium. It shows available demand for the following categories:

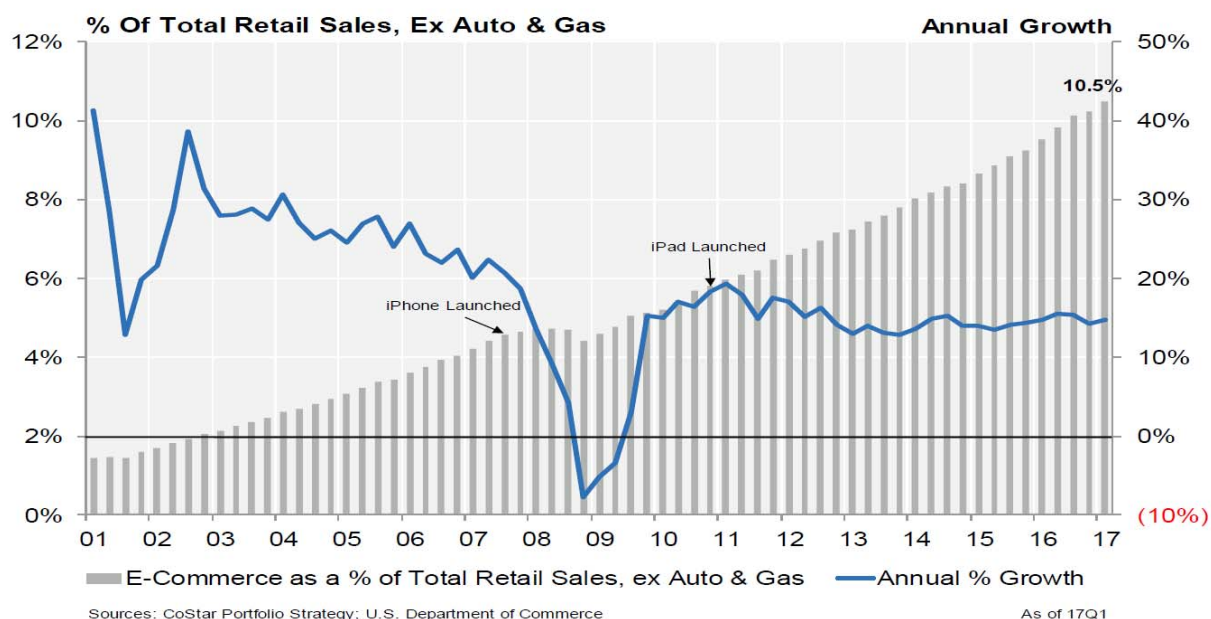
- Eating and Drinking Places: 154,000 square feet
- Electronics and Appliances: 43,000 square feet
- Miscellaneous: 51,000 square feet
- Furniture and Home Furnishings: 50,000 square feet
- Sporting Goods, Hobby: 35,000 square feet
- Clothing and Accessories: 23,000 square feet

Downtown can potentially help fill a portion of this demand, although the following caveats apply. The demand for electronics and appliances is more typically met at larger box stores. The local independent sporting goods store recently closed in downtown. The Dick's Sporting Goods at Schulman Crossing is a popular draw. While TJ Maxx and Ross at Schulman Crossing are both very competitive and popular clothing retailers for both women and men, there is reportedly a local women's clothing shop which relocated to Schulman Crossing from downtown and would like to come back downtown. Niche clothing stores, such as bridal boutiques, are also possibilities for downtown.

The internet is also increasingly a source of competition for both everyday and unique items. Retail is increasingly challenging in today's environment, because of nationwide trends including the

increased ease and popularity of e-commerce. It is estimated that 10.5% of all retail sales nationally take place via the internet and this percentage continues to increase. Restaurant spending is displacing retail spending as patrons desire “experiences” rather than “things”

Figure 14
E Commerce as a Percentage of Total Retail Sales



Source: CoStar

E-commerce is growing. Downtown should refocus its efforts on uses that require a trip to the store or provide an “experience”. The popularity of experiential retail is increasing rapidly and includes categories such as dining, spas, fitness, services, and products that require a trip to the store such as furniture and home furnishing stores. Focusing on these types of uses is essential to creating an attractive tenant mix in the downtown area.

Downtown Garden City is already seeing this trend manifesting itself. Fitness services, pet services, juice bars, and a coffee shop (as of July 2017) have expressed a strong desire to be in a Downtown setting. Eating and drinking (restaurants and the like) are also very interested in a downtown location.

Retail and restaurant uses should reflect the lifestyle and shopping habits of the community. Garden City is transitioning. One of the most important economic considerations for downtown is the demographics of the area.

5.3 Hispanic Household Spending

A growing demographic group is the Hispanic households. In the quarter and half mile radius around Garden City, Hispanic households represent over 60% of the population. On average, household incomes may be lower than the larger population. On a national basis, however, these households spend a higher portion of their income on food, both at home and away from home, apparel, and personal care products and services.

Table 20
Hispanic Household Spending

	Hispanic or Latino Spending	Not Hispanic or Latino
Consumer Unit		
Income before Taxes	\$54,746	\$71,855
Food at home	7.6%	5.6%
Food away from home	5.0%	4.2%
Alcoholic Beverages	0.6%	0.8%
Apparel and Services	3.7%	2.5%
Entertainment	3.2%	4.2%
Personal Care Products and Services	1.1%	1.0%

Source: BLS, ArLand

Table 20 shows average Hispanic household spending based on recent Bureau of Labor Statistics spending nationwide. The downtown market has already responded to this demographic trend. 8th Street has already seen a cluster of Hispanic stores at the edge of downtown.

5.4 Retail Recommendations

The popularity of experiential retail is increasing rapidly and includes such categories as dining, spas, fitness, services, and products that require a trip to the store such as furniture and home furnishing stores. Focusing on these types of uses is essential to creating an attractive tenant mix in the downtown area. The current tenant mix in downtown is shown in Table 22.

Table 21
Downtown Garden City Tenant Mix

Places to Eat/Drink
Garcia Restaurant
La Espiga Bakery Inc.
Las Margaritas
Loving's Cakes
Ninja Steak & Sushi
Panaderia Alexis
Papa John's Pizza
Patrick Dugan's Coffee House
Traditions Soda & Sandwich Shop

Places to Shop
Antique & Comic Shoppe
B&J's Collectibles
Botas Chihuahua
Brown's Shoe Fit
Chino's Fashions
Coleen's Trophies, Awards & Gifts
Davis Designs Home Décor Boutique
Escape the Clock
Family Bookhouse
Fashion Girl's Boutique
Gipson Diamond Jewelers
Harvest Pantry

Services
A&A Body Shop
A-1 Locksmithing
Adams Real Estate
AJ Graphics
Allstate Insurance
American Family Insurance - Neil Hawley

Places to Shop
Janet Doll Goldsmith
Kep's Menswear
Linenberger Jewelry
Little Britches/Moodz
Lorie's Alterations & Boutique
Lucy's Fashions
Mi Ilusion
Porter's
Regan Jewelers
RT's Sporting Goods
Stage (<i>department store</i>)
The Bike Rack
The Corner on Main
The Good Sport

Services
April Harmon Photography
Big Brothers/Big Sisters
Bors Law
Carizma Salon & Boutique
Catholic Social Services
Church of the Brethren

Services

Classy Looks "The Modern Wig Boutique"
Cliff's Barber Shop
Coldwell Banker
Commerce Bank
Craig & Gaede Law Office Inc.
Dean K. Ryan, Attorney at Law
Doering & Grissell, PA
Don Eves Individual/Family Therapy
Edge Salon
Emmy's Salon
Exclusive Barber Shop & Spa
Family Crisis Center
Fansher Inc.
Farm Bureau Financial Services
Farmers Insurance - Rodrigo Ruvalcaba
Finney County Economic Development Corp.
Finney County Farm Bureau Association
First Christian Church
First National Bank
G. Robertson Photography
Garden City Arts
Garden City Downtown Vision
Garden City Monument Co.
Garden Spot Rentals
Garnand Funeral Home
Generations Salon
Gerber Commodities, LLC
Girl Scouts of Kansas
GMCN Architects
Grant County Medical Services
High Plains Public Radio
Home Medical Services
Ideal Weight Loss Center
Illusions Salon
Jackson Hewitt
Juaritos Tire Shop
Kansas Works
KFSA Rutter/Cline/Associates

Services

King's Portrait Studio
Kinney Glass
Knights of Columbus
KOC at Sandhill
L&L Floorcovering
Ladd Welding & Machine Service
Landmark National Bank
Landson & Company, LLC
Legends Salon
Lopez Insurance - Mario Lopez
Luxe Salon
Main Street Salon & Spa
Martial's Kenpo Karate
MJ's Barber Shop
Nstyle Salon
Occupational Health Services
Omega Internet Services
Pete's Tires
Plaza Medical
Plaza Pharmacy
Price & Sons Funeral Home
Prick the Skin Body Piercing & Tattoo
Pro-Tek Dent and Windshield Repair
Prudential Financial / Insurance –
Richard McNaugle
Regan & Co. Real Estate
RJ's Plumbing
Robinson Alignment
Rocking M Radio
Roth Glass
Rybak's Barber Shop
Shear Style
Sore Spot Massage Therapy
St. Catherine Hospital
St. Thomas Episcopal Church
State Farm Insurance - Cynthia Warden
Stenographic Services Inc.
Streeter Cleaners

Services

Tammy & Company Salon

The Architect

The Bottom Line (Appraisals)

The Finnup Foundation

The Garden City Telegram

The Hot Spot

The Paraclete Group

The Room (salon)

The Salvation Army Thrift Shop

The Tinker Shop

Unger's Heating & Air Conditioning

United Capital Management

Weber Refrigeration Heating & Air

Wells Fargo Advisors

Western KS Community Foundation

Western State Bank

Womens Clinic

Xtreme Tanning

The strongest future demand for Downtown is in the Eating and Drinking category. Other categories showing demand on a regional basis include:

- Eating and Drinking:
- Miscellaneous Retail (Used merchandise, gift shops, florists, etc.)
- Furniture and Home Furnishings (Antiques)
- Electronics and Appliances
- Sporting Goods, Hobby
- Clothing and Accessories

There is local demand for:

- Groceries. In the downtown area, given the demographics of the surrounding area, any grocery store would need to stock items geared to Hispanic households and have price points appropriate for the local population
- Health and Personal Care.

5.5 Office

There are at least 600 employees in the downtown area working in the city and county buildings. Downtown also includes banks, insurance, real estate and other office uses. Stakeholder interviews indicate that downtown is no longer the business draw it once was with service businesses preferring a Kansas Avenue location. At the same time, there are few businesses that like the downtown atmosphere and occupy about 1,500 square feet of downtown office space.

Office space provides daytime employment and activity. There is also a concern and desire that office uses occupy “noncore” areas of downtown. Side streets and other locations are preferable for these uses which is a relatively low percentage of total commercial space in downtown.

VI. DOWNTOWN RECOMMENDATIONS

Downtown Garden City will never be, as most American downtowns, the retail center it once was. Many communities are reimagining their downtowns as multi-use, multi-functional places that offer specialty retail, shops, restaurants, art, entertainment, recreation, offices, loft apartments and condos and attract multiple generations.

Downtown has always been the City and region's "Civic Center". Broadening its brand to become more multi-use and multi-functional will enable it to serve the region for years to come.

Focus on Restaurants and Multifunctional Uses for Downtown Garden City

Currently, there are a small handful of restaurants in the heart of downtown Garden City including Traditions, Las Margaritas, and Sushi Ninja. Patrick Dugan's is a popular coffee shop. There has long been talk of a microbrewery restaurant in Downtown, which could be very popular. Sushi Ninja opened in Garden City when it noticed that its original Dodge City restaurant was attracting Garden City patrons. Garden City also has a few food trucks. When comparing the tenant mix of downtown Garden City to other downtowns, it is obvious that eating and drinking venues as a percentage of total businesses is much lower than in the other comparable communities.

Unique culinary options would greatly enhance downtown's draw. While competition may be a concern to local restaurants, expanding the number of restaurant options would help brand the downtown as a restaurant destination. There are at least 600 employees in the downtown area daily who help provide daytime support for restaurants. Reaching out to locally owned successful restaurants in communities like Hays, Pueblo, and even Dodge City, for a restaurant expansion would help keep the locally owned flavor, yet entice experienced restaurateurs to the area.

Restaurant uses require convenient parking. A parking strategy in combination with an outreach / incentive restaurant strategy would be helpful to attracting restaurants.

Expand Nightlife

With the exception of a few restaurants, downtown doesn't have much of a nightlife. Examples of store types that could help with this issue and help fulfill demand would include taverns, coffee shops, small music venues, comedy clubs, quick serve restaurants, organic restaurants, game stops, "cool" secondhand fashion stores, anything electronic. Many of these business types tend to stay open later in the evening

Continue and Enhance Downtown Vision Events

Downtown Vision hosts a number of downtown events and activities which include the following:

- First Friday Events- The first Friday of every month
- Winter Sidewalk Sale- February
- Adult Easter Egg Hunt- March or April
- Summer Sidewalk Sale & Watermelon Feed- August
- Banner Art Walk- August
- Fall Fest- September
- Banner Art Auction- November
- Holiday Open House- November

- Small Business Saturday- November
- Downtown Christmas Parade- December

The number of events in downtown are similar to other downtown organizations and serve a purpose of broadening downtown's appeal to a wide ranging number of people. One of the goals of these events should be to serve different groups of people, perhaps at different times of the year to help address merchants' concerns about events not benefitting them. A couple of the case study communities hold weekly events during the summer.

Broaden the Downtown Market by Also Focusing Closer to Home

Stakeholder interviews indicate that many of the downtown merchants focus on the regional trade area outside of Garden City which tends to be older and wealthier. While marketing to the regional area remains important, population and household forecasts indicate that the population in the City of Garden City is slated to grow at a slightly faster rate than the broader regional area, is younger and more diverse. Focusing on the younger and more diverse demographic in retail / restaurant offerings, special events, etc. can help broaden downtown's appeal. There has been a stated desire for a grocery store in the downtown area. Given the demographics of the immediately surrounding area and the local nature of grocery shopping, there would be the need to stock items geared for the Hispanic community.

Expand the Ideal Tenant Mix

There is a strong desire for "retail", somewhat akin to what has been offered in downtown in the past. Retail has changed along with shopping habits and uses in the past are no longer relevant. Expanding the definition of the ideal tenant to include services such as fitness, pets, personal care should be considered. Many successful downtowns "curate" their tenants in cooperation with property owners, in order to ensure that there is an ideal mix of retail, restaurant, and services. Also, over time, given more traffic and activity in the downtown area, the more "niche" businesses such as the boutique retail have a better chance of surviving.

While downtown can accommodate a mix of uses, focusing active retail and restaurant uses near Laurel and Main (in the center / heart of downtown) would help maintain Main Street as downtown's center.

Refocus Redevelopment Efforts on the Windsor Hotel and the State Theater

The Windsor Hotel is an especially prominent building within the Downtown. While there are ongoing efforts to rehabilitate the building, these efforts are slow because the costs of renovation are so high. There have also been discussions about reusing the upper floors as hotel rooms or for residential uses. Given the current nature of business in downtown Garden City, there is no market for a downtown hotel at this point in time. However, at a minimum, rehabbing the ground floor or reactivating its ground floor use would help activate this section of downtown and eliminate the perception of a stagnating downtown at the gateway to the Downtown area.

Expand Downtown Residential

While the number of second story units in the downtown area may not significantly expand because all of those units that can be rehabbed have already been completed, exploring options to enhance and expand residential at the edges of downtown should be explored. As the CHAT mentioned, there is a huge housing need and some of this demand could be met with downtown area housing. Working in conjunction with the Housing Authority, potential nonprofit organizations, developers

who have been successful in other Kansas towns, and identifying potential locations for housing development could not only fulfill a housing need but help to support downtown. There is a residential neighborhood adjoining downtown Garden City with attractive and historic housing stock. Rehabilitation programs focused on these neighborhoods would help bolster demand for downtown services. Downtown Garden City recently expanded its boundary area to locations where additional housing could be accommodated.

Reexamine Incentive Programs

There are a few programs which potentially should be reexamined.

- *Business Improvement District:* Downtown stakeholders have mentioned potential support for a Downtown Business Improvement District to raise money for all types of downtown related purposes. This should be further explored.
- *Incentive Programs:* Focus available funding on areas that the City Commission with Downtown Vision Board input agree on. For instance, if it's a goal to bring in restaurants / nightlife, consideration should be given to developing or redirecting programs to specifically accomplish that goal.

Reexamine Basics

Basic issues such as store hours, customer service, parking, internet presence, the street environment all need to be addressed over and over again in many downtowns and should be emphasized with downtown merchants and the Downtown Vision board.

Because the wider trade area is so important to Garden City, consideration should be given to updating the license plate survey which surveys cars in parking lots of major regional shopping destinations such as Wal Mart, Home Depot, and Schulman Crossing. It was last updated in 2011. Regular updates (at a minimum, every 5 years) would be recommended to help inform direct mailing and other marketing and advertising efforts for downtown services and activities.