



Dallas, Georgia

LIVABLE CENTERS INITIATIVE

Prepared for The City of Dallas and
The Atlanta Regional Commission
by Urban Collage, Inc. with
Market+Main, URS and JB+a

December 2006



ACKNOWLEDGEMENTS

This document represents five months of work by a Planning Team from Urban Collage, Inc., Market + Main, URS Corporation and JB+a in conjunction with the Atlanta Regional Commission, the City of Dallas, local property owners, business owners and residents. The planning team wishes to thank the following individuals and all who participated in the planning effort for their time, leadership and vision.

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- Council Member Nancy Rakestraw Arnold
- Council Member Kelly Carter
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ON THE COVER: The historic Dallas Theatre on Main Street in Downtown Dallas has recently been renovated. The structure was built in 1920.

TABLE OF CONTENTS

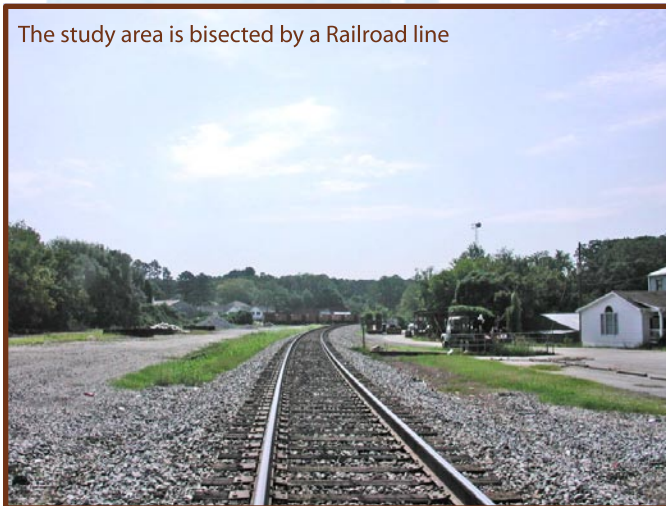
Inventory and Assessment	3
Study Area Context	3
Existing Land Use	5
Existing Zoning	5
Historic Resources	8
Existing Transportation and Circulation	10
Socioeconomic Analysis	16
Susceptibility to Change	24
Issues and Opportunities	26
Concept Plans	28
Short-Term Concept Plan	29
Main Street Improvements	31
Confederate at Memorial Redevelopment Opportunities	33
Urban Redevelopment Area	35
Downtown Pedestrian Improvement Extensions	38
Long-Term Concept Plan	38
Johnston Street Roadway and Pedestrian Improvements	38
Redevelopment North of the County Government Center	41
Transportation and Pedestrian Safety Improvements	43
Connector Road from Memorial Drive to the Paulding County Government Center at Paulding Wellstar Hospital	43
Hardee at Main Street Realignment	44
Memorial at Buchanan Realignment	44
Memorial Drive Pedestrian Enhancements	45
Confederate Avenue Pedestrian Enhancements	45
Downtown Parking Structure(s)	45
Downtown Wayfinding and Signage Program	46
Downtown Dallas Gateways	46
Economic and Market Trends	48
Action Plan	50
Short-Term Priority Projects	50
Additional Short-Term Transportation Improvements	51
Short-Term Strategic Action Items	51
Long-Term Priority Projects	52
Zoning Modifications	52
Appendix	56
LCI Goals	
Public Involvement Summary	
Detailed Market Analysis	



Main Street in Downtown Dallas

STUDY AREA CONTEXT

The Dallas LCI Study Area includes historic Downtown Dallas, the future Paulding County Government Center site on Highway 278, southwest of downtown and the residential and industrial areas between Downtown Dallas and Highway 278. This area is roughly bordered by Buchanan Street/Memorial Drive on the West, one block beyond Memorial Drive on the North, one block beyond Park Street, Main Street and West Avenue on the East and Highway 278 on the South. A map of the Study Area can be found on the following page.

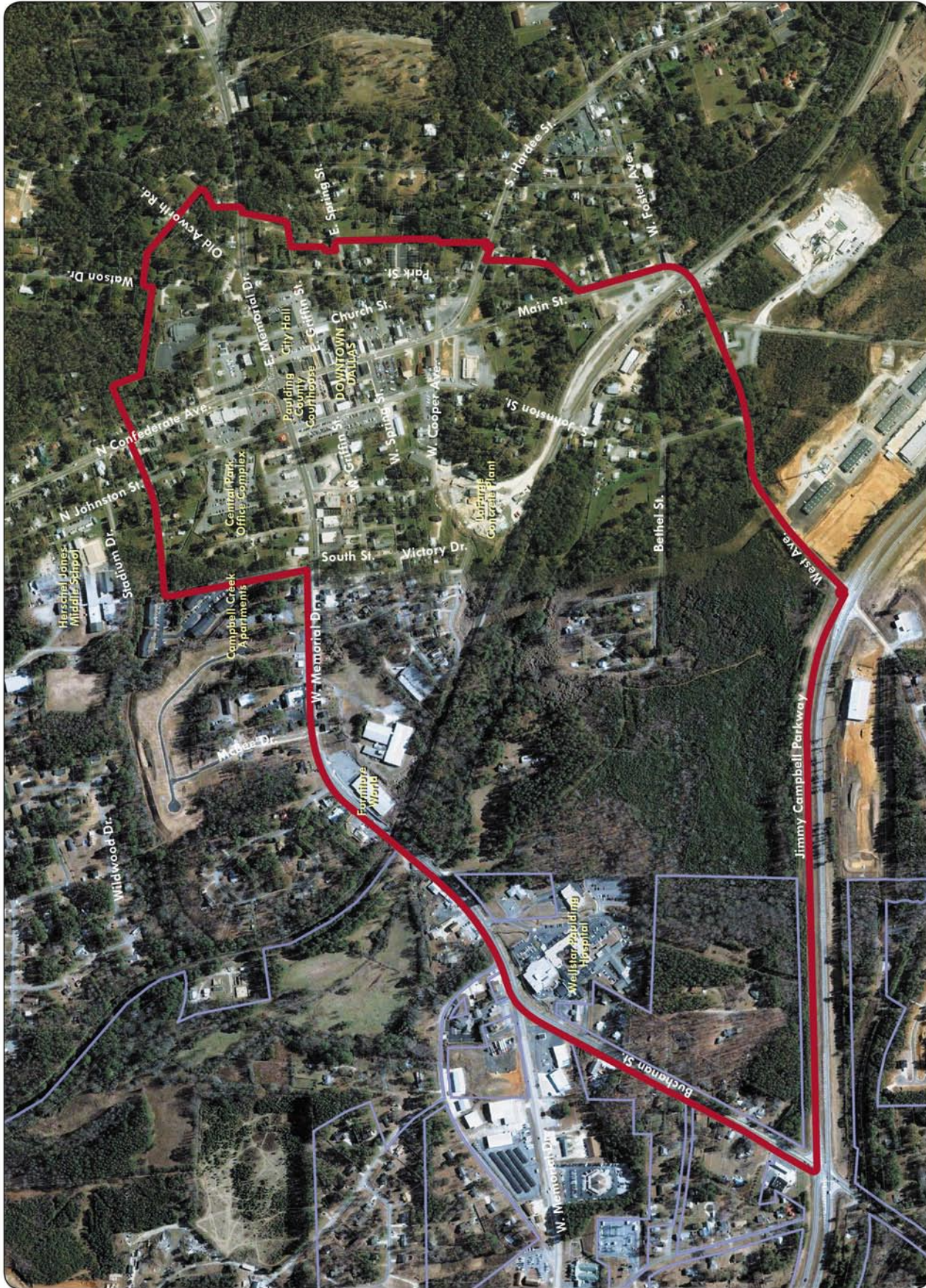


The study area is bisected by a Railroad line

The Study Area is bisected by a NW-SE Norfolk Southern railroad line, paralleled by a floodplain/creek area immediately to the south. Major landmarks within the Downtown Area include the Paulding County Courthouse (SW corner of Main Street and Confederate Ave.), Dallas City Hall, the County Courthouse Annex, First United Methodist Church and First Baptist Church of Dallas. Just outside the Historic Downtown Area, landmarks include Paulding Wellstar Hospital, several businesses along Memorial including Furniture World, Joan's Family Restaurant and the City Café, and a vacant historic general store at the bend of West Avenue at Main Street.

The City of Dallas, first established in 1854, is the seat of government for Paulding County. As the County seat, the downtown area includes a number of government offices, a hospital and ancillary medical support offices, two schools, several churches, and multiple retail businesses and professional/service businesses. The city is a central point for medical services, educational facilities, cultural activities and commercial business in Paulding County.

The LCI Plan is intended to guide downtown redevelopment in a way that will support the long term vitality of the historic downtown area. The Plan comes at a significant time as Paulding County will begin construction of a new Government Center outside of the downtown area in 2007.



Dallas, Georgia LCI Study
STUDY AREA/CONTEXT MAP
 Prepared by Urban Collage, Inc. August 2006 NORTH



 STUDY AREA BOUNDARY
 CITY LIMITS



 0 200 400 800 FEET



 ARC

EXISTING LAND USE

A review of existing land uses within the Study Area allows the Planning Team to analyze development in the area as it currently exists. The following land use information was gathered by the Planning Team through a “windshield survey” in August 2006.



Paulding County Annex Building on the square in Downtown Dallas

The predominant land uses in the Downtown Area are commercial and institutional uses. The collection of institutional uses (government, churches, etc.) is significant and contributes heavily to the number of daytime workers in the downtown area. Single-family homes ring the downtown commercial core.

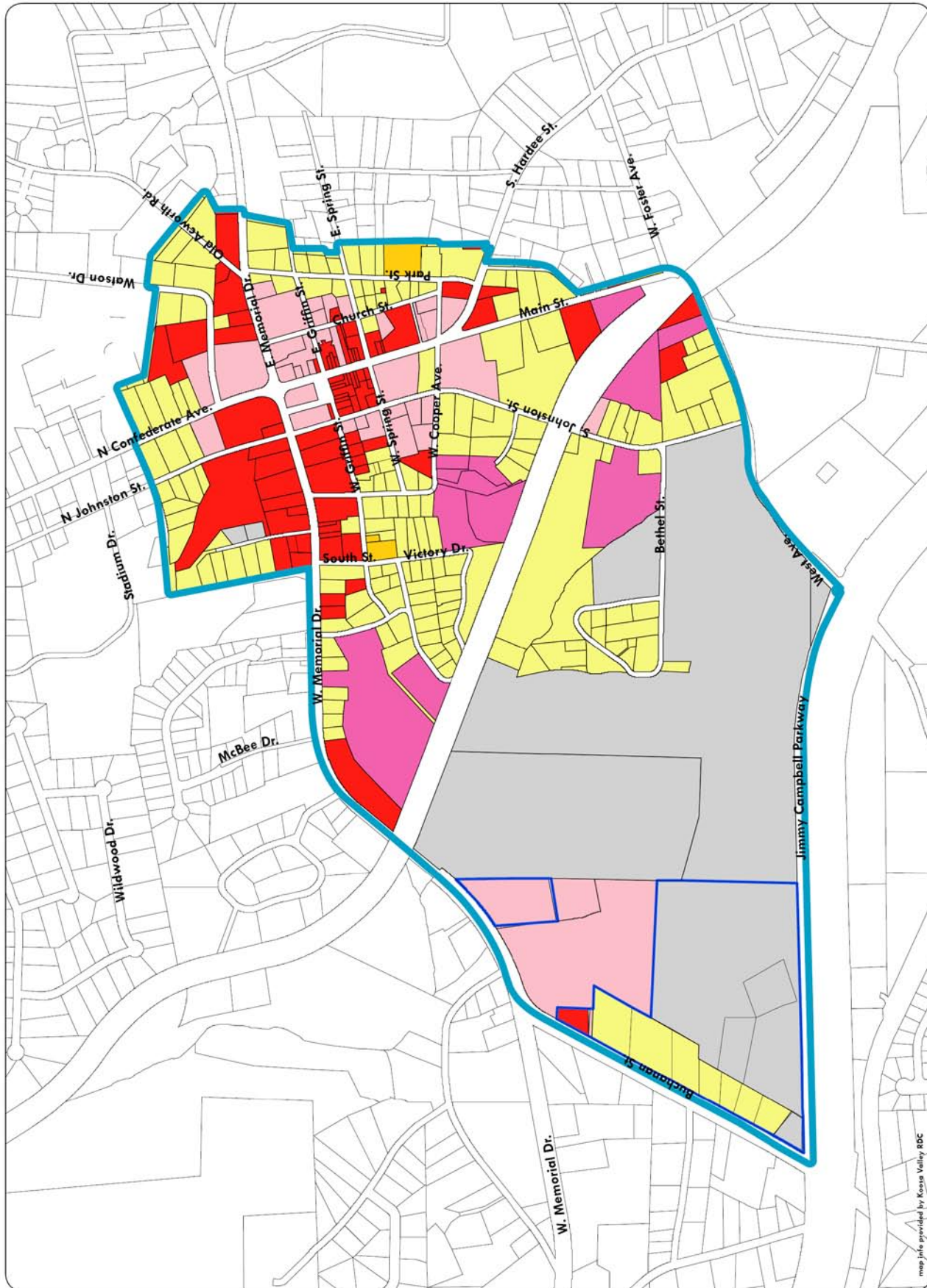
Along the existing east-west railroad, land uses include single-family residential properties (homes along Victory Drive, S. Johnston Street, Bethel Street) and industrial uses (abandoned textile mill behind Furniture World, LaFarge concrete plant, Moore’s Impound). The area east of Buchanan/W. Memorial and north of Hwy 278 is largely vacant with the exception of Paulding WellStar Hospital, but will soon become home to the new Paulding County Government Center, beginning construction in 2007. The Study Area contains 2 multifamily residential parcels; an apartment building on Griffin Street and a townhome development on Park Street. It is also noteworthy that the Study Area contains only a very small amount of open space (plaza behind the courthouse on Main Street).

EXISTING ZONING

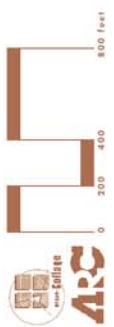
Existing zoning classifications within the Study Area are limited . The 6-block area that makes up the Downtown core is primarily zoned C-1 (Central Business District). This includes the area bordered by E. Memorial Drive on the north, about half-block beyond Spring on the South and between Church and Johnston to the east and west, respectively. The C-1 District allows for a variety downtown businesses, uses, institutions and transportation/utility facilities. Just outside of the 6-block core, areas along Main Street, Memorial Drive and Confederate Avenue are zoned C-2 (General Business District). This C-2 zoning classification extends the types of businesses that may be accommodated including light industrial operations.

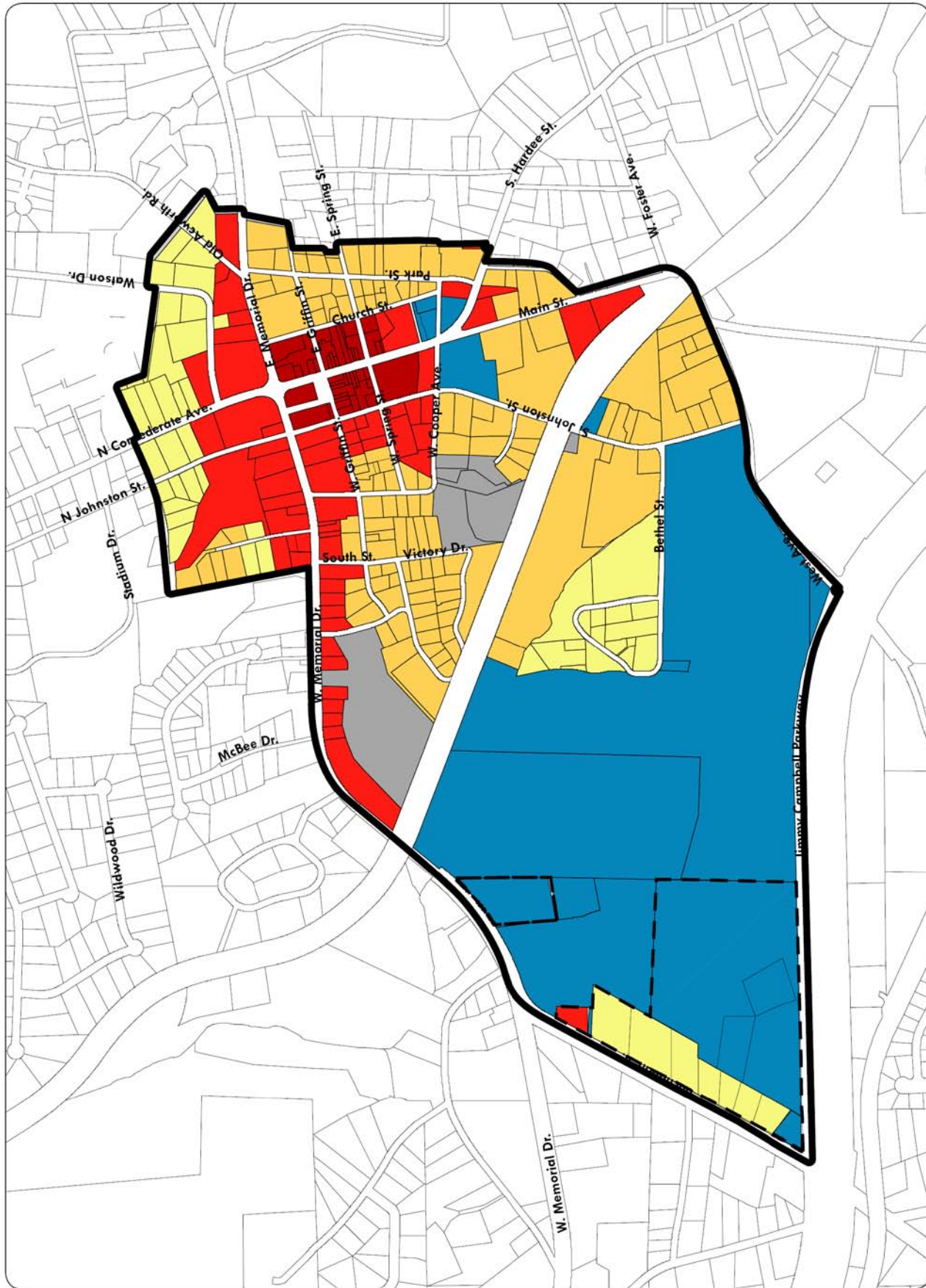


Dallas, Georgia LCI Study
EXISTING LAND USE MAP
 Prepared by Urban Collage, Inc. August 2006



- LEGEND**
- SINGLE-FAMILY RESIDENTIAL
 - MULTIFAMILY RESIDENTIAL
 - COMMERCIAL
 - INDUSTRIAL
 - INSTITUTIONAL
 - OPEN SPACE
 - VACANT
 - STUDY AREA BOUNDARY
 - CITY LIMITS





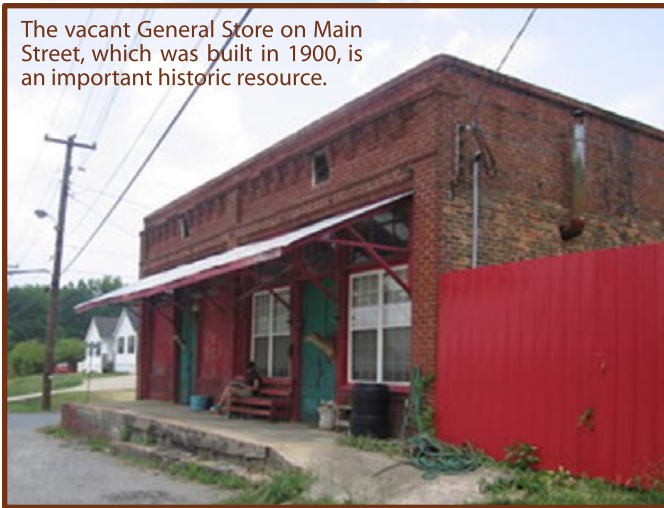
Dallas, Georgia LCI Study
EXISTING ZONING MAP
Prepared by Urban Collage, Inc. August 2006

GENERAL BUSINESS DISTRICT
GENERAL INDUSTRIAL DISTRICT
STUDY AREA BOUNDARY
CITY LIMITS

LEGEND
R-1 RESIDENTIAL
R-2 RESIDENTIAL
O-1 OFFICE-INSTITUTIONAL
C-1 CENTRAL BUSINESS DISTRICT



North of the downtown area and along Bethel Street to the south, residential areas are zoned R-1 (Residential). Other residential areas south of downtown and near the east-west railroad are R-2 (low density residential with a maximum of 3 units/acre). Two large industrial areas are also located just north of the railroad tracks. Just north of Highway 278, most property has been rezoned to O&I (Office and Institutional District) in preparation for the construction of the new Paulding County Government Center.



The vacant General Store on Main Street, which was built in 1900, is an important historic resource.



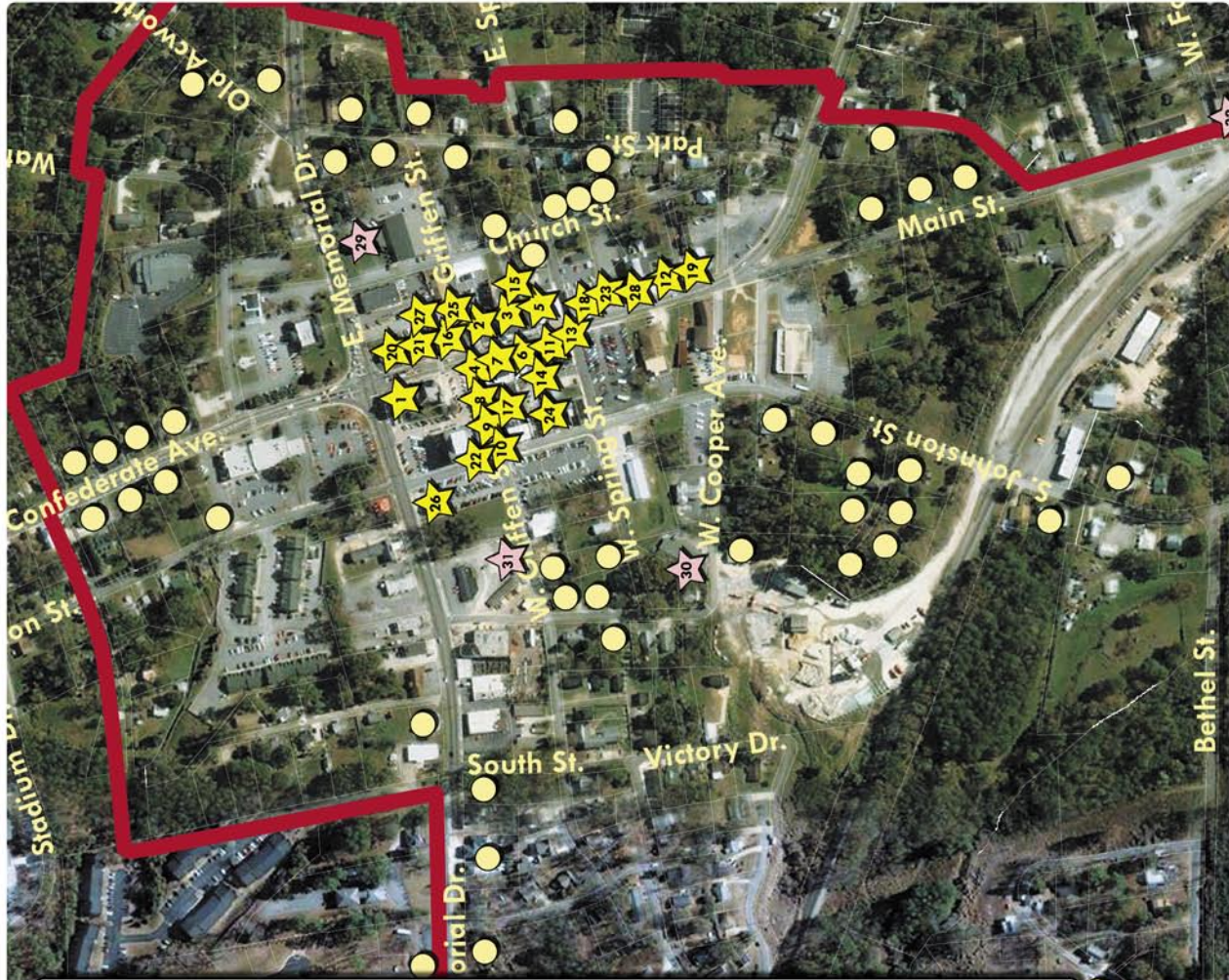
Historic Single-Family House on S. Johnston Street

HISTORIC RESOURCES

The Study Area includes a significant number of Historic Resources including turn-of-the-century residential farmhouses, abandoned railroad storage warehouses and old commercial storefronts (many of which have been preserved and reused). The planning team worked with The University of Georgia's Historic Preservation Department to identify Historic Resources by accessing the University's Natural, Archaeological and Historic Resources GIS Database. With access to the University's GIS Database, the planning team was able to map documented historic homes, downtown buildings and other various structures that become important assets for Dallas to capitalize upon.

According to the aforementioned GIS database, Downtown Dallas contains 28 historic structures, including the Paulding County Courthouse (built 1892), Lodge #182 at 116 Main Street (built 1925), The Dallas Theatre (built 1920), JF Welch & Sons Retail Store (built 1900) and the Dallas Police Department (built 1959), to highlight a few. Outside of the downtown but within the Study Area, there are numerous historic homes; most

notably areas north of downtown along Confederate Avenue, west along Memorial Drive, south along Main Street, east along Church and Park Streets and several scattered properties southwest of downtown along Spring, Cooper and Johnston. There are also a handful of other notable buildings outside downtown, including First United Methodist Church (built 1920),



LEGEND

- HISTORIC HOMES
- ★ DOWNTOWN HISTORIC RESOURCES
- ★ OTHER HISTORIC RESOURCES

<ul style="list-style-type: none"> 1 Paulding County Courthouse, built 1892 2 206 Main Street (Business/Office), built 1900 3 202 Main Street (Business/Office), built 1900 4 41 Courthouse Sq. (Business/Office), built 1900 5 210 Main St./J.F. Welch & Sons (Retail Store), built 1900 6 213 Main St. (Retail Store), built 1900 7 211 Maint St. (Retail Store), built 1900 8 37 Courthouse Square (General Store), built 1900 9 35 Courthouse Square (Multiple Bldgs/Arcade), built 1900 10 29 Courthouse Square (Retail Store), built 1900 11 217 Main St. (Retail Store), built 1900 12 300/302 Main St. (Retail Store), built 1900 13 215 Main St. (Business/Office), built 1900 14 209 Main St. (Retail Store), built 1907 15 208 Main St./Dallas Theatre (Theatre), built 1920 16 204 Main St. (Retail Store), built 1920 17 27 Courthouse Square (Retail Store), built 1920 18 222 Main St. (Retail Store), built 1920 19 304 Main St. (Retail Store), built 1920 20 114 Main St./Dallas Women's Club (Duplex), built 1920 21 116 Main St./Dallas Lodge No.182, built 1925 22 100 W. Griffen St. (Retail Store), built 1935 23 306 Main St. (Retail Store), built 1940 24 Paulding Co. Hardware (Retail Store), built 1940 25 200 Main St. (Retail Store), built 1945 26 210 W. Memorial (Restaurant/Bar), built 1945 27 Dallas Police, Municipal Court (Jail/Police Station), built 1959 28 306 Main St./Curl's Pharmacy (Commerical Market), built 1945 	<ul style="list-style-type: none"> 29 141 Dallas Hwy./First United Met. Church, built 1920 30 225 W. Cooper (Warehouse/Mill), built 1900 31 S. Main/West Foster, Vacant (Retail Store), built 1900 32 238 W. Griffen St. (Retail Store), built 1945
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Map info provided by the UGA's Natural, Archaeological & Historic Resources GIS Database



the General Store at Main/West Ave. (built 1900) and several warehouses on Cooper and Griffin Streets. The Historic Resources Map on the following page contains the complete list of documented historic properties and structures.

EXISTING TRANSPORTATION AND CIRCULATION

The Dallas LCI Study Area includes two very different transportation identities, divided by the Norfolk Southern rail line. The northern half of the Study Area encompasses downtown Dallas, with a traditional street network characterized by a grid pattern, small blocks and interconnected streets. The southern half of the Study Area is primarily undeveloped, with major roadways serving as the Study Area boundaries: Buchanan Street, US 278/Jimmy Lee Campbell Parkway and West Avenue.



Roadway: Functional Classification

Functional classification indicates a roadway's purpose, whether it is primarily for providing vehicular throughput or access. Functional classification is a hierarchical system, with "arterials" providing the greatest mobility and limited access and "local roads" providing a higher level of access and lower level of mobility. "Collector" roadways provide a balance between arterials and local roads by allowing access for motorists to the roadway, while maintaining a reasonable degree of throughput capacity to facilitate traffic movement.

According to the Georgia Department of Transportation (GDOT), US 278/Jimmy Lee Campbell Parkway is classified as an urban principal arterial. Buchanan Street, East/West Memorial Drive, a portion of Main Street, and Hardee Street are classified as urban minor arterials. The remaining streets in the Study Area are considered local streets. As arterial streets, designated by GDOT, US 278, Buchanan Street, Memorial Drive and a portion of Main Street are the only streets currently available for federal and state transportation funding of roadway improvements. If the City desires to apply for state and/or federal transportation funds for other roadway improvements, the streets must be reclassified.

Roadway : Traffic Controls and Cross-Sections

Only two intersections within the Study Area are controlled by traffic signals. The characteristics of the signalized intersections are summarized as follows.

US 276/Jimmy Lee Campbell Parkway (E/W) at Buchanan Street (N/S):

- Northbound - 1 shared left-through-right
- Southbound - 1 shared left-through, 1 exclusive right
- Westbound - 1 exclusive left, 2 exclusive through, 1 exclusive right
- Eastbound - 1 exclusive left, 2 exclusive through, 1 exclusive right
- The intersection does not have marked crosswalks or pedestrian signals.

East/West Memorial Dr (E/W) at Main St/North Confederate Avenue (N/S):

- Northbound - 1 exclusive left, 1 shared through-right
- Southbound - 1 exclusive left, 1 exclusive through, 1 exclusive right
- Westbound - 1 exclusive left, 1 exclusive through, 1 exclusive right
- Eastbound - 1 exclusive left, 1 exclusive through, 1 exclusive right
- The intersection was recently redesigned with the Main Street streetscape project. Pedestrian crossings connect to sidewalks, and each direction includes pedestrian-actuated signals.

The predominant roadway type within the Study Area is a two-lane roadway. US 278 is divided four-lane highway. SR 6 Business/Buchanan Street/E/W Memorial Drive varies between two lanes and three lanes and includes a two-way left turn lane in some sections.

Table 1.1:
Posted Speed on Dallas Roadways

Roadway	Posted Speed
US 278/Jimmy Lee Campbell Parkway	55 mph
SR 6 Business/Buchanan Street	45 mph
SR 6 Business/East/West Memorial Drive	35 mph, 40 mph
SR 61/North Confederate Avenue	35 mph
Main Street	25 mph
South Hardee Street	25 mph
West Avenue	15 mph
South/North Johnston Street	15 mph



Posted Speed

The posted speed throughout the Study Area ranges from 15 to 55 miles per hour (mph). By ordinance, non-posted roadways have a speed limit of 15 mph. The posted speed on select Study Area roadways is summarized in Table 1.1.

Utilization and Level of Service (LOS)

Level of Service (LOS) is a qualitative rating of the effectiveness of a roadway in serving traffic in terms of operating conditions such as traffic flow. Ratings are designated by an alphabetical scale ranging from A to F with A being the best (free flow) and F being the worst (extreme congestion). For the purposes of analyzing existing LOS conditions within the Study Area, an analysis program called LOSPLAN was used. LOSPLAN, developed by the Florida Department of Transportation, is nationally recognized as the leading program that implements Highway Capacity Manual methodologies for planning purposes. In the analysis process, the LOSPLAN software calculates LOS based on several factors, such as traffic volume, capacity, number and spacing of signals as well as other factors. LOSPLAN can use default values or be customized, based on roadway, traffic, and control (signalization) characteristics of the roadway being analyzed.

Table 1.2
Study Area 2005 AADT and LOS

Roadway	Segment Description	Traffic Count Station	Number of Lanes	No. of Signals	AADT	LOS*
S. Hardee Street**	From Merchants Drive to Henry Holland Drive	132	2	--	6,070	C
US 278	From Mt. Oliver to Crossover	107	4	--	33,870	C
US 278**	From Nathan Dean Blvd. to SR 6 Bus.	111	4	3	31,760	F
Buchanan Street	US 278 to Bensen Drive	219	2	--	5,570	B
Buchanan Street	W. Memorial Dr. to Weaver Creek	109	2	--	10,840	C
E. Memorial Drive	Pinecrest Circle to Courthouse Square	112	2	--	10,600	C
SR 61	Acworth Road	147	2	--	10,180	C
North Confederate Avenue**	Park Street to Polk Ave.	149	2	1	11,030	C

*LOS calculation using Artplan/Highplan Analysis.

**These locations are not located in the study area but are in close proximity to the study area.

Source: GDOT



No new traffic counts were collected for this study. Traffic volumes are reported using GDOT data collected at count stations. A generalized LOS analysis was conducted using the existing Annual Average Daily Traffic (AADT) volumes. Table 1.2 shows existing AADT and estimated LOS for the count stations located in and adjacent to the Study Area.

Historical AADT at the traffic count locations was also reviewed to identify recent circulation trends. The three-year average volumes from 1999 through 2001 were compared to those from 2003 through 2005 for Study Area traffic count locations. Only the count locations on SR 6 Business/Buchanan Street/ E. Memorial Drive had enough data to perform this comparison. It appears that traffic volumes have increased by approximately one-third along SR 6 Business between 2001 and 2005, as shown in Table 1.3.

Table 1.3
AADT Historical Comparison

Roadway	Segment Description	Traffic Count Station	AADT (1999-2001)	AADT (2003-2005)	Percent Change
Buchanan Street	US 278 to Bensen Drive	219	4,030	5,380	33.5%
Buchanan Street	W. Memorial Dr. to Weaver Creek	109	7,650	10,160	32.8%
E. Memorial Drive	Pinecrest Circle to Courthouse Square	112	10,590	14,030	32.5%

Data for the existing count station locations was extracted from the ARC 20-County 2030 travel demand model to better understand how travel is forecasted to change in and around the study area by 2030. Estimated 2030 AADTs were calculated, based on existing 2005 AADTs, using the

Data for the existing count station locations was extracted from the ARC 20-County 2030 travel demand model to better understand how travel is forecasted to change in and around the Study Area by 2030. Estimated 2030 AADTs were calculated, based on existing 2005 AADTs, using the absolute change in average daily traffic volumes from the 2005 and 2030 models. A LOS analysis was then conducted, using the same methodology as was used for the existing volumes. A caveat to this future LOS analysis is that the roadway characteristic assumptions are based on what we know now about the roadways. The estimated future volumes and LOS are shown in Table 1.4. As is shown, the arterials serving local and regional through trips such as US 278, SR 6 Business and SR 61 are expected to experience significant traffic growth and decline in LOS by 2030.

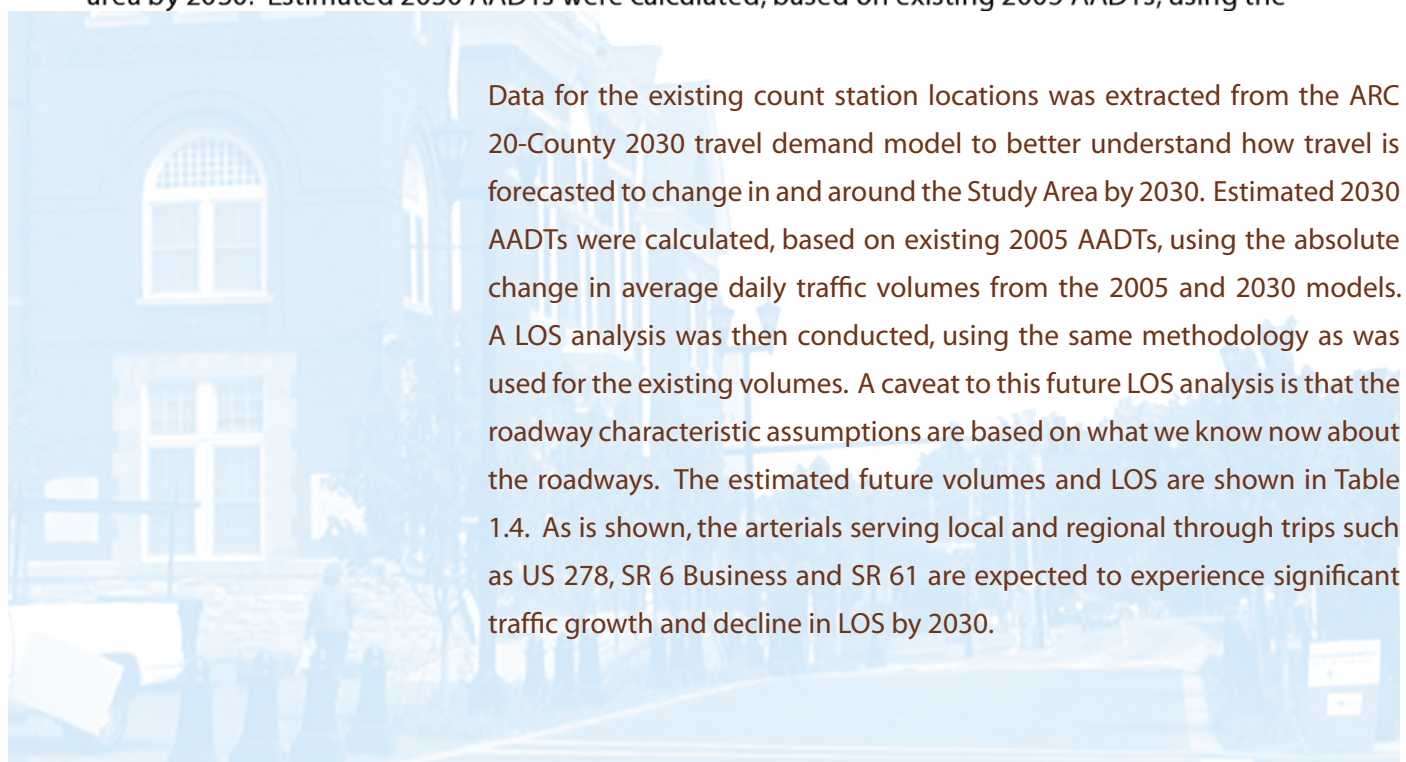


Table 1.4
Study Area 2030 AADT and LOS

Roadway	Segment Description	Traffic Count Station	Number of Lanes (Model)	Estimated AADT	LOS*
S. Hardee Street**	From Merchants Drive to Henry Holland Drive	132	4	15,830	A
US 278	From Mt. Oliver to Crossover	107	4	50,250	D
US 278**	From Nathan Dean Blvd. to SR 6 Bus.	111	4	47,320	F
Buchanan Street	US 278 to Bensen Drive	219	2	8,950	C
Buchanan Street	W. Memorial Dr. to Weaver Creek	109	2	21,270	F
E. Memorial Drive	Pinecrest Circle to Courthouse Square	112	2	21,030	F
SR 61	Acworth Road	147	2	14,810	D
North Confederate Avenue**	Park Street to Polk Ave.	149	4	39,900	F

*LOS calculation using Artplan/Highplan Analysis.

**These locations are not located in the study area but are in close proximity to the study area.

Source: GDOT, ARC

Traffic Safety

Traffic crash data was obtained from GDOT for the years 2002 through 2004 for the major roadways in the Study Area. Crash data were screened to identify higher crash locations. An average of 12 crashes per year occurred at the intersection of Main Street/North Confederate Avenue and West/East Memorial during that time period. However, it is important to note that the data is historic and does not reflect the recent improvements at the intersection. An average of five crashes per year occurred at the West Memorial and N. Johnston Street intersection and the West Memorial and Buchanan Street intersection. An average of one crash per year occurred at the intersection of Main Street and S. Hardee Street.

Transit

There is only limited access to public transit services within the Study Area. A rural demand response transit service is operated by Paulding County Transit. The service is targeted to seniors and provides access to clients to Downtown Dallas for shopping, community services and medical trips. Outside of the Study Area, GDOT operates a park and ride lot at SR 61 and SR 120 that includes 167 parking spaces. The closest commuter service is the GRTA Xpress Route 470, which operates from the city of Hiram to downtown Atlanta through the SR 6 corridor via I-20 West.



The GRTA Xpress Route 470 operates its route between the City of Hiram and Downtown Atlanta.

Parking

Existing public parking is provided by the city at the Dallas police department and City Hall. In addition, three public use parking lots are available: the southwest corner of Main Street and East Spring Street (100 spaces), south of the intersection of Church Street and Spring Street (55 spaces), and the southeast corner of East Griffin and Church Street (50 spaces). There is limited general public on-street parking in the downtown. A joint-use, public/private parking deck is proposed between Church Street and Park Street.

Railroad

An active Norfolk Southern rail line bisects the Study Area. Three crossings are included along this segment of the rail line, one separated and two at-grade. The railroad crossing at West Memorial Drive is elevated over the roadway. At-grade crossings are located at S. Johnston Street (ID number 719803X) and West Avenue (ID number 719804E). Both of the at-grade crossings are equipped with cross-bucks and gates. According to the Federal Railroad Administration (FRA), the total number of trains passing through these crossings is 35 trains per day. FRA safety data was queried to identify any recent crash history. Only one injury crash was reported at either crossing between 2002 and 2005. That crash occurred at the Johnston Street crossing in 2004.

Programmed and Planned Transportation Improvements

Programmed and planned transportation improvements impacting the Dallas LCI Study Area are listed in Table 1.5. The projects are included in the ARC Mobility 2030 Transportation Implementation Program (TIP) for FY 06-11, the long range Regional Transportation Plan (RTP), or the GDOT Construction Work Program (CWP).

It should be noted that the SR 61 widening will be evaluated through the Paulding County Comprehensive Transportation Plan process, which is underway. In lieu of widening SR 61 through Dallas, a SR 61 bypass west of downtown Dallas is under consideration.

Table 1.5
Planned and Programmed Projects

Project Name	Location	Improvement Type	Source	Project No.	Status
SR 61	SR 6 Business (Memorial Drive) to Bartow County Line	Widen from 2 to 4 lanes	ARC Mobility 2030	PA-061D	Planned, 2030
Dallas Connecting Sidewalks	Phase 1, Dallas to Silver Comet Trail along Seaboard Ave. Phase 2, Paulding County Library and Recreation Center connection	Sidewalks/pedestrian facility	ARC TIP FY 06-11	PA-AR-BP-007; GDOT PI# 0004208	Construction 2007
Dallas Trailhead	Dallas	Bicycle/pedestrian facility	GDOT CWP	GDOT PI# 0008188	
SR 120 Bridge	At Silver Comet Trail	Bridge upgrade	ARC TIP FY 06-11	PA-026; GDOT PI# 632920	Construction 2007

Source: ARC, GDOT

It should be noted that the SR 61 widening will be evaluated through the Paulding County Comprehensive Transportation Plan process, which is underway. In lieu of widening SR 61 through Dallas, a SR 61 bypass west of downtown Dallas is under consideration.

SOCIOECONOMIC ANALYSIS

Regional Population and Employment Trends

The Atlanta Region experienced dramatic and consistent growth during the 1990s. Between 1990 and 2000, the Atlanta Region grew by 34%, averaging to an annual growth rate of 3.4%, or adding about 87,000 new residents per year. The Atlanta Region was able to move out of the recession of the early 1990s quickly, based on a diversified economic base. In fact, the Region doubled its size between 1980 and 2006, as its total population has reached about 3.9 million. The increase between 2005 and 2006 is the greatest single-year increase since 1999 to 2000, and the fourth largest single year increase in the history of the Region.

The Atlanta Region experienced a similar phenomenon in job growth, more than doubling during the same time period, to about two million jobs. It is widely known that Atlanta’s population growth has been fueled primarily by people moving to the Region for jobs. As the national recession slowed job growth, so did Atlanta see a slowing in their population growth until just this year.

Historically, most of the growth within the Region was seen in more suburban locations. During the 1980s and 1990s, the north side of town experienced roughly 75% of the Region’s total growth. In terms of employment, most of the Region’s job growth happened along the GA400 corridor, in the Perimeter Center area, and in northern Gwinnett and Forsyth counties. Since the mid-1990s, growth has accelerated on the south side (with I-20 as the demarcation line) as congestion has increased and land has become more expensive on the north side. The Region’s areas with the greatest population increases between 2000 and 2005 are all located outside I-285.

The expectation across the Region is for growth to continue, both in population and employment, but at slower rates than the enormous expansion that was seen during the 1990s. Jobs are expected to increase by 1.2 million by 2030. Population is expected to increase by 2.3 million by 2030. Net in-migration is expected to account for just over half the growth in the Region. Suburban counties, like Paulding County, are expected to experience the highest growth rates over the next 25 years, in terms of both population and employment. ARC’s forecasts indicate that the Region’s economy will still outpace the nation in terms of growth, even though we are not expected to see the phenomenal rates of growth that were experienced in the late 1990s.

Study Area Population and Employment Overview

The Dallas LCI Study Area has grown approximately 49% since 1990; clearly demonstrating that the area has received a share of the phenomenal growth the Atlanta Region saw during this time. Between 2000 and 2006, the Study

Table 1.6

	1990	2000	CENSUS-BASED				ARC	
			2006	2011	Change 2000-2006	Change 2006-2011	Change 2000-2005	Change 2005-2010
Study Area	966	813	1,437	2,109	76.8%	46.8%	8.7%	19.0%
Primary Market Area	8,150	12,448	16,862	21,197	35.5%	25.7%	N/A	N/A
Secondary Market Area	43,606	79,147	100,717	120,790	27.3%	19.9%	N/A	N/A
Atlanta MSA/Region	2,959,980	4,112,224	4,657,426	5,168,874	13.3%	11.0%	6.0%	7.7%

Area experienced it's most significant growth, indicating the transition it was undergoing from rural to exurban, and even in the last couple of years to suburban. The population growth in the Study Area since 2000 is almost six times the growth seen in the Atlanta MSA as a whole as seen in the table on the previous page. The growth expected over the next five years is greater than the City of Dallas, four times the Atlanta MSA average, and nearly ten times the national average.

Estimates and forecasts from the Atlanta Regional Commission were also reviewed. ARC's projections provide a local perspective on what is happening in the Study Area compared to US Census information. An annual household growth was determined using a combination of Census-based and ARC forecasts. Combining the two ensures a mid-range approach, instead of being too conservative or too aggressive; this is what is used as the basis for forecasts throughout these analyses.

While employment growth is projected to be moderate for the Region, it is expected to be experienced primarily in existing employment centers. The daytime population within the Study Area is small, but when considering the Primary Market Area, that number increases notably. The Primary Market Area includes all of Dallas, and extends into unincorporated Paulding County. The Study Area constitutes about 30% of the City of Dallas' total employment, as shown in following table. Also interesting to note is that the jobs to housing ratio for the Study Area is 1.2, which demonstrates its standing as an employment center, instead of being solely a residential base.

Table 1.7

	Study Area	Primary Market Area	Secondary Market Area
Daytime Population	771	5,582	19,086
Businesses	143	751	2,525

Economies do not function locally, economics is a regional phenomenon. Trying to isolate detailed employment numbers and retain meaning for them is a difficult endeavor. Sector employment and business size data



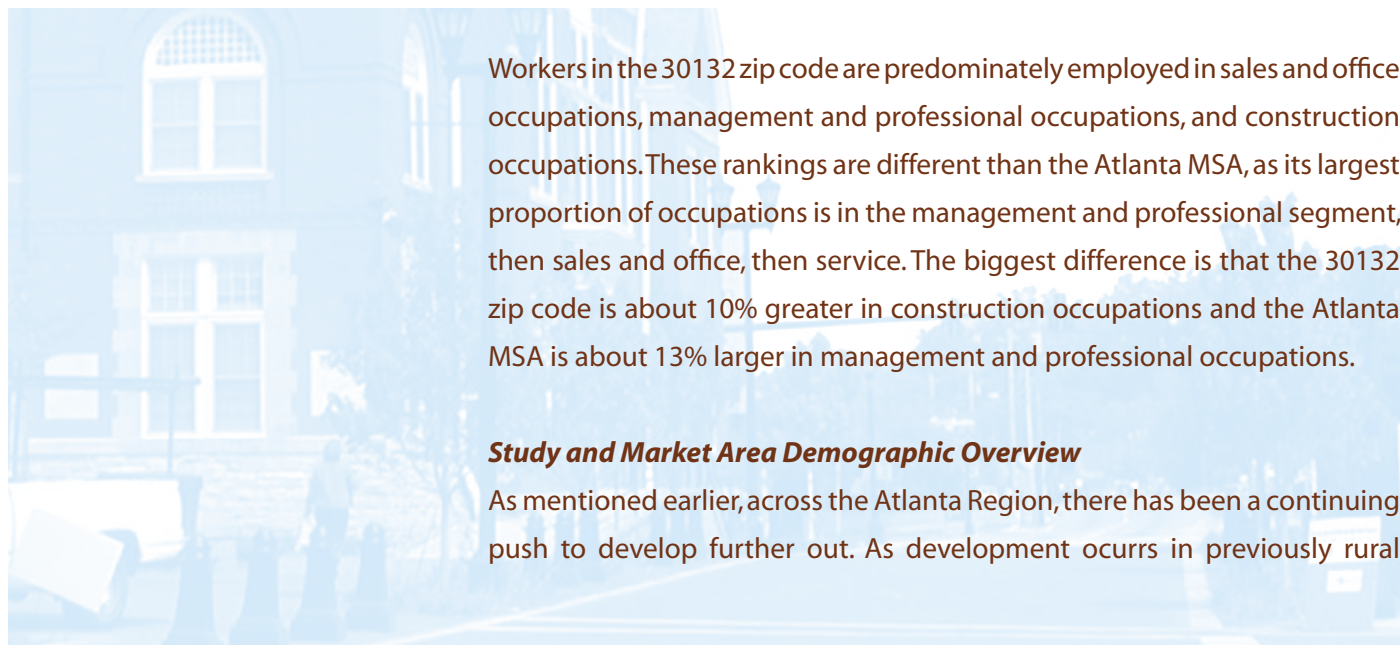
are collected through different methodologies, thus different geographies need to be used for comparison. In terms of sector employment, the 30132 zip code’s largest industry sectors are Construction, Educational and Health Services, and Retail Trade. The Atlanta MSA’s top three industry sectors, in terms of employment, are Educational and Health Services, Professional Services, and Retail Trade. Clearly, the primary difference is the size of the Construction industry in the 30132 zip code, which is twice as large as the Atlanta MSA’s proportion. This is not terribly surprising since this is an exurban area with substantial growth, which demands significant construction. The 30132 zip code mirrors the Atlanta MSA in terms of job proportions in all sectors but Construction; Information; Finance, Insurance, and Real Estate; Professional Services; and Arts, Entertainment, and Food Services.


Table 1.8	Industry Sector	30132 Zip Code	Atlanta MSA
	Construction	16.8%	8.0%
	Manufacturing	11.9%	11.1%
	Wholesale trade	4.9%	4.5%
	Retail trade	12.8%	11.9%
	Transportation and warehousing, and utilities	8.7%	6.9%
	Information	2.2%	5.0%
	Finance, insurance, real estate, and rental and leasing	5.4%	8.0%
	Professional, scientific, management, administrative services	7.0%	12.6%
	Educational, health and social services	15.7%	15.6%
	Arts, entertainment, recreation, accommodation and food services	4.9%	7.2%
	Other services (except public administration)	4.6%	4.7%
	Public administration	4.4%	4.2%

Workers in the 30132 zip code are predominately employed in sales and office occupations, management and professional occupations, and construction occupations. These rankings are different than the Atlanta MSA, as its largest proportion of occupations is in the management and professional segment, then sales and office, then service. The biggest difference is that the 30132 zip code is about 10% greater in construction occupations and the Atlanta MSA is about 13% larger in management and professional occupations.

Study and Market Area Demographic Overview

As mentioned earlier, across the Atlanta Region, there has been a continuing push to develop further out. As development occurs in previously rural





areas, many people move outward in an effort to recapture some of those elements. The Study Area was cited as having many of these features that people find enticing, while having access to the metro area's assets as well. Conversely, much of the Region's development is clearly headed this way, and much has already arrived in the Study Area. There are congestion and traffic issues facing both residents and employees trying to access the area. Land prices are increasing steadily as more and more people discover the area. Yet, as the Study Area includes the traditional downtown area of Dallas, it is actually experiencing another metro trend as well. Urban areas that have experienced disinvestment are being revitalized as people rediscover the qualities that made these urban environs attractive to residents and businesses originally.

Table 1.9 on page 23 illustrates the key demographic and economic elements of the markets being considered in this analysis. Those that deserve specific highlighting include the following:

- The Study Area is expected to grow at almost twice the pace of the phenomenal growth seen in the City of Dallas as a whole, at 47% between 2006 and 2011. This is nearly ten times the national average and over four times the Atlanta MSA2 average. However, it is also important to point out that the small size of the Study Area helps to explain the exceptional growth, as the absolute numbers of growth account for less than 700 people.
- The Atlanta Regional Commission's and the Census-based projections are quite different for the Study Area. The Atlanta Regional Commission has a larger starting residential base, but projects it at a slower growth rate while the Census-based projections show a much higher projected growth rate.
- The growth projections for the both the market areas being considered are above the Atlanta MSA and national averages as well. The three largest age groups in the Study Area are 5 to 13, 35 to 44, and 18 to 24/25 to 34 years of age (18 to 24 and 25 to 34 are basically "tied").

• These statistics demonstrate established families and people starting families in the area. The median age of the Study area is 30.9, about six years younger than the national average.

• There are few retirement age and elderly people in the Study Area. However, the largest growth in the next five years is expected in the age groups of 55 to 64, 45 to 54, and 65 to 74 years of age. In terms of recent growth, in the last five years, the 14 to 17 and 18 to 24 age groups were the ones that saw the largest increase.

• Approximately half the population within the Study Area has not graduated from high school. The proportion of residents with a high school degree is under both the Atlanta MSA and national averages. The proportion of the Study Area's residents that have college degrees is less than the MSA and national averages, equaling about onethird of the national rate.

• The per capita income (perhaps the most important statistic to review in terms of understanding how a community is really doing) in the Study Area (\$19,943) is 81.8% of the national average, a difference of about \$4,400 annually. Perhaps more alarming than being almost 20% below the national average, is the trend that is projected is for the Study Area to actually decline in it's percentage of the national average over the next five years.

• The Primary Market Area's per capita income is also less than the national and MSA averages. However, the Secondary Market Area's PCI is above the nation's (\$24,385), but still below the Atlanta MSA's (\$27,533) average.

• About half of the Study Area's households earn less than \$15,000 annually. This is three and a half times more than the national average and just over five times the Atlanta MSA average.

• Nearly 80% of the households in the Study Area earn under \$50,000 annually. A very small percentage (3.6%) of the Study Area's households

earns over \$100,000 on a yearly basis. The household income increases as the market areas get bigger. Both the Primary and Secondary Market Areas have proportions of households greater than the national and MSA averages between \$50,000 and \$100,000. The Secondary Market Area has a greater proportion of households earning above \$100,000, in comparison to the nation.

- The average household income in the Study Area is \$44,431, which is less than the MSA (\$76,088) and national (\$64,443) averages.

The average household size of the Study Area is smaller than the national, Atlanta MSA, and market area averages. Normally this is because of a strong presence of young single professionals or elderly, but in the Study Area it seems to be due to singleparent households.

- The ratio of single-person households in the Study Area (42.5%) is well over the national (27.4%) and Atlanta MSA (30.0%) averages.

- The Study Area has a greater proportion of renters than both the national and Atlanta MSA averages. In fact, the proportion of renter-/owner-occupied housing is essentially inverse the percentages found in the nation, MSA, and market areas.

There is opportunity for these numbers, and the trends they represent, to change as continued development and redevelopment takes place in the Study Area. The potential types of uses that are supportable in this market lend themselves to a mixed use development scenario, which would help to make the area a destination.

Additional demographic and economic information, including residential, retail, office and industrial market analyses can be found in the Appendix.



Table 1.9

Study Area	Primary Market Area	Secondary Market Area
SIZE OF MARKET		
Residents	1,437	16,862
Households	645	6,301
Daytime Population	771	5,582
CHARACTERISTICS OF MARKET		
AGE		
Under 18	34.2%	31.4%
Between 25 & 35	14.4%	19.0%
Over 65	14.9%	9.1%
INCOME		
Per Capita Income (PCI)	\$19,943	\$23,550
PCI as % of National Average	81.8%	96.6%
Change in PCI since 1990	249.6%	106.4%



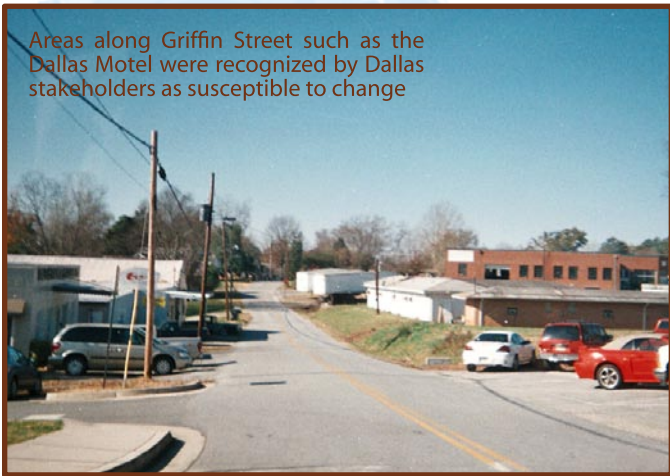
Table 1.10

Study Area	Primary Market Area	Secondary Market Area
Household Incomes \$25,000 - \$49,999	19.0%	32.1%
Household Incomes Above \$100,000	2.2%	7.3%
Average Household Income	\$44,431	\$60,063
HOUSEHOLDS		
Average Household Size	2.23	2.63
Single-Person Households	42.5%	22.8%
Owner-Occupied Households	18.3%	61.9%
PROJECTED GROWTH OF MARKET		
Census-Based, 2006-2011	46.8%	25.7%
ARC, 2005-2010	19.0%	N/A



SUSCEPTIBILITY TO CHANGE

Through a series of analyses, meetings and public workshops, the Planning Team identified areas within the Study Area most susceptible to change and separated properties into two categories. Development opportunities represent those areas that are likely to change due to underutilization, location or other factors. Priority development opportunities are those areas that not only have potential to redevelopment, but were identified by participants in the planning process as those properties whose redevelopment could have the most significant affect on the Study Area.



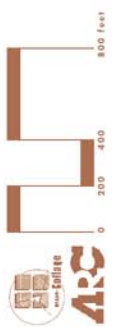
Generally, properties within the immediate downtown are stable, with the exception of surface parking areas. Two significant development opportunities were identified on the NW and NE corners of Memorial Drive and Confederate Avenue. These parcels are currently owned by Paulding County. However, these two buildings are expected to be vacated upon the completion of the new County Government Center on Highway 278 and made available for redevelopment. The County is expected to continue to operate the County Courthouse even after completion of the new Government Center. The County is pursuing opportunities for an educational institution to occupy the Courthouse Annex Building once space becomes available. Use of the annex building by an educational institution would be supported by the Planning Team as it could extend the number of visitors and the hours occupied compared to a more traditional office use. Occupation by an educational institution would also prevent additional competition to existing downtown office facilities.

Several residential properties were identified as development opportunities east of downtown along Griffin, Church and Park Streets, west of downtown along Spring, South and Cooper Streets, and in between West Avenue and Johnston Street in the SW corner of the study area. These properties were identified due to vacancy or deterioration.



Dallas, Georgia LCI Study
DEVELOPMENT OPPORTUNITIES MAP
 Prepared by Urban Collage, Inc. October 2006 NORTH

- STUDY AREA BOUNDARY
- FLOODPLAIN
- DEVELOPMENT OPPORTUNITY
- PRIORITY DEVELOPMENT OPPORTUNITY



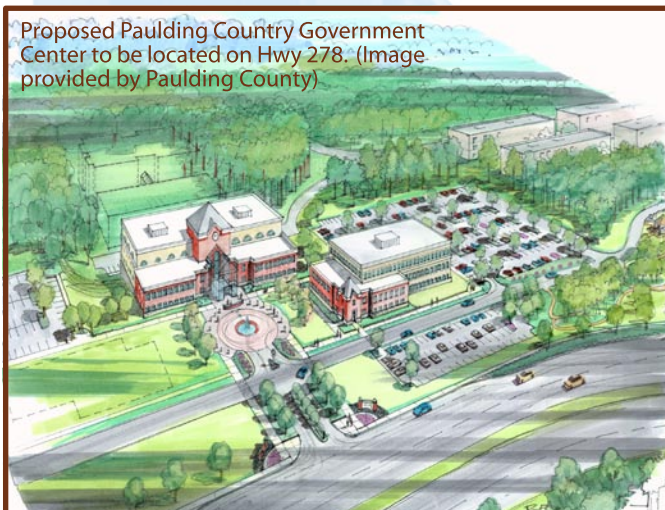
The largest development opportunity in terms of land area, is the collection of properties between the future Paulding County Government Center and the railroad.

ISSUES AND OPPORTUNITIES

As discussed in the previous section, there is significant potential for development and redevelopment in the Study Area. However, as in every community, there are challenges that need to be addressed and assets that need to be recognized. The following issues and opportunities are based on stakeholder interviews, market assessment, and feedback at public meetings.

Challenges

- Relocation of Paulding County government offices from downtown to Highway 278
- No destination uses in downtown area
- Low income levels in Study Area
- Vacant buildings
- Few restaurants or dining options downtown
- Lack of quality housing options
- Little-known identity for downtown
- Relocation of Paulding WellStar Hospital
- Underutilized building footprints
- Lack of connectivity to Highway 278
- Many businesses not open at night in downtown
- Shortage of park/greenspace



Assets

- Sense of community
- Recently-Implemented Streetscape and Downtown Plaza
- Proximity to Silver Comet Trail
- Historic buildings in Central Business District
- Paulding Community Theatre (recently renovated)
- Pedestrian scale on portions of Main Street
- Small town character
- Civic uses – city hall, county courthouse, churches

The recently-implemented plaza/greenspace is an asset to the future success of Downtown Dallas



- Significant amount of historic resources
- Proximity of Chattahoochee Technical College
- Existing small, local businesses on Main Street
- Re-use potential of currently vacant buildings
- Preservation of heritage



CONCEPT PLANS

Due to the complexity of issues and challenges facing the future of Downtown Dallas, the Dallas Livable Centers Initiative Plan includes both a short-term concept plan and a long-term concept plan. The two plans are not mutually exclusive. Rather, the short term plan is intended to help stabilize downtown Dallas over the next five years as the Paulding County Government Center is constructed and occupied on Highway 278, just outside of Historic Downtown Dallas, and as the city lays the groundwork for more significant mixed-use and residential redevelopment.

The projects included in the short-term plan are those that can be reasonably implemented within the next five years, provide a vital link between the planned Paulding County Government Center and Historic Downtown Dallas, and help maintain the viability and sustainability of the downtown area while priority redevelopment projects can be undertaken. The long-term plan is based on projects that require funding beyond the level of capital available in the short-term, require negotiation with other public entities and landowners, and require some success with short-term redevelopment projects to help generate more aggressive private and public-private investment. Additionally, the short-term plan builds off of the City's recent, successful streetscape improvements and the planned downtown Silver Comet Trailhead, while the long-term plan is more aggressive in terms of the public funding necessary for public improvements and private reinvestment to redevelop underutilized properties.

There are two other defining differences between the short-term and long-term plans: 1) the primary connection between the new Paulding County Government Center/Highway 278 and Downtown, and 2) the potential land use for the property between the Paulding County Government Center and the east-west railway. The short-term plan utilizes Main Street as the primary multi-use path between Highway 278 and Historic Downtown Dallas building on the recently completed streetscape improvements on Main Street and the proposed Silver Comet Trailhead along Main Street from Seaboard Drive to Hardee Street (GDOT PI# 0008188). The long-term plan, which is based on increased activity in the Historic Downtown Area, seeks to create a more suitable roadway for heavier automobile traffic between Highway 278 and Downtown, while maintaining Main Street as the primary

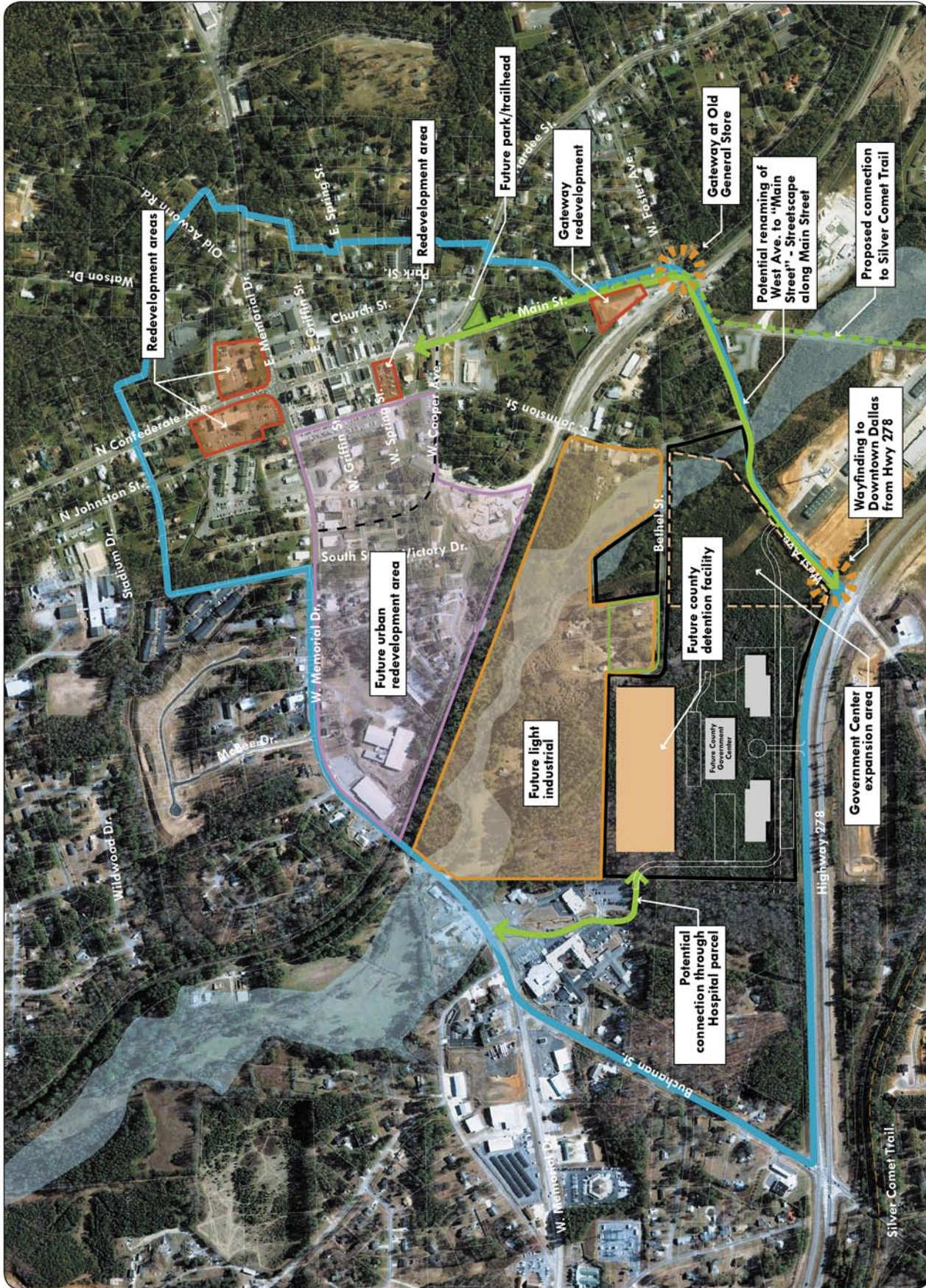
street for local traffic, pedestrians, bicyclists and mixed-use development. The most appropriate land use for the property between the new Paulding County Government Center and the east-west railway depends in part on the Paulding Government Center Master Plan and the future location of the County detention facility and sheriff’s office. Current county plans show the northernmost portion of the government center as the location of the future detention facility and sheriff’s office. If the detention facility is apparent to the adjoining property to the north, then residential redevelopment on

the site, as called for in the City’s long range plan is unlikely. In this case, light industrial uses are most likely for the area between the Government Center and the railway. However, if the County could be convinced to retain the detention facility off-site or at a minimum consider an alternate location further from the most significant redevelopment opportunities, then the potential for a more compact residential development may be much more likely and certainly preferable for the long term viability and success of Historic Downtown Dallas.



SHORT-TERM CONCEPT PLAN (1-5 YEARS)

As discussed above, the short-term concept plan is designed to stabilize the historic downtown area upon the relocation of a significant number of county employees from the downtown area to the new Government Center on Highway 278. The plan seeks to establish Main Street as a primary, multi-use roadway building off the recent, successful streetscape improvements in Downtown Dallas and planned Silver Comet Trailhead; initialize redevelopment of two corners of the intersection of Confederate Avenue and Memorial Drive (properties expected to be vacated by Paulding County) and begin work on stricter code enforcement and redevelopment of the residential area to the west of downtown bordered by Johnston Street, Memorial Drive and the Norfolk Southern railway.



Dallas, Georgia LCI Study
REDEVELOPMENT FRAMEWORK SHORT-TERM CONCEPT PLAN
 Prepared by Urban Collage, Inc. November 2006 NORTH

Main Street Improvements

Based on the short-term number of vehicles likely to travel from the Paulding County Government Center to the downtown area and the amount of potential funds available between 2007 and 2012, Main Street should be utilized in the short-term as the primary, multi-use connection from the downtown area directly to the new Paulding County Government Center. For the downtown area to retain its vitality and continue to draw county employees as patrons for downtown restaurants, offices and retailers, the Main Street connection must be established when the Government Center opens for business or soon thereafter (target 2009).

The proposed project extends approximately 0.72 miles from the intersection of US 278 to the existing streetscape on Main Street near W. Cooper Avenue. Main Street is likely to remain a two lane roadway with one travel lane in each direction and will continue to serve a modest amount of automobile traffic, as designed. However, to build upon the recently installed streetscapes and integrate the proposed Silver Comet Trailhead at Hardee and Main Street, improvements should be undertaken to:

- Include two, 12-foot wide vehicular travel lanes
- Install a pedestrian sidewalk (minimum 5 feet wide) along the west side of Main Street and West Avenue from Highway 278 to the recently completed streetscapes on Main Street near Cooper Avenue.
- Install a multi-use trail (minimum 12 feet wide) along the east side of Main Street and West Avenue from Highway 278 to the recently completed streetscapes incorporating the Silver Comet Trailhead project between Seaboard Drive and Hardee Street.
- Provide a minimum five-foot landscape buffer between the roadway and the pedestrian sidewalk/multi-use trail on either side.

Additionally, the City should rename West Avenue to South Main Street, so that Main Street directly intersects Highway 278 at the new Paulding Government Center. This strategic move will not only reinforce Main Street as a primary corridor between the Government Center and downtown, but along with proposed gateway improvements, will heighten Dallas' presence along Highway 278.


Photosimulation of Main Street looking North towards Downtown Dallas

BEFORE



AFTER





Implementation considerations for this project include incorporation of the Dallas trailhead park and path from the Silver Comet Trail, the transition to the downtown streetscape, realignment of the South Hardee Street intersection at Main Street, crossing the Norfolk Southern rail line, and improving the intersection of West Avenue at US 278. A landscaped median may be included as part of the project south of downtown between Foster Avenue and Highway 278. Since the improvements along Main Street would provide a gateway to downtown, realigning the intersection at South Hardee Street to favor Main Street would provide a continual connection from US 278. Improvements to the rail line crossing will require coordination with Norfolk Southern. Coordination with GDOT and a signal warrant study will be needed to provide traffic signals at the intersection with US 278 and is expected to occur as part of the implementation of the Paulding County Government Center.

Utilization of Main Street as the primary, multi-use path between Highway 278 and Downtown Dallas also requires safety improvements at Main and the Norfolk Southern Railway to straighten the hairpin turn as feasible and encourage reinvestment/improvement of the south end of Main Street near Foster Avenue. Enhancing the appearance of the Main/Foster area would be a suitable first step. If redevelopment interest can be garnered, smaller residential or office facilities would be most suitable to reinforce the route between Highway 278 and downtown and add to downtown's residential base and commercial reinforcement.

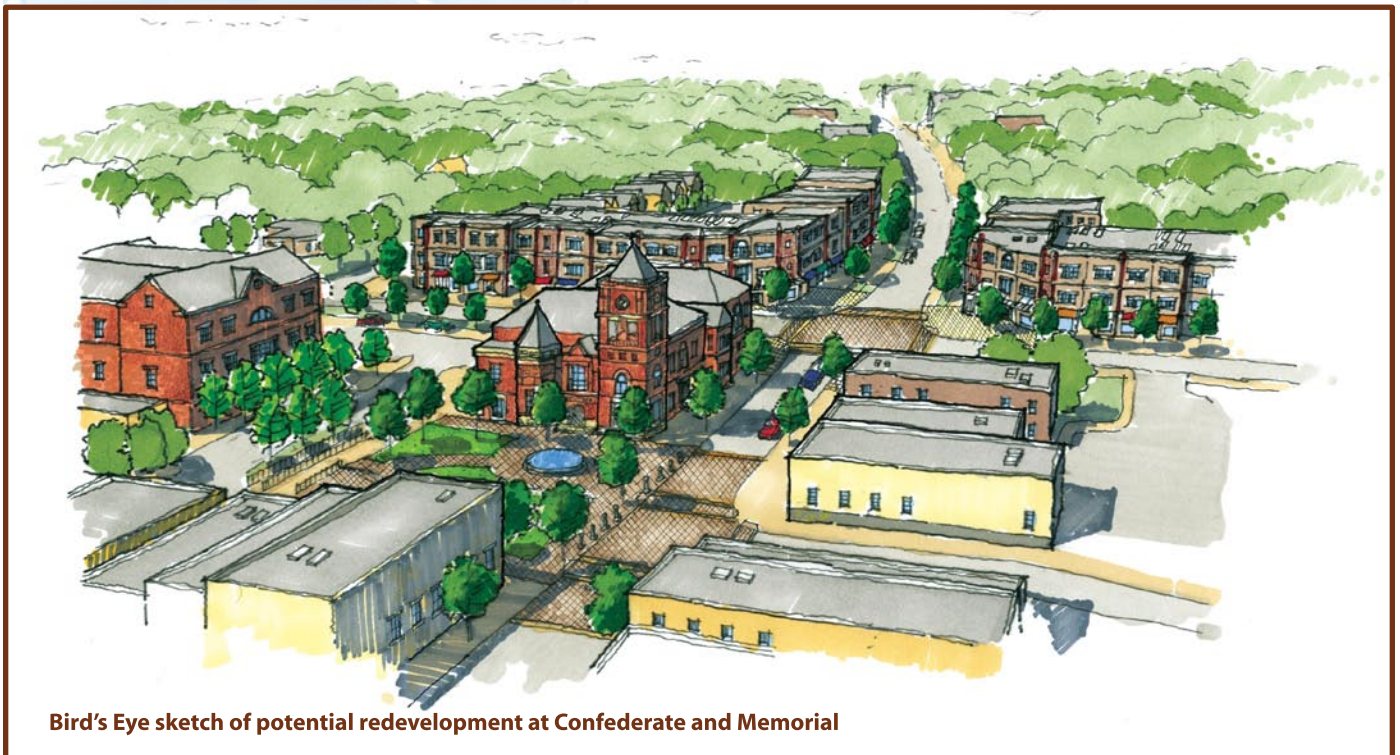
Confederate at Memorial Redevelopment Opportunities

Upon completion of the Paulding County Government Center Administrative Buildings, Paulding County is expected to vacate the two parcels at the northwest corner and northeast corner of Confederate Avenue and Memorial Drive. The two properties make up the northern end of Dallas' historic Main Street and as such are priority redevelopment projects for the character and vitality of Downtown Dallas.

Ideally, these sites will redevelop to form a new northern anchor to downtown via mixed use development. Infill mixed use development with retail space, housing, and open space would be a substantial catalyst to

re-ignite the Central Business District. A true economic destination is still lacking for downtown; this type of development could aid in downtown redevelopment efforts. A sizable catalyst will be needed for downtown upon the departure of the Paulding County government offices. The mixed use development should provide residential integrated with both retail and office uses. The ideal configuration would be residential over retail at the two corners, with additional residential and office further back on the site (closer to North Johnston Street and Watson Drive).

Additionally, a configuration that allows live/work in a portion of the development would be ideal. Townhomes are also a widely-accepted and known product that can help bridge the gap between single-family and commercial. They are a variable product type because they will provide a comparable scale that can help to transition to the surrounding single-family residential nearby. Developing infill mixed use projects in this area would serve to meet pent-up demand for diversified services in the Study Area, allow people to experience “downtown” living in Dallas, replace the existing office space that will be lost, help to anchor the CBD retail mix and bolster its visibility and choice as a destination location.



Bird's Eye sketch of potential redevelopment at Confederate and Memorial

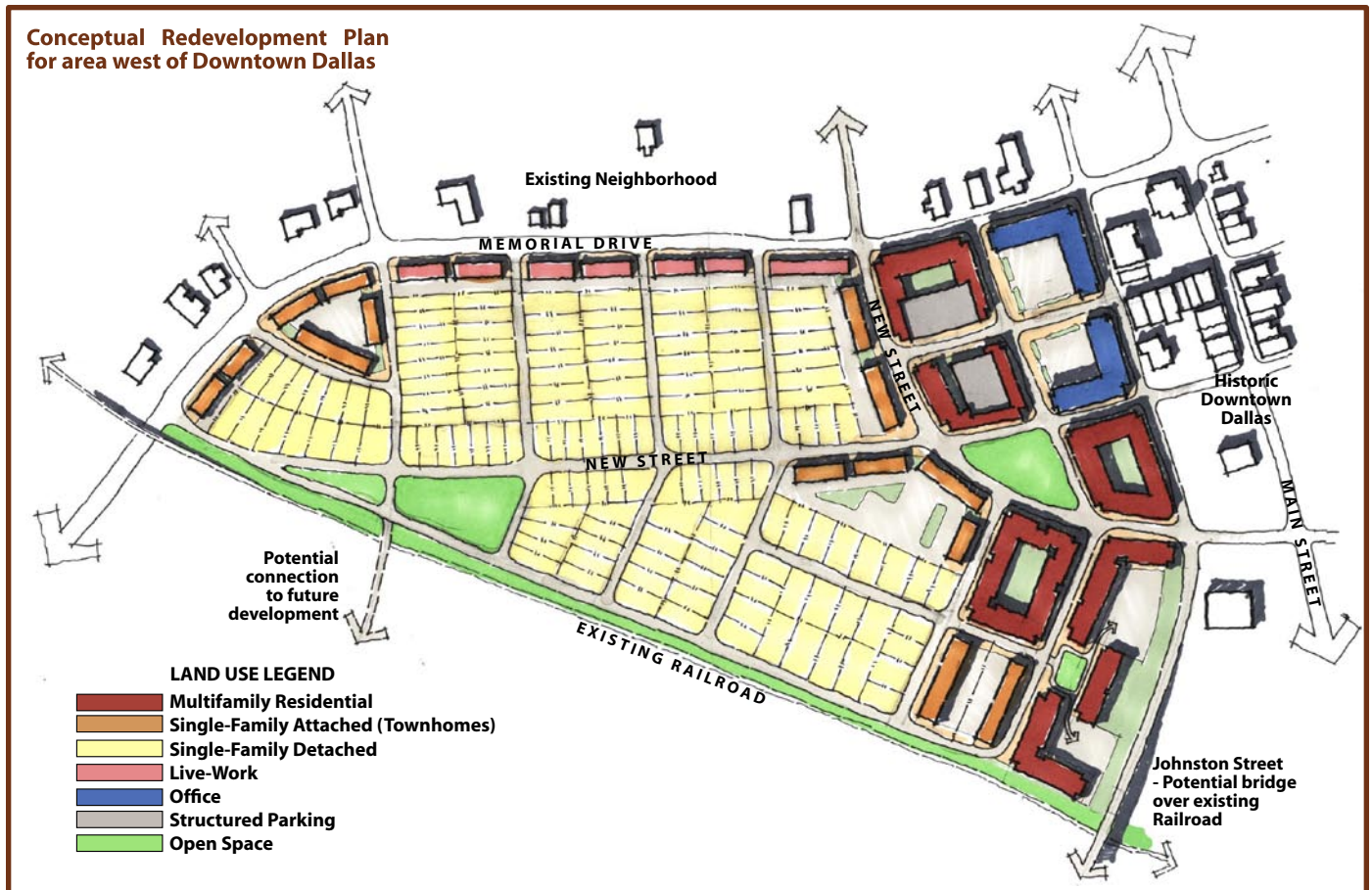
Based on the concept plans developed by the Planning Team in cooperation with community participants, the northwest corner of Confederate and Memorial, at 3 stories, can accommodate up to 29,000 SF of retail on the ground floors with 58,000 SF of office space or 50 residential units on the 2 floors above. None of the existing buildings on the current site are expected to remain.

The northeast corner of Confederate and Memorial includes the Wynn Community Development Building. Community opinion varies on whether the existing building should remain or be razed by a potential redevelopment. If the existing building remains, the redevelopment opportunity is more than likely two-story maximum buildings built as “outparcels” along Memorial and Confederate, due to limited surface parking areas. If the current building is eliminated, redevelopment may mimic the concept plan for the northwest corner including 3-4 story buildings with retail or office on the ground floor and office or residential above. This would also allow the new development to “wrap” the corner and extend further east along Memorial Drive. Office condos or residential townhomes may also be considered on both sites off of Memorial Drive and Confederate Avenue, including areas facing Watson Drive.

Urban Redevelopment Area


One of the most important strategies for ensuring the future sustainability of Downtown Dallas is increasing the number of residents and encouraging more, higher-quality residential development and redevelopment within and near the Main Street District. At the same time, residential living near the downtown area is not popular at this time due to perceived (and potentially real) public safety and code enforcement issues in the area bounded by Johnston Street, Memorial Drive and the Norfolk Southern Railway.

The concentration of residential properties bounded by Memorial Drive to the west and north, Johnston Street to the east and the Norfolk Southern railway to the south may have the most significant impact on the future of Downtown. This area includes a mixture of small, single-family homes, duplexes, and apartments. Generally, the structures are older, ill-maintained, and in various states of disrepair. For successful downtown redevelopment,



this blighted residential neighborhood must be redeveloped. The “downtown” area should be a place that attracts both young professionals and aging baby boomers, based on lifestyle preferences. Currently, this area is a barrier and detractor from any development efforts in this part of the city. It is of such a scale, that what an individual private owner does on a single parcel would not impact the area as a whole. It is imperative that the City step in to take a leadership role in redeveloping this area.

The first step would be to undertake strong enforcement of zoning conditions and codes already on the books. The next step would be to aggressively collect any past due taxes on property in the area, for both local and absentee landlords. As these steps are taken, clear changes would be visible in this area. It is crucial that the public sector take this first step to help “ripen” this currently blighted area for redevelopment. As people can see changes in the area, the private sector will take more interest and begin to reinvest in the neighborhood with new product. Taking visible action in the area will help to get people excited and engaged, including private



sector developers and investors, about what could happen immediately west of Downtown. There is the possibility that the City might have to take the additional step of developing and implementing an urban redevelopment plan and/or buying some of the properties to get property assembled to further incent private development. Without question, this will activate the private sector to appropriately leverage a greater impact from the public sector's actions and investments.

This area should be redeveloped as residential. It is recommended that this area include a diversity of housing product; simply meaning allowing mixed products and a variety of price points. This diversity is what can make an area thrive. Single-family homes, townhomes, condos, and apartments should all be allowed to develop here. They should be co-located, and not separated into clusters. This will enable life cycle housing, meaning allowing recent college grads with their first job to couples starting families to retirees to live in the same community, and in close proximity to each other. Another important component of housing product diversification in this area would include capitalizing on the trend towards active adult communities. This is ideal for baby boomers that are aging that might desire to be near their children and grandchildren, and still be part of their greater community.

Additionally, as automobile traffic increases along Main Street, a secondary roadway connecting South Main Street to Memorial Drive may be necessary to prevent congestion and pass-through traffic through the historic downtown area. The Planning Team recommends an approximate one-quarter mile loop road extending from West Memorial Drive at Butler Place to Main Street at West Cooper Avenue. The loop road would provide easier access to the downtown core by avoiding the intersection of Memorial Drive and Main Street without removing traffic from the central activity area entirely.

Implementation of the loop road would be contingent on the adoption of a redevelopment plan for the identified area. A traffic study would be required to determine future volumes generated by the planned development and also to address the intersection with West Memorial Drive. Additionally, comments from participants at the public workshops indicated that

extending Butler Place to Stadium Drive would be desirable to create a secondary connection to the Herschel Jones Middle School relieving peak hour congestion along Confederate Avenue and Johnston Street.

Downtown Pedestrian Improvement Extensions

Following the proposed improvements to Main Street as the primary connection between Highway 278 and Downtown Dallas, extensions of the recently completed downtown pedestrian improvements will be necessary to further tie downtown together and create pedestrian connections between Main Street and new development/redevelopment projects in the downtown area.

Priority downtown pedestrian improvements include:

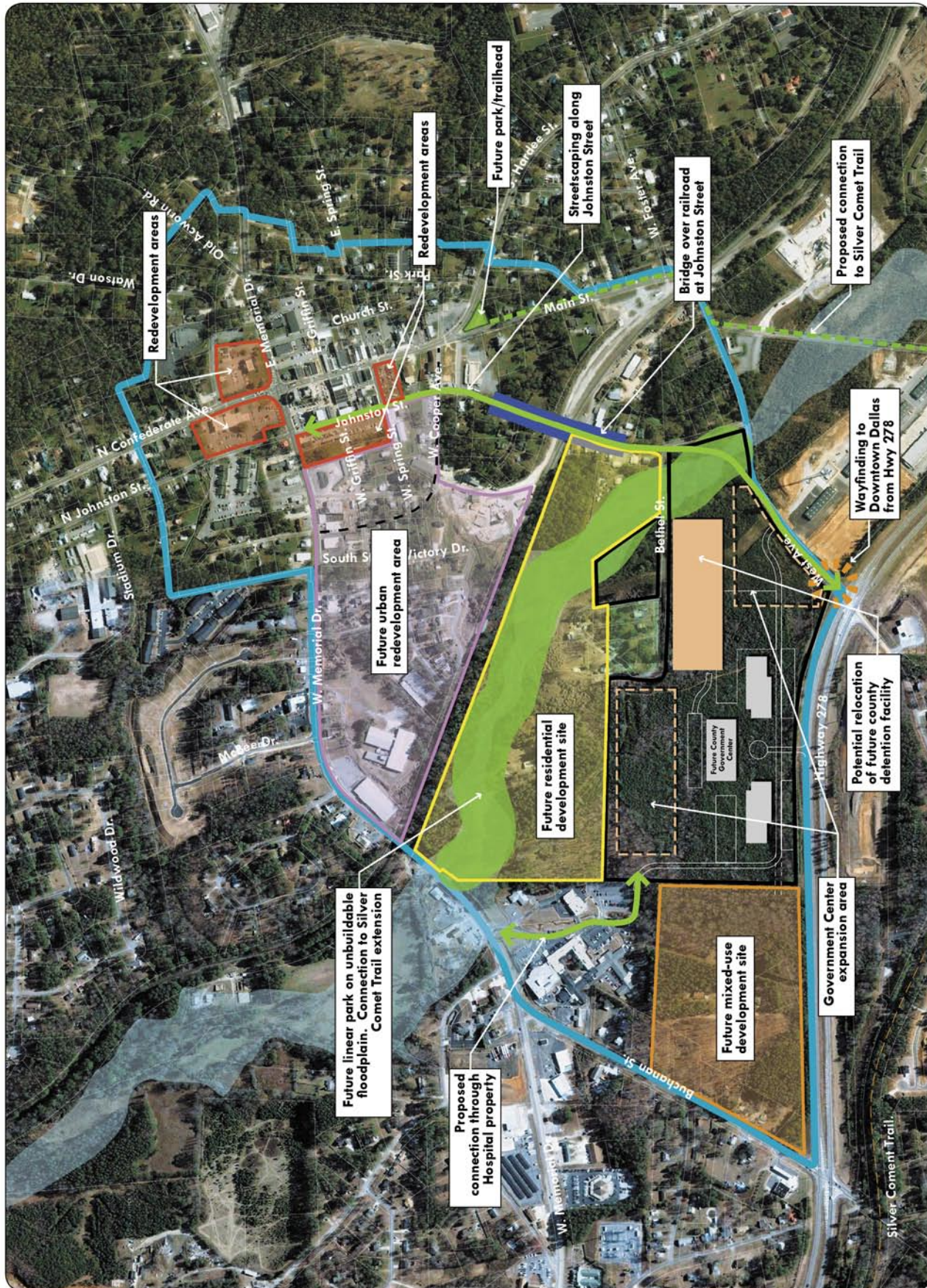
- East Griffin and East Spring Street from the existing improvements (east of Main Street) to the proposed parking structure along Church Street
- Johnston Street from Cooper Avenue to Memorial Drive

LONG-TERM CONCEPT PLAN (5-10 YEARS)

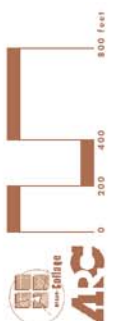
While the short-term concept plan priorities provide an implementation plan for the next five years, the long-term concept plan is based upon more aggressive redevelopment in the downtown area and anticipation that early successes will lead to increased future traffic demand and demand for office, retail and residential facilities.

Johnston Street Roadway and Pedestrian Improvements

While the short-term concept plan utilizes Main Street as the primary multi-use trail, successful stabilization of the downtown area and future redevelopment and growth will lead to increased traffic demand. Main Street is limited in its current curb-to-curb width and cannot be widened and is not suitable as a major automobile thoroughfare. If stabilization of the downtown area succeeds and redevelopment projects result in enhanced transportation demand, Johnston Street should be improved to become a primary automobile route from South Main Street (just north of the County Government Center) to West Memorial Drive.

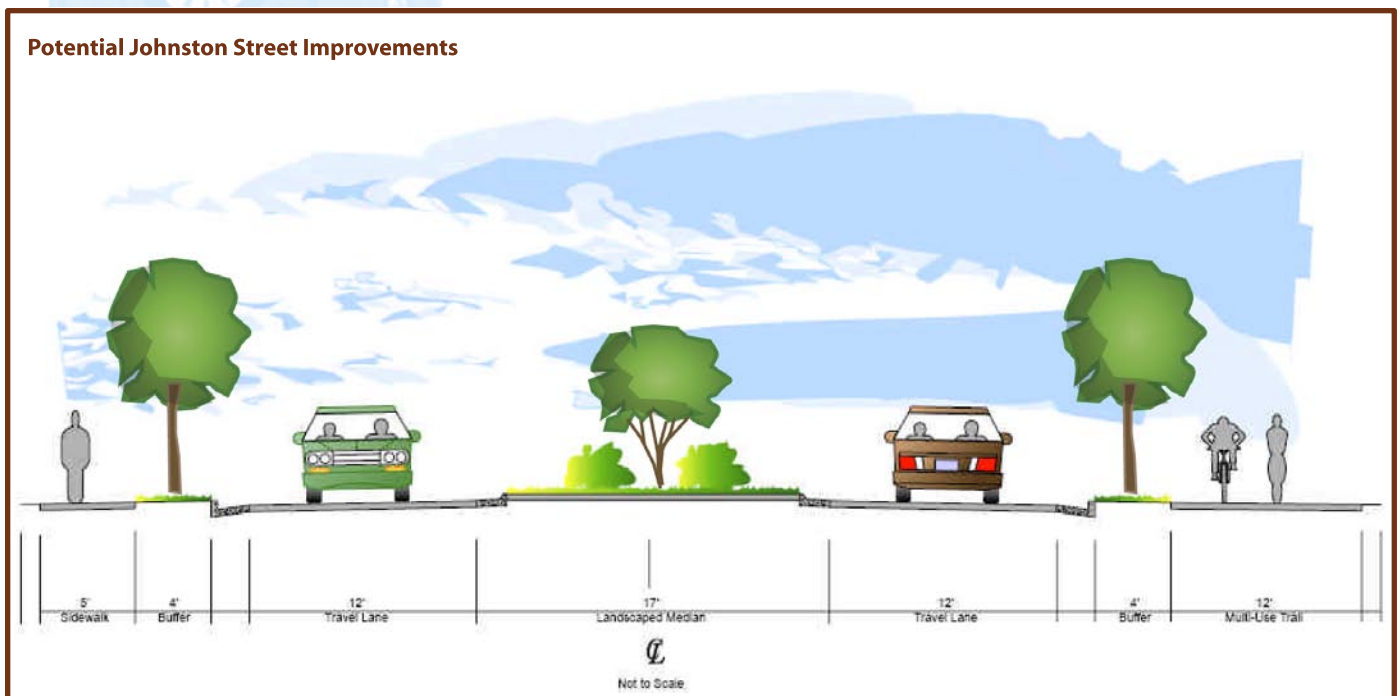


Dallas, Georgia LCI Study
REDEVELOPMENT FRAMEWORK LONG-TERM CONCEPT PLAN
 Prepared by Urban Collage, Inc. November 2006 NORTH



The project extends approximately 0.8 miles from the intersection of US 278 to the intersection with West Memorial. The major element in this project is construction of a bridge over the Norfolk Southern rail line to provide a grade-separated connection. This project would eliminate the at-grade crossing at S. Johnston Street and remove the delay and potential safety conflicts that occur due to passing trains.

The proposed Johnston Street Connector, while primarily serving as the direct automobile route from South Main Street to Memorial Drive should also enhance the character of the Paulding County Government Center and downtown areas. The envisioned roadway would include sidewalks



(minimum 5 feet in width) on both sides of the street with minimum 5-foot landscape buffers. Two- twelve foot wide travel lanes will also be necessary. The travel lanes may be separated by a landscaped median on the portion of the roadway between Cooper Avenue and Highway 278.

Implementation considerations include the physical and community impacts of the bridge, the greater costs of constructing a bridge, crossing the Norfolk Southern rail line, and intersection improvements at US 278. Bridging over

the railway may limit access to S. Johnston Street. Potential impacts to nearby residences should be considered. The required height of the bridge should be considered within the scale of downtown development. Evaluating potential impacts to Weaver Creek and its wetlands will be necessary.

The Johnston Street bridge will require negotiation and approval from Norfolk Southern and identification of financial partners and/or funding opportunities. If federal transportation funds are to be used, the roadway will also have to be reclassified by the Georgia Department of Transportation as an "Urban Collector" or higher classified roadway, resulting in additional guidelines and restrictions.

Negotiations with Norfolk Southern, Paulding County, the Georgia Department of Transportation and other potential partners can take several years in addition to the need to raise significant funds to complete the proposed project. The project is not likely feasible over the first five years of the plan, but the City should incorporate the project into future plans, begin to discuss the future improvement with potential partners and re-evaluate the need for and cost of the potential roadway annually.

Redevelopment North of the County Government Center

The key to the success of any infill development located between the new Paulding County Government Center and the railroad tracks will be the final decision made about which buildings house which uses within the County complex. The location of the proposed detention facility and sheriff's

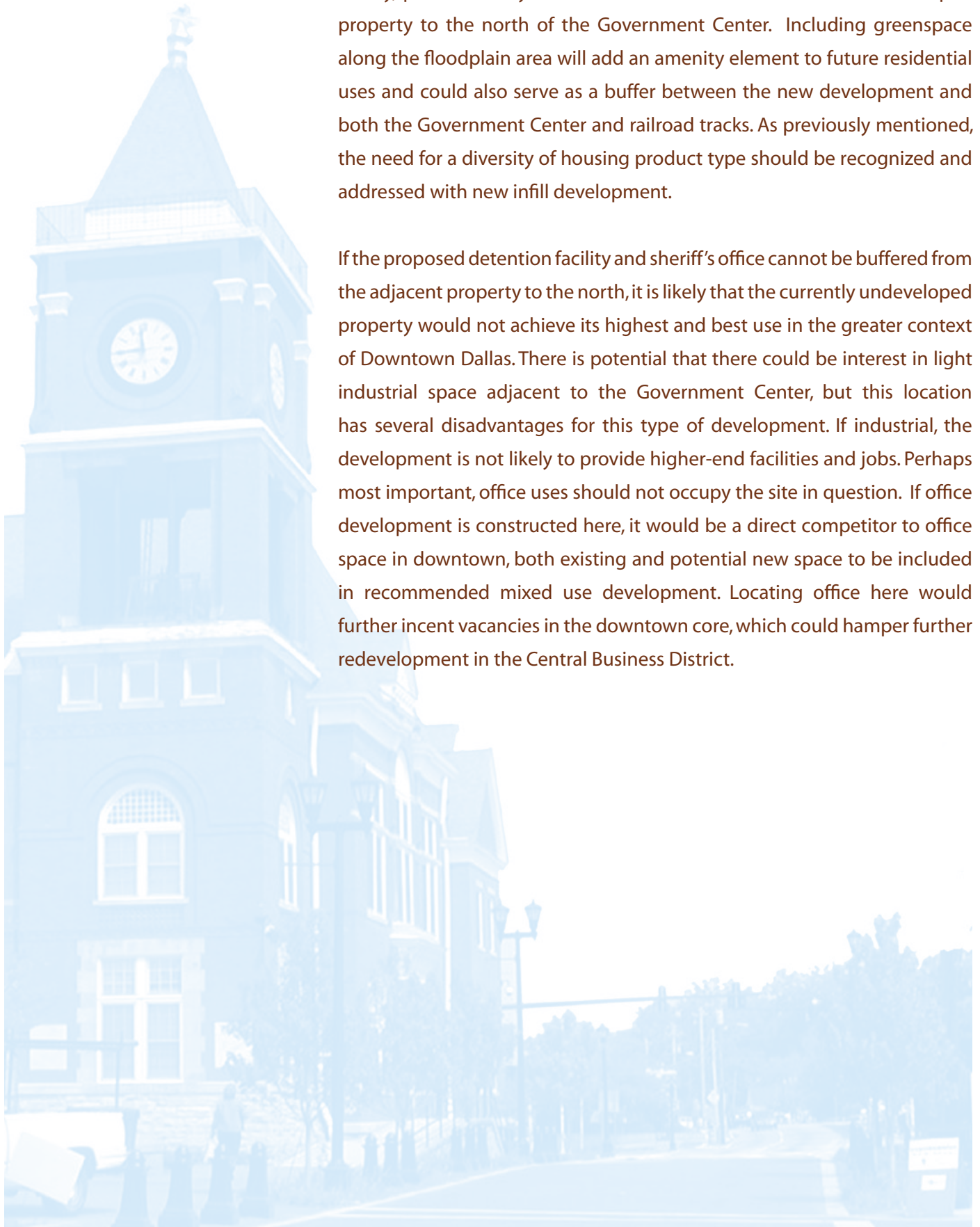
office is the primary source of concern. The current plan to place the detention facility towards the back of the Government Center site places it adjacent to the now undeveloped land that then borders the railroad tracks. Putting the detention facility here jeopardizes the potential for quality infill development. The Planning Team recommends that the proposed detention facility be moved to another off-site location. If relocation of the detention center is not feasible, the Planning Team would recommend a significant landscape buffer to shield the adjacent property from the detention and sheriff's facility.



Traditional Neighborhood-style residential development could provide an alternative housing choice for residents of Dallas

Ideally, predominately residential infill would occur on the undeveloped property to the north of the Government Center. Including greenspace along the floodplain area will add an amenity element to future residential uses and could also serve as a buffer between the new development and both the Government Center and railroad tracks. As previously mentioned, the need for a diversity of housing product type should be recognized and addressed with new infill development.

If the proposed detention facility and sheriff's office cannot be buffered from the adjacent property to the north, it is likely that the currently undeveloped property would not achieve its highest and best use in the greater context of Downtown Dallas. There is potential that there could be interest in light industrial space adjacent to the Government Center, but this location has several disadvantages for this type of development. If industrial, the development is not likely to provide higher-end facilities and jobs. Perhaps most important, office uses should not occupy the site in question. If office development is constructed here, it would be a direct competitor to office space in downtown, both existing and potential new space to be included in recommended mixed use development. Locating office here would further incite vacancies in the downtown core, which could hamper further redevelopment in the Central Business District.



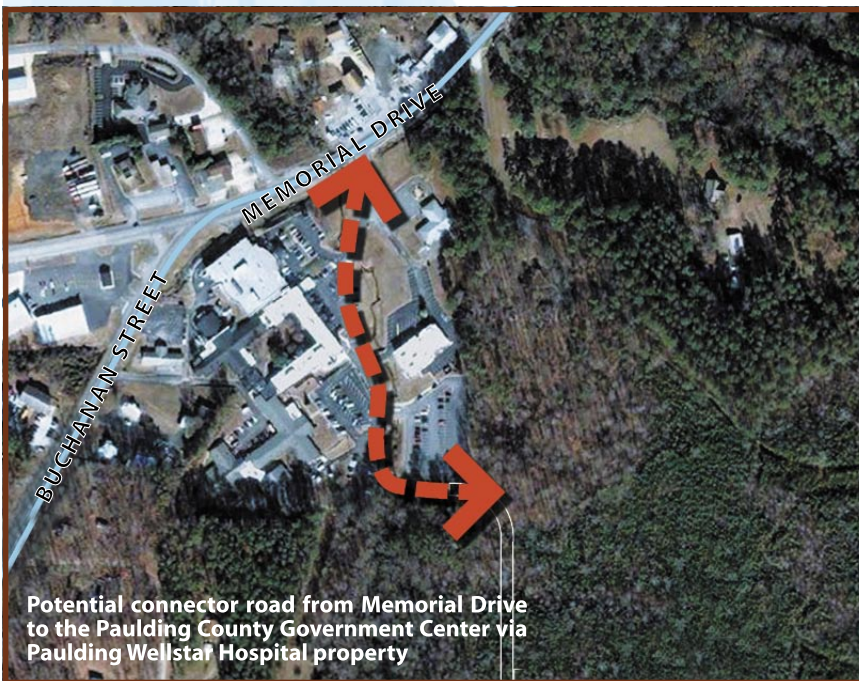
TRANSPORTATION AND PEDESTRIAN SAFETY

In addition to the priority transportation and pedestrian improvements discussed above, several additional transportation and pedestrian safety improvements were identified during the LCI planning process and should be considered as conditions change and funding becomes available. The City of Dallas should also seek to have commensurate transportation and pedestrian improvement projects constructed in conjunction with adjacent redevelopment projects when feasible. The proposed projects focus on improving transportation accessibility, connectivity, and safety. Pedestrian and bicycle facilities are a crucial component of many of the projects in order to encourage non-vehicular trips.

Connector Road from Memorial Drive to the Paulding County Government Center at Paulding WellStar Hospital

The current plans for the Paulding County Government Center show a proposed roadway terminating at the northwest edge of the site. A connection to the government center from the roadway through the hospital

would provide additional connectivity between the center and downtown. This connection would provide alternate access to downtown and connect to the only existing separated grade rail crossing. The proposed roadway extends from W. Memorial Drive to the government site, approximately one-quarter mile. The desired cross-section would be a two-lane roadway, with five-foot sidewalks on both sides of the through lanes, separated from the vehicle lanes by a landscaped buffer.



Implementation considerations include coordination with Paulding County and Paulding WellStar hospital, traffic impacts, and impacts to adjacent parcels. A traffic study may be required to determine the impact of a new connection and what traffic controls are needed at the intersection at West Memorial Drive. Primary responsibility

for implementing the loop road is expected to fall to Paulding County as part of the Government Center construction.



Hardee at Main Street Realignment

The realignment of the intersection at S. Hardee Street and Main Street is proposed to reduce potential conflicts from vehicles entering and exiting Main Street. A planning level concept is shown in Figure BB. This improvement would keep Main Street the primary thoroughfare, which is essential if it is to be the gateway to downtown.

Implementation considerations include the following. This project requires coordination

with the proposed Silver Comet Trail trailhead connection and park, which is slated for this intersection. A traffic study will need to be conducted to ensure the design of the intersection meets anticipated future traffic demand and to determine appropriate traffic controls. The realignment may impact current parcel access on S. Hardee Street, so coordination with local property owners will be required to address property access.



Memorial at Buchanan Realignment

The realignment of the intersection at West Memorial Drive and SR 6 Business/Buchanan Street is proposed to reduce potential conflicts from vehicles entering and exiting Buchanan Street. A planning level concept is shown in Figure CC. Preference was given to Buchanan Street because it is a main entrance to downtown Dallas from the west, and it is the SR 6 Business route.

Implementation considerations include coordination with GDOT, access to parcels served by the existing alignment, and impacts on existing businesses. Coordination with GDOT is required,



Recent streetscaping implemented in Downtown Dallas on Main Street



Recent streetscaping implemented in Downtown Dallas on Main Street

since Buchanan is a state route. A traffic study will need to be conducted to ensure the design of the intersection meets anticipated future traffic demand and to determine appropriate traffic controls. Impacts to affected parcels on West Memorial Drive will require further evaluation.

Memorial Drive Pedestrian Enhancements

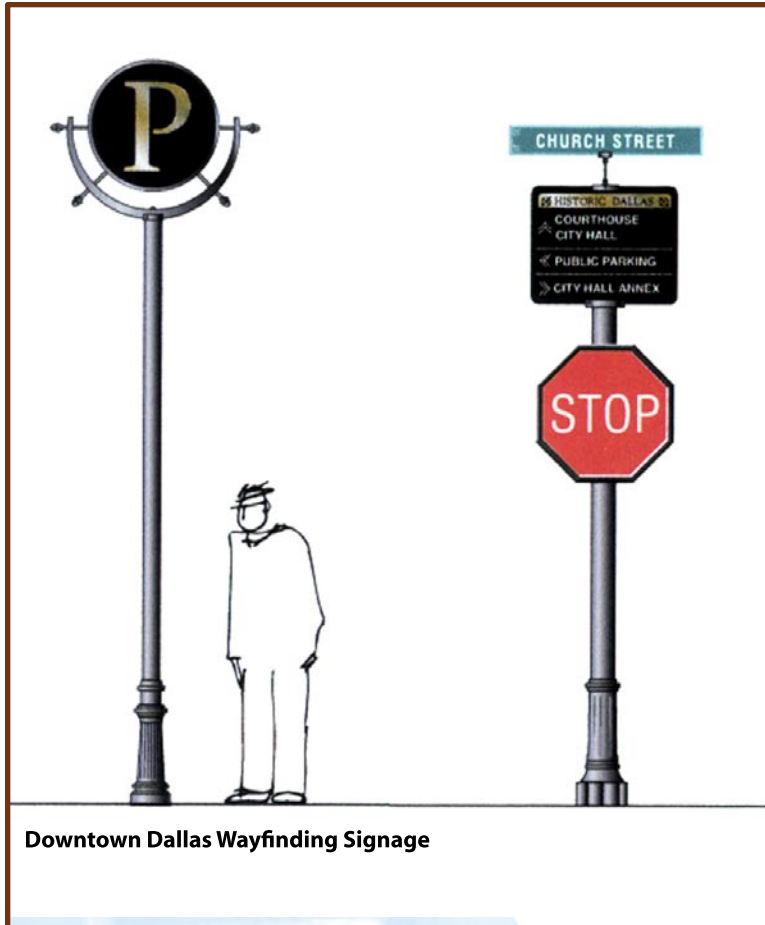
As new development and redevelopment occurs, the recently completed downtown pedestrian improvements should be extended along Memorial Drive throughout the Central Business District. Sidewalk, pedestrian crossings, lighting and landscaping improvements should be considered along East Memorial Drive between City Hall and Merchants Drive and along West Memorial Drive from Johnston Street to North Griffin Street or to the Norfolk-Southern rail line (if the Urban Redevelopment Plan is successful).

Confederate Avenue Pedestrian Enhancements

Similar to Memorial Drive, future redevelopment along Confederate Avenue should be complemented with extending downtown pedestrian improvements from Watson Drive to West Polk Avenue. In addition to providing greater pedestrian safety, lighting and landscaping, sidewalk extensions to Polk Avenue would create a direct connection to Herschel Jones Middle School.

Downtown Parking Structure(s)

As downtown redevelopment occurs the amount and location of parking will be critical to the success of downtown restaurants, businesses and insitutions. The City of Dallas is exploring potential for several public parking structures in and around the downtown area including locations on Church Street, Main Street and Johnston Street. As possible, the City should seek to cluster parking on Church Street to serve City Hall, the Downtown Civic and Cultural Center and businesses on the north end of the Main Street



Downtown Dallas Wayfinding Signage

and should seek a location on the south end of Main Street, near Cooper Avenue to provide convenient parking to businesses on Main Street and Johnston Street.

Downtown Wayfinding and Signage Program

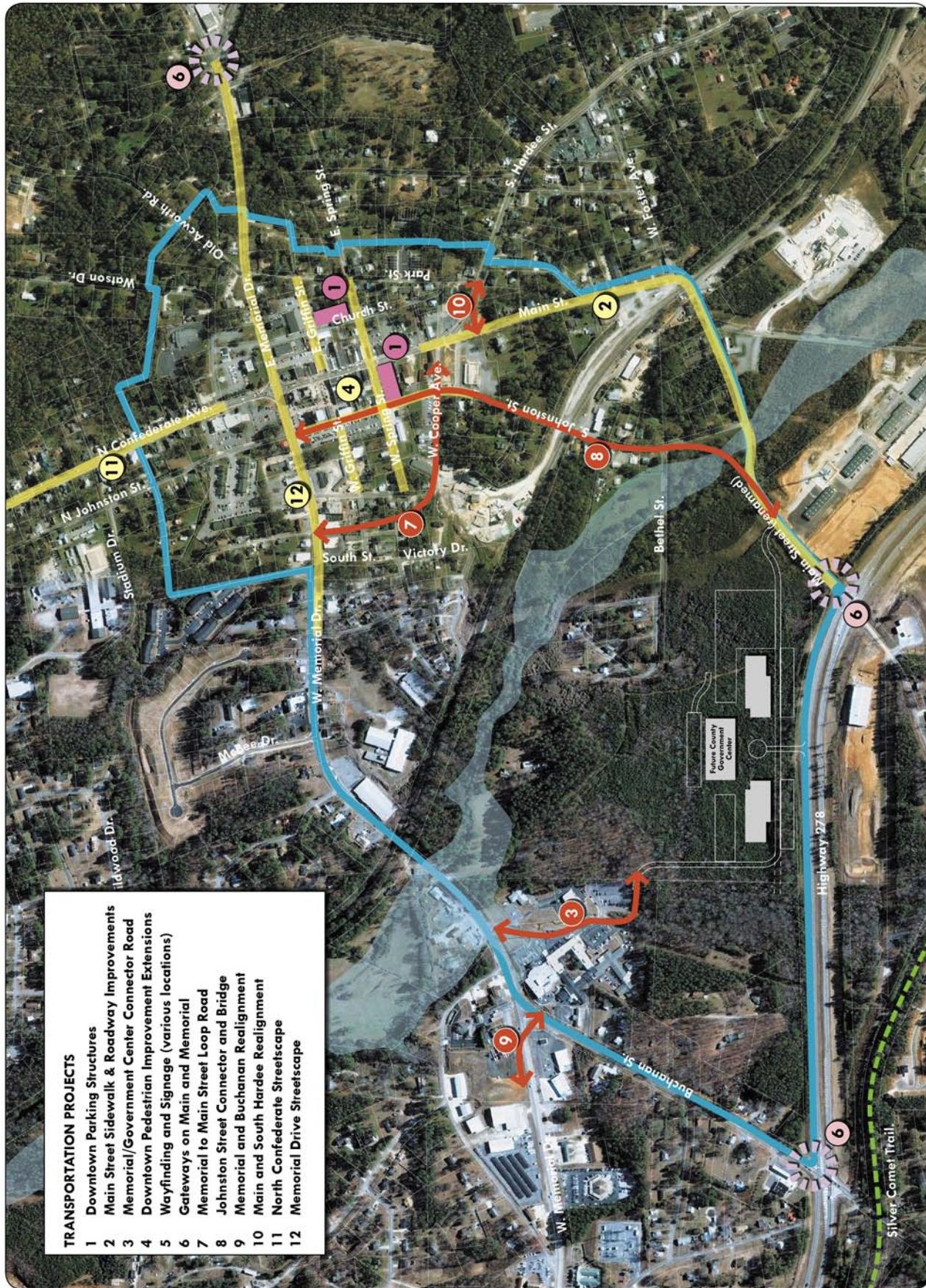
As part of the recently-completed Downtown pedestrian improvements, a more ambitious signage and wayfinding program was developed. As downtown stabilizes and experiences redevelopment, the wayfinding and signage program should be extended throughout downtown and leading into the downtown area along Memorial Drive, Confederate Avenue and along Main Street south to Highway 278.

Downtown Dallas Gateways

To enhance the City of Dallas’ presence and better promote Downtown Dallas as an office, shopping and residential destination, the City should install gateways on Main Street (West Avenue) at Highway 278 and on Memorial Drive at Buchanan and near Merchants Drive. Gateway signage will not only enhance Downtown Dallas’ identity, but will mark entryways into the Downtown Area and alert drivers along Highway 278 of the designated route to Downtown’s amenities.



Potential Gateway Signage



ECONOMIC AND MARKET TRENDS


Recently, there has not been a clear framework for business development in the Central Business District (CBD). In order for a small downtown retail district to thrive and expand, there must be an economic plan. A plan should include: the kind of businesses desired; specific tenants that would meet those parameters; quality marketing materials oriented towards attracting new businesses; a recruitment team that deals with inquiries as well as pursuing targets; and benchmarks to guide the process. Further, there also has to be a system in place to serve existing businesses and ensure they are successful, that their needs are being met, and that as the diversification of tenant mix happens, all businesses are able to achieve a fair market share and friendly competition can be handled within the marketplace.



The key to sustainable development is a diversity of goods and services to appeal to the widest customer base feasible. It is critically important to expand the types and sizes of businesses in the Study Area in an effort to achieve long-term sustainability. Additionally, keeping retail centralized in a district helps to bring more customers as it becomes a destination unto itself. The localized competition begins to help all stores, even those that might be carrying similar products, as customers spend more time, and thus more money, in the immediate area.



Key to the Study Area's future sustainability is successfully leveraging customers in the greater market areas. The need for destination uses within the Study Area is high. Giving people more than one reason to visit an area helps to expand the number of visits, the time of visits, and the number of people involved. In addition to the diversification of businesses in the area, restaurants, theatres and programmed gathering spaces are all uses that can be destinations unto themselves. They bring people to an area that once there might expose them to other activities, goods, or services that they might



want to engage in or remember for a future visit or purchase. The Paulding Community Theatre located downtown is certainly a draw. The plans for the Civic Center space that will enhance the theatre, as well as provide other reasons to be downtown for a variety of people, will be a great addition. Another key opportunity to get people downtown will be the re-use of the Paulding County Courthouse Annex. Paulding County plans to continue to use the historic Courthouse, for both Commission meetings and some office space. However, they are considering re-use of the Courthouse Annex. This could be a prime opportunity to bring a new destination use to downtown. An idea worth exploring further is to use the Courthouse Annex as an educational facility that houses more than one higher educational opportunity. Exploring opportunities for full-credit offerings for both university and technical college classes, as well as extension, continuing education, and lifelong learning classes and opportunities.

Additionally, heavier and more consistent programming in the “downtown” area is needed. Trying for at least one event each month is a good guideline for downtown programming. Again, the more often people visit an area, the more likely they are to return. Of course, part of the challenge in the Study Area today is that people do not have a lot of options of other things to do or a wide variety of shops to visit, which is why diversification and expansion is needed as well.

The city is encouraged to deter future office development within the study area that is not in the Downtown (such as south of 278 or between the Government Center and the railroad). Such uses would have a negative impact by competing with existing and potential office uses within the downtown.

The bottom line in raising awareness is trying to reach additional audiences. Increasing the choices -- whether housing, shopping, eating, or recreating -- increases the number of people that might be interested in spending time and dollars downtown. That is why increasing multi-modal access to the area would also be an asset; leveraging the nearby Silver Comet Trail is an untapped asset at this point. Providing as many options, in as wide a variety as feasible, is the foundation to raising awareness in the greater market areas, which will increase the customer base for the long-term economic vitality of the Downtown Area.

ACTION PLAN

The 5-Year and beyond Action Plan for implementation of the Dallas LCI Plan follows the short-term and long-term categorization of the Concept Plans in the previous section. Over the first five years of the plan, the City will need to focus on four main initiatives to ensure the stability and sustainability of Downtown Dallas.

Short-Term Priority Projects

- Implementation of Main Street sidewalk and pedestrian improvements (in coordination with Dallas connecting sidewalks and Dallas Silver Comet Trailhead projects),
- Partnering with Paulding County to clarify the redevelopment plan for the northeast and northwest corners of Memorial Drive and Confederate Avenue to create a northern mixed-use anchor to Main Street,
- Development of an Urban Redevelopment Plan or redevelopment strategy for the area bounded by Memorial Drive to the west and north, Johnston Street to the east and the Norfolk Southern Railroad to the south, to promote residential redevelopment,
- Consideration for the construction of a new loop road from Memorial Drive at Bulter Place to Main Street at Cooper Avenue as part of the area's redevelopment.

Implementation of the proposed Main Street improvements from Highway 278 to Cooper Avenue may be best accomplished through an application for LCI Construction Funds. As part of the Dallas LCI Plan effort, a pre-qualification form for this project will be submitted placing Dallas in line for further concept study and application for construction funds. During the Concept Phase, the City should revise the project cost estimate taking into account contributions from Paulding County to improve Main Street between Highway 278 and approximately Johnston Street (Main Street was formerly West Avenue) and project funds from the Silver Comet Trailhead and Dallas Connecting Sidewalks projects already identified in the 2006-2011 TIP and Mobility 2030 Regional Transportation Plan.

The City's other main priorities should be a focus on the redevelopment of parcels to be vacated by Paulding County in the downtown area and improvement of the urban redevelopment area west of downtown and south of West Memorial Drive.

Additionally, a number of other transportation access and safety improvements and negotiations with Paulding County regarding the proposed detention facility and Norfolk Southern Railroad regarding railroad crossings should begin as soon as feasible. The City of Dallas and Paulding County should also consider LCI Supplemental Studies to assist with zoning ordinance modifications, downtown development incentives and a transportation feasibility study for the proposed Johnston Street Connector. The City of Dallas may also consider applying to ARC (Atlanta Regional Commission) for a Community Choices Workshop in February of 2007 to assist with modifying the City's zoning ordinance as recommended and create more detailed strategies for residential redevelopment around the downtown core.

Additional Short-Term Transportation Improvements

- Paulding Government Center connector road from Memorial Drive
- Implementation of downtown parking areas/structures,
- Priority pedestrian improvements on Johnston Street, Spring Street and Griffin Street,
- Expansion of the downtown wayfinding program,
- Installation of new gateways into Downtown Dallas at Highway 278/West Avenue and East and West Memorial Drive.

Short-Term Strategic Action Items

- Incorporation of the LCI Plan into the City's Comprehensive Plan (May 2007),
- Apply for LCI Supplemental Study Application to Update C-1 and C-2 zoning classifications to incorporate downtown residential types and densities and development incentive package for new mixed-use and mixed-income development,
- Renaming of West Avenue between Foster and Highway 278 to

South Main Street (now completed)

- Negotiation with Paulding County to relocate the proposed detention facility and Sheriff's office on Government Center Master Plan,
- Development of a Central Business District Business Recruitment and Retention strategy,
- Consider ARC Community Choices Workshop to assist with zoning modifications and residential redevelopment priorities,
- Johnston Street Connector Feasibility Study ,
- Begin discussions with Norfolk Southern Railroad concerning at-grade crossing at Main Street.


Long-Term Priority Projects

- Johnston Road Connector and Bridge,
- West Memorial and Buchanan realignment,
- Main Street and South Hardee Street realignment,
- North Confederate Avenue pedestrian improvements,
- Memorial Drive pedestrian improvements.

Zoning Modifications

To fully implement the downtown redevelopment projects recommended in the Dallas LCI Plan, several modifications must be made to the City of Dallas Zoning Ordinance. Most significantly, the residential densities necessary to create a critical mass of residents in and around the downtown area is not allowed by the current city code. Additionally, the current zoning ordinance does not allow for TND (Traditional Neighborhood Design)- style development which would be appropriate in the urban redevelopment area west of downtown and south of Memorial Drive as well as the larger underdeveloped parcels between the Paulding County Government Center and the Norfolk Southern Railroad.

To that end, the Planning Team recommends two significant changes to the City of Dallas Zoning Ordinance. First, the C-1 (Central Business District) and C-2 (General Business District) must be modified to allow denser, downtown housing styles. The current C-1 and C-2 classifications limit residential development in these areas to single-family and low-density multi-family



dwellings at no more than three dwellings/acre. The ordinance does not appear to directly address housing over retail or housing over office, but this use has been traditionally allowed in the Dallas Central Business District.

The C-1 and C-2 zoning classifications in the City of Dallas Zoning Ordinance should be revised to provide for medium-density condos, lofts, apartments, townhomes and cluster homes within the LCI Study Area. The Planning Team recommends that the reference to the R-2 residential district be eliminated and that a new “Downtown Residential” section be included to allow denser residential in and around downtown to be developed at 12-18 units/acre. The ordinance should also explicitly state that housing over retail and/or office is allowable and encouraged in the Central Business District.

The City might also consider raising the allowable maximum height of structures in the Central Business District to 45-50 feet to allow for taller floor-to-ceiling heights on ground-floor retail and maximum 4-story buildings. The additional maximum building height will enhance the viability of redevelopment on Memorial Drive and Johnston Street, while keeping the tallest downtown buildings below the height of the County Courthouse Clocktower.

The City of Dallas should also consider developing an **R-4 TND Residential District** to allow clustered residential units in urban redevelopment areas. TND-style developments may include a mix of single-family detached, townhomes and lofts within a single projects. These TND districts promote low-maintenance lifestyles (suitable for lively areas like downtowns and urban villages) and are attractive to young singles, young professional and empty-nesters. An R-4 Residential District should allow the residential types listed above at 6-10 units per acre, with minimal setbacks, and may also require dedicated public open spaces and the integration of small scale office and retail facilities and/or live-work style units (particularly along Memorial Drive).

Transportation Projects

Description	Type of Improvement	Engineering Year	Engineering Costs	ROW Year	ROW Costs	Construction Year	Construction Costs	Total Project Costs	Responsible Party	Funding Source	Local Source & Match Amount	
LCI Short-term Priorities												
Downtown Parking Structure	Parking	2007	\$440,000	N/A	\$0	2009	\$4,400,000	\$4,840,000	City/Private Partnership	City/Private Partnership	N/A	
Main Street Sidewalk and Pedestrian Improvements	Pedestrian and Bicycle	2008	\$411,000	2009	\$3,040,000	2010	\$4,110,000	\$7,561,000	City of Dallas	LCI, GDOT, & Others	City of Dallas \$1,512,200	
Connector Road from Memorial Drive to Paulding County Government Center (through Paulding WeIStar Hospital area)	Roadway	2008	\$81,250	2009	\$0	2010	\$812,500	\$893,750	Paulding County	Paulding County	N/A	
Dallas Downtown Pedestrian Improvement Extensions (Johnston, Griffin and Spring Streets)	Sidewalks/ Pedestrian	2009	\$135,000	2010	\$0	2011	\$1,350,000	\$1,485,000	City of Dallas	LCI	City of Dallas \$297,000	
Downtown Dallas Wayfinding and Signage	Wayfinding/ Signage	2009	\$15,000	N/A	\$0	2011	\$250,000	\$265,000	City of Dallas	LCI	City of Dallas \$53,000	
Downtown Dallas Gateways on Main Street and Memorial Drive	Signage	2009	\$20,000	N/A	\$0	2011	\$200,000	\$220,000	City of Dallas	LCI	City of Dallas \$44,000	
Memorial Drive to Main Street Loop Road	Roadway and Pedestrian	2009	\$123,250	2010	\$1,740,000	2011	\$1,232,500	\$3,095,750	City of Dallas	City of Dallas	N/A	
LCI Long-term Priorities												
Johnston Street Connector Road and Bridge	Roadway, Bridge, Pedestrian and Bicycle	2010	\$991,025	2011	\$3,340,000	2012	\$9,910,250	\$14,241,275	City of Dallas	City of Dallas	N/A	
West Memorial and Buchanan Realignment	Intersection	2010	\$49,000	2011	\$120,000	2012	\$490,000	\$659,000	City of Dallas	City of Dallas	N/A	
Main Street and South Hardee Street Realignment	Intersection	2010	\$49,000	2011	\$0	2012	\$490,000	\$539,000	City of Dallas	City of Dallas	N/A	
North Confederate Pedestrian Improvements (Watson Drive to W. Polk Ave.)	Sidewalks/ Pedestrian	2011	\$180,000	N/A	\$0	2013	\$1,800,000	\$1,980,000	City of Dallas	City of Dallas	N/A	
Memorial Drive Pedestrian Improvements (N. Griffin Street to Merchants Drive)	Sidewalks/ Pedestrian	2011	\$240,000	N/A	\$0	2013	\$2,400,000	\$2,640,000	City of Dallas	City of Dallas	N/A	
Programmed Projects in FY 06-11 TIP and Mobility 2030												
SR 6 Business (Memorial Drive) Widening	Roadway Widening	N/A	\$750,000	N/A	\$500,000	2030	\$24,440,000	\$25,690,000	GDOT	GDOT	\$1,250,000	
Dallas Connecting Sidewalks	Sidewalks/ Pedestrian	N/A	\$0	2006	\$125,000	2007	\$875,000	\$1,000,000	City of Dallas	CMAQ	City of Dallas \$300,000	
Dallas Trailhead	Bicycle/ Pedestrian	N/A	\$0	N/A	\$0	2010	\$625,000	\$625,000	City of Dallas	TE	City of Dallas \$125,000	
SR 120 Bridge at Silver Comet Trail	Bridge Upgrade					2007	\$532,000	\$532,000	GDOT	GDOT		
Totals										\$3,484,525	\$8,865,000	\$66,266,775

Housing Projects/Initiatives

Description/Action	Cost	Year	Responsible Party	Funding Source
Develop Urban Redevelopment Plan for West Memorial Drive Area	\$40,000	2007	City of Dallas	General Funds LCI
Update C-1 and C-2 zoning classifications to incorporate downtown residential types	\$15,000	2007	City of Dallas	Supplemental Study LCI
Develop Incentive Package for New Mixed-Income housing redevelopment in identified redevelopment areas	\$20,000	2007	City of Dallas	Supplemental Study

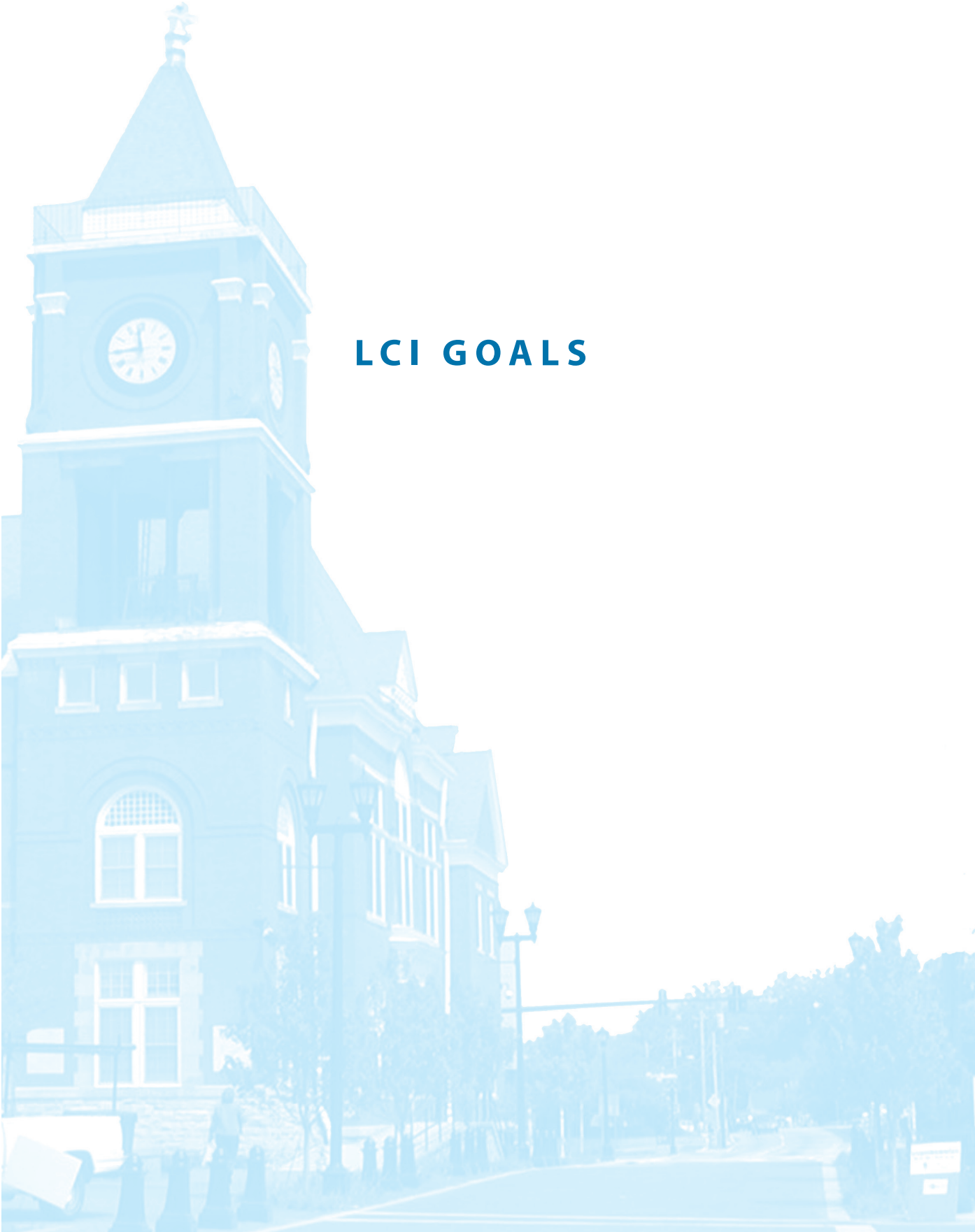
Other Local Initiatives

Description/Action	Cost	Year	Responsible Party	Funding Source
Rename West Avenue from Railroad to Highway 278 to South Main Street	N/A	2006	City of Dallas	N/A
Incorporate LCI Plan into Comprehensive Development Plan	N/A	2007	City of Dallas	General Funds
Negotiate with Paulding County to relocate detention facility and sheriff's office on Government Center Master Plan	N/A	2007	City of Dallas	General Funds
Develop Central Business District Business Recruitment Strategy	N/A	2007	City of Dallas	General Funds
Consider ARC Community Choices workshop to focus on West Memorial Drive residential area	N/A	2007	City of Dallas	ARC Program LCI Supplemental Study
Johnston Road Connector Feasibility Study	N/A	2008	City of Dallas	General Funds
Negotiate with Norfolk Southern Railroad to improve grade crossing at Main Street	N/A	2008	City of Dallas	General Funds
Negotiate with Norfolk Southern Railroad plan future Johnston Street bridge over railroad.	N/A	2008	City of Dallas	General Funds

APPENDIX

Supplemental information including:

1. LCI Goals,
2. Public Participation Summary
3. Detailed Market Analysis



LCI GOALS

LCI GOALS

The following section describes how the Dallas LCI Study addresses each of the 10 study components as required by the Atlanta Regional Commission as part of the Livable Centers Initiative.

1. Efficiency/feasibility of land uses and mix appropriate for future growth including new and/or revised land use regulations needed to complete the development program.

The market analysis included in this document forecasts tremendous growth in the City of Dallas. The Dallas LCI Plan promotes a mix of residential development and redevelopment within the Study Area to promote sustainability and ensure the success of Downtown businesses, while seeking to stabilize and sustain office and retail uses during the transition period that will follow the opening of the Paulding County Government Center and loss of downtown employees. The plan focuses on promoting retail, new residential and office growth in the downtown while retaining existing goods and services. Also included are recommendations to revise downtown zoning categories in order to expand the mix of residential units in and around the downtown area, including revisions to the C-1 and C-2 categories and the development of an R-4 category for TND-style development.

2. Transportation demand reduction numbers.

The plan seeks to develop a clear, direct path from Highway 278 and the Paulding County Government Center to Downtown Dallas. The recommendations also consider the consolidation of parking in the downtown area and expansion of pedestrian improvements to enhance walkability. The development of more and expanded housing types in and around downtown will reduce short-distance automobile trips by allowing Dallas residents to utilize alternative forms of transportation to access local goods and services.

3. Internal mobility requirements- traffic calming, pedestrian circulation,

transit circulation and bicycle circulation including safety and security of pedestrians.

Recent streetscape enhancements serve to slow traffic and create a pedestrian-friendly environment downtown. The plan seeks to reinforce Main Street improvements by utilizing Main Street as a direct, multi-use connection between Downtown and Highway 278/Paulding County Government Center and by creating a long-term automobile route alternative along Johnston Street. Also discussed within the plan is the proposed expansion of pedestrian improvements on Johnston, Griffin, Spring, Cooper, Memorial and Confederate to expand useable public space and pedestrian/bicycle infrastructure and consideration of a new loop road to connect South Main to Memorial Drive.

4. Mixed-income housing, job/housing match and social issues.

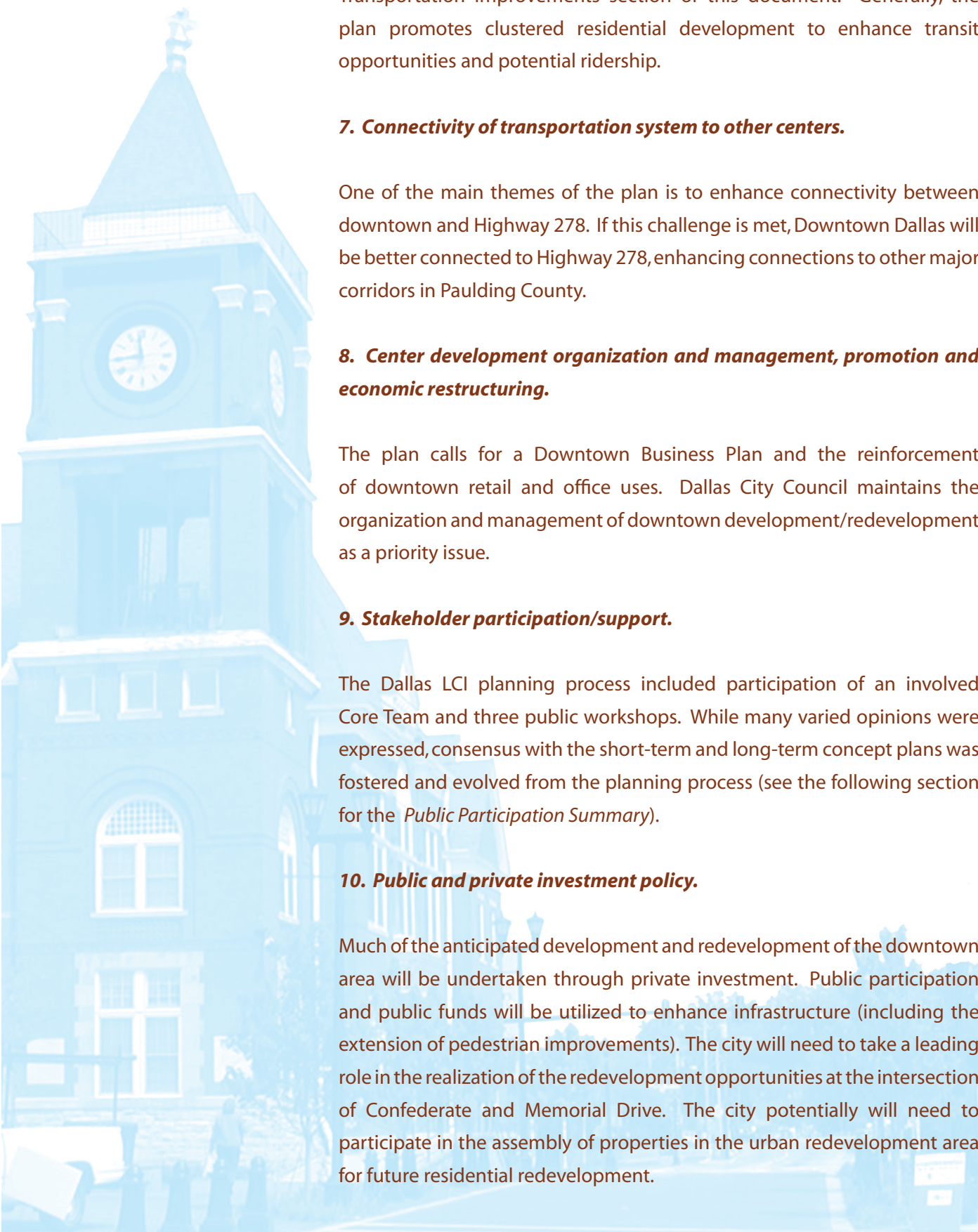
The Urban Redevelopment Area is envisioned as a clustered, mixed-income residential area (see pg. 36). This residential redevelopment is focused in areas where code enforcement issues and public safety concerns are a priority. Overall, the plan promotes development of varied housing types and mixed-income development in and around the downtown area. Combined with the anticipated loss of downtown employees over the next five years, the job/housing match is appropriate in and around the downtown area. As downtown employment opportunities re-emerge, additional downtown residential units will be needed to maintain that balance.

5. Continuity of local streets in study area and development of a network of minor roads.

The plan outlines a recommendation for a Cooper Avenue extension to connect Memorial Drive to South Main Street. The concept plan for the Urban Redevelopment Area also reinforces the downtown grid by extending Griffin, Spring and Cooper further west.

6. Need/identification of future transit circulation system.

Consideration of a Paulding County circulator is discussed in the



Transportation Improvements section of this document. Generally, the plan promotes clustered residential development to enhance transit opportunities and potential ridership.

7. Connectivity of transportation system to other centers.

One of the main themes of the plan is to enhance connectivity between downtown and Highway 278. If this challenge is met, Downtown Dallas will be better connected to Highway 278, enhancing connections to other major corridors in Paulding County.

8. Center development organization and management, promotion and economic restructuring.

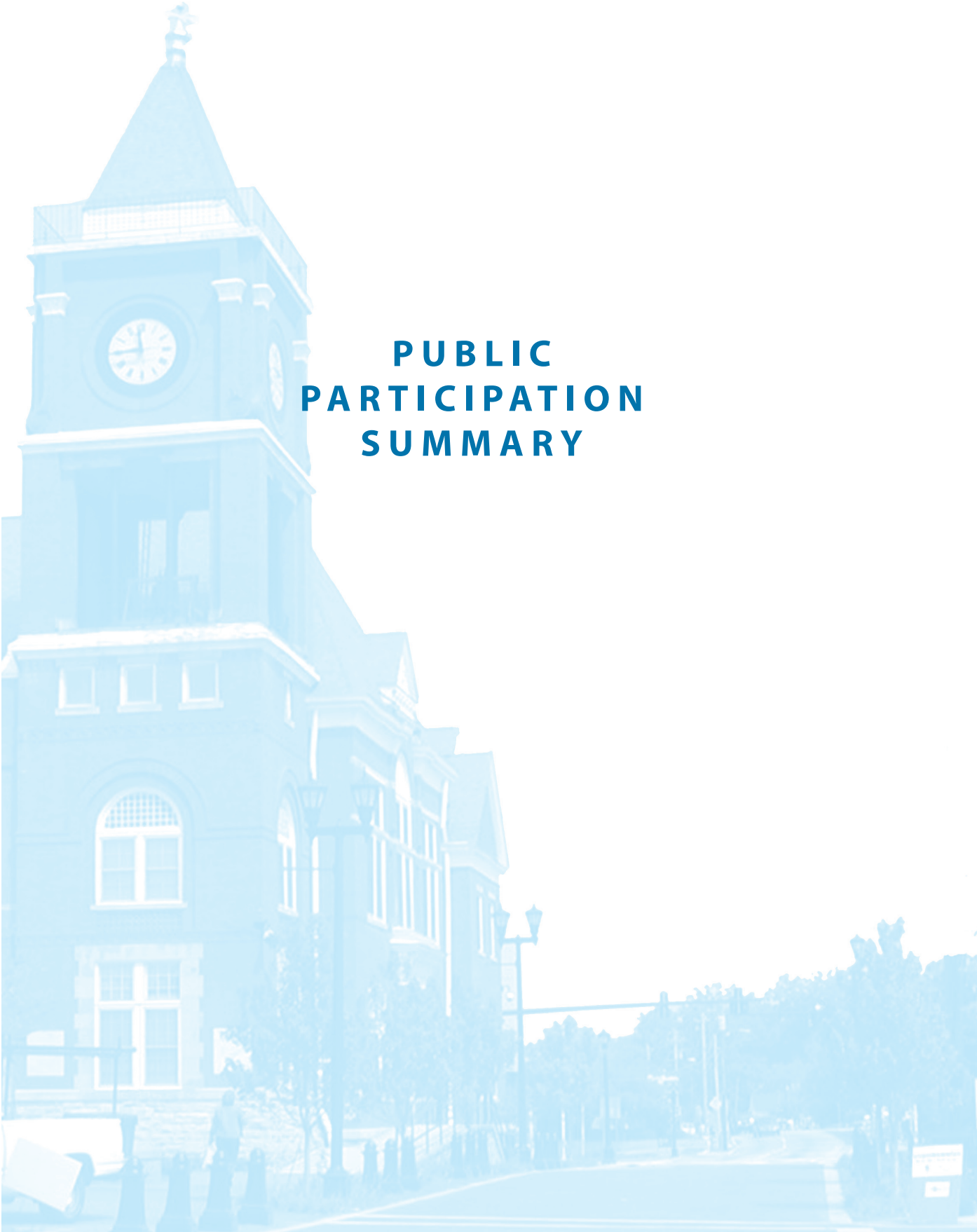
The plan calls for a Downtown Business Plan and the reinforcement of downtown retail and office uses. Dallas City Council maintains the organization and management of downtown development/redevelopment as a priority issue.

9. Stakeholder participation/support.

The Dallas LCI planning process included participation of an involved Core Team and three public workshops. While many varied opinions were expressed, consensus with the short-term and long-term concept plans was fostered and evolved from the planning process (see the following section for the *Public Participation Summary*).

10. Public and private investment policy.

Much of the anticipated development and redevelopment of the downtown area will be undertaken through private investment. Public participation and public funds will be utilized to enhance infrastructure (including the extension of pedestrian improvements). The city will need to take a leading role in the realization of the redevelopment opportunities at the intersection of Confederate and Memorial Drive. The city potentially will need to participate in the assembly of properties in the urban redevelopment area for future residential redevelopment.



**PUBLIC
PARTICIPATION
SUMMARY**

PUBLIC PARTICIPATION

Throughout the Dallas LCI Study process a series of public participation methods were utilized, providing an opportunity for community members to impart meaningful input into the plan’s development. Public participation and input opportunities included:

- One-on-one stakeholder meetings
- Project Management Team meetings
- Core Team meetings
- Public Workshops

In the early stages of the planning process, the stakeholder interviews and meetings with the Project Management Team assisted the Planning Team in assembling an accurate picture of existing conditions and issues and forces affecting Downtown Dallas and the surrounding area. As the plan’s guiding vision and components were developed, Core Team meetings and Public Workshops provided an ongoing mechanism for input and consensus building among Dallas stakeholders.

Meeting Schedule:

06/08/06	Project Management Team Meeting
08/10/06	Project Management Team Meeting
08/31/06	Core Team Meeting
09/07/06	Public Workshop
09/14/06	Project Management Team Meeting
09/28/06	Core Team Meeting
10/03/06	Public Workshop
10/19/06	Core Team & Project Management Team Meetings
10/31/06	Transportation Coordination Meeting
11/05/06	City Council Work Session
11/14/06	Public Workshop
11/21/06	Project Management Team Meeting
12/04/06	City Council Adoption of Plan

Public Workshops

Three open public workshops were held during the Dallas LCI Study process in September, October and November of 2006 (specific dates on previous page). The meetings, which were each attended by area residents, property owners and business owners (see sign-in sheets in Appendix), included presentations of ARC's LCI Program, an overview of the Dallas Study Area and a synopsis and validation of project goals and future concepts and alternatives. They also included brief summaries of overall transportation issues, demographic information and market conditions. The presentations for each of the workshops were tailored to focus on a particular issue or phase of the study process and utilized a series of large and small group exercises to gather community comment and input.

Compass Survey

A Compass survey was facilitated on September 7, 2006 in which images of development types, transportation improvements, public spaces, street types and signage found in other locations were presented to the community and then "rated" for appropriateness in Downtown Dallas. Both the presentation itself and its results are included as part of this Appendix on page 65.



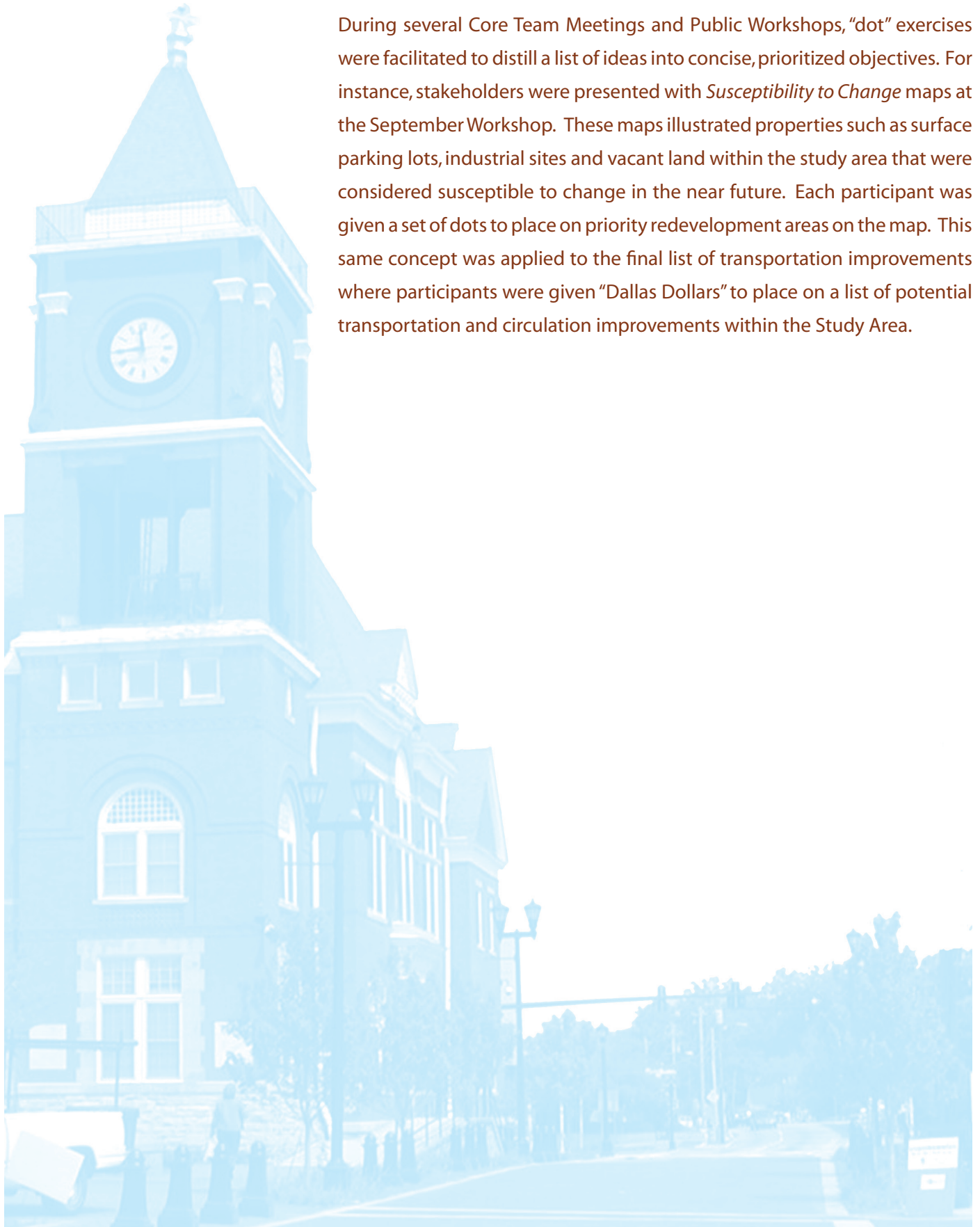
Example of "Block" Exercise of Downtown Dallas at Public Workshop

Table Exercises

As part of the workshop on October 3, 2006, attendees were separated into several table groups, each of which was facilitated by a member of the Planning Team. Through several mapping exercises, each group developed a set of recommendations for the Study Area including future land use designations, new streets and connections, new public space enhancements and priority locations for future development. The groups also engaged in a 3D "block exercise" which focused on new development within a compact area along Main Street in Downtown Dallas.

Prioritization Exercises

During several Core Team Meetings and Public Workshops, “dot” exercises were facilitated to distill a list of ideas into concise, prioritized objectives. For instance, stakeholders were presented with *Susceptibility to Change* maps at the September Workshop. These maps illustrated properties such as surface parking lots, industrial sites and vacant land within the study area that were considered susceptible to change in the near future. Each participant was given a set of dots to place on priority redevelopment areas on the map. This same concept was applied to the final list of transportation improvements where participants were given “Dallas Dollars” to place on a list of potential transportation and circulation improvements within the Study Area.



*Dallas LCI
COMPASS RESULTS*



*Urban Collage, Inc. in association with
Market + Main, jB+a and URS Corporation*

Commercial Buildings



Image 27: Sidewalk Dining

Rating: 4.4



Image 3:
Condos over Retail

Rating: 4.25



Image 7:
Lofts over Retail

Rating: 4.19



Image 16:
2-Story Traditional

Rating: 4.06



Image 19:
1-Story Strip Retail



Rating: 1.88



Image 21:
Warehouse-Style Retail



Rating: 2.06



Image 13:
Strip Commercial

Rating: 2.13



Image 6:
Stand Alone Retail

Rating: 2.25

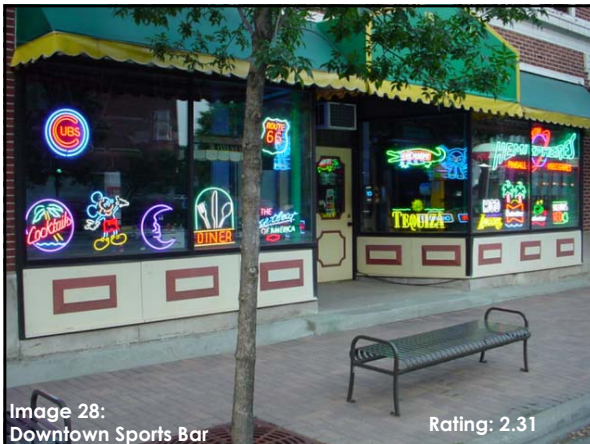


Image 28:
Downtown Sports Bar

Rating: 2.31

Residential Buildings



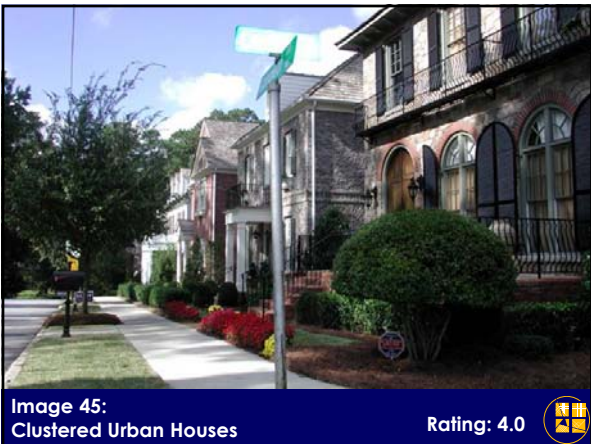




Image 50:
Suburban Apartment Building

Rating: 2.31



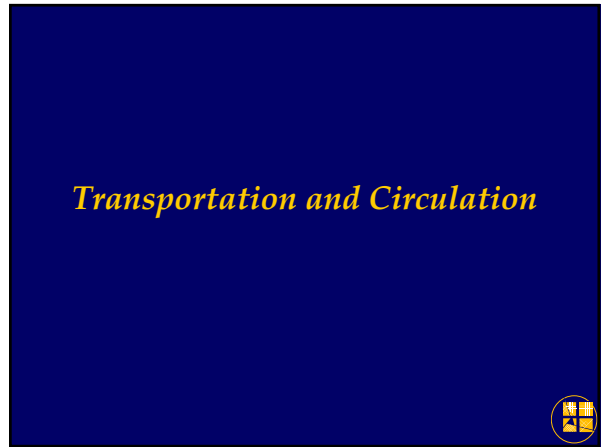
Image 46:
Contemporary
Townhomes

Rating: 2.75



Image 52:
Garden Apartments

Rating: 2.75



Transportation and Circulation



Image 60:
Parking Deck that
looks like a Building

Rating: 4.19



Image 53:
Main Street w/ Carriage

Rating: 3.81



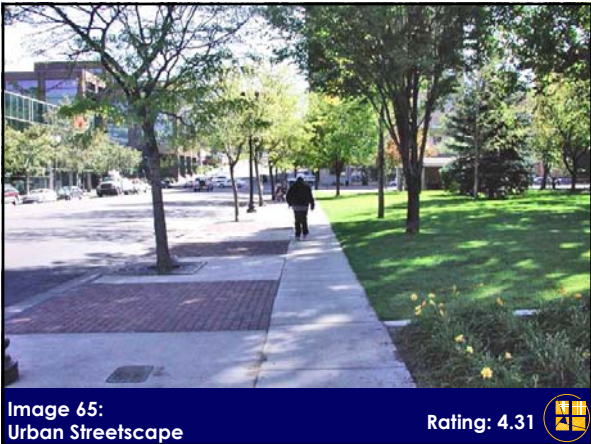
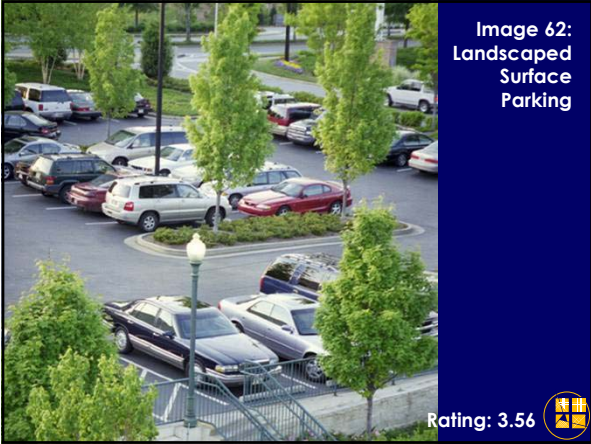


Image 63:
Small Pocket Park



Rating: 4.25



Image 69:
Greenway Trail

Rating: 4.25



Image 73:
Recreation Facilities



Rating: 2.44



Signage



Image 87:
Banners and Flags
on Light Post

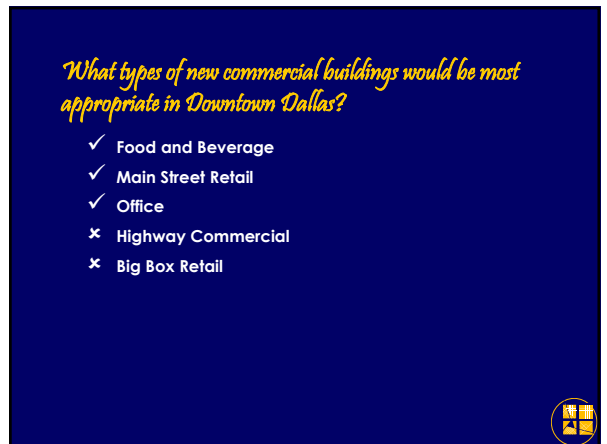
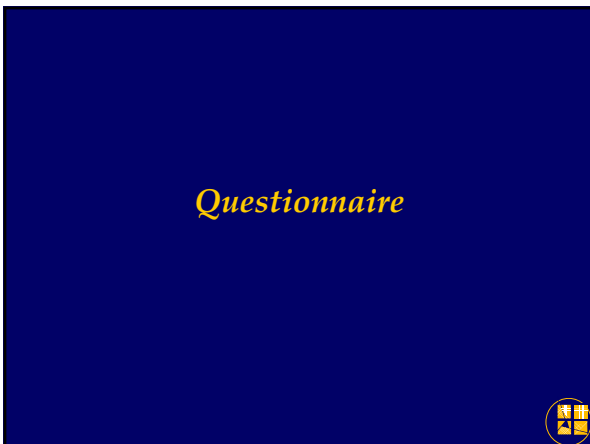
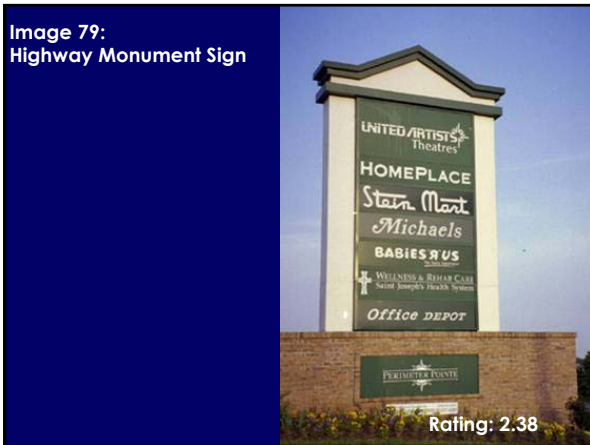
Rating: 4.31



Image 76:
Brick/Masonry Sign

Rating: 3.94





What types of stores are most needed in Dallas?

- ✓ Sit-down Restaurants
- ✓ Pub/Tavern
- ✓ Ice Cream Shop
- ✓ Coffee Shop
- ✓ Deli/Sandwich Shop
- ✓ Clothing, Accessories, Media
- ✗ Auto Supplies



What types of parks most needed in Dallas?

- ✓ Small Park
- ✓ Walking/Biking Trails
- ✗ Recreation Areas
- ✗ Large Park



What are the most important transportation issues?

- ✓ Parking
- ✓ Traffic Congestion
- ✓ Pedestrian Safety



Which items should be the highest priority for improvement?

- ✓ Parking
- ✓ More/Better Housing
- ✓ More/Better Shops
- ✓ Signage
- ✓ Parks and Open Space



Just the facts, . . .

- 88% of respondents work in Dallas
- 44% live in Dallas
- 67% of respondents have lived in Dallas more than 20 years, only 2 less than 5 years



“Blending the old with new and adding some class”



DALLAS COMPASS RESULTS

Short Answer Questions

LAND USE	1	2	3	4	5	Average
1. What types of new commercial buildings would be most appropriate in Downtown Dallas?						
Food and Beverage/Restaurants	0	0	0	4	12	4.8
Main Street Retail	0	0	0	6	10	4.6
Office	0	1	2	6	7	4.2
Mixed-Use Development	1	0	3	7	5	3.9
Drive-Up Commercial	3	4	4	2	2	2.9
Highway Commercial	10	1	3	1	1	1.9
Big Box Retail	10	3	3	0	0	1.6
2. What types of new commercial buildings would be most appropriate along Highway 278?						
Food and Beverage/Restaurants	0	1	3	5	7	4.1
Big Box Retail	0	2	2	6	5	3.9
Drive-Up Commercial	1	0	6	5	4	3.7
Main Street Retail	1	2	3	5	5	3.7
Office	1	0	5	7	3	3.7
Highway Commercial	0	3	3	7	3	3.6
Mixed-Use Development	0	3	4	5	4	3.6
3. What institutions are most needed or need to be more visible in Dallas?						
Performance Center	0	0	3	6	7	4.3
Museum(s)	0	2	2	6	6	4.0
Recreation Center	0	0	6	4	6	4.0
Library	1	1	5	4	5	3.7
Schools	0	3	6	3	4	3.5
Senior Center	0	2	7	4	3	3.5
Post Office	1	0	8	3	3	3.5
Daycare	1	5	8	2	0	2.7
4. What types of stores are most needed in Fountain Inn?						
Sit-down Restaurants	0	0	1	5	9	4.5
Ice Cream Shop	0	1	1	6	7	4.3
Pub/Tavern	1	1	0	4	9	4.3
Coffee Shop	0	0	3	6	6	4.2
Deli/Sandwich Shop	0	0	2	9	4	4.1
Clothing and Accessory	0	0	4	8	3	3.9
Music/Bookstore	1	1	1	7	5	3.9
Professional Office	0	0	7	4	4	3.8
Art Gallery	0	0	5	7	2	3.8
Medical Office	0	2	4	4	4	3.7
Grocery Store	1	0	5	7	2	3.6
Gift Store/Florist	1	2	5	4	3	3.4
Home Furnishings	1	3	5	5	1	3.1
Dry Cleaners/Laundry	2	1	7	4	1	3.1
Bicycle Shop	2	3	5	4	1	2.9
Drug Store/Pharmacy	1	6	5	1	2	2.8
Hobby/Toy	2	3	6	4	0	2.8
Hardware	2	2	8	3	0	2.8
Sporting Goods	1	4	6	3	0	2.8
Lawn/Garden Supplies	1	3	10	1	0	2.7
Fast Food	2	6	5	1	1	2.5
Do-it-Yourself Ceramics Shop	3	5	3	4	0	2.5
Computer/Software	3	2	9	1	0	2.5
Sewing Store	2	5	7	1	0	2.5
TV/Radio/Appliance	2	5	7	1	0	2.5
Auto Supplies	5	3	7	0	0	2.1

5. What types of new housing would be appropriate in and around Downtown Dallas?

Lofts	0	0	2	6	6	4.3
Condominiums	0	3	4	5	3	3.5
Single-Family Homes	1	3	2	7	2	3.4
Townhomes	1	2	6	3	3	3.3
Cluster Homes	3	2	3	5	2	3.1
Apartments	8	5	1	1	0	1.7

6. What types of parks are most needed in Dallas?

Small Park	0	2	4	2	8	4.0
Walking/Biking Trails	2	2	1	4	7	3.8
Children's Playgrounds	1	4	4	5	2	3.2
Paved Plazas	1	3	8	2	2	3.1
Large Park	2	5	4	4	1	2.8
Recreation Areas (fields, playgrounds)	6	3	6	0	1	2.2

7. What are the most important traffic and transportation issues in Dallas?

Parking	0	1	2	4	9	4.3
Streetscapes/Appearance	1	0	2	6	7	4.1
Traffic Congestion	0	3	1	6	6	3.9
Pedestrian Safety	0	2	5	4	5	3.8
Traffic Speeds	0	4	4	6	2	3.4
Street/Road Maintenance	1	3	6	6	0	3.1
Traffic Safety/Crashes	0	4	7	5	0	3.1

8. What is the most congested/unsafe road or intersection in Fountain Inn?

Fill-in

9. What, if anything, is most needed to improve parking in and around Downtown?

More parking lots	0	1	3	7	2	3.8
Parking deck	1	2	2	4	5	3.7
Parking closer to stores and offices	1	2	4	5	2	3.4
On-street parking	4	4	1	4	1	2.6
Parking Meters	6	4	1	1	1	2.0

10. What is most difficult about "getting around" in Dallas?

Fill-in

11. What types of public transportation, if any, might be appropriate for Dallas?

Downtown Dallas/Hwy 278 Shuttle	0	1	2	8	5	4.1
Dallas/Paulding County Shuttle Bus	0	2	4	4	6	3.9
Train/Rail Service to Atlanta	8	1	2	0	5	2.6
Bus Transit to Atlanta	8	3	2	2	1	2.1

12. What do you like most about Dallas

Fill-in

13. What events or tasks bring you downtown?

Fill-in

14. What building or sites in the study area should be preserved or remain unchanged?

Fill-in

15. What activities could be added to make downtown more lively?

More Restaurants	0	0	0	4	12	4.8
Outdoor Gathering Spaces/Parks	0	0	0	8	8	4.5
More Shops	0	1	0	9	6	4.3
Art Galleries/Dealers	0	1	5	8	2	3.7
More Homes	2	2	5	3	3	3.2
More Offices	1	6	5	2	2	2.9

16. What about Dallas needs to change?

Fill-in

17. Based on the list below, which items should be the highest priority for improvement?

Parking	0	0	2	6	6	4.3
More/Better Shops	0	1	0	9	4	4.1
More/Better Housing	0	0	3	6	4	4.1
Signage	0	1	2	6	4	4.0
Parks and Open Space	0	1	3	6	4	3.9
Bicycle Lanes and Paths	1	0	3	8	3	3.8
Improve Downtown's Appearance	1	2	4	2	5	3.6
Road Improvements	1	0	5	6	1	3.5
Trees and Landscaping	0	5	3	2	3	3.2
Sidewalk Improvements	0	5	3	5	1	3.1
Traffic Signals	0	5	5	2	2	3.1

18. What is the biggest obstacle or barrier to implementing improvements in Downtown Dallas?

Fill-in

TELL US ABOUT YOURSELF

19. Check all that apply

I live in Dallas	7	20%
I work in Dallas	14	40%
I shop in Dallas	7	20%
I own property in Dallas	7	20%
	<hr/>	
	35	

20. Number of years you have lived in Dallas

0-2 Years	0	0%
3-5 Years	2	17%
5-10 Years	0	0%
10-20 Years	2	17%
20+ Years	8	67%
	<hr/>	
	12	

21. Age

Under 21	0	0%
21-35	1	6%
36-50	8	50%
51-65	6	38%
Over 65	1	6%
	<hr/>	
	16	

22. How far do you drive to work or school on a regular day?

< 5 miles	8	53%
5-10 miles	5	33%
10-20 miles	2	13%
20-30 miles	0	0%
> 30 miles	0	0%
	<hr/>	
	15	

DALLAS COMPASS RESULTS

Fill-in Questions

8. What is the most congested/unsafe road or intersection in Fountain Inn?

- Johnston and Memorial 2
- Memorial Drive 2
- Buchanan and West Memorial
- Memorial and Merchants
- Memorial and Old Acworth Rd.
- Around the courthouse
- Main Street- need pedestrian crossings and signs
- Near the hospital

10. What is most difficult about "getting around" in Dallas?

- Lack of directional signs 3
- Only 1 north-south route
- Traffic and parking
- Coming in on Memorial Drive
- Parking
- If you move, you loose you're parking space

12. What do you like most about Dallas

- Hometown feel, friendly people 7
- Traditional/Historical look 3
- New streetscape and theatre
- The passion that everyone loves living here
- Homes, offices and businesses close together

13. What events or tasks bring you downtown?

- Work 8
- Government Offices 4
- Shop 3
- Workshop 2
- Dine 2
- Drugstore
- Concerts
- Art/Car shows
- Performing Arts

14. What building or sites in the study area should be preserved or remain unchanged?

- Courthouse 7
- Historic Downtown Buildings 3
- Historic Homes 2
- Theater
- Buildings over 75 years of age
- Confederate Avenue

16. What about Dallas needs to change?

- Need more open space and festivals (July 4th, etc.) 2
- Traffic Congestion
- Higher class of person
- Remove office downtown and replace with retail
- Need better economic opportunities and higher education/wealth levels
- Remove motel/liquor store
- More shops and restaurants
- Appearance and style of buildings
- Need new schools
- Attitude- develop a vibrant expectation, excitement and restaurants
- People need to know where Dallas is and what is has to offer
- Parks
- Clean up the corridors coming into the city

18. What is the biggest obstacle or barrier to implementing improvements in Downtown Dallas?

- Long-time residents now wanting change 2
- Income levels 2
- Old residential areas
- Cooperation from existing businesses and homeowners
- GDOT
- Lack of space
- Most buildings are government owned
- Blending the old with the new and adding some class

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PUBLIC WORKSHOP

October 3, 2006

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DALLAS LCI

PUBLIC WORKSHOP
October 3, 2006

PLEASE SIGN IN

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Transportation
Coordination meeting
10-31-06

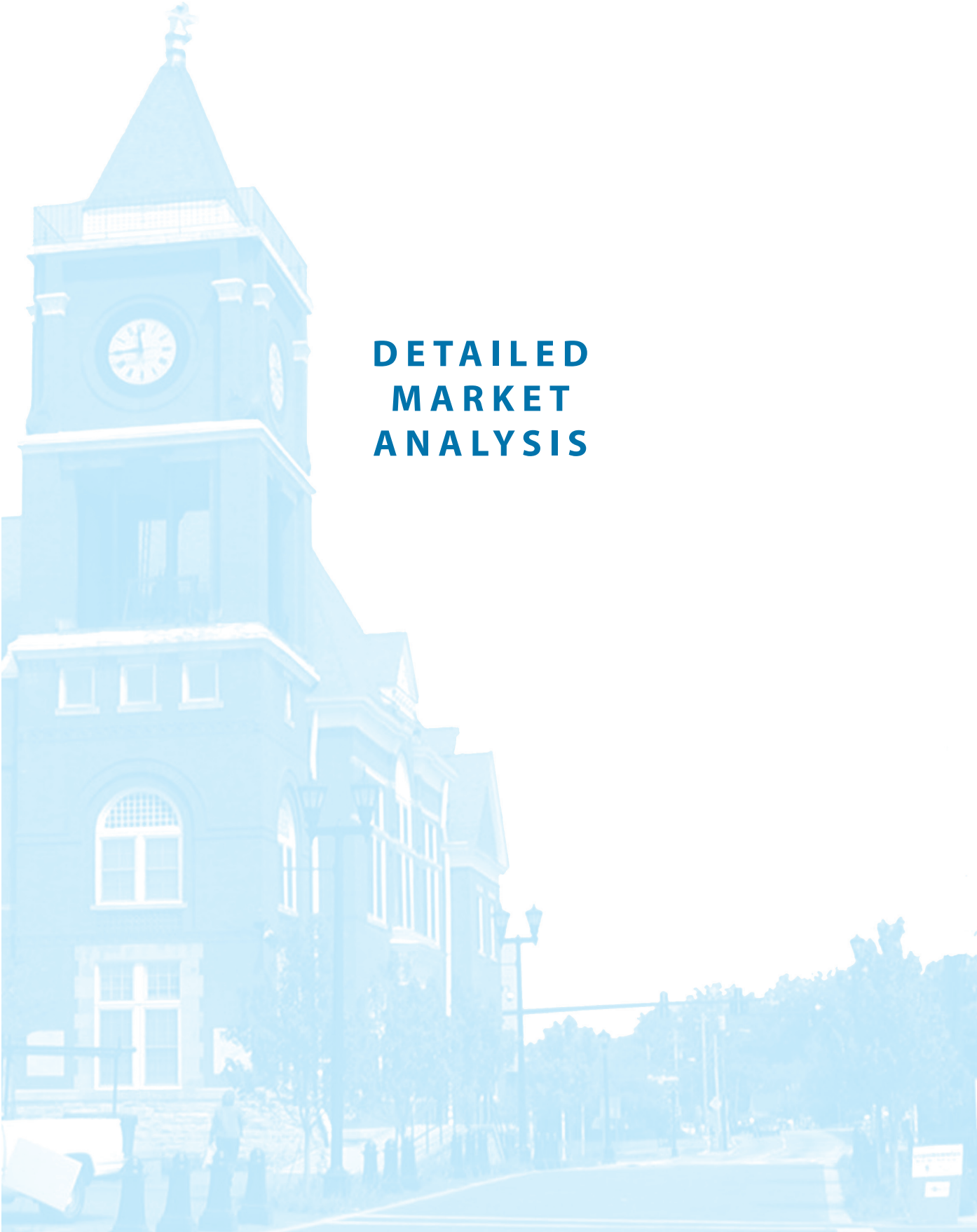
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**DETAILED
MARKET
ANALYSIS**

Market Definition

To determine the potential for new uses or support for existing and expanding uses, it is important to first understand who the market is. Understanding the demographic and economic characteristics of the residents and workers in the area is critical in understanding why the market is where it is, how the market can develop, whether it is under-served or saturated, and what would be supportable. It is also important to review the historic trends that have occurred in the area, as well as considering what is currently being projected to happen in the area in the future. All of these characteristics go into formulating what kind of development can be supported and how much can be supported. While the numbers begin to craft the backdrop for the story of the Study Area, they certainly can not effectively convey the entire story. The final recommendations will be based on a mixture of quantitative and qualitative analyses. Maps of these areas are on following pages.

STUDY AREA

The Study Area is roughly bordered on the north by Memorial Drive. It is bounded by Buchanan Street on the western portion. Highway 278 and West Avenue form the southern border. And Main Street and Park Street shape the eastern boundary. In terms of statistics, the Study Area is comprised of Census Tract 1203 (Block Group 2).

PRIMARY MARKET AREA

The Primary Market Area is defined by a 10-minute drive time from the intersection of Merritt Circle and Bethel Avenue. On average, residents are willing to drive less than ten minutes (usually between two and three miles) for convenience retail, such as groceries, sundry items, dry cleaners, etc. This drive is usually at the maximum of this range for suburban/exurban areas where uses are traditionally more spread out. This area is primarily comprised of residents of the immediate area, or workers from businesses located in the area, in search of convenience-related goods and services. Restaurant customers would most likely be those making spontaneous decisions to eat out or pick something up for dinner that evening.

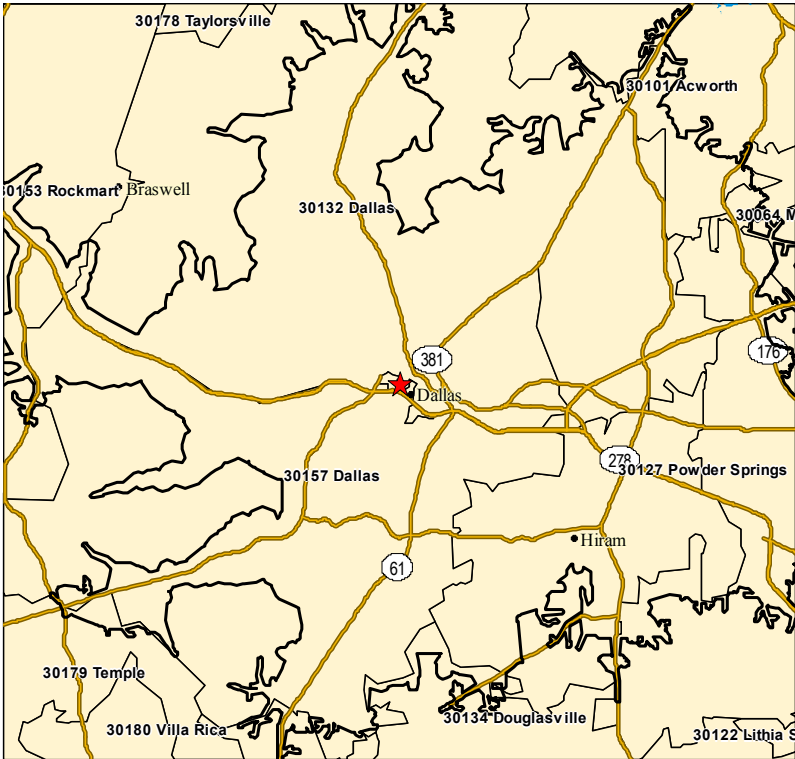
SECONDARY MARKET AREA

The Secondary Market Area is defined by a 20-minute drive time from the intersection of Merritt Circle and Bethel Avenue. This area is where the majority of customers will come from. These consumers will be looking for some convenience retail, but will also be searching for community and even regional retail options; these will be planned or destination-related shopping trips. These customers will be willing to travel further distances for unique goods and services, something they cannot find close to their own homes or businesses. Restaurant customers will be looking for the same elements: unique foods or selections; unusual atmospheres; white-tablecloth restaurants; or popular meeting places.

PRIMARY MARKET AREA MAP



SECONDARY MARKET AREA MAP



Residential Market Analysis

OVERVIEW

Housing sales and values in metro Atlanta remain strong. The Atlanta MSA led the nation again in residential permits in 2005, with 72,861; it is slightly ahead of itself, in terms of pace, compared to this time last year. The median sales price for single-family homes in the Atlanta MSA was at \$173,900 for second quarter 2006, according to the National Association of Realtors. The Atlanta MSA median sales price gained 4.4% since this time last year. On the other hand, condominium sales prices actually reported a decline, with a 5.1% decrease from this time last year. However, the sales activity of condos and townhomes has been picking up slightly. The median sales price in for the Atlanta MSA was at \$146,500 for condos in second quarter 2006, according to the National Association of Realtors.

These statistics demonstrate a continuing increase in sales prices over the last few years, bucking the national trend of a softening in housing prices. The appreciation of home prices, relative to inflation, are the strongest increases on record, and demonstrate the continuing surprise of many in the industry that would have expected the metro area's sales prices to at least have flattened by now. Instead, the metro Atlanta area is still experiencing a strong single-family housing market.

Multi-family housing is making a slow, but steady resurgence. The effects of the recession and job losses are still evident, as people moved or entered roommate situations to alleviate impact. The historically low interest rates that have been seen in the last few years served to make renters into first-time homebuyers. As interest rates continue to increase, and the economy rebounds, more potential renters will emerge, creating a higher demand for rental housing. Some increases in inventory through new construction are already evident in the metro area.

There are some concerns that the pace of building in metro Atlanta is actually slightly outpacing sales; combined with rising interest rates and a slowing in population growth as a result of the recession, this could indicate some slowing in the rate of home value appreciation, as well as overbuilding. While home values seem to be appreciating at a slower rate, it appears to be helping to stabilize the market, and there is not an expectation for a significant crash in the housing market, but perhaps a slight softening. As a housing market softens, it is traditionally in the high-end prices and the rural or farther out markets that experience the slow-down first.

STUDY AREA CHARACTERISTICS

Paulding County has experienced what could be characterized by explosive growth over the last decade. A great proportion of the population growth has been from in-migration, and a significant number of these in-migrants are young families. Continued growth at very high rates is expected in at least the near future, if not longer. The greater Dallas area has experienced considerable residential development in the last several years. It is seen as family-

friendly, with active community organizations. The Study Area includes the historic downtown of Dallas, which is the county seat of Paulding County.

BUILDING PERMITS

Since 2001, residential building permit activity has significantly outpaced commercial building permit activity in the City of Dallas. The biggest increase was between 2001 and 2002, when residential building permits issued grew by over 1,000% in a single year. Going from just under ten permits issued in 2001 to nearly 100 permits issued in 2002. The year 2003 seems to be the high point seen over the last five years, but there has been consistent residential building activity continued. The pace of residential building today is still five and six times what it was in 2000 and 2001.³

When looking a bit more closely at the building permit information, it is also important to consider the value created by the issuance of the permit. While this is an estimation at time of application, it is still interesting to consider any trends obvious in this information. The value of the permits in 2000 and 2001 were higher than the average now; making it likely that there were larger developments permitted in these years. In more recent years, 2004 saw the high in average permit value. The change in permit value speaks to the additions to housing stock in the City of Dallas, and seems to point to low- to mid-scale pricing for single-family homes.

RESIDENTIAL SALES

Paulding County has an average price for single-family homes thus far in 2006 of \$214,497. This is an 11.7% increase from last year. The sales volume activity in the County was also up from 2005, with a 19.8% increase. There were a total of 4,728 sales, for both new and existing homes, last year.⁴

The average sales price (\$225,086) for the 30132 zip code has appreciated since 2003, posting a gain of 21% in overall value. There was a slight dip in price between 2003 and 2004, but steady gains around 20% were reported for both 2005 and year-to-date 2006. Meanwhile, the biggest increase in new homes built was between 2003 and 2004, with a 44% increase in a single year. Now, taking this information with the home sale price dip noted above, this likely means that the sales price decreased slightly to account for the increase in product on the market, and a better understanding of the customer in the area. For year-to-date 2006, the new homes built are on pace with the large number of homes constructed in 2004 and 2005.⁵

Between 2003 and year-to-date 2006, there are 58 single-family home subdivisions accounted for in the 30132 zip code, with an average sales price of \$186,162 over this three-year period. There were 2,121 new homes built in the 30132 zip code between 2003 and year-to-date 2006. Only 15 of these were not single-family homes, in this case 15 townhomes and zero condominiums. The average price of the townhomes was \$92,413.⁶

³ Source: City of Dallas.

⁴ Source: Atlanta Journal-Constitution Home Sales Report, Market Data Center.

⁵ Source: Smart Numbers.

⁶ Source: Smart Numbers.

EXISTING RESIDENTIAL

A surprisingly large proportion of the Study Area includes residential uses. Most of the residential is dispersed, with the only significant concentration in the northeast portion of the Study Area, bordered by West Memorial Drive, South Johnston Street, and the railroad tracks. The vast majority of the housing within the Study Area is very old, run-down, and could be characterized as ill-maintained and low-end. There are five residential areas within Study Area.

Bethel Street & Merritt Circle Area

There is a concentration of residential in the southern portion of the Study Area in the Bethel Street and Merritt Circle area. This residential is predominately very old, low-end single-family housing. There are also some mobile homes present. These homes are very run-down and there is a safety issue in the area; or at least there is the perception of a safety issue in the area.

South Johnston Street & Main Street Area

In the eastern portion of the Study Area, there is a diversity of residential product types. Along South Johnston Street, a handful of single-family homes are all older and pretty run-down. On 1st Avenue, which is just to the east of Main Street, there is a small collection of grand, older, well-maintained homes that are now in commercial use, primarily law offices. On the southern portion of Main Street are both apartments and duplexes; these seem to be relatively well-maintained.

Church Street & Park Street Area

In the eastern portion of the Study Area, there are older, somewhat run-down single-family homes along both Park Street and Church Street. On Park Street is one of the relatively new residential developments in the Study Area. The Hickory Grove Townhomes are the only single-family attached residential product in the Study Area. They appear well-maintained.

Old Acworth Road Area

In the northeastern portion of the Study Area, along Old Acworth Road are more single-family homes. These homes are older and are a mixture of both well-maintained and ill-maintained homes. In this area is a sprinkling of single-family residential along East Memorial Drive, though much of it has been transitioned to commercial use.

South Street/Victory Drive Area

In the area just north of the railroad tracks, south of West Memorial Drive, and east of South Street/Victory Drive, there is a concentration of residential. There is a mixture of small, single-family homes, duplexes, and apartments. This area seems to be ill-maintained, whether it is an ownership or rental housing product. All of the residential product is older, with no new stock added in at least the last few decades, if not longer. There is a significant crime perception in this area. There is additional residential east of South Street/Victory Drive, but much of this is interspersed with commercial uses, some in what were residential buildings. In this area, the properties are also

predominately not well-maintained and again, there is a safety concern or perception in this area.

PLANNED RESIDENTIAL

Directly adjacent to the Study Area are two residential clusters currently under development. Along Watson Drive, just to the northeast of the Study Area, there are a handful of infill homes going in. These are an anomaly in the area to say the least. These are very large homes with the most updated and modern amenities. These are four-bedroom homes that are priced at over \$400,000. There are a small number of these lots, with the homes being built amidst an established older single-family home neighborhood, made up primarily of brick ranches. The homes being built along Watson Drive and Watson Place are a departure from the housing stock found in the immediate area. Further, these infill homes are a departure from the bulk of the new residential stock in the Dallas area, since most are what are considered starter homes.

Just to the northwest of the Study Area, there is a new subdivision going in, along McBee Street. This single-family subdivision is now pre-selling, with prices ranging from the \$150,000s to the \$200,000. There is a range of floor plans and sizes to the homes, but all are ranch style. There are a total of 42 lots within the subdivision. It is located off West Memorial Drive, with a large portion of the subdivision being built directly behind some old, run-down apartments.

DEMAND ANALYSIS

It was determined that using only new household growth produced from the Study Area itself was the best route for the residential market demand forecast because there is such a high level of residential building activity planned and under review in the City of Dallas and Paulding County, as listed above. Thus, there is a very real possibility that these estimates could ultimately underestimate what happens in this market, similar to the residential activity in other rapidly suburbanizing locations within metro Atlanta that have outpaced expectations the last few years. The focus should realistically be on the next five years, and then the marketplace should be re-assessed since there could be opportunity to capture more growth as this area continues to develop and redevelop.

ASSUMPTIONS

In order to determine the level of demand for residential product that the Study Area can support, some assumptions had to be made. The addition of 55 households annually was used, based on the combination of forecasts from the Atlanta Regional Commission and Census-based projections. Using only new household growth as a market determination can produce conservative estimates, as demand also comes from turnover within the market. This means there are residents in the Study Area that might move into another location within the Study Area, thus producing a new customer, but not a new household.

Key assumptions were also made about the tenure characteristics and housing preferences. An effort was made to bring them more inline with the consumer preferences shown in areas that are slightly further along in their redevelopment process. For instance, the national average and the Atlanta MSA have renter occupancy rates between 25% and 30%. The primary market

area reports renter occupancy at about 29%. There will be a natural shift to bring the ratios of owners and renters in closer alignment to greater market area trends as the Study Area redevelops (current renter occupancy rate is 74%).

Moving forward with assumptions on annual household growth; tenure characteristics (owner versus renter), housing preferences, and residential product trends were then reconciled to produce the final residential demand preferences.

	TENURE PROPORTION		ANNUAL DEMAND		FIVE-YEAR DEMAND		TEN-YEAR DEMAND	
	Owner HH	Renter HH	Owner HH	Renter HH	Owner HH	Renter HH	Owner HH	Renter HH
Single-Family Detached	40%	10%	12	2	61	12	122	25
Single-Family Attached	45%	45%	14	11	68	56	136	111
Multi-Family (Condo/Apt)	15%	45%	5	11	22	56	45	111
Total Units			30	25	151	124	303	247
			55		275		550	

These projections are on the conservative side; as new projects start, more interest and momentum is developed, thus, it is highly likely that more demand will also be developed for residential product within the Study Area.

RECOMMENDED DEVELOPMENT

The primary push of residential development in the Study Area should be in single family detached and single family attached product located in the South Street/Victory Drive area. The demand for new households will require infill housing be developed as well, some spread throughout the Study Area and some in clusters. Infill and new residential development tend to reinforce the strength and character of existing neighborhoods. More densification of the residential base in the Study Area will help to attract more amenities and services to the area.

Mixed use developments with commercial uses on the ground floor, and residential above would also fit these forecasts. This type of development would make sense at the northern end of downtown, near the intersection of East/West Memorial Drive and Confederate Avenue/Main Street. Residential development above existing Main Street stores, as well as new development that included both retail and residential components would do well in this area. Further, additional residential product will then help to stabilize and improve market conditions for further potential office development in the Study Area.

Our recommendations revolve around the simple concept of ensuring more choices to appeal to a greater diversity of customers. There is a clear consumer preference shift happening in the greater metro residential market, as more and more people want to buy a lifestyle in a neighborhood, not simply a house in a subdivision.

Retail Market Analysis

OVERVIEW

The metro Atlanta retail market suffered from the recession of the 1990s, as did the rest of the nation. It has been making a slow recovery, due in large part to its sprawling boundaries. Given the nature of retail development across such a sizable metropolis, it is feasible for different submarkets to have completely different and isolated experiences within this recovery period. However, there are certainly many reasons that industry experts are expecting consumer spending and retail leasing activity to slow down, such as increasing gas prices and rising interest rates, among others. However, the economy seems to still be creating jobs at at least a moderate rate and wages are on the rise again after a long delay. Thus, construction of shopping centers is concentrated in fast-growing suburbs, infill sites in mature trade areas, in downtown areas that have had considerable condo construction, and in areas with ethnic concentrations that have growing sales potential. Not surprisingly, upscale and discount retailers are reporting better performance results than middle-market retailers, according to Grubb & Ellis.

During these last few years, retail space in Atlanta has continued to grow. Specialty lifestyle centers are a hot and proven product in Atlanta, with examples like Camp Creek Marketplace and The Forum at Peachtree Parkway. More and more retail space is showing up as components of large mixed use developments, such as Atlantic Station. Not surprisingly, grocery-anchored retail centers and neighborhood centers continue to be solid products in the metro area.

As a whole, the retail market in Atlanta has a total of 5,094 shopping centers, representing approximately 200.6 million square feet, with an 8.3% vacancy rate. The average rent per square foot is \$14.17. The total space can be subdivided into ten categories: Community Center (15.5%); General Retail (19.1%); Lifestyle Center (1.1%); Neighborhood Center (29.9%); Outlet Center (1.1%); Power Center (9.1%); Regional Mall (2.1%); Specialty/Festival/Entertainment Center (1.9%); Strip Center (12.0%); and Super Regional Mall (8.3%).⁷

The Study Area is located within the West Metropolitan retail submarket.

The West Metropolitan retail submarket has a total of 317 shopping centers, reflecting approximately 13.8 million square feet of retail space. The vacancy rate is well above the metro average, at 10.5%. The average rent per square foot is below the metro average, at \$11.54. Approximately 41,400 square feet have been delivered in this submarket this year, with another 314,400 square feet under construction currently, according to CoStar.

⁷ Source: *The Retail Report: Atlanta Retail Market*, CoStar Group, Mid-Year 2006.

STUDY AREA CHARACTERISTICS

The Study Area has a range of retail types and size. Taking Main Street along with the bordering retail uses along the commercial corridors serves only some of the basic resident and employee needs in the Study Area. The large-scale retail uses located in Hiram, a short distance from the Study Area, serve most customers in the greater market areas as well.

There are basically three types of retail functionalities at work in any given market.

1. **Convenience** – grocery and drug store purchases, as well as some apparel and home items. Usually purchased close to home, based on available selection. Can also include restaurants.
2. **Regional/Chain** – more likely to be shoppers goods, such as apparel, home items, hobby-related goods, etc., and restaurants. Consumers travel to specific stores based on the consistency of selection and types of goods. The same consistency and familiarity with product is the driving force behind dining out at chain restaurants as well.
3. **Regional/Unique** – most likely shoppers goods and restaurants. Consumers will drive long distances to go to stores and restaurants that provide goods and services unlike anywhere else. This uniqueness can be specific products, the environment/atmosphere, or the ability to go to a place that clusters similar goods and services in a hard-to-find fashion.

In short, having all three types of retail functions within the Primary Market Area helps to keep more money in the local economy by meeting all residents' and workers' consumer needs within one area.

EXISTING RETAIL

There is no true destination retail located within the Study Area. The large-scale retail concentration in the greater market area is located west of the Study Area in Hiram, along Highway 278. The Study Area is characterized by small-scale retail. Most is dispersed in the northern portion of the Study Area. Within the sub-area roughly north of the railroad tracks, the Study Area has two distinct retail areas.

Main Street

There is a three-block concentration of retail along Main Street. There is a wide variety of types of businesses, ranging from cafés to antiques to trophies to hair care to books to a tattoo parlor. There is only some small-scale office mixed in among the storefronts. While the concentration is small scale, there is a discernable concentration. The inconsistency of tenants and business hours are issues that many downtown shopping districts sometimes face during redevelopment. While Main Street has “good bones,” this area has not achieved destination status. Continued diversification and upgrading of tenants and space is needed.

Memorial Drive

There is a mix of commercial uses in this area, including both retail and office. East Memorial seems to be more office than retail uses, but there are a few service businesses along this road within the Study Area. Along West Memorial there are more retail establishments than offices. There is a mix of stores and restaurants, with the retail concentration becoming heavier the further from the intersection with Main Street/Confederate Avenue. The retail uses along Memorial Drive are secondary and tertiary retail uses; this simply means these are not premier businesses, marquee services, or national tenants. The area is characterized by more free-standing retail establishments than strip centers. The corridor should remain commercial, but the tenant mix needs to be upgraded and diversified.

PLANNED RETAIL

There is no significant retail planned and/or approved for the Study Area currently. The Paulding County Government Center, to be located on Highway 278, will potentially include an ancillary retail component. This is not a definitive plan at this point, and the details are still being determined. If it is included, it will be “Main Street/Village”-like style, and the uses will be convenience for the government employees, such as food service, cleaners, etc. Depending on the final decision about scale of the retail component, there is certainly potential for this retail use to draw customers away from the actual Main Street area of Dallas. The relocation of the government workers themselves, with the upcoming construction of the new Government Center on Highway 278, will have a significant impact on the daytime customer population that current businesses on Main Street count on.

DEMAND ANALYSIS

Demand analysis was conducted in relation to two types of retail development: neighborhood serving and community serving. Neighborhood serving retail usually includes convenience goods and personal services for day-to-day needs of the immediate area. Community serving retail serves a slightly larger area, and provides a wider variety of shops, making merchandise available in a greater array of styles and prices, as well as providing convenience goods and personal services.

ASSUMPTIONS

In order to determine the amount of retail space that the Study Area can support, some assumptions had to be made. Demand analysis used the Study Area for the neighborhood serving retail population base; the Primary Market Area was used for the community serving retail population base, and then the proportion the Study Area could realistically support was determined. The addition of new households computed earlier using the combination of forecasts from the Atlanta Regional Commission and Census-based projections was also utilized here. This growth was then used in calculating supportable retail space by reviewing potential retail sales for the areas and estimating target sales per square feet based on national trends.

A total of approximately 84,200 square feet of retail space is supportable in the Study Area currently. A breakdown of the components of this total is shown in the table below, as well as

projections for five-year demand. Convenience Goods are primarily grocery store and drug store purchases. Shopper Goods are the balance of retail items, such as apparel, home furnishings, hobby-related goods, etc. Food and Beverage is primarily restaurants and liquor stores.

	Convenience Goods	Shoppers Goods	Food & Beverage	<i>Total Retail</i>	
	Existing	Existing	Existing	<i>Existing</i>	<i>Five-Year</i>
Neighborhood Serving	2,300	11,350	4,650	18,300	134,000
Community Serving	10,700	34,350	20,850	65,900	446,000
Totals	13,000	45,700	25,500	84,200	580,000

RECOMMENDED DEVELOPMENT

The Study Area has reasonable access to Convenience Retail and the market areas have a strong level of Regional/Chain retail in reasonable proximity. There is an opportunity for Regional/Unique retail in the downtown Dallas area. This is about creating destination retail that increases the choices that people have both inside the Study Area and outside. The most likely opportunity to expand retail space within the Study Area will be making upgrades and additions to Main Street and the immediately surrounding area.

Main Street needs a significant upgrade in product that will serve to attract new interest and help to recruit new tenants as the space becomes more competitive. As the building stock is upgraded, the opportunity will arise for the diversification of services along Main Street. Restaurants and shops that are open for evening hours are key components to the long-term success and vitality of Main Street as a destination.

Throughout the Study Area, locations in the ground floor of new mixed use developments will also be another key opportunity. A combination of professional services, restaurants, and convenience services would be the best use of this kind of retail space.

As retail space is created and upgraded on Main Street, along with small-scale retail added in new mixed use developments in the Study Area, there should follow a natural shift in upgrading the mix of retail and service businesses along Memorial Drive. Further, in the longer term, as more rooftops are added to the Study Area and Primary Market Area, opportunities for retail expansion will increase as well.

In revitalization efforts, it is imperative to remember the economics of retail redevelopment, particularly when considering the Memorial Drive corridor. Many building owners are able to achieve a positive cash flow on their properties with discount and low-end tenants. Many times the cost of capital improvements or demolition far outweigh the possibility of increased profit margins from higher-end tenants. In order to spur redevelopment, the potential for increased profits must be documented and usually some sort of incentive, such as a tax allocation district or façade improvement grant or landscaping assistance, needs to be offered to help bear the improvement costs.

Office Market Analysis

OVERVIEW

The metro Atlanta office market is undergoing a recovery that is long due. The last two years have brought improvement in terms of net absorption, vacancy and subleases. The first half of 2006 has continued that trend, with occupancy growth continuing, vacancy rates still declining, and sublease space steadily going down. The second quarter of 2006 marks the eighth consecutive quarter of positive growth in the Atlanta office market. While Atlanta seems to be moving into an expansions mode for office, there is still a significant proportion of vacant space on the market, as well as lower than average asking rents.

The market recovery is certainly more gradual than many past cycles. Some question how accurately a comparison can be made with the record low vacancy rates that occurred six years ago in metro Atlanta as a result of the technology boom. There is an expectation that supply will outweigh demand as more new construction gets underway. However, job growth is expected to continue, and as that happens, rents should remain stable as concessions decline. The brokerage community's confidence levels are up and activity is not showing any signs of slowing down, according to Grubb & Ellis.

The Atlanta office market has 7,205 buildings, comprising about 234.3 million square feet. The average rental rate is \$18.95 per square foot, and the vacancy rate is at 14.4%. The total space can be classified into three categories: Class A (42.6%), Class B (43.6%), and Class C (13.8%).⁸

The Study Area is located within the Northwest Atlanta office submarket.

The Northwest Atlanta office submarket has 1,432 buildings, comprising about 38.5 million square feet. The average rental rate is on par with the metro average, at \$18.57 per square foot. The vacancy rate is 15.3%, slightly above the metro average. Approximately 62,500 square feet have been delivered in this submarket this year, with another 359,000 square feet under construction currently, according to CoStar.

STUDY AREA CHARACTERISTICS

The Study Area encompasses the Central Business District of Dallas. As such, there is a notable proportion of small-scale, local-serving office uses. There is only one instance of a multi-tenant, multi-story office building (though the majority of the space is occupied by a single tenant). Much of the office development in the Study Area is housed in free-standing buildings or in former single-family residential buildings. Even when considering the greater market area, there is not what could be characterized as a significant office market. The Study Area also houses the offices of the County government as County seat. There is little office outside of the Study Area, those that are are Class B and Class C at best, or light industrial uses.

⁸ Source: *The Office Report: Atlanta Office Market*, CoStar Group, Mid-Year 2006.

EXISTING OFFICE

The office located in the Study Area is concentrated at the intersection of East/West Memorial Drive and Main Street/Confederate Avenue. This concentration is primarily due to the location of the Paulding County Courthouse and government offices. The bulk of the office located in the Study Area is small-scale. Much of these offices are professional services, much related to the legal industry. The office uses that are located in the Study Area are in two clusters.

Central Business District (CBD)

The heaviest concentration of office uses is on Confederate Avenue, where Paulding County's government offices are clustered in two buildings. In addition, there are some additional office tenants in close proximity to the government offices. Particularly along Johnston Street, with both the offices in the Courthouse Annex and the small Central Park office park. In addition, there are a handful of office uses along Main Street, interspersed between the retail establishments. There are also a few offices housed in former residences south of the First Baptist Church of Dallas. Most of the offices throughout the CBD house professional services.

Memorial Drive

It seems Memorial Drive was originally primarily a residential street. As times changed and lanes widened, the single-family homes transitioned to business uses. Most businesses along Memorial Drive are located in these former homes. A large proportion of the commercial uses along Memorial Drive are retail. The actual office on Memorial Drive house professional services.

PLANNED OFFICE

There is a very significant change planned in the Study Area's office uses. The Paulding County Government Center, to be located on Highway 278, will both remove and add office space and employees in the Study Area. The new complex is being built to be able to handle the growth of Paulding County's administrative staff as it attempts to handle the growth of the County itself. The addition will have a significant impact on this portion of Highway 278, which is still largely undeveloped. The Government Center will likely spur more development nearby.

However, this addition also serves as a subtraction within the Study Area itself. The withdrawal of the County government employees from the downtown core will likely have an adverse effect. The immediate vacancies are an obvious impact, but it will remain to be seen whether other office users, such as attorneys, engineers, and accountants, will move their location as well. Paulding County is still making decisions about how the space being vacated will be used in the future. The Courthouse will stay in County control and will retain some use by the County, including housing some employees. The future of the Courthouse Annex and the Harry A. Wynn Community Development Center are both unclear at this juncture. It is likely that the building that also houses Regions Bank will be put up for sale.

DEMAND ANALYSIS

In order to determine the amount of small-scale, local-serving office uses that the Study Area can support, some assumptions had to be made.

ASSUMPTIONS

Demand analysis was actually conducted on the Primary Market Area and then the capture rate of the Study Area was determined. The addition of new households computed earlier using the combination of forecasts from the Atlanta Regional Commission and Census-based projections was also utilized here, with an assumption that office employment has a ratio of about 0.020 to total population, which is based on national averages. Further, office employment was then translated to square footage based on a ratio of 275 square feet to each employee, again based on national averages. Finally, a capture rate of the Primary Market Area was determined to be 55%.

Existing Demand	Five-Year Demand	Ten-Year Demand
42,500 SF	235,000 SF	305,000 SF

Interestingly, office space is actually one of the most difficult land uses to recruit. There are stringent requirements for access, amenities, location, and agglomeration that are used as guidelines. This basically means that office begets office; office is a use that most often clusters together. As alluded to earlier, the trend sequence is usually that residential helps to lead to retail that in turn helps to beget office.

RECOMMENDED DEVELOPMENT

The actual key to the success of office in the Study Area will be based on keeping professional services offices located here now. With the relocation of the Paulding County government offices to the new Government Center on Highway 278, it will be imperative to incent office to stay in downtown Dallas and not to move to Highway 278. It will be important as part of the overall strategy to not develop new offices space adjacent to the new Government Center, as it will serve to draw tenants away from its current cluster downtown.

Including office as part of new mixed use development at the vacated location of the Paulding County government would be the best strategy, as the location serves to leverage existing office space nearby. Trying to leverage Main Street as an amenity would allow the pursuit of new small-scale, local-serving office uses. It would be best to pursue offices scattered throughout the Central Business District as part of mixed use developments. Targeting professional services that need small spaces, and do not necessarily need storefronts would be a good fit.

Another consideration is the new trend that is being witnessed across the nation and in metro Atlanta of the combination of live and work space. This would be a solid direction for the office space development in the Study Area to pursue, particularly near the intersection of East/West Memorial Drive and Confederate Avenue/Main Street.

As redevelopment happens, there will be a greater level of amenities in the area as well, which certainly can be leveraged as a positive characteristic for continued office development. A

higher level of amenities in the Study Area will also help to promote a diversified tenant base, and help to increase demand for different types and higher classes of office product.

Industrial Market Analysis

OVERVIEW

Much like the office market, the industrial market in metro Atlanta has been making a slow recovery over the last few years, inching towards its peak seen during the 1990s. The second quarter of 2006 marks the ninth consecutive quarter of positive growth in the Atlanta industrial market. Net absorption continues to be positive and rental rates seem to be evening out at a rate slightly higher than recent quarters. However, there was an increase in vacancy rates in the second quarter of 2006, as a significant number of project completions were achieved. Continued significant additions to supply could slow the growth performance that the metro area is currently enjoying.

As is well-known, Atlanta has many characteristics that have made it the southeastern hub for transportation, distribution and logistics, such as interstate highways, rail lines, and the airport. For all these reasons, metro Atlanta is still a strong location choice for industry. The industrial market is expected to continue to experience a strong recovery, but at a more subdued pace as over-supply is a risk as new development is completed. New construction is expected to be focused in outlying distribution corridors throughout the metro area. The trend of industrial firms consolidating into larger and more modern facilities is projected to continue, as companies find it more convenient to put all operations under one roof, according to Grubb & Ellis.

The Atlanta industrial market has 10,125 buildings and about 554.8 million square feet. The average rental rate is \$4.09 per square foot. The vacancy rate averages to 11.6% for the metro market as a whole. The total space can be split into two dominant sub-types: Flex (9.6%) and Warehouse (90.4%).⁹

The Study Area is located within both the I-20 West/Fulton Industrial and Northwest Atlanta industrial submarkets.

The I-20 West/Fulton Industrial submarket has 1,078 buildings, comprising about 82.8 million square feet. The average rental rate is below the metro average, at \$3.05 per square foot. The vacancy rate is 14.1%, which is well above the metro average. Approximately 3.7 million square feet have been delivered in this submarket this year, with another 2.7 million square feet under construction currently, according to CoStar.

The Northwest Atlanta industrial submarket has 1,455 buildings, comprising about 53.6 million square feet. The average rental rate is above the metro average, at \$5.13 per square foot. The vacancy rate is below the metro average, at 10.5%. Approximately 44,400 square feet have been delivered in this submarket this year, with another 38,200 square feet under construction currently, according to CoStar.

⁹ Source: *The Industrial Report: Atlanta Industrial Market*, CoStar Group, Mid-Year 2006.

STUDY AREA CHARACTERISTICS

Because a railroad line bisects the Study Area, it is not surprising to find some industrial uses in the area. Most of the industrial that is in the Study Area has been there several decades. While the industrial that is here has been here a while, there has never been a significant concentration of industrial uses in Paulding County. This is partially based on policy decisions, partially based on its adjacency to Cobb and Douglas counties which have heavy industrial concentrations, and partially due to its locational disadvantages. The industrial that is the greater market area is primarily small-scale and light on the industrial use spectrum.

EXISTING INDUSTRIAL

There are only a handful of truly industrial uses in the Study Area. They are located near the railroad line, which would be expected. The LaFarge Concrete Plant, which is adjacent to the railroad at the end of West Cooper Street, is the only really active heavy industrial use in the Study Area. South Johnston Street, between West Avenue and the railroad, houses some old and abandoned industrial uses mixed among other uses. There is also a vacant warehouse off West Memorial Drive, near the railroad, that has an industrial history. Directly adjacent to, but outside, the Study Area is an “office complex” that is characterized by a mix of light industrial and technical services. The greater market area is home to several small-scale business parks that are predominated by light industrial uses.

PLANNED INDUSTRIAL

There is no planned or approved industrial space within the Study Area currently.

DEMAND ANALYSIS

There does not seem to be discernable demand for additional industrial space within the Study Area in the near-term. It is likely that any demand for light industrial expansion would be more appropriate at nearby business parks and industrial use clusters in the greater market area. The real dictator of long-term industrial space demand will hinge on the intervening redevelopment that takes place in the short-term. If any were to make sense in the Study Area, the potential for office uses related to light industrial could be accommodated in mixed use development close to the new Paulding County Government Center to be constructed on Highway 278.

Catalyst Projects

There are many projects and initiatives that can be undertaken in efforts to improve upon the assets of the Dallas LCI Study Area and continue redevelopment efforts in their infancy. But, it is important to strategically use public resources to leverage private investments. There are some projects that, when begun, can send the message to private developers, future residents, brokers and realtors, future businesses and existing Dallas residents and workers that something is *really happening* in the Study Area. The problem continually cited with developing plans and studies is that they sit on the shelf.

With that said, the projects suggested below should be viewed as the key projects that need to be priorities for the City of Dallas in relation to the Study Area. These projects have the ability to set the Study Area apart, define its character, help it to become a destination and continue positive economic trends. Some are new developments that will be long-term efforts and some are leveraging existing assets to their fullest potential. Regardless of the horizon or development timeline, action must be taken today to get these projects underway. Again, there are a multitude of projects and programs that can help to move the Study Area forward, the projects below were selected based on market conditions, stakeholder interviews, potential to spur continued development, and leveraging strategic public investments.

REDEVELOP BLIGHTED DOWNTOWN NEIGHBORHOOD

As noted in an earlier section, there is a concentration of residential in the area just north of the railroad tracks, south of West Memorial Drive, and east of South Street/Victory Drive. There is a mixture of small, single-family homes, duplexes, and apartments. This area is older, ill-maintained, and in various states of disrepair. There is a significant crime perception in this area. For successful downtown redevelopment, this blighted residential neighborhood has to be redeveloped. The “downtown” area should be a place that attracts both young professionals and aging baby boomers, based on lifestyle preferences. Currently, this is essentially a pocket of poverty that is a barrier and detractor from any development efforts in the area. It is of such a scale, that what an individual private owner does on a single parcel would not impact the area as a whole. It is imperative that the City step in to take a leadership role in redeveloping this area.

The first step would be to undertake strong enforcement of zoning conditions and codes already on the books. The next step would be to aggressively collect any past due taxes on property in the area, for both local and absentee landlords. As these steps are taken, clear changes would be visible in this area. It is crucial that the public sector take this first step to help “ripen” this currently blighted area for redevelopment. As people can see changes in the area, the private sector will take more interest and begin to reinvest in the neighborhood with new product. What this area needs most is action – it is clear from community input that this area has been in a state of blight for some time and people question whether it could ever change. Taking visible action in the area will help to get people excited and engaged, including private sector developers and investors, about what could happen in the area. There is the possibility that the City might have to take the additional step of buying some of the properties

to get property assembled to further incent private development. Without question, this will activate the private sector to appropriately leverage a greater impact from the public sector's actions and investments.

This area should be redeveloped as residential. It is recommended that this area include a diversity of housing product; simply meaning allowing mixed products and a variety of price points. This diversity is what can make an area thrive. Single-family homes, townhomes, condos, and apartments should all be allowed to develop here. They should be co-located, and not separated into clusters. This will enable life cycle housing, meaning allowing recent college grads with their first job to couples starting families to retirees to live in the same community, and in close proximity to each other. Another important component of housing product diversification in this area would include capitalizing on the trend towards active adult communities. This is ideal for baby boomers that are aging that might desire to be near their children and grandchildren, and still be part of their greater community.

MIXED USE DEVELOPMENT AS NEW NORTHERN ANCHOR

One of the key intersections in the Study Area is Confederate Avenue and Memorial Drive; it is basically the northern anchor of downtown Dallas. Currently on the northern side of this intersection, there are buildings that house the administrative offices of Paulding County government. This space will become vacant once the new Government Center is constructed along Highway 278. It is absolutely imperative that this key node in the Study Area remains a strong anchor for the downtown area.

Ideally, these sites will form a new anchor to downtown via mixed use development. Infill mixed use development with retail space, housing, and open space would be a substantial catalyst to re-ignite the Central Business District. A true economic destination is still lacking for downtown and this type of development could aid in downtown redevelopment efforts. A sizable catalyst will be needed for downtown upon the departure of the Paulding County government offices. The mixed use development should provide residential integrated with both retail and office uses. It would be best for the residential over retail at the two corners, with residential and office further back on the site, closer to North Johnston Street and Watson Drive.

Additionally, a configuration that allows live/work in a portion of the development would be ideal. Townhomes are also an accepted and known product that can help bridge the gap between single-family and commercial. They are a variable product type because they will provide a comparable scale that can help to transition to the surrounding single-family residential nearby.

Developing infill mixed use projects in this area would serve to meet pent-up demand for diversified services in the Study Area, allow people to experience "downtown" living in Dallas, replace the existing office space that will be lost, as well as help to anchor the CBD retail mix and bolster its visibility and choice as a destination location.

INFILL DEVELOPMENT BETWEEN NEW GOVERNMENT CENTER & RAILROAD TRACKS

The key to the success of any infill development located between the new Paulding County Government Center and the railroad tracks will be the final decision made about which buildings house which uses within the County complex. The location of the Justice Center is the primary source of concern. Despite the plans and intentions for this facility to probably be the safest place to be in Paulding County, the perception will always remain that a facility with a jail is unsafe. The initial plan to put the Justice Center towards the back of the site that fronts Highway 278 places it adjacent to the now undeveloped land that then borders the railroad tracks. Putting the Justice Center here all but kills the potential for quality infill development. It would be a hard sell from a marketing perspective to promote being a neighbor to a jail. Our recommendation is for the Justice Center to move to another off-site location. If that is not feasible, at a minimum locating it towards the eastern portion of the site would be the next best solution. It is key that the jail not be the “back” of the County complex that is immediately adjacent to prime undeveloped land. Additionally, the jail would not apply any redevelopment pressure for the Merritt Circle and Bethel Street area either.

Ideally, with the Justice Center moved, there would be predominately residential infill on the currently undeveloped land. Including greenspace will add an amenity element to the residential, and could also serve as a buffer between the new development and both the Government Center and railroad tracks. As previously mentioned, the need for a diversity of housing product type should be recognized and addressed with this new infill development.

If the Justice Center is not relocated, it is likely that the currently undeveloped land would not achieve its highest and best use in the greater context of downtown Dallas. There is potential that there could be interest in some light industrial space adjacent to the Justice Center, but this location has several disadvantages for this type of development. If it is done, it will most likely not be higher-end facilities and jobs. Perhaps most important, what should not be built in this location is office uses. The concern about this kind of use in this location is that this market can only support a small proportion of office. If office is constructed here, it would be a direct competitor to office space in downtown, both existing and potential new space to be included in recommended mixed use development. Locating office here would further incent vacancies in the downtown core, which could hamper further redevelopment of any sort in the Central Business District.

DEVELOP & IMPLEMENT CBD BUSINESS RECRUITMENT STRATEGY

There has not been a clear framework for business development in the Central Business District (CBD). The City of Dallas has not been funding any type of revitalization programming in the area in recent years. This has left the overall vision and direction of the CBD business mix to happenstance. The quality of the anchor commercial tenants that have been in the CBD core for a notable length of time is good. The tenants that are already here should be worked with to stay – particularly during the wake and transition of the relocation of the Paulding County government offices.

In order for a small downtown retail district to thrive and expand, there has to be a plan. A plan should include: the kind of businesses desired; specific tenants that would meet those parameters; quality marketing materials oriented towards attracting new businesses; a recruitment team that deals with inquiries as well as pursuing targets; and benchmarks to guide the process. Further, there also has to be a system in place to serve existing businesses and ensure they are successful, that their needs are being met, and that as the diversification of tenant mix happens, all businesses are able to achieve a fair market share and friendly competition can be handled within the marketplace.

The key to sustainable development is a diversity of goods and services to appeal to the widest customer base feasible. It is critically important to expand the types and sizes of businesses in the Study Area in an effort to achieve long-term sustainability. Additionally, keeping retail centralized in a district helps to bring more customers as it becomes a destination unto itself. The localized competition begins to help all stores, even those that might be carrying similar products, as customers spend more time, and thus more money, in the immediate area.

RAISE AWARENESS

The real key to the Study Area's future sustainability is to successfully leverage the customers in the greater market areas. The need for destination uses within the Study Area is high. Giving people more than one reason to visit an area helps to expand the number of visits, the time of visits, and the number of people involved. In addition to the diversification of businesses in the area, restaurants, theatres and programmed gathering spaces are all uses that can be destinations unto themselves. They bring people to an area that once there might expose them to other activities, goods, or services that they might want to engage in or remember for a future visit or purchase.

The Paulding Community Theatre already located downtown is certainly a draw. The plans for the Civic Center space that will enhance the theatre, as well as provide other reasons to be downtown for a variety of people, will be a great addition. Another key opportunity to get people downtown will be the re-use of the Paulding County Courthouse Annex. Paulding County plans to continue to use the historic Courthouse, for both Commission meetings and some office space. However, they are considering re-use of the Courthouse Annex. This could be a prime opportunity to bring a new destination use to downtown. Over the course of this process, we heard interest from Chattahoochee Technical College in locating some space downtown, and public support for this idea. An idea worth exploring further is to use the Courthouse Annex as an educational facility that houses more than one higher educational opportunity. Exploring opportunities for full-credit offerings for both university and technical college classes, as well as extension, continuing education, and lifelong learning classes and opportunities.

Additionally, heavier and more consistent programming in the "downtown" area is needed. Trying for at least an event a month is a good guideline for downtown programming. Again, the more often people visit an area, the more likely they are to return. Of course, part of the challenge in the Study Area today is that people do not have a lot of options of other things to

do or a wide variety of shops to visit, which is why diversification and expansion is needed as well.

The bottom line in raising awareness is trying to reach more audiences. Increasing the choices -- whether housing, shopping, eating, or recreating -- increases the number of people that would be interested. That is why increasing multi-modal access to the area would also be an asset; leveraging the nearby Silver Comet Trail is an untapped asset at this point. Providing as many options, in as wide a variety as feasible, is the foundation to raising awareness in the greater market areas, which will increase the customer base for the long-term economic vitality of the Study Area.

Appendix

Below are definitions/references that are used throughout this document and in the subsequent detailed tables and charts found in this section.

Study Area – The Study Area is roughly bordered on the north by Memorial Drive. It is bounded by Buchanan Street on the western portion. Highway 278 and West Avenue form the southern border. And Main Street and Park Street shape the eastern boundary. In terms of statistics, the Study Area is comprised of Census Tract 1203 (Block Group 2).

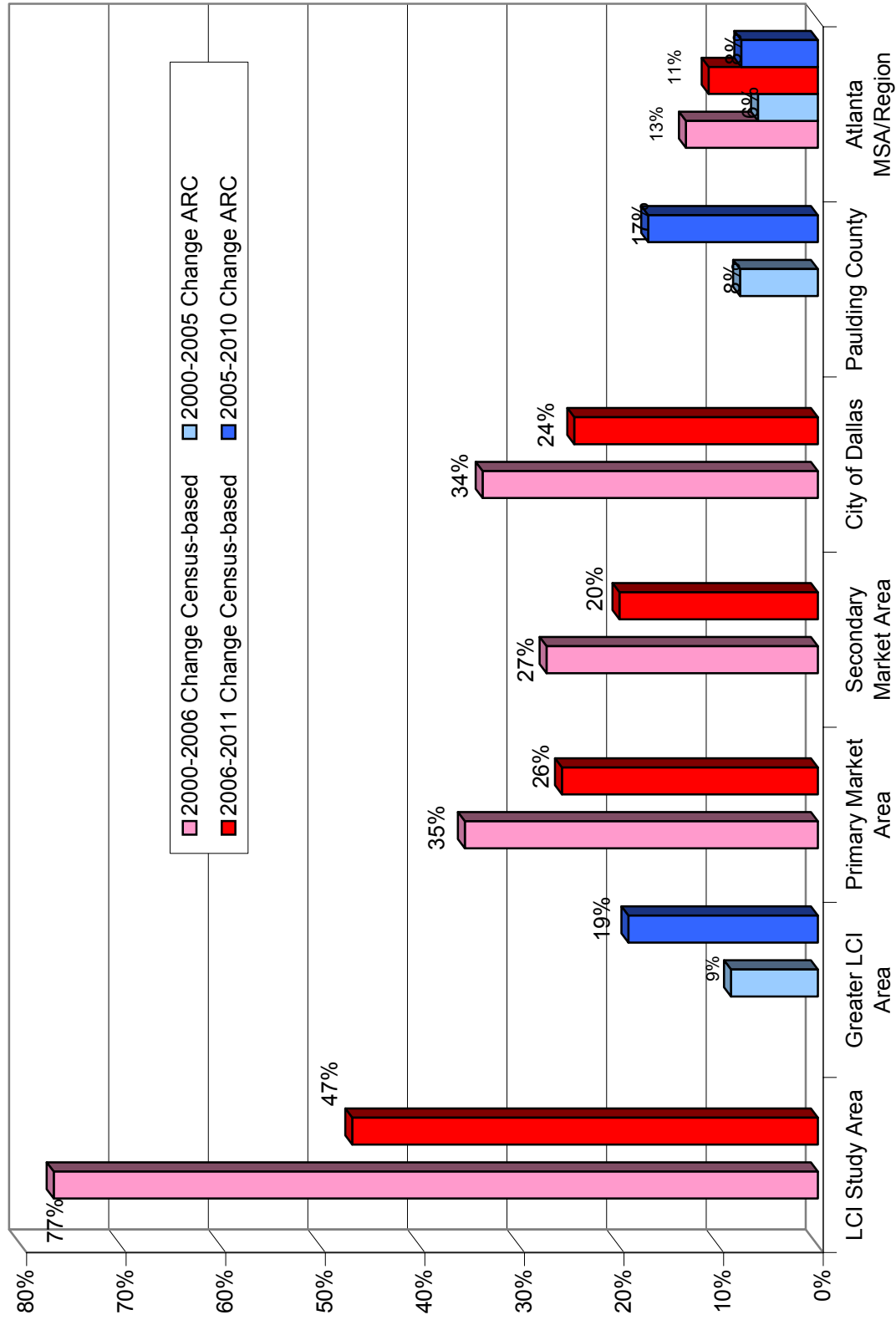
Primary Market Area – defined by a 10-minute drive time from the intersection of Merritt Circle and Bethel Avenue.

Secondary Market Area – defined by a 20-minute drive time from the intersection of Merritt Circle and Bethel Avenue.

Atlanta Region – Atlanta Regional Commission’s 13-county jurisdiction, made up of Cherokee, Clayton, Cobb, Coweta, DeKalb, Douglas, Fayette, Forsyth, Fulton, Gwinnett, Henry, Paulding, and Rockdale counties.

Atlanta MSA – 20-county metropolitan statistical area, made up of Barrow, Bartow, Carroll, Cherokee, Clayton, Cobb, Coweta, DeKalb, Douglas, Fayette, Forsyth, Fulton, Gwinnett, Henry, Newton, Paulding, Pickens, Rockdale, Spalding, and Walton counties.

Population Change, 1990-2011 Comparison of Census-Based and Atlanta Regional Commission Forecasts



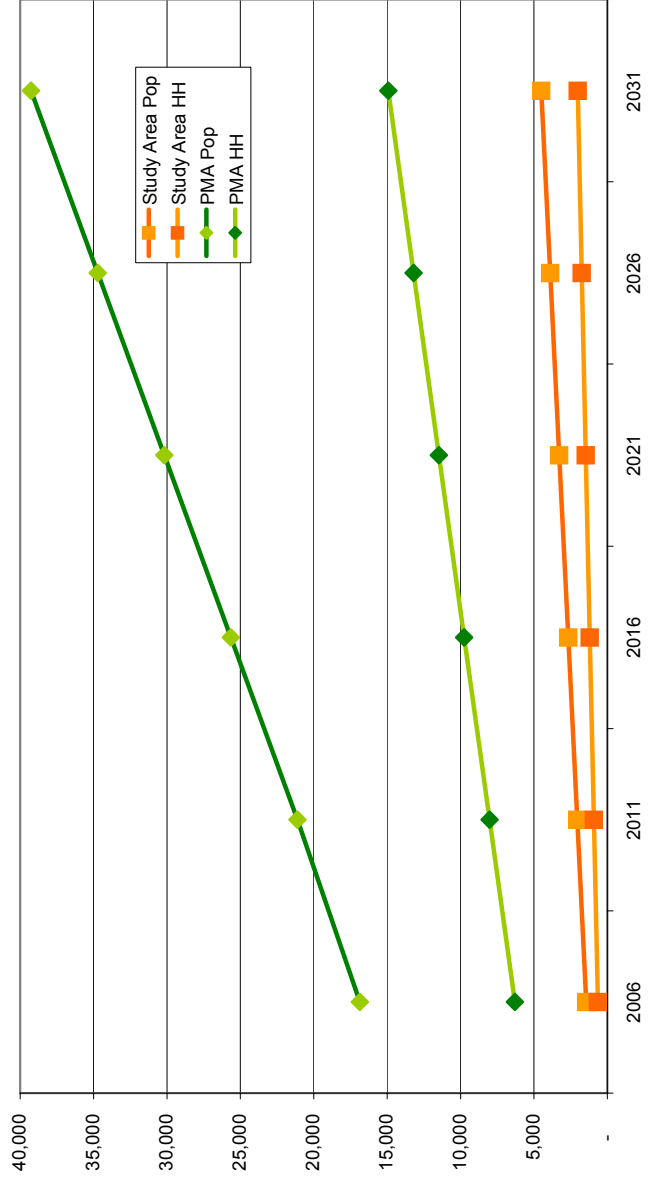
Source: US Census Bureau, DemographicsNow, Atlanta Regional Commission

Population and Household Change Forecasts, Study Area and Primary Market Area, 2006-2031

	Total Change					Average Annual Percent Change				
	2006	2011	2016	2021	2026	2031	2006-2011	2011-2016	2016-2021	2021-2026

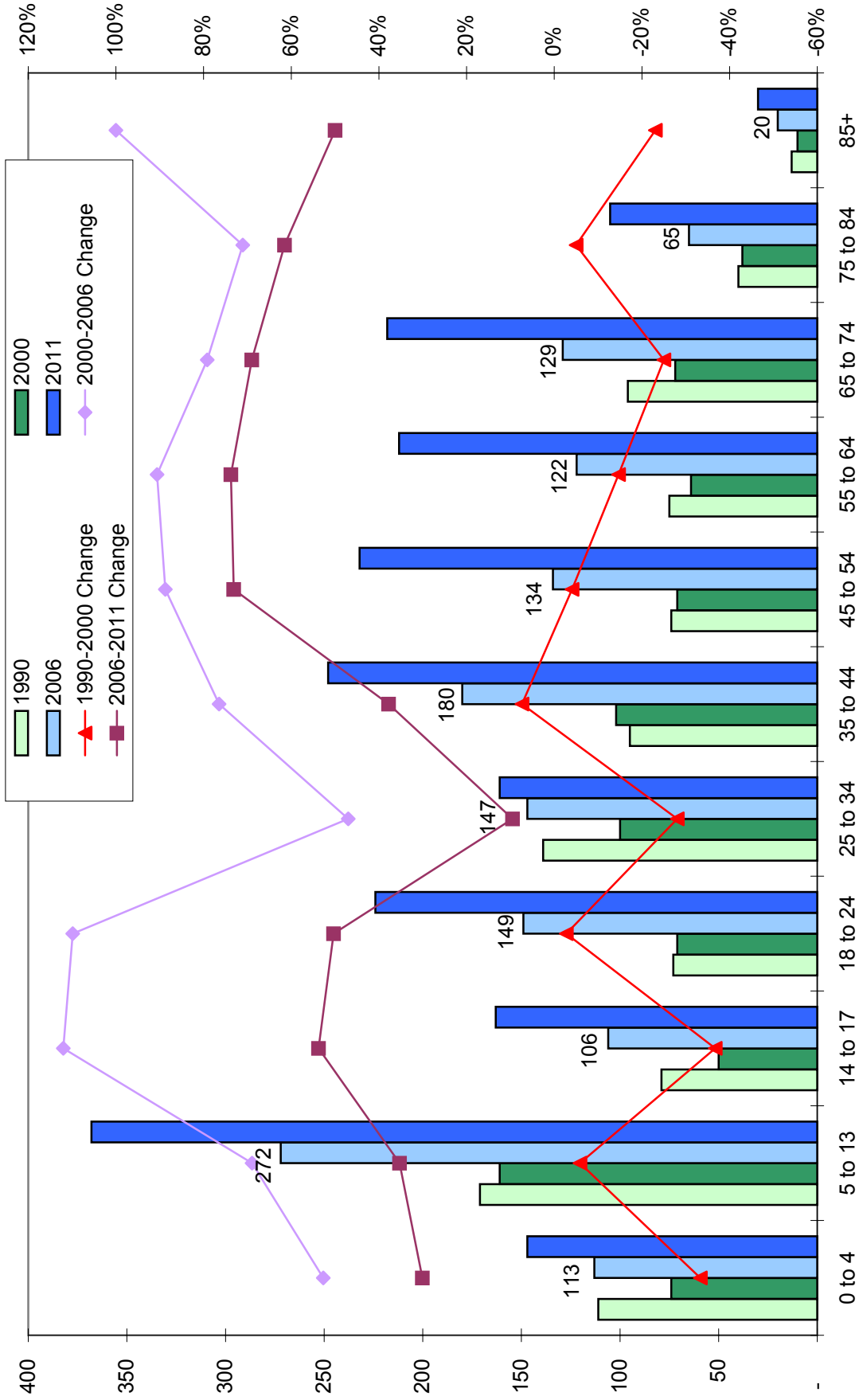
LCI Study Area												
Population	1,437	2,052	2,665	3,278	3,891	4,505		8.6%	6.0%	4.6%	3.7%	3.2%
Households	645	920	1,195	1,470	1,745	2,020						
Primary Market Area												
Population	16,862	21,108	25,645	30,182	34,719	39,255		5.0%	4.3%	3.5%	3.0%	2.6%
Households	6,301	8,026	9,751	11,476	13,201	14,926						

Population and Household Growth Projections, 2006-2031



Source: US Census Bureau, DemographicsNow, Market + Main, Inc.

Age Distribution and Change Trends, Study Area, 1990-2011



Source: US Census Bureau, Demographics Now, Market + Main, Inc.

Occupations and Sector Employment, 30132 Zip Code and Atlanta MSA, 2006

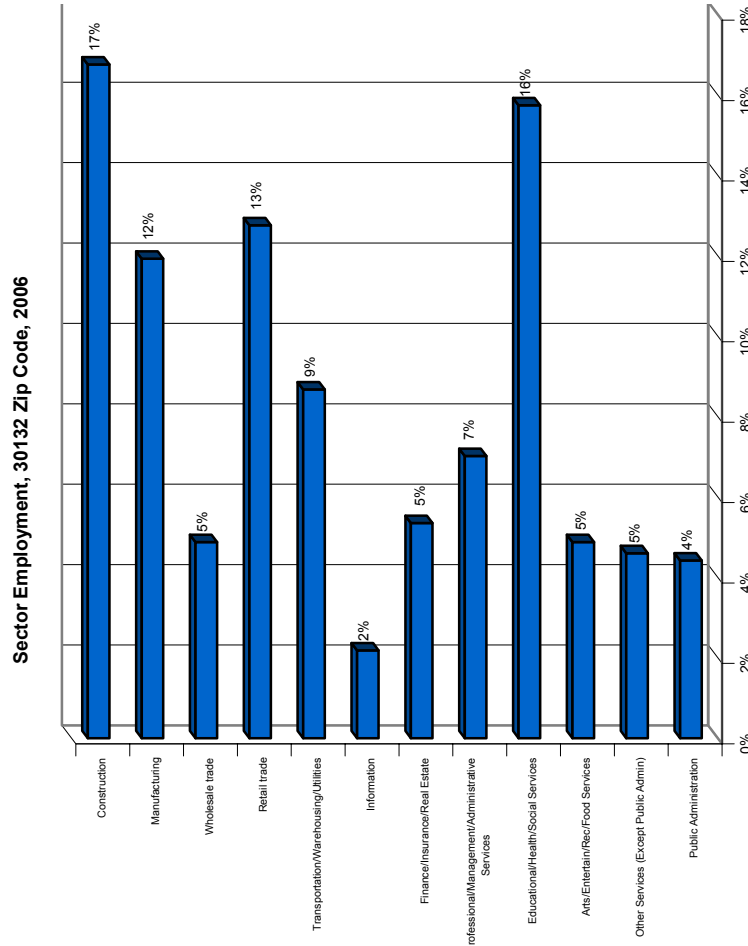
	30132	Atlanta MSA
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OCCUPATION

Management, professional, and related occupations	24.8%	37.5%
Service occupations	12.2%	12.1%
Sales and office occupations	27.8%	28.7%
Farming, fishing, and forestry occupations	0.3%	0.2%
Construction, extraction, and maintenance occupations	19.6%	10.0%
Production, transportation, and material moving occupations	15.3%	11.6%

INDUSTRY SECTOR

Construction	16.8%	8.0%
Manufacturing	11.9%	11.1%
Wholesale trade	4.9%	4.5%
Retail trade	12.8%	11.9%
Transportation and warehousing, and utilities	8.7%	6.9%
Information	2.2%	5.0%
Finance, insurance, real estate	5.4%	8.0%
Professional, scientific, mgmt, admin services	7.0%	12.6%
Educational, health and social services	15.7%	15.6%
Arts, entertainment, recreation services	4.9%	7.2%
Other services (except public administration)	4.6%	4.7%
Public administration	4.4%	4.2%

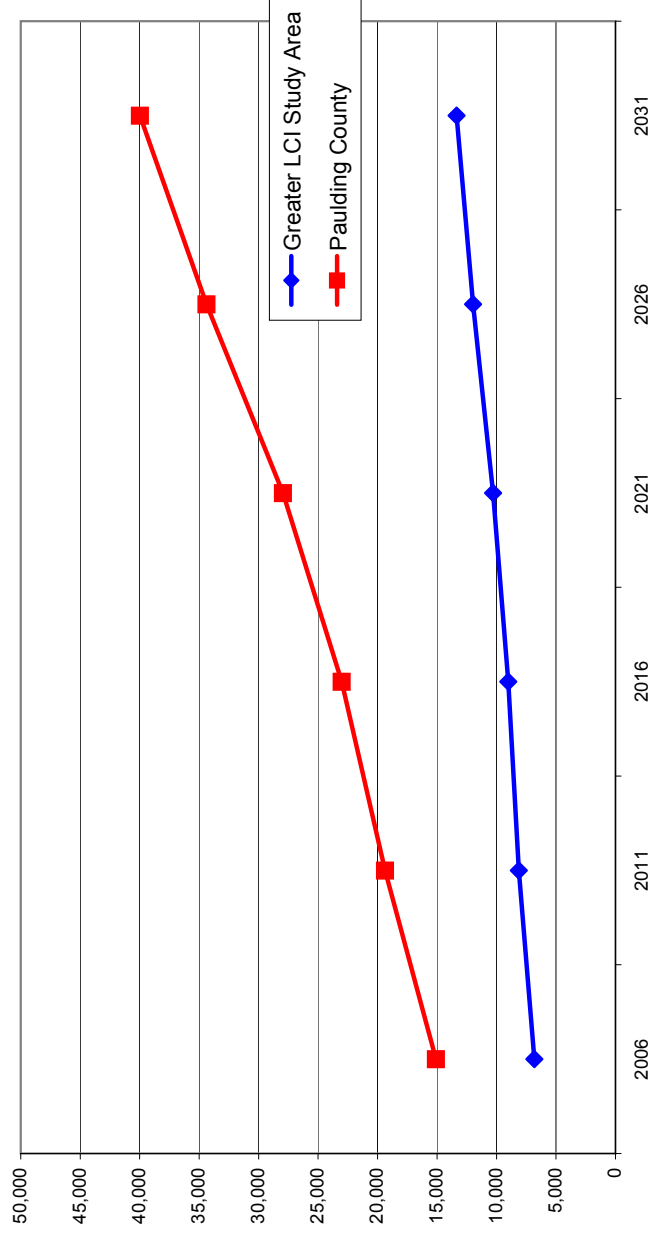


Source: US Bureau of Economic Analysis

Employment Change Forecasts, Study Area, Paulding County and Atlanta Region, 2006-2031

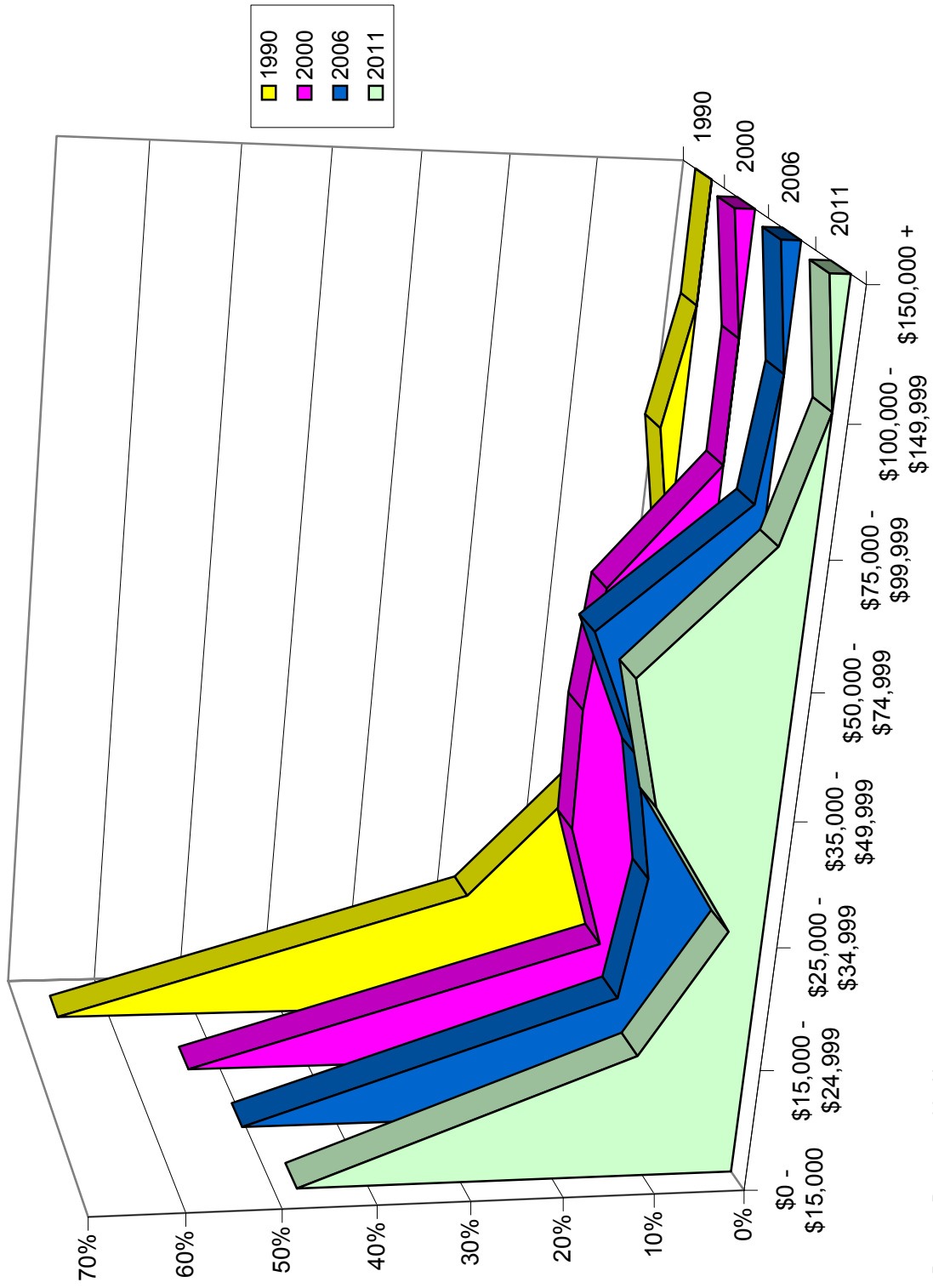
	Total Change					Average Annual Percent Change					
	2006	2011	2016	2021	2026	2031	2006-2011	2011-2016	2016-2021	2021-2026	2026-2031
Greater LCI Study Area	6,826	8,126	9,017	10,294	11,967	13,355	3.8%	2.2%	2.8%	3.3%	2.3%
Paulding County	15,099	19,364	23,018	27,951	34,380	39,982	5.6%	3.8%	4.3%	4.6%	3.3%
Atlanta Region	2,197,012	2,385,619	2,599,161	2,845,466	3,104,205	3,310,004	1.7%	1.8%	1.9%	1.8%	1.3%

Employment Growth Projections, 2006-2031



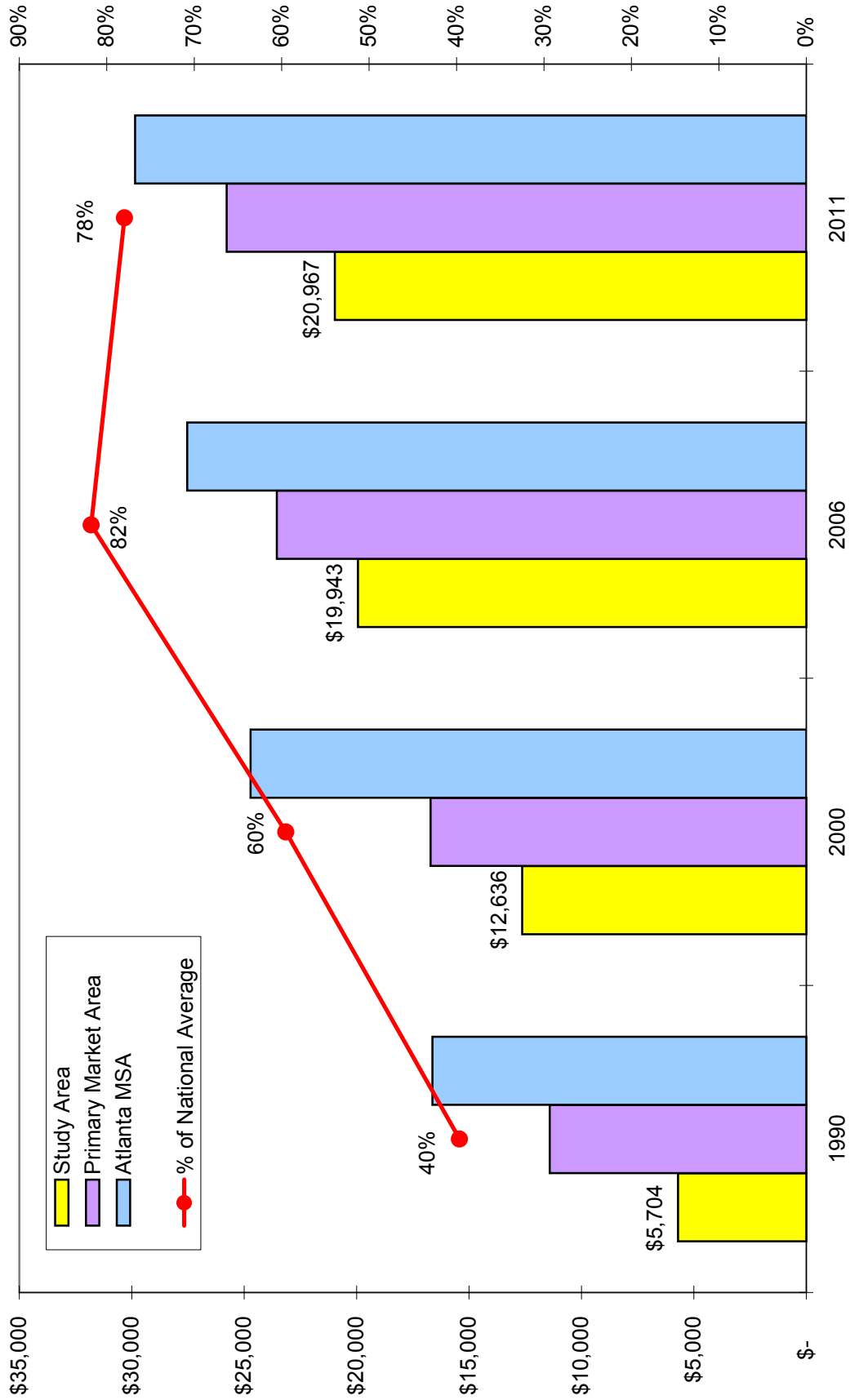
Source: DemographicsNow, Atlanta Regional Commission, Market + Main, Inc.

Household Income Trends, Study Area, 1990-2011



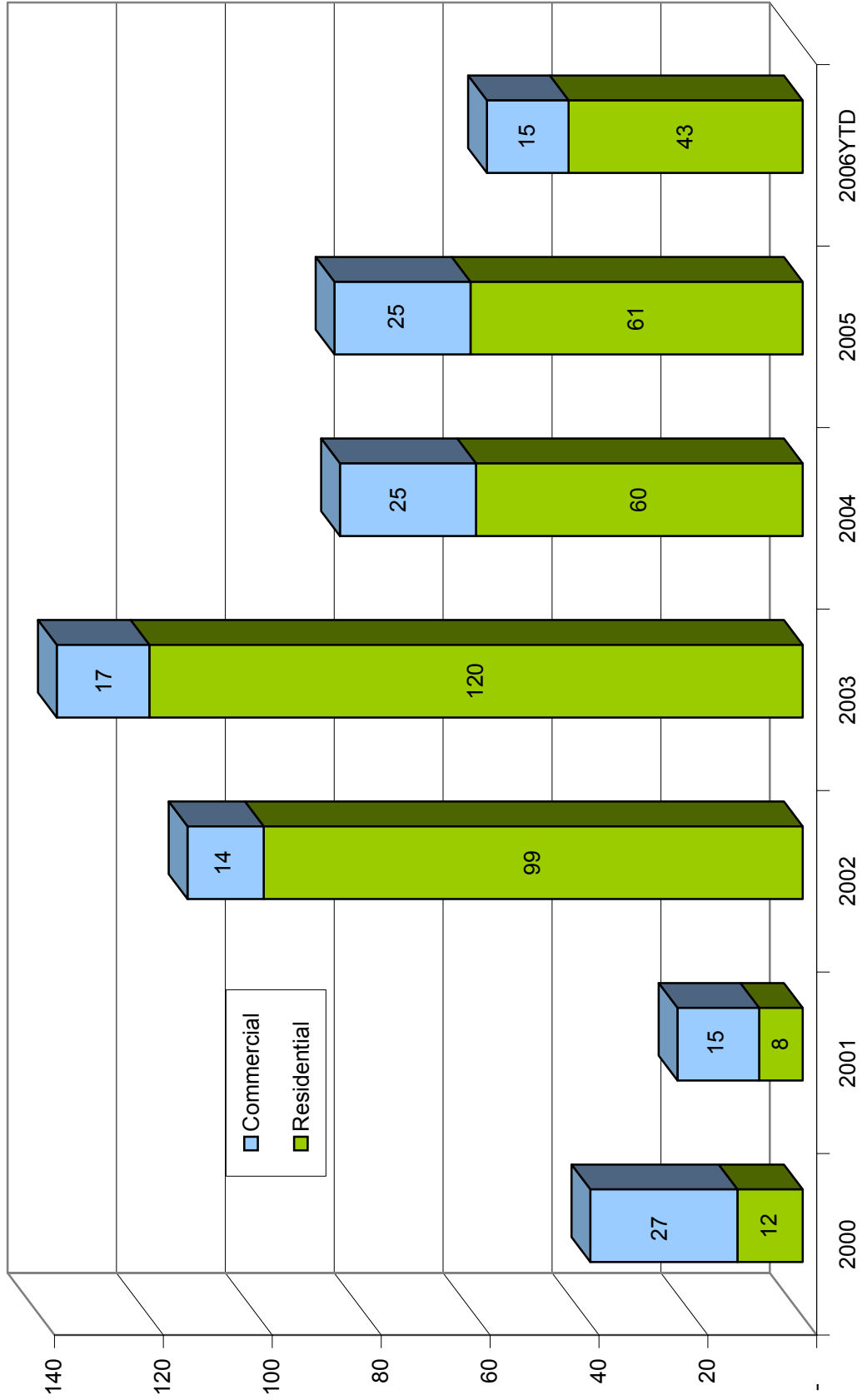
Source: US Census Bureau, DemographicsNow

Per Capita Income Trends, 1990-2011



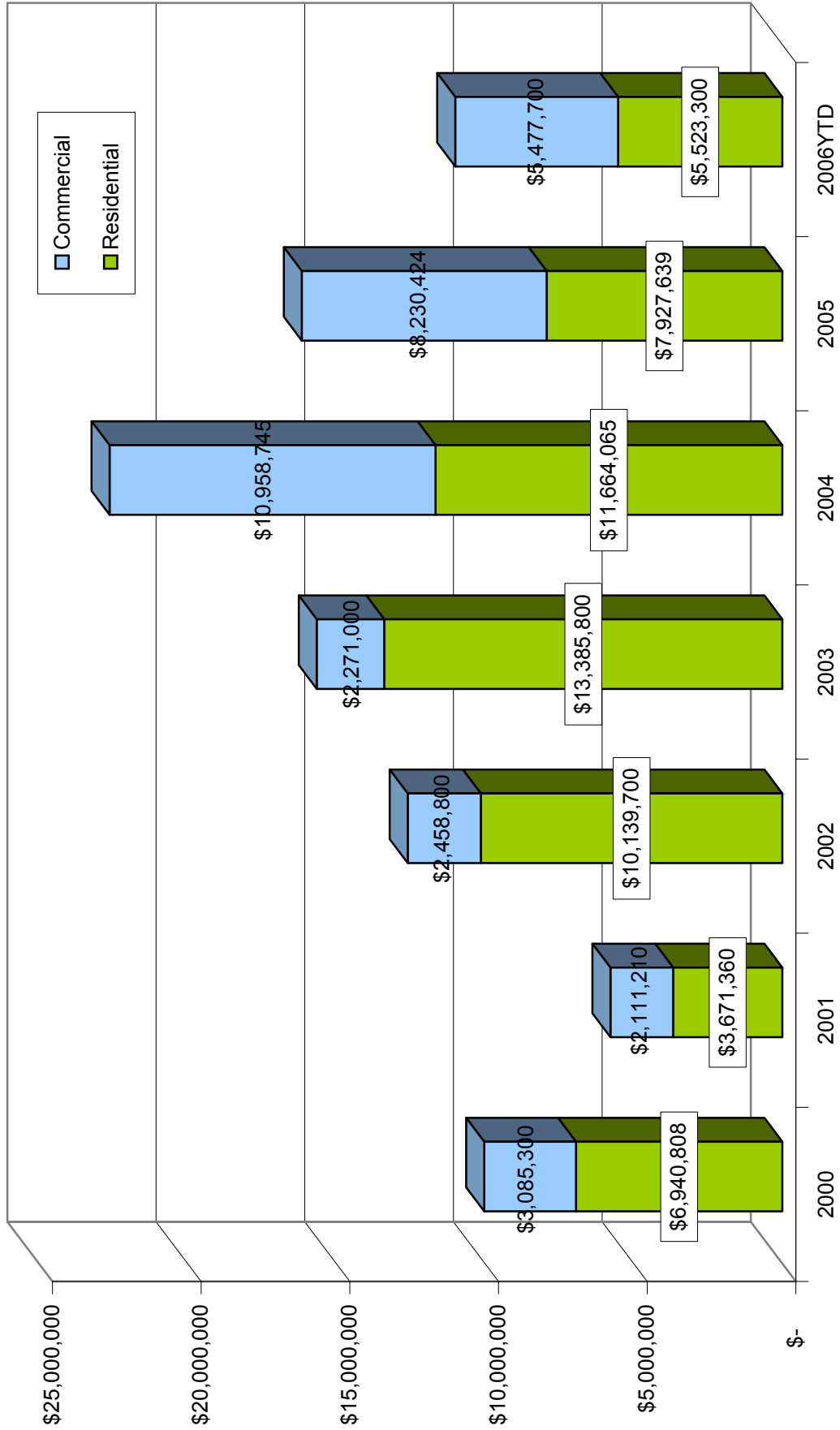
Source: US Census Bureau, DemographicsNow, Market + Main, Inc.

Number of Building Permits Issued, City of Dallas, 2000-2006 (YTD)



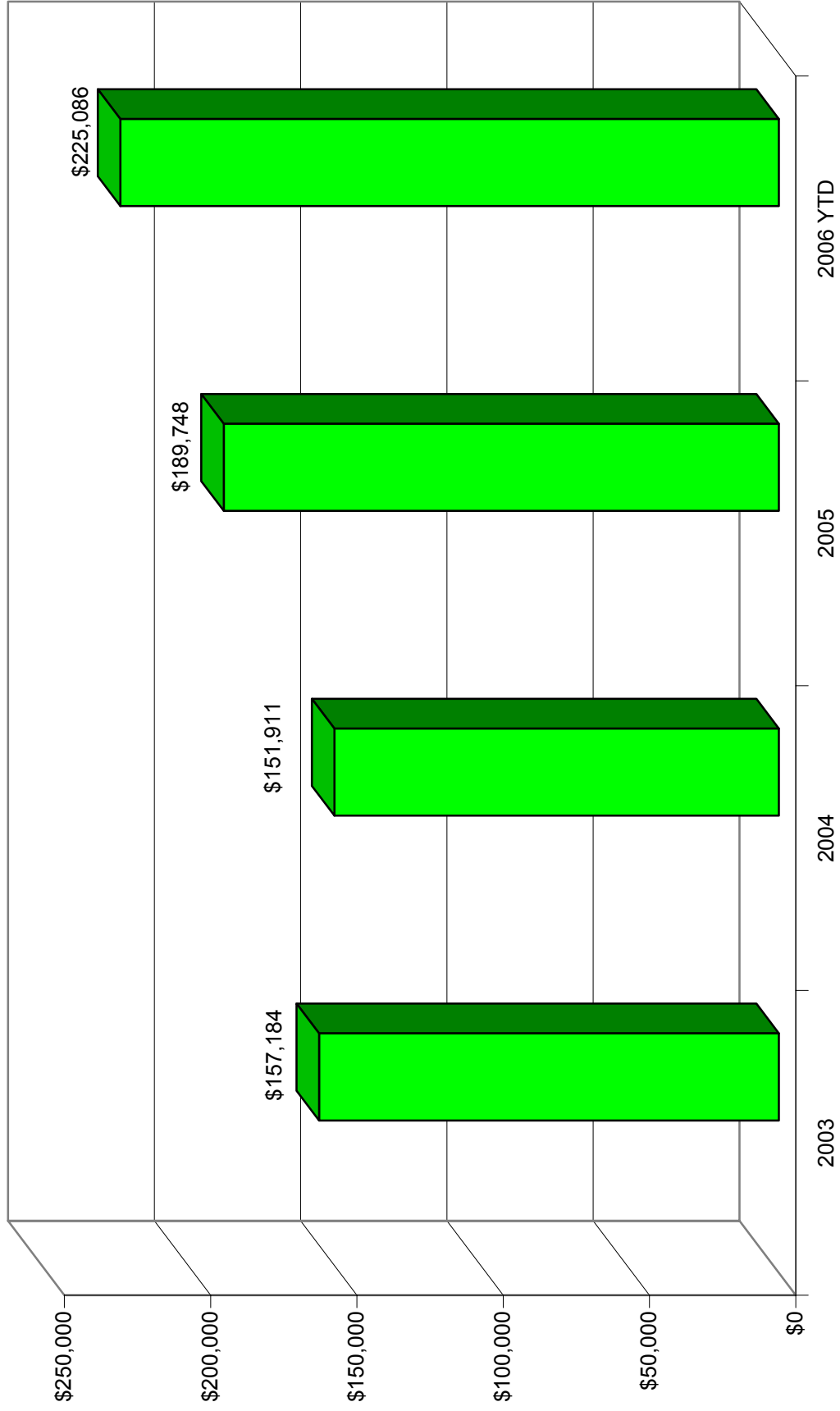
Source: City of Dallas

Value of Building Permits Issued, City of Dallas, 2000-2006 (YTD)



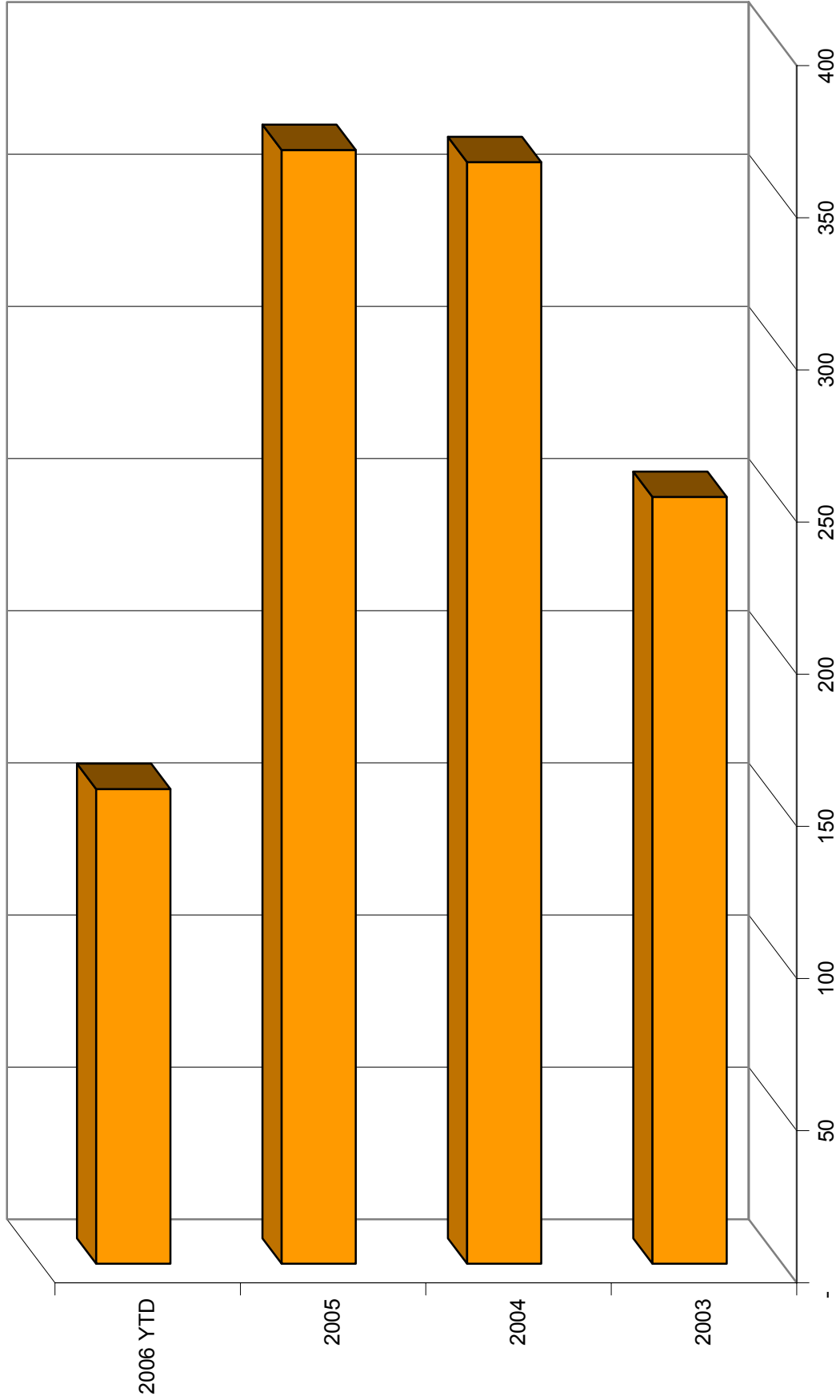
Source: City of Dallas

Average Home Sales Prices, Zip Code 30132, 2003-2006 YTD



Source: Smart Numbers

Homes Built, Zip Code 30132, 2003-2006 YTD



Source: Smart Numbers

Summary of Selected Apartment Complexes, Primary Market Area
November 2006

Apartment Complex Name	Year Built	Total Units	Unit Type	Unit Size	Unit Rent	Value Ratio \$/SF
St. Ives Apartments 1175 Old Harris Rd	2001		1B	600-960	\$ 675	\$ 0.87
			2B	1,048-1,210	\$ 840	\$ 0.74
			3B	1,366-1,499	\$ 985	\$ 0.69
Campbell Creek 351 W. Memorial Dr.			2B	1,200	\$ 520	\$ 0.43
Merchant Court Apar. 1068 Merchants Ct.		192	2B	1,200	\$ 620	\$ 0.52
			3B	1,400	\$ 670	\$ 0.48

Summary of Selected Retail Centers, Primary Market Area
Third Quarter 2006

Building Name	Address	Type	Year Built	% Leased	Gross Leasable Area	Cost Per Square Foot
2415 Atlanta Hwy	2415 Atlanta Hwy	Retail		100		
49 Hosier Mill Rd	49 Hosier Mill Rd	Shopping Center	2006	57.2	5,350	\$ 19.00
Highland Pavilion	76 Highland pavilion Ct	Retail	2004	89.83	5,000	\$ 18.75
Hiram Crossing Shopping Center	4272 Jimmy Lee Smith Pky	Shopping Center	1995	91.43	2,975	\$ 16.00
Hiram Point	Highway 278 @ Highway 92	Shopping Center	2006	7.27	8,200	
Merchant Square (Dallas)	260 Highway 278	Shopping Center	1983	100		
Millpointe Pavillion	45 Enterprise Path	Shopping Center	2001	63.39	6,150	\$ 15.33
Mrs. Winners Chicken and Biscuits	1195 Merchants Dr	Retail		100		
Paradise Shoppes of New Hope	351 E Paulding Dr	Shopping Center	2004	100		
Paulding Commons	2221 Highway 278	Shopping Center	1991	93.17	13,137	
Paulding Place	Hwy 278 @ Hwy. 278 & Rte. 120	Shopping Center	1979	100		

Summary of Selected Retail Centers, Primary Market Area
 Third Quarter 2006

Building Name	Address	Type	Year Built	% Leased	Gross Leasable Area	Cost Per Square Foot
Paulding Plaza	700 Highway 278	Shopping Center	1973	81.29	15,974	\$ 8.10
Shoppes of Dallas	604 W Memorial Dr	Shopping Center	2005	86.85	1,052	
Shops of Hiram Station - Phase I	Jimmy Lee Smith Pky	Shopping Center	2006	100		
Sudie Crossing	2985 Villa Rica Hwy	Shopping Center	1997	97.76	49,866	\$ 12.00
Wendy's	1266 Merchants Dr	Retail		100		
Winn Dixie	1701 Villa Rica Hwy	Retail		100		

Summary of Selected Office Buildings & Business Parks, Primary Market Area
Third Quarter 2006

Building Name	Address	Type	Building Class	Year Built	% Leased	Total Space	Cost Per Square Foot
101 Bainbridge Way	101 Bainbridge Way	Office	B	2005	42.86	9,191	\$ 12.00
1117 Cadillac Pky	1117 Cadillac Pky	Office	C		100	1,650	
286 Merchants Dr	286 Merchants Dr	Office	C		100	1,464	
3010 Business 6 Hwy	3010 Business 6 Hwy	Office	B		100	12,000	
Dallas Professional Bldg	300 W I Pky	Office	B	1985	100	12,000	
Former Post Office	407 S Main St	Office	C		100	8,832	

Summary of Selected Industrial Buildings, Primary Market Area
Third Quarter 2006

Building/Park Name	Address	Type	Building Class	Year Built	% Leased	Total Space	Cost Per Square Foot
101 Simmons Industrial Blvd	101 Simmons Industrial Blvd	Industrial			100	60,000	
104 White Park Dr	104 White Park Dr	Flex	C	2004	100	6,000	
123 International Pky	123 International Pky	Industrial	B	2001	100	50,000	
127 International Pky	127 International Pky	Industrial	B	2001	100	52,500	
1400 N Industrial Blvd	1400 N Industrial Blvd	Industrial			100	197,000	
201 International Pky	201 International Pky	Industrial	C	2001	100	17,500	
210 International Pky	210 International Pky	Industrial	B		100	12,000	
230 Cadillac Pky	230 Cadillac Pky	Flex			100	15,000	
238 Cadillac Pky	238 Cadillac Pky	Flex		2001	100	20,000	
2500 N Industrial Blvd	2500 N Industrial Blvd	Industrial		1975	100	45,000	
338 N Industrial Way	338 N Industrial Way	Industrial			100	10,000	
351 S Industrial Park Dr	351 S Industrial Park Dr	Industrial			100	62,000	

Summary of Selected Industrial Buildings, Primary Market Area
 Third Quarter 2006

Building/Park Name	Address	Type	Building Class	Year Built	% Leased	Total Space	Cost Per Square Foot
398 West Memorial Drive	398 W Memorial Dr	Industrial	B	1982	70	50,000	\$ 4.00
Bldg 3 - The Putnam Bldg	210 Commerce Dr	Flex	C	1975	100	20,000	
Bldg 4	210 Commerce Dr	Industrial	C		100	11,000	
Cadillac Products, Inc.	1133 Cadillac Industrial Pky	Industrial		1995	100	98,000	
North 306 Industrial Park, Lot 7	4460 N Industrial Park Dr	Industrial	B	2000	0	10,000	\$ 5.00

Housing Demand Forecast by Type, Study Area, 2006-2031

Avg. Annual New Households	55
Owner HH	30.25
Renter HH	24.75

Percentage Distribution by Type

	Owner HH	Renter HH
Single-Family Detached	40%	10%
Single-Family Attached	45%	45%
Apartments	15%	45%
	100%	100%

Total Units Annually by Type

	Owner HH	Renter HH
Single-Family Detached	12	2
Single-Family Attached	14	11
Apartments	5	11
	30	25

Housing Units Forecasts by Type

	2011		2016		2021		2026		2031	
	Owner HH	Renter HH	Owner HH	Renter HH	Owner HH	Renter HH	Owner HH	Renter HH	Owner HH	Renter HH
Single-Family Detached	61	12	121	25	182	37	242	50	303	62
Single-Family Attached	68	56	136	111	204	167	272	223	340	278
Apartments	23	56	45	111	-	167	-	223	-	278
	151	124	303	248	386	371	514	495	643	619

Total Housing Units Forecasts

	275	550	757	1,009	1,262
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Potential Supportable Neighborhood Serving Retail Space, Study Area, 2006

	Retail Sales Potential	Avg. HH Expenditure	Target Sales \$/SF	Total Potential Retail Space	Study Area Capture Rate	Study Area Potential Supportable Retail Space
General Merchandise	\$1,963,227	\$3,044	\$103	19,059	43%	8,195 SF
Food	\$2,332,706	\$3,617	\$347	6,721	30%	2,016 SF
Food Service	\$1,459,669	\$2,263	\$224	6,508	69%	4,491 SF
Clothing and accessories	\$468,859	\$727	\$168	2,791	27%	754 SF
Shoes	\$127,508	\$198	\$165	771	19%	146 SF
Home Furnishings	\$264,952	\$411	\$147	1,798	22%	396 SF
Home Appliances/Electronics	\$543,035	\$842	\$138	3,939	15%	591 SF
Building Materials/Hardware	\$568,623	\$882	\$143	3,968	12%	476 SF
Hobby/Special Interest	\$385,968	\$598	\$163	2,366	23%	544 SF
Gifts/Specialty	\$59,047	\$92	\$186	317	26%	82 SF
Jewelry	\$61,432	\$95	\$280	219	14%	31 SF
Liquor	\$91,937	\$143	\$254	362	50%	181 SF
Drugs/Pharmacy	\$288,770	\$448	\$408	707	45%	318 SF
Other Retail	\$221,282	\$343	\$159	1,390	10%	139 SF
Total Retail	\$8,837,015	\$13,701		50,916		18,360 SF

Major Retail Categories:	
Convenience Goods	2,334 SF
Shoppers Goods	11,354 SF
Food & Beverage	4,672 SF

Potential Supportable Community Serving Retail Space, Study Area, 2006

	Retail Sales Potential	Avg. HH Expenditure	Target Sales \$/SF	Total Potential Retail Space	Study Area Capture Rate	Study Area Potential Supportable Retail Space
General Merchandise	\$23,441,968	\$3,720	\$149	157,466	13%	20,471 SF
Food	\$26,560,312	\$4,215	\$336	78,978	12%	9,477 SF
Food Service	\$17,458,386	\$2,771	\$280	62,309	33%	20,562 SF
Clothing and accessories	\$5,499,283	\$873	\$196	28,062	12%	3,367 SF
Shoes	\$1,399,604	\$222	\$199	7,045	10%	705 SF
Home Furnishings	\$3,457,990	\$549	\$204	16,924	10%	1,692 SF
Home Appliances/Electronics	\$6,780,637	\$1,076	\$271	24,992	5%	1,250 SF
Building Materials/Hardware	\$7,020,774	\$1,114	\$170	41,323	6%	2,479 SF
Hobby/Special Interest	\$4,781,457	\$759	\$201	23,734	12%	2,848 SF
Gifts/Specialty	\$734,118	\$117	\$148	4,974	13%	647 SF
Jewelry	\$738,800	\$117	\$446	1,657	9%	149 SF
Liquor	\$1,062,776	\$169	\$321	3,308	10%	331 SF
Drugs/Pharmacy	\$3,377,670	\$536	\$374	9,025	14%	1,263 SF
Other Retail	\$2,536,678	\$403	\$229	11,082	7%	776 SF
Total Retail	\$104,850,453	\$16,640		470,881		66,017 SF

Major Retail Categories:	
Convenience Goods	10,741 SF
Shoppers Goods	34,384 SF
Food & Beverage	20,893 SF

Neighborhood Serving Retail Space Forecasts, Study Area, 2011-2031

	2011			2016			2021			2026			2031		
	Retail Sales Potential	Study Area Supportable Retail Space		Retail Sales Potential	Study Area Supportable Retail Space		Retail Sales Potential	Study Area Supportable Retail Space		Retail Sales Potential	Study Area Supportable Retail Space		Retail Sales Potential	Study Area Supportable Retail Space	
General Merchandise	\$ 2,888,531	12,058		\$ 3,725,566	15,552		\$ 4,562,600	19,046		\$ 5,399,635	22,540		\$ 6,236,670	26,034	
Food	\$ 3,432,152	2,966		\$ 4,426,717	3,826		\$ 5,421,281	4,686		\$ 6,415,846	5,545		\$ 7,410,410	6,405	
Food Service	\$ 2,147,637	6,607		\$ 2,769,977	8,522		\$ 3,392,316	10,436		\$ 4,014,656	12,351		\$ 4,636,995	14,266	
Clothing and accessories	\$ 689,841	1,109		\$ 889,742	1,430		\$ 1,089,643	1,752		\$ 1,289,544	2,073		\$ 1,489,445	2,394	
Shoes	\$ 187,605	216		\$ 241,969	278		\$ 296,333	340		\$ 350,696	403		\$ 405,060	465	
Home Furnishings	\$ 389,829	582		\$ 502,793	751		\$ 615,757	919		\$ 728,721	1,088		\$ 841,685	1,257	
Home Appliances/Electronics	\$ 798,977	869		\$ 1,030,504	1,121		\$ 1,262,030	1,373		\$ 1,493,557	1,625		\$ 1,725,083	1,877	
Building Materials/Hardware	\$ 836,625	701		\$ 1,079,061	904		\$ 1,321,497	1,107		\$ 1,563,934	1,310		\$ 1,806,370	1,513	
Hobby/Special Interest	\$ 567,882	801		\$ 732,442	1,033		\$ 897,002	1,265		\$ 1,061,562	1,497		\$ 1,226,122	1,729	
Gifts/Specialty	\$ 86,877	121		\$ 112,052	156		\$ 137,227	191		\$ 162,402	227		\$ 187,577	262	
Jewelry	\$ 90,386	45		\$ 116,578	58		\$ 142,770	71		\$ 168,962	84		\$ 195,154	98	
Liquor	\$ 135,269	266		\$ 174,466	343		\$ 213,664	420		\$ 252,862	498		\$ 292,060	575	
Drugs/Pharmacy	\$ 424,872	468		\$ 547,991	604		\$ 671,110	739		\$ 794,229	875		\$ 917,348	1,011	
Other Retail	\$ 325,576	205		\$ 419,921	264		\$ 514,266	323		\$ 608,611	382		\$ 702,956	442	
Total Retail	\$ 13,002,058	27,014		\$ 16,769,777	34,842		\$ 20,537,497	42,670		\$ 24,305,216	50,498		\$ 28,072,936	58,326	

Major Retail Categories:

Convenience Goods	3,435	4,430	6,420	7,416
Shoppers Goods	16,706	21,547	31,229	36,070
Food & Beverage	6,873	8,865	12,849	14,840

DALLAS LCI STUDY
ECONOMIC AND MARKET ANALYSIS

Community Serving Retail Space Forecasts, Study Area, 2011-2031

	2011			2016			2021			2026			2031		
	Retail Sales Potential	Study Area Supportable Retail Space		Retail Sales Potential	Study Area Supportable Retail Space		Retail Sales Potential	Study Area Supportable Retail Space		Retail Sales Potential	Study Area Supportable Retail Space		Retail Sales Potential	Study Area Supportable Retail Space	
General Merchandise	\$ 29,617,760	25,864		\$ 36,039,096	31,471		\$ 42,460,432	37,078		\$ 48,881,768	42,686		\$ 55,303,103	48,293	
Food	\$ 33,557,633	11,974		\$ 40,833,160	14,570		\$ 48,108,688	17,166		\$ 55,384,215	19,762		\$ 62,659,743	22,359	
Food Service	\$ 22,057,802	25,979		\$ 26,840,087	31,612		\$ 31,622,371	37,244		\$ 36,404,655	42,876		\$ 41,186,940	48,509	
Clothing and accessories	\$ 6,948,070	4,255		\$ 8,454,460	5,177		\$ 9,960,850	6,099		\$ 11,467,240	7,022		\$ 12,973,630	7,944	
Shoes	\$ 1,768,330	890		\$ 2,151,716	1,083		\$ 2,535,102	1,276		\$ 2,918,489	1,469		\$ 3,301,875	1,662	
Home Furnishings	\$ 4,368,998	2,138		\$ 5,316,227	2,602		\$ 6,263,457	3,066		\$ 7,210,686	3,529		\$ 8,157,915	3,993	
Home Appliances/Electronics	\$ 8,566,997	1,579		\$ 10,424,382	1,921		\$ 12,281,766	2,263		\$ 14,139,151	2,606		\$ 15,996,535	2,948	
Building Materials/Hardware	\$ 8,870,399	3,133		\$ 10,793,563	3,812		\$ 12,716,726	4,491		\$ 14,639,890	5,170		\$ 16,563,054	5,849	
Hobby/Special Interest	\$ 6,041,133	3,598		\$ 7,350,893	4,379		\$ 8,660,652	5,159		\$ 9,970,412	5,939		\$ 11,280,171	6,719	
Gifts/Specialty	\$ 927,522	817		\$ 1,128,615	994		\$ 1,329,708	1,171		\$ 1,530,801	1,348		\$ 1,731,894	1,526	
Jewelry	\$ 933,437	188		\$ 1,135,813	229		\$ 1,338,188	270		\$ 1,540,564	311		\$ 1,742,940	352	
Liquor	\$ 1,342,765	418		\$ 1,633,885	509		\$ 1,925,006	599		\$ 2,216,127	690		\$ 2,507,247	780	
Drugs/Pharmacy	\$ 4,267,518	1,596		\$ 5,192,745	1,942		\$ 6,117,973	2,289		\$ 7,043,200	2,635		\$ 7,968,428	2,981	
Other Retail	\$ 3,204,966	980		\$ 3,899,825	1,193		\$ 4,594,684	1,405		\$ 5,289,543	1,618		\$ 5,984,402	1,830	
Total Retail	\$ 132,473,331	83,410		\$ 161,194,467	101,493		\$ 189,915,604	119,577		\$ 218,636,741	137,661		\$ 247,357,877	155,745	

Major Retail Categories:

Convenience Goods	13,571	16,513	22,397	25,339
Shoppers Goods	43,442	52,861	71,698	81,116
Food & Beverage	26,397	32,120	43,566	49,289

Total Retail Space Forecasts, Study Area, 2006-2031

	2006	2011	2016	2021	2026	2031
General Merchandise	28,666	37,921	47,023	56,124	65,226	74,327
Food	11,494	14,941	18,396	21,852	25,308	28,763
Food Service	25,053	32,586	40,133	47,680	55,228	62,775
Clothing and accessories	4,121	5,364	6,607	7,851	9,095	10,339
Shoes	851	1,106	1,361	1,617	1,872	2,127
Home Furnishings	2,088	2,720	3,353	3,985	4,617	5,249
Home Appliances/Electronics	1,841	2,448	3,042	3,637	4,231	4,825
Building Materials/Hardware	2,956	3,833	4,715	5,598	6,480	7,362
Hobby/Special Interest	3,392	4,399	5,411	6,423	7,435	8,448
Gifts/Specialty	729	938	1,151	1,363	1,575	1,787
Jewelry	180	234	288	342	396	449
Liquor	512	684	852	1,020	1,187	1,355
Drugs/Pharmacy	1,582	2,065	2,546	3,028	3,510	3,992
Other Retail	915	1,185	1,456	1,728	2,000	2,272
Total Retail SF	84,378	110,423	136,335	162,247	188,159	214,070

Major Retail Categories:	2006	2011	2016	2021	2026	2031
Convenience Goods	13,075	17,005	20,943	24,880	28,817	32,755
Shoppers Goods	45,738	60,148	74,407	88,667	102,926	117,186
Food & Beverage	25,564	33,270	40,985	48,700	56,415	64,130

Office Space Demand Forecast, Study Area, 2006-2031

	2006	2007	2008	2009	2010	2011	2016	2021	2026	2031
Primary Market Households	6,301	6,646	6,991	7,337	7,682	8,027	9,753	11,479	13,205	14,931
Primary Market Population-Est.	14,051	14,821	15,591	16,361	17,130	17,900	21,749	25,598	29,447	33,296
Office Employees-Est.	281	296	312	327	343	358	435	512	589	666
Total Demand-Potential Office SF	77,282	81,516	85,750	89,983	94,217	98,451	119,621	140,790	161,959	183,129
Demand Increments	0	4,234	8,468	12,702	16,936	21,169	42,339	63,508	84,678	105,847
Study Area Capture- Total SF	42,505	44,834	47,162	49,491	51,820	54,148	328,956	387,172	445,388	503,604