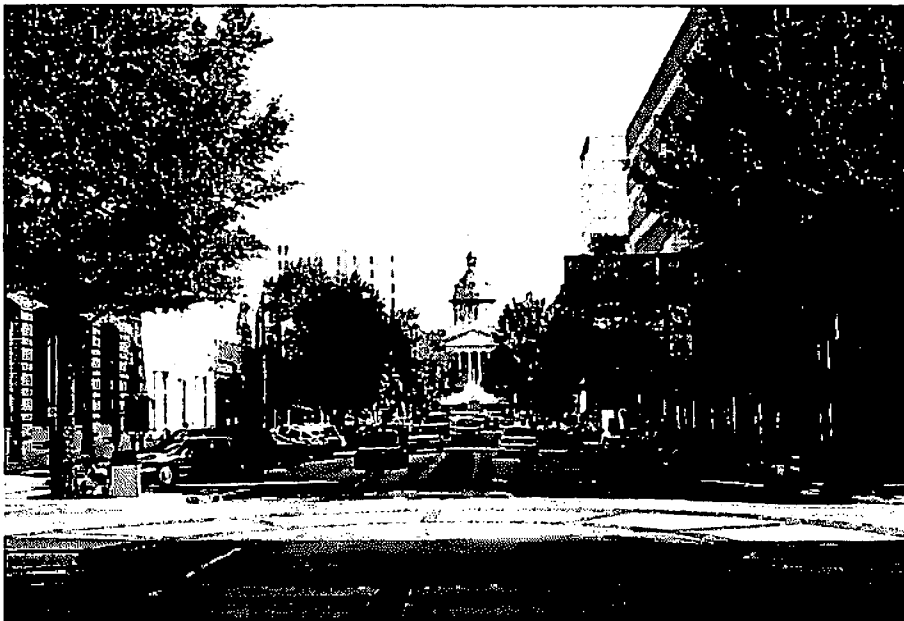


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## Final Draft Report

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# *City Center Master Plan A Vision for the Future*



Prepared for:

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**The City of Columbia**

Prepared by:

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**LDR International, Inc**  
April 1, 1999

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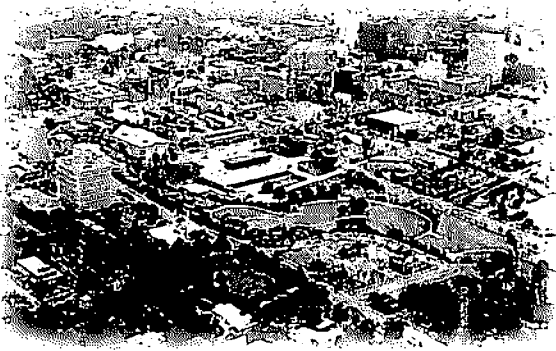


Figure 1.1: Aerial View of Columbia's City Center

## 1.0 Introduction

### 1.1 Purpose

City Center is the hub of Columbia and the Midlands Region. It is the financial, governmental, cultural, and entertainment center for the region. The institutions and attractions in City Center were designed to serve not just the City of Columbia but the surrounding Cities and Counties as well. As a result, City Center belongs to everyone. A successful City Center will have positive benefits throughout the Midlands. Conversely, the health of the greater community fuels the success of the City Center.

Over the past several years, Columbia's City Center has experienced an unprecedented volume of investment both from the public and the private sectors. These investments, however, are only a prelude to the number of significant projects that are currently being proposed for the area over the next few years. If every potential project comes to fruition as proposed, Columbia will enjoy nearly half a billion dollars in capital public and private investment in the next few years. Columbia has the unique opportunity to create a City Center that is a hub for the region and the State and one that could become a national model for urban revitalization.

The City Center Master Plan will reinforce this opportunity and its purpose is threefold. First, it will establish an economic development agenda for the City of Columbia that focuses the City's efforts to encourage City Center investment through its policies and public improvement projects. Second, the Master Plan will serve to coordinate and provide a vision for the relationships between existing and proposed projects already slated for completion resulting in a unified and focused City Center. Third, the Master Plan will offer a vision to guide continued investment in City Center or years to come, investment based on sound economic insight into the region's economy.

## 1.2 Background

In May of 1998, the City of Columbia, South Carolina retained LDR International, Inc. of Columbia, Maryland, to continue its work in Columbia's City Center by preparing this master plan. LDR had previously completed three important planning efforts in City Center (a strategic assessment report, development design guidelines, and a location assessment report for the new arena and convention center). The City Center Master Plan is designed to build on these efforts and coordinate with other projects already underway.

### 1.2.1 Strategic Assessment Report

The Strategic Assessment Report, completed in November of 1997, reinforced the work of the South Carolina Downtown Development Association and the policy commitment of City Council to focus efforts on City Center as a critical investment area. The report provided an overview of existing conditions in City Center and offered a series of policy and physical improvement suggestions. It concluded with an action agenda, designed to establish a framework for future decisions affecting development in City Center. These recommendations formed the baseline for subsequent studies in City Center and the policies and projects outlined in the Strategic Assessment are the foundation for this report.

### 1.2.2 City Center Design/Development Guidelines

One of the policy directives indicated in the Strategic Assessment was the recommendation to establish guidelines for design and development in City Center. The City developed these guidelines to identify parameters for public and private sector development in City Center. The objective of the guidelines is to encourage high quality projects that will preserve and protect investments on adjacent properties and make a long-term contribution to the economic well being of City Center. City Council adopted the City Center Design/Development Guidelines in November of 1998.

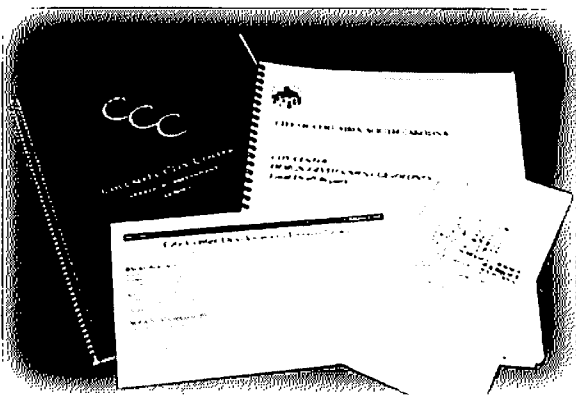


Figure 1.2: Prior plans and documents for City Center.

### **1.2.3 *Location Assessment for Arena/Convention Center***

One of the more immediate projects identified in the Strategic Assessment Report was the USC Sports Arena and Midlands Regional Convention Center to be jointly developed by the City of Columbia and the University of South Carolina. LDR, working with a team of architects and other consultants, presented several location alternatives as well as a preferred location for the proposed arena, convention center, and accompanying hotel development.

### **1.2.4 *CanalSide***

In addition to LDR's efforts in City Center, the planning for another significant project was well underway at the onset of the City Center Master plan process. The City of Columbia is actively working with a private developer on the important former site of South Carolina's Central Correctional Institution on the banks of the Historic Columbia Canal and the Congaree River. Master planning efforts to provide for a mixed-use residential project with a predominantly residential base were incorporated into the City Center Master Plan early in the process.

### **1.2.5 *Three Rivers Greenway***

The River Alliance, a unique cooperative effort among the various jurisdictions along the Congaree River has been a driving force in a visionary effort to transform Columbia's riverfront into a unique amenity for the region. The plan, known as the Three Rivers Greenway, is currently being implemented. The Master Plan coordinates with the vision of the River Alliance for the Three Rivers Greenway that include amenities and predominantly residential uses along the Historic Columbia Canal and the Congaree River.



### **1.3 Study Area Boundary and Context**

The study area for the project is defined as Columbia City Center. City Center is a large area covering over 225 blocks that stretch from Elmwood Avenue to Blossom Street and Pickens Street to the banks of the Congaree River. This large area contains a variety of important institutions including the South Carolina State Capitol and the historic core of the University of South Carolina. Always a regional employment center for the area, City Center in recent years has evolved into a growing entertainment and tourist destination. City Center is easily accessible to the region and state via four US highways which cross through City Center and two Interstate spurs that terminate in City Center.

Although City Center is a regional center, its presence is even more profound in the urban neighborhoods that surround it. Columbia's City Center is fortunate to be ringed by vibrant neighborhoods with active citizens and strong pride. Olympia, Elmwood, Earlwood, and Granby all contribute to the health of City Center and many of the residents of these communities work directly in City Center.

### **1.4 The Columbia City Center Process**

Columbia has an outstanding record in obtaining community involvement in its projects, particularly with regard to recent efforts in City Center. The Master Plan process built on these efforts in several ways. The process involved City Council, City staff, a Council-appointed Master Plan Task Force of City stakeholders in a number of work sessions. The process concluded with an open house at the Tapp's Department Store building on Main Street and a final presentation at The South Carolina State Museum was held to share the vision with the public. These meetings involved hundreds of stakeholders and interested citizens who were able to offer comments and input on the plan in informal settings. LDR also worked with the Columbia Development Corporation to meet with residents of the Arsenal Hill neighborhood to better understand the



Figure 1.3: The City Center Task Force meets in the Tapp's Building to discuss the City Center Master Plan.

needs and concerns of this important neighborhood in City Center.

#### **1.4.1 City Center Task Force**

In addition, the LDR team made periodic reports to and solicited input from a City Center Task Force. Members of the committee included a diverse cross section of Columbia stakeholders and included representatives from the City, Richland and Lexington Counties, area colleges and universities, interested business owners, neighborhood associations, and a variety of other participating stakeholders with an interest in Columbia. A list of those who served on the City Center Task Force is included in Appendix F of this report.

#### **1.4.2 Physical Analysis**

In addition to the listening process, LDR conducted a thorough site analysis to categorize development opportunities and challenges in City Center. LDR also reviewed documentation provided by the City of Columbia. The team conducted field research including a photographic inventory as well as walking and windshield surveys. Ultimately, maps were prepared that identified the following components:

- Pedestrian streets, greenspace amenities, and walking linkages throughout City Center,
- Vehicular streets, transportation corridors, and entryway opportunities, and
- Focus areas that identified areas where investment are taking place, major projects that are underway, and other critical issues.

#### **1.4.3 Economic Analysis**

The physical analysis information that was compiled was coupled with economic data for the region that included population and income projections and a regional overview of the Midlands economy. This preliminary economic assessment was augmented by a thorough assessment of the City Center area in relation to the region to establish its position for successful economic

development in the residential, office, tourism and hospitality, and retail sectors. During the economic analysis process, officials from the University of South Carolina, local real estate professionals, and area planning agencies were interviewed to provide qualitative information to augment the data based interpretation of the economy.

#### **1.4.4 Strategy Development**

The Columbia City Center Master Plan is a long-term vision for the future that will be implemented over a period of time. The plan identifies key areas where public and private investment might take place to create the maximum impact on the future of City Center. The plan is a visual and written representation of the vision for the future and is flexible in its implementation strategies. The plan is augmented by a concept for implementation that identifies a number of topical Economic Development strategies including an organizational, marketing, and information database development program that should be implemented in the next three years.

### **1.5 Strategy, Organization and Content**

The Columbia City Center Master Plan is organized into four parts:

- 1.0 Introduction
- 2.0 The Columbia City Center Economic Position
- 3.0 The City Center Master Plan
- 4.0 Implementation Strategy

## **2.0 City Center Economic Market**

Real estate market dynamics for City Center Columbia are dependent on the overall economy of the Midlands region of South Carolina. A complete summary of the Columbia Midlands economy including a regional demographic overview, a profile of employment sectors, and a profile of the regional retail market are included in Appendix A.

The regional summary provides the baseline analysis to begin tracking the Columbia economy more closely. It is this foundation that provides the underlying data for a sound master planning process for the City Center. The following sections outline City Center real estate market dynamics in four sectors:

- Housing
- Retail
- Hospitality
- Office

The report outlines existing market conditions and where possible, makes projections based on sound assumptions about existing development in the region and within City Center. The report also outlines steps that need to be taken to ensure continued economic success of each market segment.

### **2.1 Residential**

The residential analysis is divided into three parts showing profiles of single family, multi-family and an overall profile of the housing market's implications for City Center. The residential analysis concludes with recommendations to understand the demand for housing and the supply changes within Columbia. For a detailed profile of residential construction trends in the region and in the City refer to Appendix A which details the total number of units constructed in the region and the City between 1989 and 1997.

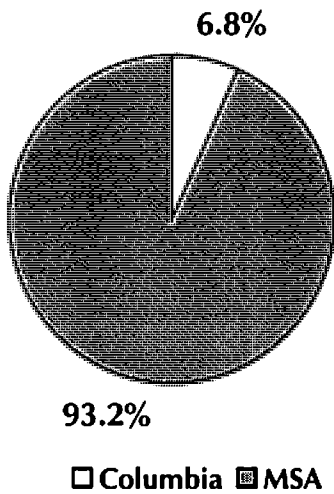


Figure 2.1: Columbia's Single Family Share

### 2.1.1 Single Family

Columbia's share of the regional single family market is small. New single-family construction accounts for only 6.8% of the total new single family units constructed in Lexington and Richland Counties over an eight-year period. The overall market, however, is robust with over three thousand units constructed per year in the MSA in 1996 and 1997.

"Figure 2.1: Columbia's Single Family Share" \f c Columbia's small share is attributable to limited land available for new construction compared to the suburban area. A more accurate indicator of investment in residential property in the City of Columbia would be the dollar amounts invested in renovations and expansions to existing units. The City does not currently track this data.

### 2.1.2 Multi-Family

What the City of Columbia lacks in its share of the single-family market, it makes up for in the multi-family market segment. The City captured 43.5% of all new multi-family construction in the region between 1989 and 1997.

The high capture rate is tempered because the number of multi-family units constructed each year is small when compared to single family units. In fact, the average number of multi-family units constructed each year between 1989 and 1997 in the region was 569. This is less than 20% of the 2,755 single-family units constructed per year during the same period.

Columbia averaged about 247 new multi-family units per year between 1989 and 1997 fluctuating greatly from a low of 0 to a high of 552 during that period. One or two major apartment complexes could easily account for the total number of units constructed each year.

Despite the high fluctuations, Columbia's capture rate for multi-family units is a good sign that City Center can attract some of that share.

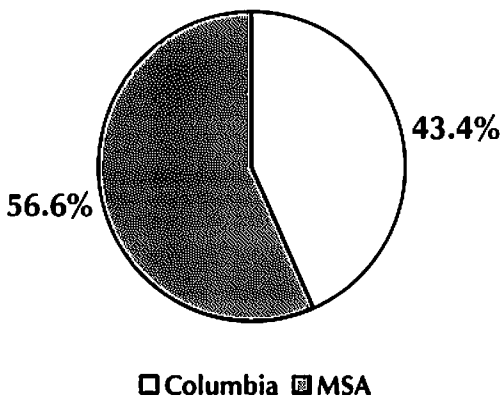
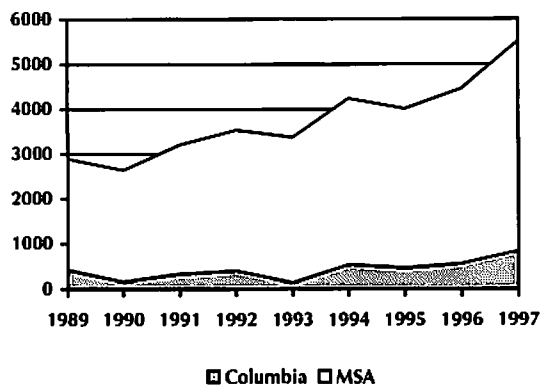


Figure 2.2: Columbia's Multi-Family Share



**Figure 2.3: New Residential Units Constructed Per Year**

### 2.1.3 Overall

The City of Columbia accounted for about 13% of the overall residential new construction in the two county region between 1989 and 1997. These trends, while seeming low at first glance, are not particularly unusual when the factors of residential construction are considered.

The City of Columbia is “landlocked” because of stringent South Carolina annexation laws. New construction will naturally gravitate to greenfield sites at the edge of metropolitan areas.

A more accurate comparison would be in total investment in housing that would include renovations and expansions of existing housing stock. An investment in existing housing stock is as important (if not more so) than new construction, particularly for urban core areas.

### 2.1.4 Issues

- Regional single-family construction trends are going upward, and Columbia’s capture rate is also increasing. Though it is difficult to shift consumer patterns, the City of Columbia can continue to capture a share of the high growth single-family market and possibly increase market share.
- Columbia’s ability to capture a sizable share of the regional multi-family housing market is strong. It is likely that the City of Columbia can use this strength to focus multi-family development toward City Center.
- The metropolitan residential market has not readily accepted new product types such as condos and cooperative apartments. While this shouldn’t discourage this product type, developers should be cautious when assessing market demands for these new product types in this market.

### 2.1.5 Recommendations

- *Conduct a Housing Demand Survey* – Appendix C contains a survey designed for Columbia to assess consumer demand for City Center. This survey should be conducted with major employers in City Center to assess consumer demand for residential development. This can form a baseline for future development.
- *Develop a Residential and Housing Development Strategy* – One of the central recommendations of the Strategic Assessment Report was that the City of Columbia should develop a housing development strategy to encourage additional residential development in City Center. The City has taken positive steps, such as a low interest loan program and zoning changes to encourage housing. The housing demand analysis will help focus these efforts toward specific market segments. The strategy should use this as a tool to create additional incentives, develop a marketing and education campaign, and work toward agreements with other entities to support additional housing in City Center.
- *Track Building Permits* – Currently, the City of Columbia depends on the Counties for data related to building permits. Residential building permits should be tracked by location within the City, by new and rehabilitation construction value, and by single and multi family categories.
- *Create and Reinforce Residential Neighborhoods* – The most important policy decision related to residential development in City Center will be the creation of neighborhood environments and the reinforcement of existing neighborhoods within and adjacent to City Center. The Master Plan will outline some specific strategies for the City of Columbia to begin implementation of this recommendation.

## **2.2 Retail**

The regional retail climate for Columbia has been very healthy with compound growth rates of 5.5% since 1993. Growth in Lexington County has outpaced that of Richland with compound rates of 9.4% compared to 3.4% in Richland.

Little is known about the statistical performance for retail in the City of Columbia itself. Sales information is not tracked for the City nor is it tracked for any sub-sectors in Columbia. Columbia does benefit from being home to two major shopping malls and several exclusive shopping districts: Five Points, Devine Street, and Gervais Street. Gervais Street, the most recent to emerge, is located within City Center. The emergence of these districts represents a market sophistication that is important in attracting additional specialty retailers.

Overall, the Columbia region has about 21 square feet of retail space per residents compared with about 18 square feet of space nationally. This could be attributable to Columbia's regional position in the retail spectrum, but is also due to a recent building boom in retail space that is leaving many older retail centers at a competitive disadvantage.

### **2.2.1 Issues**

- Major shopping center development should not be the focus of a retail development strategy for City Center because competition is fierce in more affordable suburban locations and shopping centers could attract retail away from existing building stock.
- Niche retail should be targeted which will be complementary to existing specialty retail. These categories would be:
  - Local and regional retailers and restaurants,
  - Shops with "family appeal,"



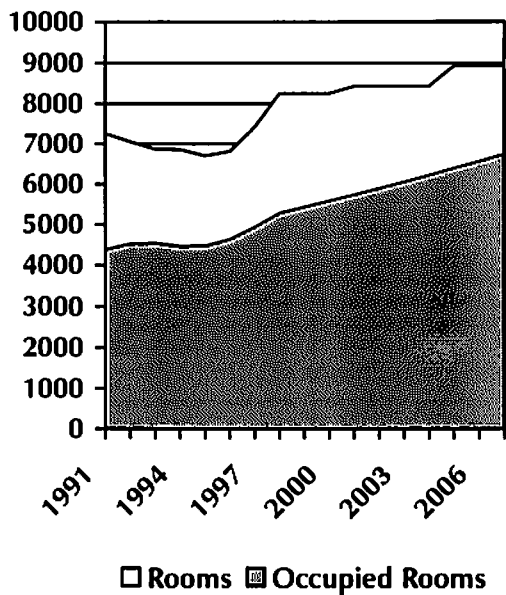
- Highly specialized and unique retail themes such as art galleries, coffeehouses, cigar bars, handicrafts, and other specialty shops.

### **2.2.2 Recommendations**

- *Establish Baseline Sales Information* – As with residential development, the City of Columbia should begin tracking retail sales and geocoding it to specific districts within the City. This information will allow the City to track retail sales growth and even categorize it to target specific market segments.
- *Examine the possibility for an Entertainment Retail Strategy for City Center* – City Center is an ideal candidate for one of the newest forms of retailing. Entertainment retail combines shopping, entertainment, and dining into unique packages and these combinations are becoming more and more complex. The City should aggressively pursue this type of retail and have policies in place to ensure that such retail is defined as a category.
- *Conduct an Inventory of Retail Space* – Specialty retail should be the focus of the retail strategy for Columbia and this type of retail, for the most part, should locate in existing commercial buildings in City Center. An inventory of retail space that includes ownership, size, location, features, and any other pertinent information will be a valuable economic development tool to the City of Columbia and the various business associations in City Center.

## **2.3 Hospitality**

Room supply in metropolitan Columbia stands at about 8,272. The number of rooms has grown substantially with a 13.7% increase since 1991. This growth has occurred exclusively in the extended stay/limited service properties in suburban locations. Room night demand has also grown. Columbia's pace of demand has grown at an average of 2.8% increase annually since 1991. This



**Figure 2.4: Room Count and Occupancy Trends and Projections 1991-2008**

has been heavily weighted toward the past three years. This pace compares favorably with the national trend of 2.0% growth annually during the same period. Details of the growth rates, trends, and projections for the hospitality market are contained in Appendix B.

With this in mind, however, Columbia is performing below the national trend for hotel “profitability” with its occupancy rate at approximately 65% compared to a rule of thumb for profitability at 70% to 75%.

Hotel development, however, is not necessarily tied to room demand but rather to broader economic cycles driven by capital availability.

This bodes well for City Center, home to only one full-service upscale hotel and several moderately priced hotels. In fact, the best performing hotel in the region is a full-service high-end property in an out-of-City Center location. This particular consideration is the basis for the interest in a major convention center hotel in City Center.

### 2.3.1 Issues

- A full service convention center hotel is likely in light of the existing product types in City Center. This development, however, would be tied to significant participation on the part of the public sector in order to be successfully developed.
- Estimating the future growth in demand at 2.8% annually, accounting for a more profitable level of occupancy at above 70% and considering the addition of a 350 room hotel in 2001, 500 additional rooms could be absorbed by the Columbia metropolitan market in about six years.
- Although the 500 room demand is expected, boutique hotels and unique product types will always accommodate specific market segments that may not be factored in the overall count.

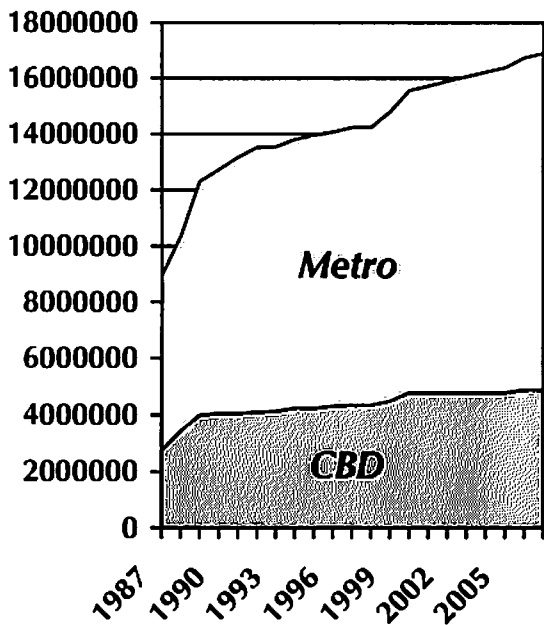
- A booming convention business at the new convention center coupled with increased marketing to attract tourists could have a very positive impact on demand.

### **2.3.2 Recommendations**

- *Develop a Convention Center and Accompanying Hotel* – The Convention Center and Hotel has the potential to generate significant spin-off traffic in the area. The City of Columbia should be prepared, however, to provide a subsidy for the hotel's completion. This could range from parking and infrastructure improvement, to specialized financing.
- *Develop a Tourism Strategy for City Center* – Columbia is positioned near several major tourist attractions and can make significant strides to position City Center as a focal point for much of the regional tourism economy. A comprehensive strategy for tourism would help position the community to take advantage of this fact.
- *Encourage Niche Hotel Development* – Columbia has experienced growth in the number of hotel rooms, but still suffers from a lack of upscale rooms in City Center. Niche and specialty hotel markets would not only increase the options within City Center, they could be accommodated in a scale that is fitting with existing building stock.

## **2.4 Office**

Unlike other communities where the office market has emerged in a number of office "centers," Columbia's City Center has retained prominence as the premier location for businesses in the Columbia metropolitan region. In fact, City Center accounts for over 40% of the total office space in the metropolitan area. City Center has held its own with absorption rates averaging 38.4% of the absorption between 1987 and 1998.



**Figure 2.5: Office Space Trends and Projections for Metropolitan Columbia and the CBD**

Occupancy rates in the suburbs are high at 92%. City Center is slightly less at 89%. This discrepancy is largely due to vacant class B office space in the City Center.

City Center has absorbed an average of 100,000 square feet of office space every year since 1987. This figure fluctuates with highs and lows ranging from negative numbers in 1994 up to 544,000 in 1988. City Center is experiencing a “boom” in office construction with 446,000 of leasable space becoming available in the next year in three buildings. This will create a supply in the market that should accommodate historical absorption levels over the next several years.

#### 2.4.1 Issues

- With little new construction in progress on speculative buildings in the suburbs, City Center has the opportunity to continue to capture additional office space absorption.
- This absorption is most likely to happen in the Class B and Class C office market.
- The existing construction of new Class A buildings is likely to satisfy the market for this type of office space for the next few years.
- Additional major speculative office buildings in City Center are unlikely in the near future but a new single tenant occupant could create instant demand for a major building at any point.

#### 2.4.2 Recommendations

- *Encourage the redevelopment of Class “B” Offices –* Columbia’s historic buildings have high demand as do the newer Class A buildings. The mid range 1960s era Class B buildings are the ones accounting for the higher vacancy rate. These buildings should be redeveloped to accommodate new office users.

- *Work on Filling Smaller Buildings* – The upper floors of existing buildings and smaller office buildings can accommodate smaller office users that are currently looking for space. By concentrating on these buildings, the City of Columbia will be redeveloping existing stock. Conversely, major speculative office buildings are difficult to finance and lease, often require a subsidy, and can sap away demand from existing stock.
- *Encourage Development of Smart Buildings* – High technology office users are one of the fastest growing market segments for office space. Wiring buildings for high-tech users will position City Center as being “on the cutting edge” with these types of users. In fact, a partnership with the University of South Carolina and other area colleges could yield some significant incubators for high-tech businesses.

## **2.5 Conclusion**

The Columbia-Midlands economy is growing at a healthy rate. Columbia’s City Center has successfully maintained its prominence as an office location; has begun to re-invent itself as a new retailing niche location; and has maintained steady investment in housing. The economic baseline information recommended provides the Master Plan with the opportunity to connect its recommendations to market realities while offering the opportunity to build on the success to create a more diverse urban environment.

### **3.0 City Center Districts**

City Center is a vast area covering nearly 1400 acres and over 225 blocks. In addition the blocks are 420 feet by 420 feet, an large dimension considering many cities' blocks are under 350 by 250 feet. This size is compounded by the size of the street rights-of-way, which were laid out in an unusually monumental way. Because of the grid layout of the area and its original platting, City Center is, in many respects, a city within a city.

This sheer size, however, is broken up by the characteristics of specific areas within City Center with different land uses, building types, and layouts. Each has a distinct personality. To deal with each of the area's specific characteristics, capture a way to manage this vast area, and offer an opportunity for civic and private sector leaders to better understand the area, City Center was analyzed and addressed as a collection of nine district neighborhoods. Each of these areas or districts is part of the greater whole, City Center, and each is dependent upon the other. At the same time, each district has distinct land use, architectural character, and transportation issues that makes each unique.

Each of the districts is presented individually with the various issues that affect each. Five districts have detailed plans presented in the Master Plan. These districts are currently experiencing great development interest; have an abundance of vacant property; and are slated for some degree of public sector infrastructure improvements. The four other districts have character descriptions and policy directives in the Master Plan that outline strategies to ensure that these areas continue to be active components in the continued growth of City Center.

This section concludes with a presentation of the overall plan that describes all of the districts and includes critical linkages with regard to pedestrians and the automobile. This section also outlines a series of strategies for an

improved approach to parking that includes opportunity sites for additional major parking resources.

## **3.1 Arena District**

### ***3.1.1 Introduction***

The Arena District is the area bounded roughly by Senate, Assembly, Blossom, and the railway cut. This area was at one time a distribution and industrial section of Columbia. Over the years significant development along Assembly Street has changed the complexion of this area as hotels and later large-scale institutions such as the Carolina Coliseum and the Koger Center were developed. Off Assembly Street, however, the area remained a mixture of parking, remnant service and industrial uses and a mixture of state office buildings and limited commercial properties.

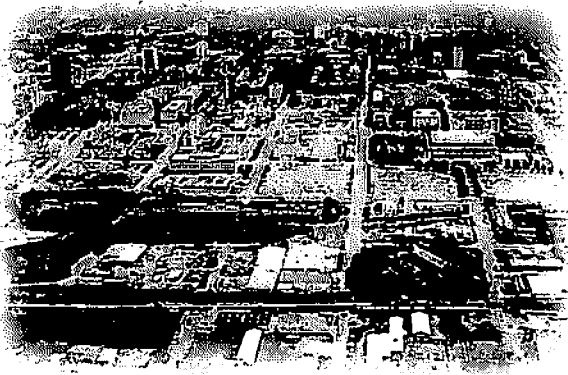
### ***3.1.2 Assets and Amenities***

Significant investment is soon slated to take place in the Arena District. The USC Sports Arena, Midlands Regional Convention Center, and supporting hotel are all part of an effort to transform this into a cultural, arts, entertainment, and recreation center. Its proximity to the University of South Carolina, the State Capitol complex, and adjacency to the growing Gervais Street entertainment and shopping district make it an ideal area for significant investment.

This potential/opportunity becomes even more appealing because of the large amount of vacant land in the area and its proximity to east/west and north/south roadway traffic corridors.

### ***3.1.3 Challenges and Opportunities***

Joint projects such as the planned University of South Carolina South Arena, Midlands Regional Convention Center, and hotel are among the most complex projects that public sector entities can undertake. The City, Richmond and Lexington Counties, and the University



*Figure 3.1: Aerial view of the Arena District showing the Carolina Coliseum and the Koger Center*

have already made significant commitments to embark on these projects. This energy and enthusiasm should be sustained to complete these important projects in the near future, as they will position Columbia as a regional competitor for conventions, sports events, and additional entertainment/retail venues.

As these projects develop, they will have significant influence on the redevelopment of adjacent sites. Parking and infrastructure provisions will also become critical issues as major users continue to focus on this area.

#### ***3.1.4 Vision Statement***

The Arena District will become a new entertainment, performing arts, and convention district for City Center and the surrounding regions with supporting hospitality, retail, commercial, and institutional uses. This vision is represented in Figure 3.3 at the end of this section.

#### ***3.1.5 Public Investment Projects***

##### *Arena and Convention Center*

These projects are the driving force for the other recommendations for the Arena District. The Convention Center and Arena site location process has been completed and specific recommendations for the preferred locations for these facilities has been made. The success of a privately developed hotel project in conjunction with the Convention Center depends on the center's ability to be a striking attraction in City Center. In fact, it should be an architectural landmark for the Senate Street Corridor that it anchors.

##### *Lincoln Street*

In the site selection process for the Arena and Convention Center, Lincoln Street emerged as a primary street for the area accessing the coliseum, the new arena, the convention center, the Koger Center, and other development in the area. This street is envisioned as a boulevard that will ultimately connect Blossom Street



*Figure 3.2: Vision of potential architectural treatment for the Midlands Regional Convention Center*



and the Arena District through the Vista to Finlay Park. This street should:

- Be a well landscaped boulevard,
- Contain pedestrian-scaled sidewalks,
- Have on-street parallel parking,
- Have a central landscaped median, and
- Have pedestrian-scaled lighting fixtures and street furniture.

#### *Senate Street*

As Lincoln Street redevelops as a primary north/south connector, Senate Street should become its equal as an east/west connector to Assembly Street and the State Capitol Complex. Senate Street's pedestrian scale should match that of Lincoln Street. Ultimately, Senate Street will be an intense commercial/entertainment district and a major pedestrian-friendly connector.

#### *Improve Intersections along Assembly Street*

Assembly Street is a vast north/south, auto-dominated through street in City Center. Significant improvements should take place to this corridor to provide additional links between the institutions to the East and the amenities in the Arena District. Assembly Street should have the following changes adjacent to the Arena District:

- Intersection and traffic circulation improvements to the Blossom/Assembly intersection
- Streetscape and pedestrian crossing improvements at Gervais, Senate, College and Blossom Streets.

#### *Gadsden and Wayne Street*

These streets should become less oriented toward through traffic and more geared toward servicing businesses and parking facilities. As major projects develop in the Arena District, these streets should be improved to accommodate additional servicing and parking needs.

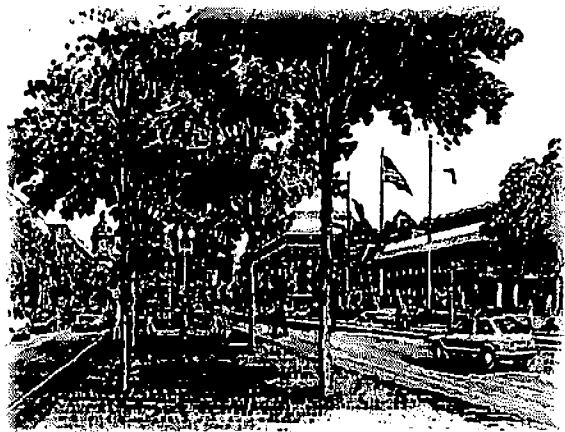


Figure 3.3: View of a landscaped Senate Street toward the Capitol.

### *Implement Regional Stormwater Management*

The slopes in this area, the potential development mix, and the existing patterns of growth create a need for more effective stormwater management. An overall approach to stormwater retention must take place in order for the Arena District to develop successfully.

### *Street Extensions and Abandonment*

Currently Devine Street has a temporary at-grade crossing over the railway cut. This should be replaced with a permanent grade crossing at Greene Street which would provide better connectivity to the Arena District.

### **3.1.6 Private Investment Projects**

#### *Gervais Street Investment*

The development of a major convention facility and associated uses will certainly create spin-off investment on Gervais Street. The plan reflects the potential for a major investment on the existing Ben Arnold property that could be a hotel, retail, or entertainment use. Additional investment is shown on the site immediately west of the Adluh Flour plant. These major development opportunities will complement continued investments in renovating and the adaptive reuse of existing buildings along Gervais and other streets in the area.

#### *Gervais/Assembly Corner*

This corner is one of the most prominent in Columbia. It is located across Assembly Street from the State Capitol building and along two of the most traveled streets in City Center. This space could develop with a main office/commercial building that could include an expanded Columbia Visitors Center.

#### *State Motor Pool Site Redevelopment*

Although this site is not on the Gervais Street corridor, it will be adjacent to the new convention center and hotel and could be developed as a commercial or office space.

*The Heart of Columbia Motor Lodge Redevelopment*

In the long term, as development continues in the Arena District, this property could be redeveloped to become a corporate hotel that would be complementary to a convention center hotel that would also locate in the area.

*Old Columbia Fire Headquarters*

The site of the old Columbia Fire Headquarters could be the site of an additional parking deck to serve the new private investment in the area.

*Residential Development*

The entire area is also suited for additional residential development either with new construction or redevelopment of existing buildings.

*Blossom/Greene Street Development*

The two blocks west of Lincoln Street between Blossom and Greene Streets are ideal for additional office or institutional uses, related either to state government or to the University of South Carolina. These investments could spread in the longer term to land south of Blossom Street.

**Insert Exhibit 3.1: Arena District Plan**

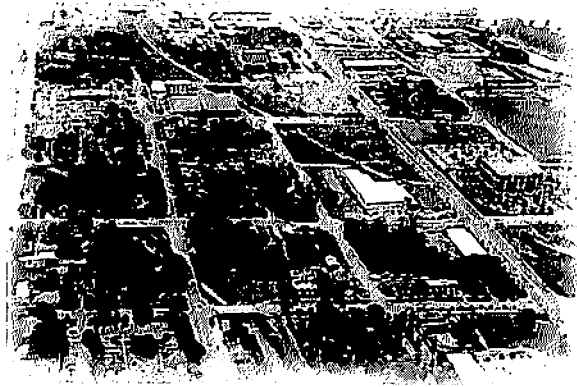


Figure 3.4: Aerial view of Arsenal Hill looking south

## 3.2 Arsenal Hill

### 3.2.1 Introduction

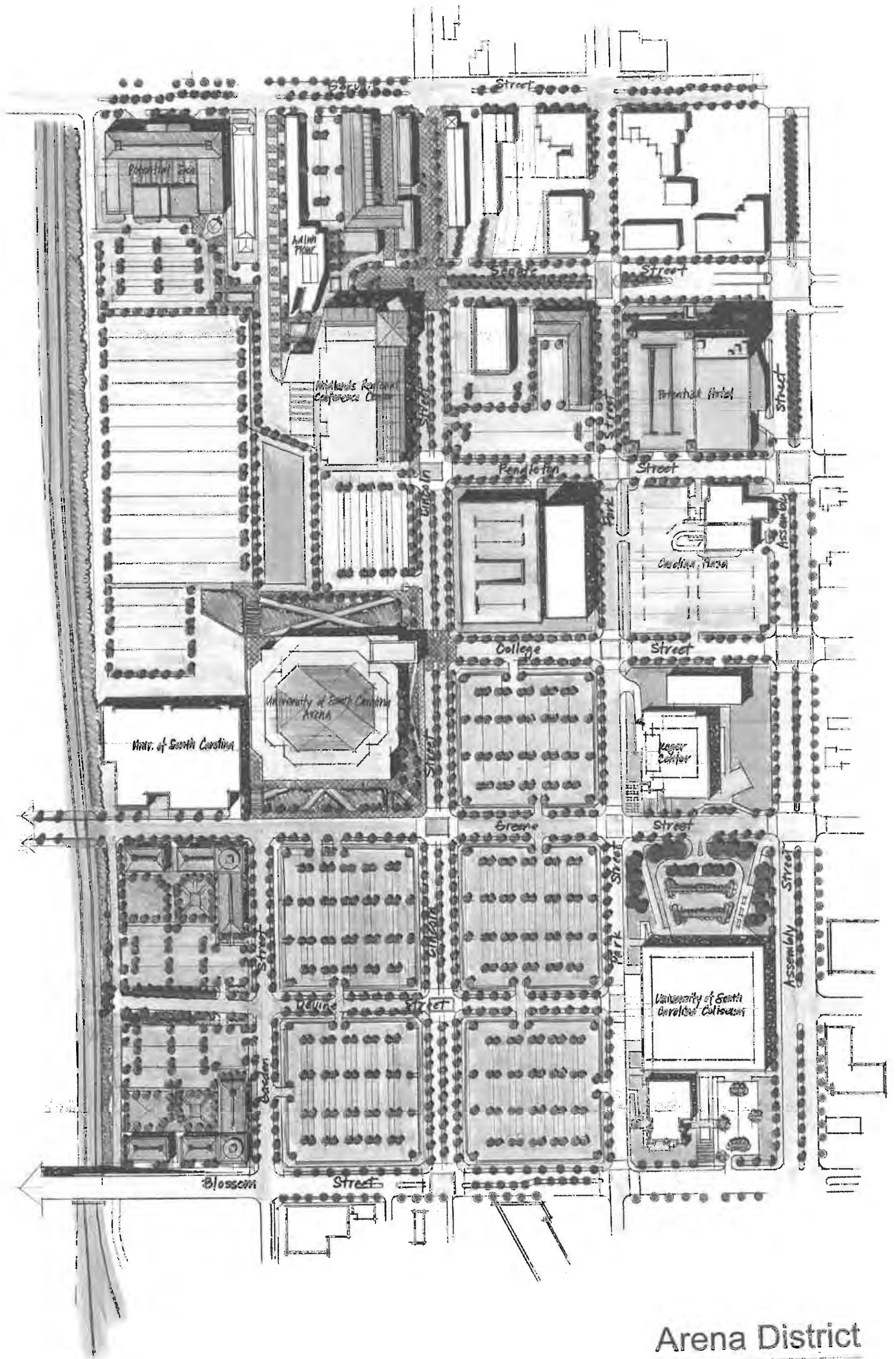
Arsenal Hill is bounded roughly by Huger and Assembly Streets to the west and east respectively and by Elmwood Avenue and Taylor Streets to the north and south. This area has traditionally been a residential community with a diverse range of housing from the South Carolina Governor's Mansion to small "shotgun" houses. Over the years businesses and institutions have converted many of the houses in the neighborhood and commercial uses have grown near the major arteries. Most recently, an upscale residential development, Governor's Hill, has been developed overlooking Finlay Park.

A core of traditional residential units remains intact in Arsenal Hill centering on Wayne Street and spreading out to cover about six blocks.

### 3.2.2 Assets and Amenities

Arsenal Hill has several outstanding, quiet, pedestrian-scale streets with some home ownership in the area. Finlay Park forms an anchor to the neighborhood with outstanding facilities and a striking view of Columbia's beautiful skyline. New housing has developed in the neighborhood both at the high end of the market and at the lower end with transitional housing. This investment has reinvigorated the area and generated new interest in residential uses for Arsenal Hill.

Blight clearance is beginning to take place in Arsenal Hill, which is removing some of the properties that have traditionally created crime problems in the neighborhood. The neighborhood association is an active voice in calling for improvements to the community and supporting quality change.



# Arena District

Columbia, South Carolina

November, 1988





Figure 3.5: Deteriorating rental housing in Arsenal Hill

### 3.2.3 Challenges and Opportunities

Arsenal Hill's major challenge is a large, abandoned railroad cut that crosses through the heart of the community. The line has been abandoned and attracts litter, crime, and other problems for the neighborhood. In addition, the cut is diagonal to the street pattern in the area restricting the development of many lots in the community.

The continued encroachment of institutional and office uses and limited home ownership in the neighborhood has encroached on traditional neighborhood patterns. Crime problems and a lack of basic street improvements such as curb and gutter and sidewalks has had a negative effect on many streets in Arsenal Hill.

Another challenge that the community is facing relates to the upscale influence of the Governor's Hill project. Neighborhood residents want to preserve their ability to continue to live in Arsenal Hill and want to protect the neighborhood from becoming an upscale enclave that would ultimately displace many of the residents that are on fixed and limited incomes.

### 3.2.4 Vision Statement

Arsenal Hill will become a healthy in-town residential neighborhood offering home ownership opportunities for a diverse population and will serve as a residential bridge between the central business district, the Vista, the Canal District, and the Elmwood Park Neighborhood. This vision is further described below and represented in Figure 3.7.

### 3.2.5 Public Investment Projects

#### *Evaluate Filling in the Rail Cut*

The rail cut is the primary obstacle to creating a viable neighborhood in Arsenal Hill. The City should give thoughtful evaluation to filling in the cut and evaluating the investment to the continued cost of maintenance and policing this part of the community. If the cut is



Figure 3.6: Existing residential units in Arsenal Hill

filled, consideration should be given to selling the land so residential units can be developed in the area. If the cut is not filled, it needs to have major landscaping improvements. In fact, it could be developed as a linear park that would connect Finlay Park to Earlwood Park.

#### *Streetscape Laurel Street*

This street is a thoroughfare through Arsenal Hill and traffic often exceeds the speed limit. Laurel Street should be landscaped with a median to add to the attractiveness of the neighborhood and to calm traffic. At its intersection with Huger and Gadsden Streets, landscaped gateways with "Welcome to Arsenal Hill" signs should be placed to help define the entry for this residential area.

#### *Create Small Parks*

If the railroad cut is filled, new housing will become a significant development opportunity. Creating small parks on the interiors of blocks around which housing can develop will enhance the community. The block size in the neighborhood is much larger than typical residential blocks and small parks and lanes will open development opportunities for piggyback residential units.

#### *Develop a Phased Approach to Streetscape Improvements*

Several streets in Arsenal Hill lack basic streetscape improvements. These improvements should be phased to provide sidewalks, curb and gutter, lighting, on street parking and limited landscaping in the neighborhood. Laurel, Gadsden and Wayne Streets should be prioritized to receive these improvements first.

#### *Link Neighborhood to Surrounding Communities*

Arsenal Hill is definitely part of a greater whole yet major arteries prevent residents from walking to adjacent districts creating boundaries. Crosswalks, signal improvements, and pedestrian-friendly improvements should link Arsenal Hill to the Vista as it continues to grow as a commercial area; to Elmwood Park as the



Figure 3.7: Close up of Arsenal Hill plan showing small internal parks and smaller "piggyback" units to the rear of existing housing





Figure 3.8: Potential residential townhouse development in Arsenal Hill

future home of an elementary school<sup>1</sup>; and to the Canal District with its planned pedestrian-friendly amenities. In addition, Gadsden Street should be promoted as a secondary north/south connector through the neighborhood to the Vista.

### 3.2.6 Private Investment Projects

#### *New Residential Development*

With the filling of the railroad cut, potential for new residential development in the Arsenal Hill neighborhood is significant. The illustrative plan shows potential for the development of the following residential unit breakout:

- 100 new townhouses located as buffers between commercial areas and the core single family residential area.
- 60 new single family houses that would locate on land reclaimed from the railroad cut, land redeveloped after blighted structures are removed, and existing vacant land that is now prepared for development.
- 20 new piggyback units that could occur on lanes and at the backs of existing and new single family residential units.

#### *Renovation of Existing Residential Units*

Renovations of existing units in the neighborhood would also take place as new development and street improvements occur. The City may consider providing low interest façade loans to serve as a catalyst for re-investment in existing housing stock for this community.

#### *Neighborhood Commercial*

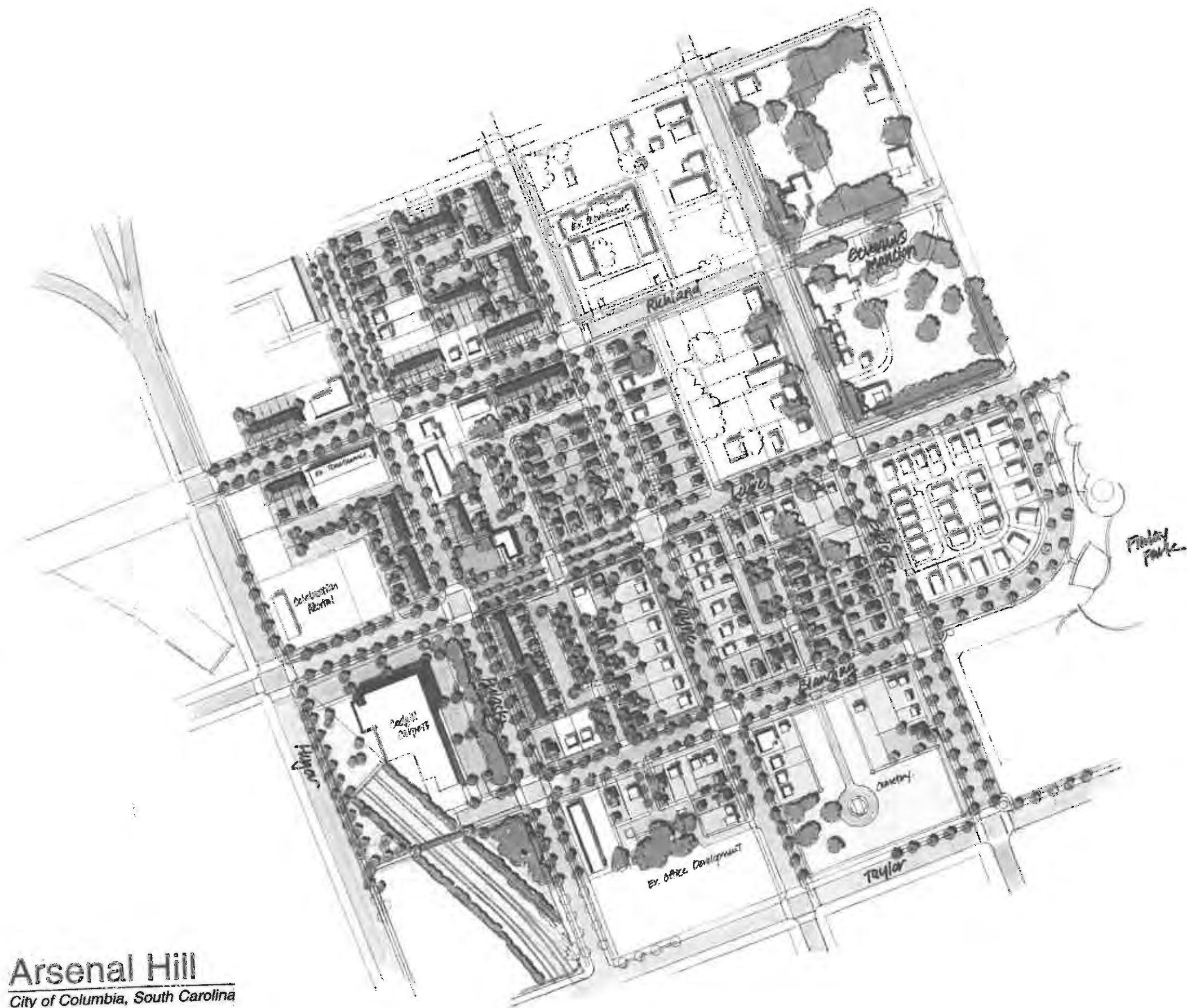
One of the major concerns of residents of Arsenal Hill is the lack of basic residential retail uses near the neighborhood. In time, neighborhood type convenience

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<sup>1</sup> Plans are underway to re-open Logan Elementary School on Elmwood Avenue. Arsenal Hill, however, is not currently in the district that would attend this school. The City should work with the School District to establish boundaries that make this school a neighborhood school.

retail or even a neighborhood shopping center with a small urban-scaled supermarket could develop on vacant land fronting Huger Street or Elmwood Avenue at the edge of the neighborhood. This would be a longer-term development that would occur on a well-traveled corridor and not within the core of the community. It would necessarily serve other markets other than Arsenal Hill.

Insert Exhibit 3.2: Arsenal Hill plan.



# Arsenal Hill

City of Columbia, South Carolina

October 1998

Utkin International, Inc.



### 3.3 Canal District

#### 3.3.1 Introduction

The Canal District is the land roughly between Gervais Street and Interstate 126 and west of Huger Street to the Congaree River. This area, once dominated by the Central Correctional Institution, state government uses, and manufacturing and service uses is undergoing dramatic change. A catalyst for this change was a major commitment by the State of South Carolina where a former textile mill was converted to the South Carolina State Museum which has become a showcase attraction. The City also has created a riverfront park at the terminus of Laurel Street providing a recreational amenity for the area.

Another major event that will cause change in this area is the closure of the prison facility (in 1994) and the formation of the River Alliance, which is formulating plans for riverside amenities and development all along the Columbia Canal and the Congaree, Broad and Saluda Rivers. This area, focusing on the future Three Rivers Greenway Project, will become the hub of a residential community that will repopulate City Center.

#### 3.3.2 Assets and Amenities

The Congaree River and the Columbia Canal are the most recognizable assets of the Historic Canal District. These attractive water features form a backdrop to the development slated for this area. The State Museum and existing improvements in Riverfront Park form a baseline for the development that is to come. Another asset in this area is the abundance of available land that has great potential for development, the most promising of which is the former Central Correctional Institution site where a water-focused, urban neighborhood is being planned by the City of Columbia.

The Canal District's proximity to the Central Business District as well as its convenient location near major



Figure 3.9: Aerial view of the Canal District showing the Columbia Canal and the Congaree River

transportation arteries makes it an ideal candidate for residential, office and retail (mixed) uses.

### ***3.3.3 Challenges and Opportunities***

Huger, Hampton, Taylor, and Gervais Streets, to a lesser degree, provide traffic barriers to this area. Pedestrian linkages across these major arteries will be a challenge, but must be done.

Some lingering industrial uses are also obstacles to the redevelopment of the area, but will take care of themselves as values increase.

### ***3.3.4 Vision Statement***

The Canal District will become a residentially focused community centered on CanalSide with an assortment of visitor attractions and recreation amenities. The vision for this district is illustrated in Figure 3.11.

### ***3.3.5 Public Investment Projects***

#### ***Three Rivers Greenway***

Commission schematic and design development drawings for the portion of the Three Rivers Greenway from Canal Park to Gervais Street. These plans, currently in conceptual form, will be formalized to reinforce the commitment to investment in this area. Public investment in this asset will immediately generate private sector interest to invest in adjacent properties.

#### ***Promenade at Upper and Lower Levels***

The Three Rivers Greenway calls for major pedestrian amenities throughout the district. At certain points, walkways both on the bluff overlooking the river and along the river itself will be needed.

#### ***Acquire Adjacent Sites along Columbia Canal***

When opportunities present themselves, the City should take action to acquire properties along the Canal in order to direct the way these properties are developed. Of particular interest would be the State Budget and



*Figure 3.10: Vision for the future Canal Promenade*



Figure 3.11: Existing high quality streetscape on Gervais Street

Control Board property located at Hampton Street fronting the Columbia Canal.

#### *Streetscape Improvements and Gateway Enhancement*

Huger Street, Hampton Street and Gervais Street are all prominent gateway streets in the Canal District. Gateways and landscaping treatments along each would help define the district and create a strong impression to people entering the district.

#### *Continue Lady Street across Huger Street to State Museum*

In the long term, Kline Iron and Steel Company's industrial use will likely become more feasible for commercial, residential, or office re-use. When this occurs, the City should ensure that Lady Street becomes a pedestrian walkway through the property, linking the Vista to the Canal District.

#### *Construct the City Dock Facility and Breakwater*

This facility is envisioned as part of the Three Rivers Greenway project, and will accommodate rafts, kayaks and other boats creating a recreational stop for boating enthusiasts using the river.

#### *Edventure*

Edventure is a Children's Museum that is programmed to occur at the edge of the State Museum Property overlooking the River. This building should be developed with outdoor areas that relate to the river and to the nearby City Dock.

#### *Infrastructure Improvements*

Street improvements in this area will be necessary to generate additional development. CanalSide street improvements are shown on the plan. Additional public infrastructure such as sewer and water will also be necessary to facilitate the CanalSide development. Street improvements in the blocks south of Hampton, shown on the plan, will also be necessary in the Canal District.

### 3.3.6 Private Investment Projects

#### *CanalSide Development*

CanalSide is the single most significant residential project envisioned for City Center. It will be constructed on the site of the former Central Correctional Institute and is slated to begin in 1999. The Master Plan for CanalSide has been incorporated in the City Center Master Plan as currently envisioned. This plan contains  $\pm 400$  new residential units that will be developed in a variety of formats. The potential for 150,000 square feet of retail space, and the potential for a 70-room hotel or loft apartment project are also included in the Master Plan.

The street network will be internalized on the property and the promenade linking the Three Rivers Greenway will occur along the western edge of the Prison Industries Building. This building should have active programming on the ground floor to provide interaction with the public and a defined border to the residential development to the east.

*Mixed Use Building along the Columbia Canal* – The property owned by the State Budget and Control Board is an ideal site for potential future investment. A new use on this site or in the existing building would take advantage of sweeping views of the River and the Canal and would relate to the promenade along the canal in this area.

#### *State Budget and Control Board Redevelopment*

In addition to the Hampton Street Property, the State Budget and Control Board owns property directly across from the State Museum. This property is an ideal candidate for redevelopment that should retain some of its significant architectural features and be focused toward commercial and residential uses.

#### *Commercial Office Development along Huger and Gervais Street*

BellSouth, Suggs and Kelly, and Derrick, Stubbs & Stith are examples of the type of development that is now occurring along Huger Street in the Canal District. These

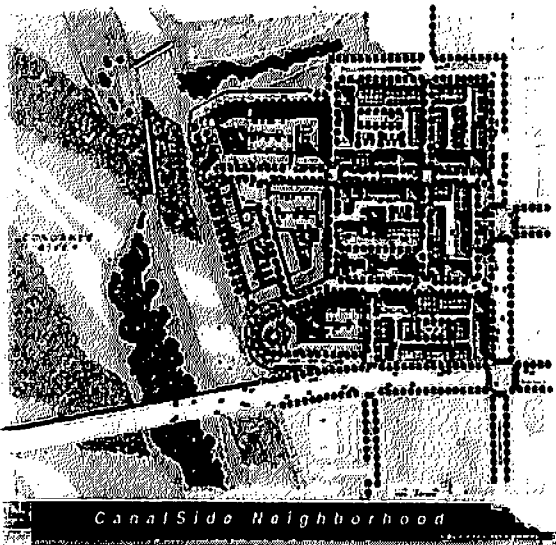


Figure 3.12: The plan for CanalSide development



Figure 3.13: Vision for residential units in CanalSide development





*Figure 3.14: Example of residential or mixed use development that may occur on Huger or Gervais Street*

types of developments are likely to continue and should follow the lead of relating to the street and using sensitive architecture.


The uses for these buildings should vary from office to residential and might include neighborhood commercial uses on the ground floors to accommodate the needs of the growing residential population of the area. .

Insert Exhibit 3.3: Canal District Plan

# Canal District

City of Columbia, South Carolina

October 1998

W. H. Rouseff, Inc. 

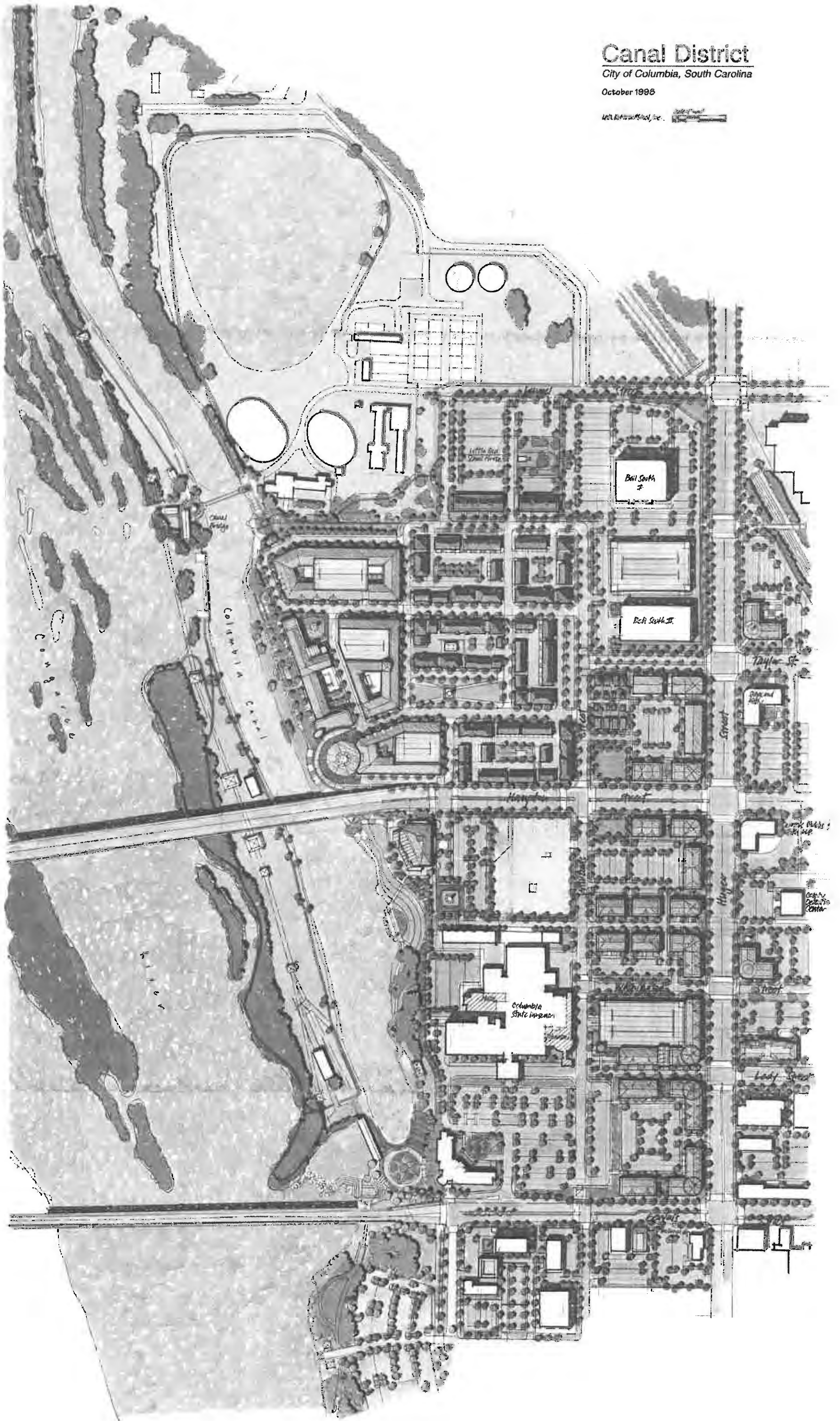




Figure 3.15: Aerial view of Main Street/CBD District

## 3.4 Main Street/Central Business District

### 3.4.1 Introduction

The Main Street/Central Business District area is bounded roughly by Sumter, Assembly, and Gervais Streets and Elmwood Avenue. This area is the heart of Columbia and is the traditional center of commercial, office, and institutional uses in the community.

As with many towns, Main Street's commercial focus declined during the 1970's and 1980's as suburban shopping centers gradually took over the majority of retail trade. Main Street Columbia prospered longer than most hanging on to its last department store well into the 1990's.

Unlike many communities, however, Columbia's office center has remained firmly entrenched in the Central Business District. The area remains the financial core of the community with a number of high rise office buildings dominating the skyline. The traditional architecture of Main Street remains largely intact as well with a number of significant buildings all along the length of the Street.

### 3.4.2 Assets and Amenities

The Central Business District contains the largest single concentration of office workers in the Metropolitan Area. The streetscape provides a relatively attractive environment with street trees and wide sidewalks. Main Street is being rediscovered with new restaurants and recent announcements for residential development.

Perhaps the most significant, recent investment on Main Street is the Columbia Museum of Art and the Carolina First Bank Building that is converting the former Macny's and Belk's Department Stores into a Class A office building and wonderful Museum of Fine Art. These commercial and institutional uses will generate spin-off pedestrian traffic for the area with significant positive impacts.

### 3.4.3 Challenges and Opportunities

While the wide sidewalks and trees along Main Street provide a reasonably comfortable environment for the pedestrian, the Main Street streetscape is tired and dated. Much of the original layout has been compromised by recent building construction, pedestrian-scaled lighting is non-existent, and the trees and street furniture is a hodge-podge of varieties and styles.

The retail climate on Main Street now is weak with only a handful of venerable shops maintaining their locations. Many retail storefronts are now vacant.

Perpendicular and adjacent to Main Street, the Central Business District's landscaping and street environment is stark with very little street furniture, severe lighting and pedestrian amenities.

### 3.4.4 Vision Statement

The Central Business District will continue to evolve as Columbia's premier office address with a focus on corporate headquarters, high technology-focused companies and a full complement of restaurants, retail shops, cultural facilities, and political institutions, located in a comfortable pedestrian environment. This vision is illustrated in Figure 3.16.

### 3.4.5 Public Investment Projects

#### *Main Street Streetscape Improvements<sup>2</sup>*

The entire length of Main Street needs streetscape improvements that will unify the street. These improvements will include the following:

- New paving patterns
- New trees



Figure 3.16: The high rises of the Midlands' employment hub

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<sup>2</sup> These improvements have been commissioned to occur subsequent to the completion of this project and will be reported under separate cover as an implementation project

- Improved crosswalks
- Pedestrian-friendly lighting
- Improved curb and gutter
- Unified street furniture

#### *Intersection Improvements on Assembly and Sumter Streets*

Assembly and Sumter Streets are very wide service streets that create barriers to the Central Business District. Crosswalk improvements at Senate, Gervais, Lady, Washington, Hampton and Laurel Streets will improve the pedestrian environments along both of these streets.

#### *Boulevard Assembly Street*

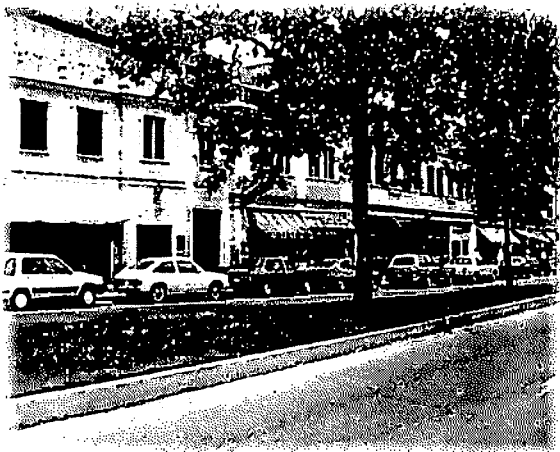
In addition to pedestrian improvements through better crosswalks, the three blocks of Assembly Street between Senate and Lady Street should have special treatment to signify the approach to the South Carolina State Capitol Building and create "islands" for pedestrians in the middle of one of the City's busiest thoroughfares. The existing parallel parking spaces along the center median should be removed. They are a hazard to pedestrians and to the moving traffic that travels this corridor.

#### *East/West Street Improvements*

Several of the streets that run from east to west should also have streetscaping improvements to enhance the image of these corridors, draw people toward Main Street and offer additional landscaped links to major vehicular arterials, Assembly, Sumter and Bull Streets.

### **3.4.6 Parking Improvements**

Parking in the Central Business District is almost always perceived as the most critical problem to continued development. Many communities have this problem since parking resources are often difficult to identify, are not used efficiently, and cannot be located directly in front of every business. Columbia is fortunate in that it has a number of outstanding parking facilities, however, the perception of a parking problem is present both with business owners and with their customers.



*Figure 3.17: Existing Gervais Street and example of how it might look with expanded streetscape*

The following suggestions outline a strategy to improve parking in the Central Business District. It includes ways to deal with existing structures and proposals for a number of new parking resources that can be constructed over time to alleviate increasing parking demand:

- *Shared Parking Facilities* – Shared parking will be a priority for City Center as nighttime uses become more pronounced and new office users create more parking demand. Shared parking is also important between the public and the private sector.
- *Parking Consolidation* – A number of parking lots in the City Center area are fragmented and parceled out to various owners. The efficiency of these lots would be maximized if owners would work together to consolidate and maximize parking resources. An example of this is shown on the Master Plan on the block east of Main Street between Blanding and Taylor Streets.
- *New Washington/Sumter Street Garage* – A first priority would be a four to six level garage located at the southwest corner of these streets. This garage could accommodate 600-800 spaces.
- *New Sumter/Blanding Street Garage* – A second priority would be this garage to be located on the west side of Sumter Street between Laurel and Blanding Streets. It would contain 600 to 800 spaces in four to six levels.
- *On-Street Parking* – On street parking in the Main Street/CBD area remains virtually unchanged. The streetscape improvement plan for Main Street presents a “no net loss” approach to parking along this corridor. As east/west streets are reconfigured, more angled parking may be installed on selected streets to create additional parking resources. The strategy for City Center should be to direct people



Figure 3.18: Existing parking garage in Columbia with ground floor retail

to structured parking where the provisions for additional spaces are more substantial.

- *Signage for Parking* – One way to ensure that the parking program is minimized is to develop a directional signage program for parking facilities. This should stray from the typical “green P” and be a creative and attractive way to designate to drivers where major parking facilities are located. This signage should be geared both for vehicles and pedestrians. The pedestrian signs should direct those who use parking facilities toward businesses and attractions in City Center.
- *Designated Customer Parking in Garages* – Existing and future garages should have designated public parking for shoppers, diners, and people running quick errands in the Central Business District area. The customer parking areas should be close to the entry floors and well signed for people to use. Long-term parking should be directed to less convenient areas in the garages.
- *Promote Transit* – Ultimately, public transit will be the preferred option for getting around in City Center, especially along Main Street. A comprehensive citywide transit plan should address the particular needs of the City Center area. In the meantime, the Columbia Trolleys are an effective way to get around Main Street and City Center. They should be promoted more, especially in the parking structures. In fact, the City should consider providing free transportation on the Trolley to those people who park in the parking garages, rather than on the street.

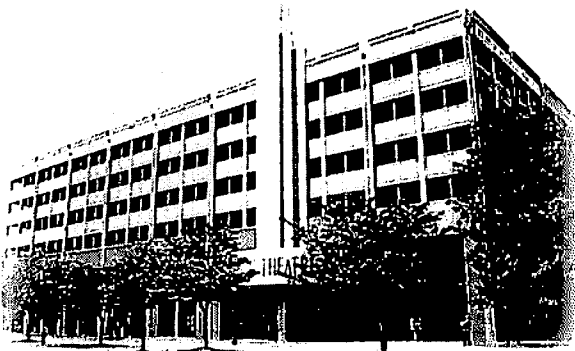


Figure 3.19: Potential new parking with cinema and transit center incorporated on ground floor



### 3.4.7 Private Investment Projects

#### *New Retail/Commercial/Office Space in Rehabilitated Structures*

Rehabilitation and adaptive re-use of existing structures will be the primary way that investment takes place in City Center. Main Street and the surrounding blocks have tremendous potential for reinvestment.

#### *New Office Developments*

Several potential locations for new office developments have been identified in the Master Plan. These offices and potential mixed-use developments could occur in a variety of scales in the following locations:

- Existing Affinity parking lot at the corner of Main and Gervais.
- Adjacent to the NationsBank Plaza (Main Street) an opportunity exists for new buildings that would complement this office tower.
- The Hampton Street block between Assembly and Main provides an opportunity for a significant building investment.
- The former Hampton Pontiac property at the southeast corner of Elmwood and Main would be an ideal site for a series of office buildings that could work together as an "office campus."
- A new building opposite the Tapp's Department Store on Blanding Street could accommodate offices or residential uses in a mid-rise setting.
- The corner of Assembly and Gervais is a prime candidate for a signature office building. This building could be scaled to accommodate offices and fit in with the surrounding architecture along Gervais and Assembly Streets.

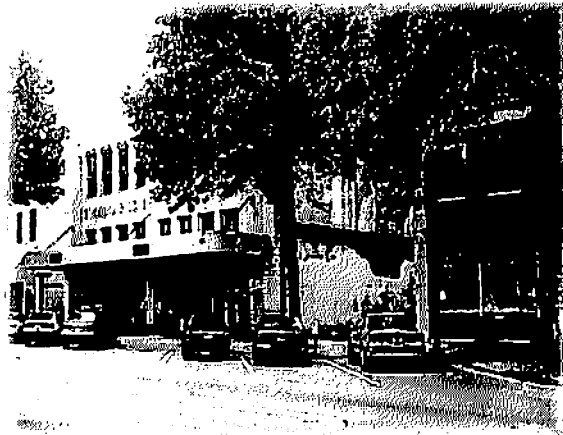
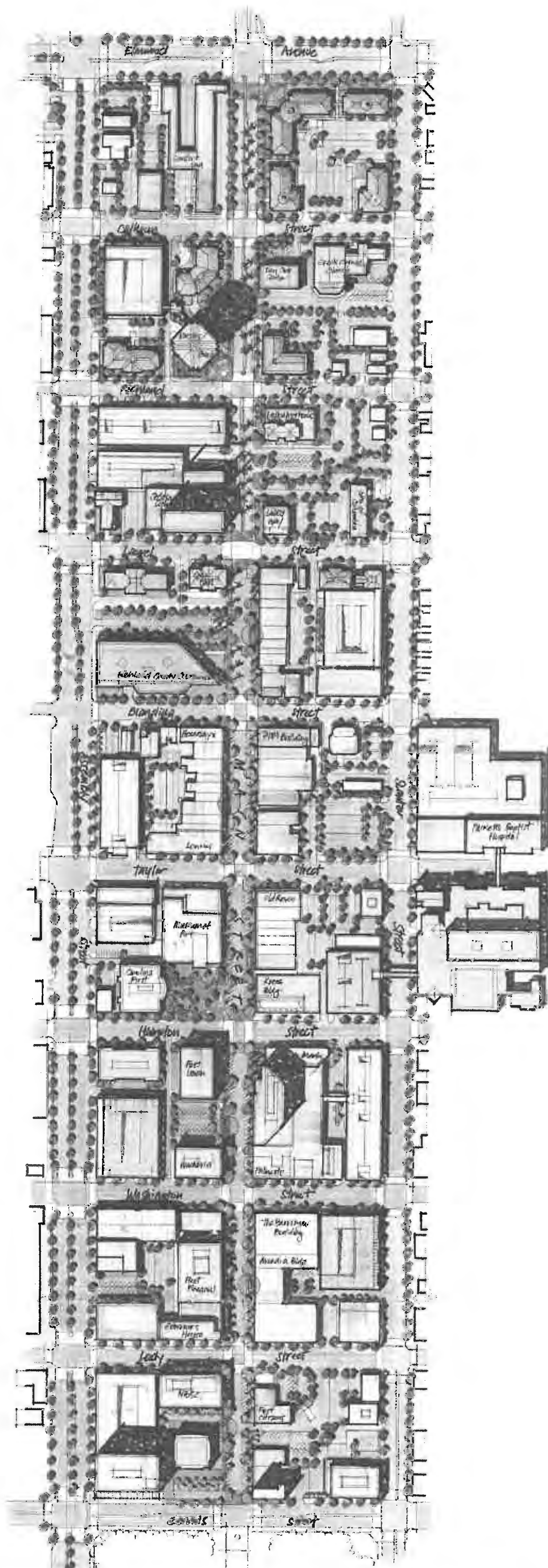


Figure 3.20: Existing conditions and vision for in-fill retail space in the CBD

Insert Exhibit 3.4: Main Street/CBD Plan



# Main Street/CBD

City of Columbia, South Carolina

October 1988

WOR. Memorial, Inc.

Scale 1" = 100'  
 1/4" = 100'  
 1/8" = 100'

## 3.5 The Vista

### 3.5.1 Introduction

The Vista is perhaps the most broadly defined district in City Center. For the purposes of the Master Plan, it is defined as the area roughly bounded by Huger, Assembly, Gervais, and Taylor Streets. This area was traditionally a service commercial district with a mixture of industrial uses. In the past, it was also the home to the African American commercial district for the Columbia area.

Thanks to recent public investments and committed property owners along the Gervais Street corridor, the Vista has emerged as a growing retail and entertainment district in Columbia. Home to over a dozen restaurants and cafes and a number of boutique, antique, and furniture shops, the Vista is one of Columbia's attractive neighborhoods.

The area is also emerging as a residential district as pioneers convert upper floors of older buildings into lofts. Plans are underway for the Vista Commons, a large garden apartment community that will invigorate the area with 180 residential units.

### 3.5.2 Assets and Amenities

The most exciting development in the Vista is the recent investment in shops, restaurants, and residential uses. This investment will continue to spur additional development in the area. The streetscape improvements on Gervais Street and the completion of the Lady Street Bridge are public investments that are setting the pace for additional growth in the area. The Vista benefits from existing architecture that is relatively easy to adapt into a number of uses due to its industrial heritage. The Vista Guild and the Columbia Development Corporation are two organizations that have helped focus investment in this area and create a focus for marketing the area.

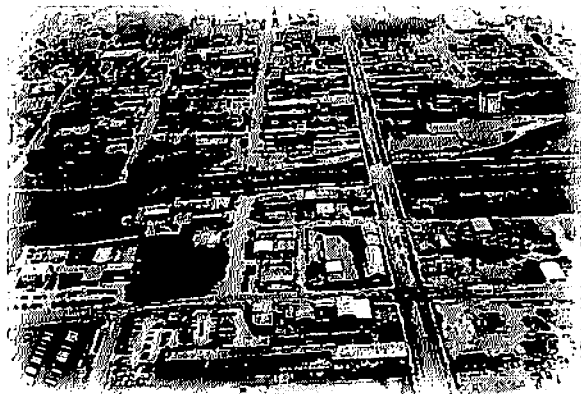


Figure 3.21: The Vista District aerial view

A lesser known, but equally important amenity to the Vista, is Columbia's Memorial Park. This park has the potential to become a great focal point for residential uses in the Vista.

### ***3.5.3 Challenges and Opportunities***

As with the other districts, the large streets in City Center form a barrier with adjacent neighborhoods in Columbia. Assembly and Huger Streets are particularly problematic for connecting the Vista to the Central Business District and the Canal District.

Parking is also an emerging problem in the Vista as commercial and restaurant uses continue to develop. This will only get worse as development continues to occur.

Unusual features such as the Lincoln Street Tunnel and Memorial Park present opportunities that can be channeled into future investments.

### ***3.5.4 Vision Statement***

The Vista will continue to develop as an eclectic mix of retail, restaurant and entertainment uses couple with additional investment in residential developments and linkages to adjacent neighborhoods.

### ***3.5.5 Public Investment Projects***

#### ***Lady Street Streetscape***

Lady Street is emerging as a secondary corridor in the Vista. With the completion of the Lady Street Bridge, development along this corridor will only grow. A streetscape program that complements Gervais Street and accommodates additional parking will be necessary to allow businesses to succeed on this corridor. This street does not need to have a major streetscape investment but should have pedestrian amenities such as streetlights, sidewalks, planting areas, and street furniture that encourage walking.



Figure 3.22: Vision for Lady Street improvements

### *Lincoln Street Improvements*

Lincoln Street is an interesting connection in that it occurs at two levels with an old railroad tunnel at a lower level and the street itself at the upper level. This street has a tremendous potential as an attraction that would link Finlay Park with the Vista and ultimately on to the Convention Center and Arena. Crosswalk improvements at Taylor and Gervais Streets are necessary to assist pedestrians cross this street. In addition, the intersection of Lincoln and Gervais will likely require a traffic signal.

### *Parking Improvements*

Shared and on-street parking will become increasingly important in the Vista to accommodate more shoppers and diners in the area. In addition, a significant structured parking resource will ultimately be needed to accommodate expected continued growth in the area. Three potential sites for a parking deck have been identified for the Vista Plan. If all were constructed now, they would add 2300 to 2500 new spaces to the Vista area. These decks would be located in the following locations:

- Assembly and Lady Streets
- Lady and Lincoln Streets
- North side of 800 block of Gervais

### *Improve Street Connections around Memorial Park*

Currently Memorial Park is an unrealized asset in City Center. This is partially true because of the limited road connection around the park. A connection via Wayne Street should be considered to connect Memorial Park to the rest of the Vista. In addition, a pedestrian link should be explored across the railroad tracks linking Memorial Park to Huger Street and ultimately the development in the Canal District.

### *Future Streetscape Improvements*

A schedule identifying future streetscape improvements throughout the area should be established that would



Figure 3.23: High quality landscaped parking lots and on-street parking

ultimately provide improvements to Washington, Gadsden, Park, Hampton and Taylor Streets.

### **3.5.6 *Parking Improvements***

As development continues in the Vista, parking will become more of a concern. The Master Plan has identified several opportunities for additional parking throughout the Vista area that include three new decks, several new surface parking lots, and one re-organized parking strategy for a local street. All told the plan identifies anywhere from one to three thousand new parking spaces within the Vista District:

- *Lady Street* – The Lady Street improvements will provide opportunities for additional on-street parking along this corridor. This increase in parking will benefit businesses along Lady Street but the net overall gain in parking will be minimal.
- *New Lady Street Parking Deck* – A major parking facility to serve the area is needed. A potential location has been identified between Gadsden and Lincoln Streets on the north and/or south side of Lady Street.
- *Assembly Street Parking Decks* – The potential for new developments at the Corner of Gervais and Assembly Streets may warrant the construction of additional decked parking facilities to serve these improvements have been identified on the plan.
- *Convention Center Parking* – A major surface parking facility has been identified behind the existing Ben Arnold distribution facility to handle the parking needs of the Convention Center. This facility could also serve the district during non-event days.
- *Internalized Parking* – The residential developments proposed on the plan for the area all contain internalized parking that call for the parking to be

on the interior of the sites being developed, not on the street.

- *Surface Parking* – A formalized parking lot overlooking the rail cut on the old Gadsden Street right of way fronting Gervais Street is also represented as a potential parking resource on the plan.

### **3.5.7 Private Investment Projects**

#### *Urban Pioneer Housing*

Several loft apartments and upper story condominiums have developed along Gervais Street. These developments will continue along Lady Street and throughout the Vista area.

#### *New Housing at Memorial Park*

Memorial Park can become the centerpiece of a major residential development in the Vista. This could be scaled similar to the Parkside Apartments as three story walk-ups with views onto the park and parking to the rear or underneath.

#### *Retail, Restaurant and Office Use on Lady Street*

With a streetscape program, Lady Street can redevelop with an assortment of attractive retail, restaurant and office uses similar to that found on Gervais Street. This will reinforce the existing trends and expand the economic capacity of the Vista.

#### *Huger Street Offices*

The Suggs and Kelly and Derrick, Stubbs & Stith Office Building trend should continue on Huger Street. The property currently occupied by the Richland County Sheriff's Department will eventually give way to higher uses along this corridor, and, a potential hotel development could occur with Huger Street frontage.

#### *Office Development on Assembly*

The corner of Assembly and Gervais is a prime candidate for a signature office building. This building could be scaled to accommodate offices and fit in with the

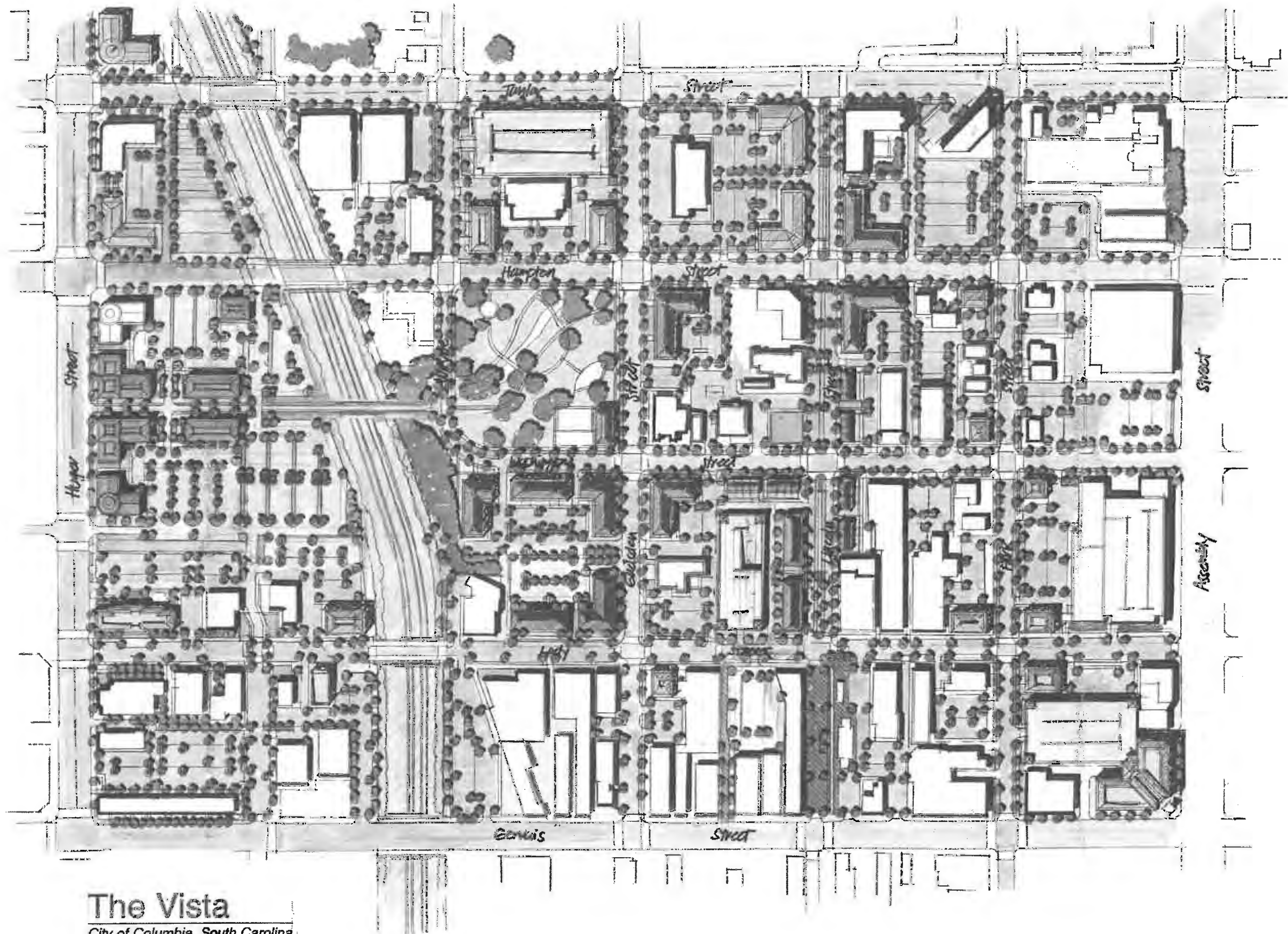


*Figure 3.24: Vision for private redevelopment of buildings along Lady Street*



surrounding architecture along Gervais and Assembly  
Streets.

**Insert Exhibit 3.5: The Vista Plan**



# The Vista

City of Columbia, South Carolina

October 1998

LR Macdonald, Inc. 



Figure 3.25: The Statehouse of South Carolina

## 3.6 Other Districts

### 3.6.1 Capitol District

The Capitol District is bounded by Assembly, Gervais, Pickens, and Pendleton Streets. This is a relatively small district defined by the Statehouse, the grounds, and associated State legislative and administrative office buildings. The future of this area is largely in the realm of the State government and is unlikely to change significantly.

The recent renovations to the State Capitol building have restored this important landmark to its original prominence that has been altered greatly over the years.

The City should look at the exceptional quality of the historic streetlights, architectural features of the Capitol, and landscaping of the grounds as examples that should be repeated in other areas of City Center. These examples would be particularly appropriate for use along Main Street when improvements are made there.

### 3.6.2 University District

The most historic parts of the University of South Carolina Campus occupy a significant portion of the southeast quadrant of City Center. The University has prepared and updated a master plan that calls for additional residential, academic, and student life facilities that will be expanding west toward the Congaree River.

As an example, the University has prepared plans to construct a Wellness Center at the southwest corner of Assembly and Blossom Street which is currently under construction.

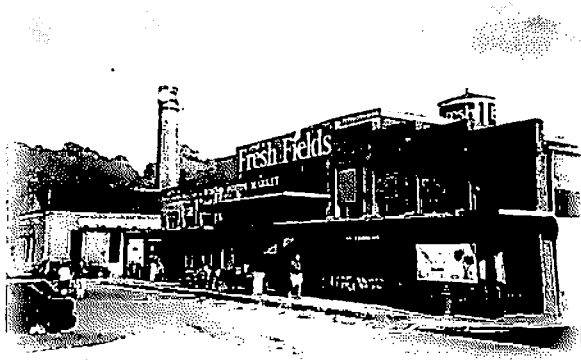
The Master Plan has indicated needed pedestrian connections along Greene, Blossom, and College Streets as well as streetscape improvements along South Main Street.

### 3.6.3 South Vista

South Vista is bounded by the railroad cut right-of-way to the east, the Congaree River to the west, Blossom Street to the south, and Gervais Street to the north. This area is a mixture of remnant industrial buildings and newer commercial establishments.

The Master Plan indicates several key objectives for the South Vista area:

- The Budget and Control Board property along Gervais is also examined in the Canal District Plan as a campus type development that would involve the removal of a building and the redevelopment of the others with valuable architectural features in the complex.
- A “natural” parking lot facility, in accordance with the plans underway by the River Alliance, is shown fronting on the Congaree River to the south of Gervais Street. This would be the primary employee parking facility serving EdVenture, the State Museum, and the City Dock.
- The Congaree River forms significant wetlands between Gervais and Blossom Streets that have been shown as a passive, natural habitat park in harmony with the River Alliance’s vision for a Bicentennial Park at that location. Eventually residential uses with access to Huger Street could develop on the bluff overlooking the Congaree River.
- The earlier suggested Greene Street connection to replace the Devine Street railroad crossing, plays a key role in creating a secondary street on which new commercial and residential development in the South Vista area can occur.
- Eventually, the South Vista area with its ease of access, great road frontage, and central location to a number of potential residential communities, will be



*in the South Vista District*

an ideal location for a well designed neighborhood commercial center with a supermarket and pharmacy.

### 3.6.4 City Center East

City Center East is bounded by Sumter, Pickens, Gervais, and Elmwood. This part of City Center was, at one time, predominantly a residential neighborhood. Over the years, most of the residential homes have been converted to professional offices and other service business locations.

In a number of instances, the 1960's and 1970's era office buildings have replaced the residential use and character of the area. Today the area's residential base is predominantly in a scattering of apartment buildings while the single family look of the district remains intact through office uses. The new design development guidelines will be the most effective tool in ensuring that the character of this area is preserved in the future.

The Master Plan does indicate a number of critical street connections through City Center East that link City Center with other parts of Columbia and provide gateways to City Center. They are as follows:

- Taylor Street
- Laurel Street
- Gervais Street
- Elmwood Avenue
- Bull Street

These streets should be programmed for streetscape improvements that would include new street trees, coordinated mast arm traffic signals, improvements to the sidewalks, and designated crosswalks at all intersections.



Figure 3.27: Guignard House in City Center East

### **3.7 City Center Master Plan**

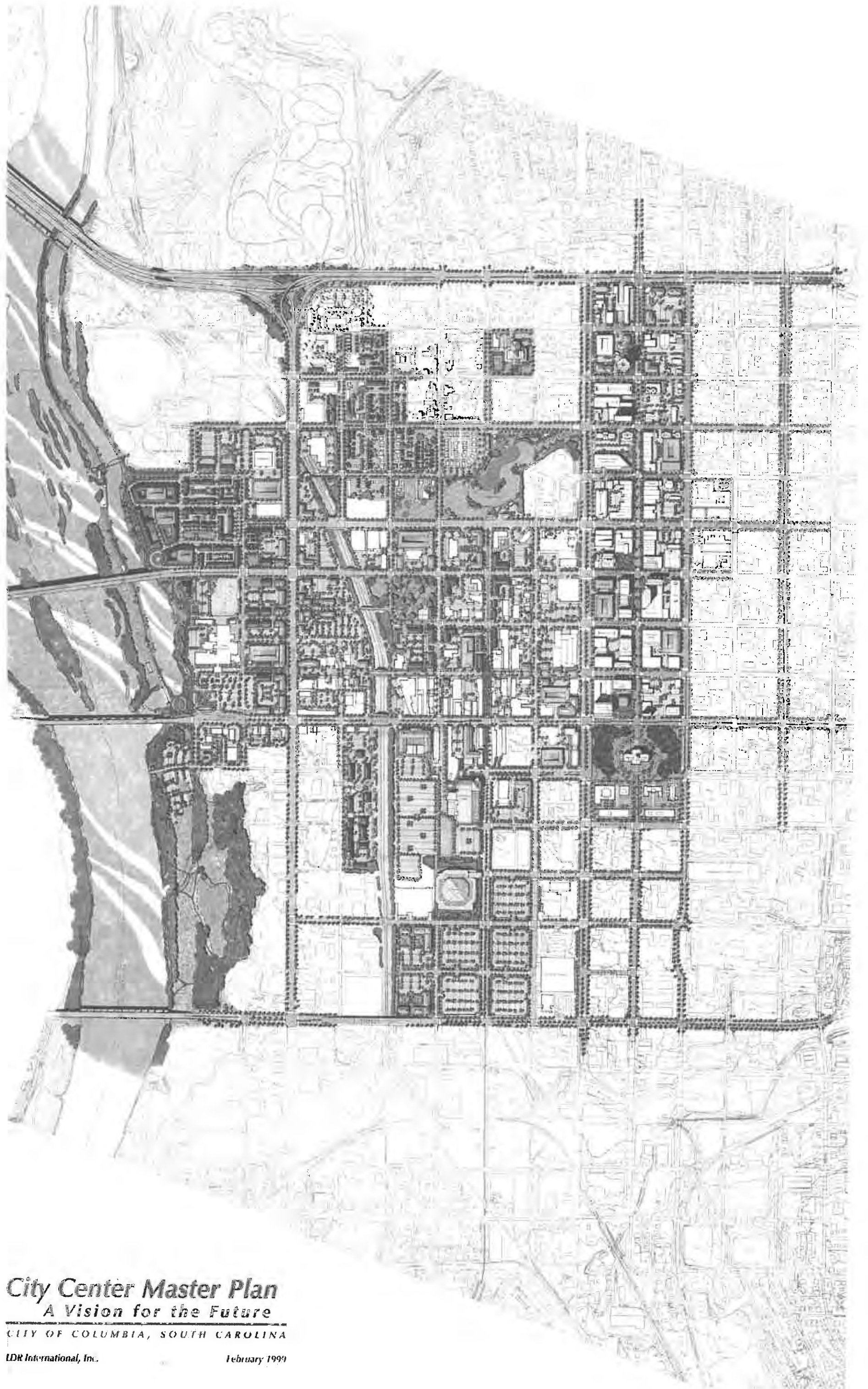
Exhibit 3.7 illustrates the overall Master Plan for City Center. This plan ties each of the individual district plans together to provide a blueprint for the future of City Center and Columbia.

It presents a diversity of cultural and recreational amenities, basic neighborhood services, and attractions as well as the critical ingredients for continued success.

This plan becomes the foundation on which an Economic Development strategy is built. This strategy is presented in the following chapter.

**Insert Exhibit 3.6: City Center Master Plan.**





***City Center Master Plan***  
***A Vision for the Future***

CITY OF COLUMBIA, SOUTH CAROLINA

LDR International, Inc.

February 1999

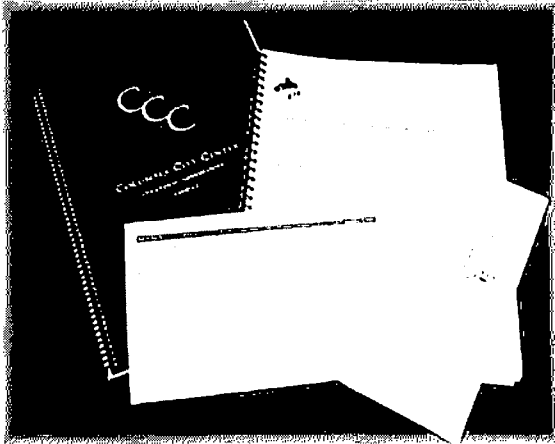


Figure 4.1: Some of the prior implementation and planning documents completed for City Center

## 4.0 Implementation Strategy

### 4.1 Introduction

The City Center Master Plan is more than a plan for the public investments that should take place in City Center, it is a coordinated economic development strategy that illustrates ideas for the private sector to use to implement viable projects in City Center. Time and again, communities have demonstrated that public investments are the seeds for private investment many times over. A target for the plan would be a ratio of five private sector dollars spent for every public dollar spent. With successful implementation, the City Center Master Plan will serve as a model for a citywide or even a regional economic development plan. As with any plan, this is a continual work in progress and will require constant reference and periodic updates.

In order to implement the plan, the City of Columbia will need to examine steps to facilitate a comprehensive economic development policy. This chapter takes the information presented in the plan, combines it with the economic reality of Columbia and outlines a policy direction for the City. It produces a series of recommendations that are organized under “Strategic Positions” for City Center.

This chapter is divided into four topical sections that deal with Strategic Positions and concludes with a project-oriented Action Plan. The Strategic Positions are as follows:

- Organizing for Economic Development
- Tracking the Progress – Information Management
- Working Together, Use a Team Approach – Critical Partnerships
- Getting the Word Out – Marketing, Promotion, and Tourism Development

The Action Plan provides insight into the projects that can be implemented in the next two years that will make a visible statement to sustain the existing excitement about City Center.

## **4.2 Organizing for Economic Development in City Center**

### **4.2.1 Background**

Columbia is experiencing unprecedented investment in City Center. Over \$483 million in public/private investment has been recently completed, is underway, or is in the planning stages. This is a staggering figure and an indication of the results that are being generated as a result of the City's focus on City Center's importance to the region.

Working with City Council, the City's Economic Development Office, the Downtown Business Association, and the Columbia Development Corporation have all played critical roles in the economic development success in City Center. These organizations' economic development functions are augmented by the City's Planning, Zoning, and Code Enforcement departments, which serve to help implement the City planning on a day-to-day basis. Throughout the development process, a private developer is likely to make contact and work with almost all of these departments or organizations.

While each of these organizations is linked in some fashion, and each provides good service, no formal relationship or coordination exists to assist the developer or property owner through the process of development approval in City Center. In addition, the efforts of tracking business growth, maintaining a local database, and promoting City Center are fragmented.

### **4.2.2 Issues**

- The passage of the City Center Design/Development Guidelines mandates that a procedure be developed to ensure an efficient clear process for development approval.
- A comprehensive customer-oriented process will enable the City's economic development functions

to work directly with the developer to ensure a seamless review and approval process.

- A “unified front” presents a clear message to the development community that the City of Columbia means business and is serious about appropriate new growth in City Center.
- Existing businesses are an important component of an economic development program. A thorough business retention program is essential to understand the changing needs of existing businesses and ensure that appropriate expansions take place in City Center.

#### 4.2.3 Recommendation

- *City Center Development Office* – The City of Columbia should create a City Center Development Office that combines the resources of the various departments, organizations, and individuals dealing with economic development in City Center. The ultimate goal is to create a public/private partnership to oversee and manage development. This would be an umbrella organization that would not replace the Columbia Development Corporation or the Columbia Downtown Business Association but would augment and expand the effectiveness of the overall economic development efforts for the City Center. This partnership is essential in coordinating continual stakeholder input and participation in the implementation of the plan and critical to provide the continuity necessary to implement a plan of this magnitude.
- *Designate Responsibilities and Functions* – Although each organization or department may remain independent, coordination of the individual functions of the department should be mandatory and understood by the staff and, most importantly, to the public. This should be coordinated through a unified design center.

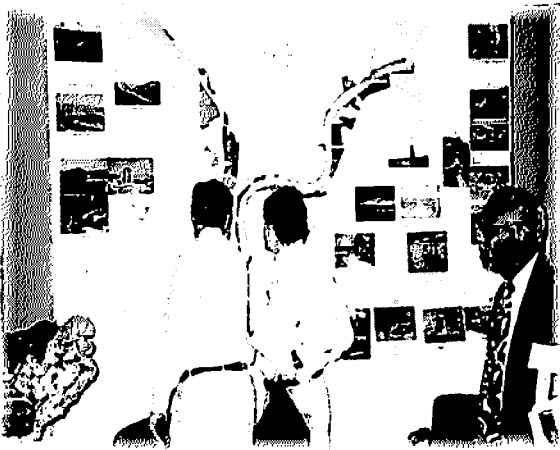


Figure 4.2: The Chattanooga Design Center is a model community planning center

- *Provide Public Interaction* – The City Center Development Office may initially locate existing offices. A long-term goal, however, should be to provide the public, the development community, and existing businesses a way to communicate ideas, view plans, and participate in City Center development through a dedicated design center.
- *Business Improvement Districts (BID's)* – BID's have become successful organizations in cities seeking to establish clean and safe programs, invest in capital projects, or market district resources. Columbia should explore the feasibility of one or more of these districts in City Center in the future.

### **4.3 Getting the Word Out: Marketing, Promotion, and Tourism Attraction**

#### **4.3.1 Background**

Columbia City Center offers the greatest concentrations and variety of office space, restaurants, entertainment, and visitor attractions in the Midlands of South Carolina. The amenities available to the public in City Center Columbia are on par with or exceed those of bigger cities such as Charlotte and Atlanta. Plans for additional investment in City Center are a clear signal that this area is one of the most desirable locations in the region.

Columbia's City Center is located within two hours of some of the most popular tourist destinations in the southeast. The community is developing a series of additional attractions, including museums and recreational amenities that, when combined with the area's rich history, make City Center a natural for vacation stopovers, extended business and sporting event stays, and regional conferences and conventions.

In spite of outstanding amenities, the stellar track record for investment, and the remarkable changes that have taken place in City Center, no focused marketing effort has been produced that showcases City Center as a prime location to live, visit, or locate businesses.

#### **4.3.2 Issues**

- Little is known about the local or regional tourist economy. Figures frequently cited for visitor counts do not match the level of spending in the area on hotel rooms. Even less is known regarding City Center's tourism economy and potential.
- The planned USC Sports Arena and Regional Convention Center will likely have dramatic effects on the local tourism market.
- The City, in partnership with the Convention and Visitors Bureau, have embarked on a program for tourism marketing in City Center. This program will be comprehensive, unique, and include the planning efforts currently underway.

#### **4.3.3 Recommendations**

- *Create City Center Marketing Materials* – The City and the Greater Columbia Convention and Visitors Bureau are working together to create a unified theme/slogan for City Center that can be shared on visitor guides, economic development recruitment brochures, and regional marketing material.
- *Develop an Image for City Center* – Although marketing materials are a first step in creating an identity, a more concerted effort will need to take place to craft a lasting and powerful image for City Center that helps identify it as unique within the region and the state. This image will be the personality of City Center and the lasting impression that visitors and residents associate with the area.
- *Work With Regional and Statewide Tourism and Economic Development Officials* – Columbia's City Center should be the focal point of regional promotional materials related to economic development functions and tourism promotion. Its concentration of business and visitor amenities is unrivaled in the region, or even in the state.

- *Conduct a Regional Tourism Study* – The Strategic Assessment Report recommended a regional tourism study be completed to better understand Columbia’s capacity to attract tourists, and identify visitor profiles. This information will pay huge dividends as City Center’s planned attractions continue to develop.
- *Keep the Public Informed* – Columbia’s track record of involving stakeholders in projects is outstanding. This should be continued and used to celebrate successes, promote continued investment, solicit input, and maintain excitement about City Center. This information should be readily available in easy to understand models and displays at a central location like a design center where development can be promoted and coordinated.

#### **4.4 Tracking the Changes: Information Database Development**

##### **4.4.1 Background**

Much of the marketing material identified above requires reliable information. Columbia is competing with increasingly savvy communities that utilize current market information to provide prospects with demographic, site location, and other statistical information they need to make good decisions. Subtle trends can make or break a project and a community’s reputation hinges on its ability to provide accurate information in a timely basis.

Information databases are also important to government policy makers because they can generate information to help make decisions more clear. Decisions should be based on fact, not in the emotional side of an issue.

##### **4.4.2 Issues**

- Information on City Center’s demographics, building values and sizes, site sizes and availability,

vacancy rates, parking and sales volume is not readily available.

- As a decision-making tool, this information is important so that public officials and the private sector can better understand the rate of return that the City is getting on public investments.
- In the economic development process, this information can and often is the only reliable data on which others will base their decisions to invest.

#### **4.4.3 Recommendations**

- *Implement Geographic Information System Technology* – Geographic Information Systems (GIS) technology is no longer an option for communities the size of Columbia. A good information database is essential to the City's staff, be it fire or police officers, planning or economic development officials. City Center's building footprints, parking lot layouts, parking space counts, sales tax data, building values, and a host of other information can be documented with a GIS system. Today's software enables anyone with computer experience the capability to learn how to deal with and understand the data, generate map products, and provide information. This should be a top priority for the City. A listing of some of the information that can be included in a GIS database is included in Appendix D.
- *Conduct a Building Inventory* – An inventory of existing commercial buildings in City Center that includes ownership, tax value, size, characteristics, availability, zoning, and other pertinent information is a valuable tool when dealing with interested investors.
- *Complete a Residential Unit Inventory* – Residential development in City Center is a stated priority. Understanding the baseline information with regard to existing residential development will be of great



value in the future. Unit types, ownership/renter distribution, vacancy and absorption rates and even profiles of City Center workers and residents will help the City better understand the market for urban living.

- *Track Public and Private Investment* – The City’s Economic Development office has started to track investments in City Center, this is extremely important to understand how the public sector’s investments have earned a return through private sector investments.
- *Create a Design/Development Center* – As already mentioned, a coordinated City Center Development Office or Design/Development Center could house and coordinate this information in a central location with shared staffs from a number of entities handling the development of City Center.

## **4.5 Critical Partnerships**

### **4.5.1 Background**

Partnerships and working together are the key to successful revitalization of any urban area. The same holds true for Columbia’s City Center. The City of Columbia has effectively partnered with the private development community on a number of projects to create an environment where development can efficiently occur. CanalSide is an example of such a partnership as is the River Alliance’s success in uniting the cities and counties in the common goal of developing the area’s riverfront. The current plans for the Convention Center, Arena, and Hotel will be among the most complex partnerships that the City has had to work with and success is critical.

For all practical purposes, this entire plan rests on the ability of the City of Columbia to share and allocate its limited resources with other facets of the community to make projects work.

#### **4.5.2 Issues**

- The State of South Carolina has significant influence over the health of City Center. State employees are a critical and large component of the employment base in City Center and State owned property and offices make-up a large portion of the developed real estate in City Center.
- The University of South Carolina is one of Columbia's most important economic assets. Along with the State, the University has major investment in City Center and significant opportunities to influence the continued development of the City.
- Few large projects are completed in urban settings without the active participation of both the public and private sectors. The same is true in Columbia. Cooperation toward common and clear goals is essential.
- The focus on residential development in City Center will never come to full fruition without the full cooperation and support of the local school district, realtors, the development community, and the financial community.

#### **4.5.3 Recommendations**

- *Develop a Formal Relationship with the University of South Carolina* – The existing relationship between the City and the University is good but a formal agreement between the two should be instituted to promote working together on a regular basis to better understand expansion plans, become co-developers of projects, and promote research and high tech office opportunities.
- *Partner with the State of South Carolina* – The City of Columbia and the State of South Carolina have significant opportunities to partner together to create a better City Center.

- Land owned by the State could be recycled into premier new development sites.
- New State investments can set the stage for high quality urban settings.
- The State should work with the City to retain jobs in City Center to help support the retail and small businesses located there.
- *Establish a Residential Development Task Force* – The City should engage local residents, property owners, realtors, developers, financial institutions, community leaders, and school officials to meet and discuss issues related to City Center residential development.
- *Interact with Area Colleges* – In addition to the University of South Carolina, the City of Columbia has the opportunity to team with Benedict College, Allen University, Columbia College, and Midlands Technical College to create strategic initiatives in City Center and the surrounding community.

#### **4.6 Strategic Positions: A Summary**

These strategic positions can be summarized in the following benchmark statements for City center:

- Columbia’s economic development program and process will be a national model for attracting and retaining investments.
- Columbia will be able to track City Center public and private investments in order to provide economic development data, and share information to the public.
- Partnerships will strengthen between the City of Columbia and Richland and Lexington Counties, the State of South Carolina, the University of South Carolina, Columbia and Benedict College, Allen University, Midlands Technical College and the private sector.

- Columbia will share City Center's attractions, amenities, and features with the region, the state, and the nation through a focused marketing campaign and tourism development strategy.

#### **4.7 Immediate Action Agenda**

The following tasks are short-term initiatives that should be implemented immediately to begin work on the Master Plan.

- Create the City Center Development Office.
- Implement GIS technology and begin to establish an information database.
- Develop an image for Columbia.
- Develop and implement a marketing program.
- Conduct a residential demand analysis.
- Resolve to complete Main Street streetscape improvements and plan for a new parking facility.
- Complete the Phase I section of the Three Rivers Greenway.
- Complete improvements to Lady Street and plan for a new parking facility.
- Complete the CanalSide development.
- Complete plans for the USC Arena and Midlands Regional Convention Center.

#### **4.8 Conclusion**

Columbia has the unique opportunity to channel the positive initiatives that are taking place now throughout City Center into additional investments that will help create a national model for urban regeneration. With thoughtful efforts, strategic partnerships, and long term commitment, Columbia's City Center will become the most desired residential, retail, and office location in the Midlands of South Carolina.

## ***Appendix A: Regional Economic Analysis***

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## ***Appendix A: Regional Economic Analysis***

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Columbia is South Carolina's state capitol and largest city as well as the heart of a five-county economic region known as "The Central Midlands." Within the state, this central area is called "the Midlands."

The region's strategic geographic position midway between Miami and New York has been enhanced by accessibility at the crossroads of three Interstate highways (I-20, I-26, and I-77) and proximity to two additional Interstates, which are among the busiest in the U.S. Interstate system (I-95 and I-85).

The Columbia region has capitalized on South Carolina's favorable business climate and renowned employee productivity with extensive capital investment by domestic and international corporations in new manufacturing plants and industrial facilities. Economic expansion in the region attests to the success of the local initiative of attracting new jobs and investment based on high quality of life, low corporate tax rates, and the inherent strengths associated with the presence of the state's largest university.

### **1.1 Regional Demographic Overview**

The Columbia MSA encompasses the City of Columbia and surrounding Richland and Lexington counties while the Central Carolina economic unit consists of the MSA plus Fairfield, Newberry, and Kershaw counties. As the regional population base expands and intra-regional commuting patterns shift, these counties may be added to the officially designated base of the MSA in the future.

The Columbia MSA will likely surpass the 500,000 population level prior to the Census in the year 2000.

#### ***Population Growth and Projections: 1980-2010 Columbia, South Carolina MSA***

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	<b><i>1980</i></b>	<b><i>1990</i></b>	<b><i>2000</i></b>	<b><i>2010</i></b>
Richland County	269,735	285,720	312,600	337,100
Lexington County	140,353	167,611	201,300	232,700
Columbia MSA	410,088	453,331	513,900	569,800

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The Central Carolina economic region has approximately 100,000 more residents than the MSA itself and is well beyond the half-million level.

The concept of the regional economic unit is important since businesses and residents of this extended area rely upon Columbia-based shopping and dining areas, medical care, and a variety of professional and other services.

***1980-2010 Population Growth And Projections  
Columbia MSA vs. Central Carolina Region***

	<b>1980</b>	<b>1990</b>	<b>2000</b>	<b>2010</b>
Columbia MSA	410,088	453,331	513,900	569,800
Central Carolina Region	501,045	552,397	622,700	686,800

Local estimates show the pace of growth in the current decade to be higher than the annual growth rate experienced between 1980 and 1990.

***1980-2010 Comparative Annual Population Growth Rates  
Columbia MSA vs. Central Carolina Region***

	<b>1980-1990</b>	<b>1990-2000</b>	<b>2000-2010</b>
Columbia MSA	1.0%	1.3%	1.0%
Central Carolina Region	1.0%	1.2%	1.5%

The City of Columbia’s population changes according to annexation actions. Its current population is approximately 126,700.

## **1.2 Employment**

The Central Carolina region has a labor force of 325,500 and a prevailing unemployment rate of less than 2.0 percent. The labor force has grown by 1.0 percent since 1997. The regional economy is influenced by multiple economic engines:

1. South Carolina State Government
2. University of South Carolina
3. U.S. Army Fort Jackson
4. Broad-based Manufacturing Sector

5. Employment by Sector
6. Strong Service Employment: Finance/Insurance/Real Estate (F.I.R.E.)

The Central Carolina Economic Development Alliance announced an average of \$354 million in new and expanded investment per year between 1994 and 1997 resulting in a total of 6,600 new jobs for the region. In 1998 alone, investment in the midlands region topped \$642 million and over 3000 jobs. 1998 marked the most successful year in investment and job creation since CCEDA had been tracking the data.

### ***Government***

- One-quarter of all employment in the Central Carolina region is generated by government; within Richland County, the share of employment attributable to government is even higher at 31 percent.
- State government is the predominant employer within this category.
- There is minimal growth in state employment; however, the majority of existing state jobs are in City Center.

### ***University of South Carolina***

The University of South Carolina is a significant contributor to the regional economy and to the vitality of the City of Columbia. A 1991 economic impact analysis identified \$505 million annual impact of the University on the Midlands Region.

- The University has an enrollment of 25,000 students with 5,000 faculty and staff.
- Annual payroll exceeds \$300 million; estimated annual student expenditures in the local economy was \$204 million.
- Student spending is realized most in the retail (\$44 million) and food/beverage (\$47 million) sectors in addition to housing (\$26 million).
- In 1991-1992, sports programs at the University “imported” direct spending of \$52 million according to a University study.
- The campus occupies a large area on the southern edge of City Center. The campus continues to expand as the University adds facilities. A major growth area for the campus is a new sports arena complex which will be built in the Arena District of City Center.

### ***U.S. Army Fort Jackson***

The U.S. Army maintains a large Initial Training Facility (ITF) at Fort Jackson in eastern Columbia. The base covers 52,000 acres with an active duty and civil service base of 97,000. It is the largest ITF in the United States.



- The annual payroll generated by Fort Jackson exceeds \$431 million.
- More than 62,000 soldiers receive basic training or advanced individual training here annually. The facility is critical to the mission of the Army and has not been threatened by Base Realignment and Closure discussions.
- ITF graduations each week attract significant visitors to the Greater Columbia area.

### ***Manufacturing Sector***

Approximately 13 percent of non-agricultural jobs are in the manufacturing sector.

- Employment in Columbia's manufacturing sector is equally split between durable goods and non-durable goods reflecting the area's diversified base.
- The region is a major production center for nylon and synthetic fibers, tires, chemicals, and food products.
- Rural counties within the economic region (Fairfield, Newberry, and Kershaw) have higher shares of manufacturing employment than Richland and Lexington counties.

### ***Service Sector Employment***

As the state capitol and a major health care center, Columbia has more than 70,000 service workers accounting for 25 percent of total employment.

- Health service providers account for more than 13,000 jobs in the Columbia MSA while membership service organizations related to the state government account for 2,500 jobs.

### ***Finance/Insurance/Real Estate (F.I.R.E.)***

The white collar jobs within the F.I.R.E. sector range from clerical positions to executive management positions. Columbia's employment of more than 20,000 in this sector reflects its position as the state's banking and insurance center.

- A majority of F.I.R.E. jobs are located within the City Center area.
- Major employers with 1,000 or more employees in this sector include NationsBank, Wachovia, Blue Cross/Blue Shield, and Colonial Life & Accident Insurance Company (A Unum Company).

***Appendix B: Market Sector Trends and Projections***

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## ***Appendix B: Market Segment Trends, Projections & Observations***

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### **B-1 Office Market**

Office employment in the Columbia MSA occupies in excess of 10.0 million square feet of office space. City Center is the largest office submarket in Columbia with approximately 78 buildings with aggregate space of 4.5 million square feet.

- The metropolitan area has absorbed 263,745 square feet of speculative office space annually during the 1987-1998 time period; 38.4% of that in CBD. With the heydays of bank and government expansion gone, most of office absorption in the future is expected to be from smaller firms rather than large corporate offices.
- An average annual absorption of 50,000 square feet in City Center and 150,000 square feet in the suburban market is estimated over next ten years.
- The suburban occupancy rate is currently very high (92%), with little new construction in progress.
- The occupancy is lower (88.8%) in the CBD, with certain 1970's era office properties in City Center have not been upgraded and represent a disproportionate share of CBD vacancy rate.
- As of mid-1998, the CBD had 470,000 square feet of vacant space primarily caused by reductions in the use of space by banks involved in interstate mergers.
- New leases in City Center Columbia are averaging \$14.23 PSF--down 24¢ in the past two years. City Center's new lease rate is 5-10 percent higher than the market-wide average rental rate of \$13.38.
- City Center Columbia's share of the regional office space inventory has gradually declined from 50 percent in 1990 to 43 percent in 1998. Emerging office nodes include St. Andrews and East Columbia. Each of these areas has nearly 2.0 million square feet of office space – still far less than the Central Business District.
- Unlike many markets, older City Center properties with historic character are in demand.
- There is very little Class A office space available in the CBD, especially in significant, contiguous space. Available space is fragmented.

## Issues

- Economic development spin-off into older, lower rent space for smaller entrepreneurial/incubator firms could accelerate need for Class B or rehab type of space – public encouragement/development of technology incubators could spur City Center demand.
- City Center can capture some of the growth which would likely go to the suburbs in near terms since little construction is planned. Medical/professional offices might be a target, clustering near hospitals. Need strong anchor tenant and pre-leasing to enable development to happen.
- Parking availability in City Center is perceived to be a problem. Additional parking resources will be required to handle major new office components and a management and public relations campaign can alleviate existing perceptions.
- An aggressive marketing program should be established to augment the commercial real estate community's efforts to lease available office space.
- Available office space inventory, lost size and location should be readily available to assist in a marketing program.

## **B-2 Tourism and the Visitor Economy**

The Greater Columbia area has a modest visitor economy compared with other South Carolina destinations such as Hilton Head, Charleston and Myrtle Beach. The estimated annual overnight visitor market is 3.0-3.2 million persons. Business travelers and government-related visitors are potentially more important to the local visitor economy than traditional family vacationers. A substantial daytrip market is drawn to Columbia for athletic events at the University of South Carolina and during the legislative session. Local estimates of annual total visitation seem excessive at 12.0 million annually.

- In 1997, hotels/motels in Richland and Lexington counties generated total sales of \$102.5 million--up 20 percent from \$85.6 million in 1993.
- There are approximately 8,252 hotel/motel rooms in the MSA with 900 located in City Center, an increase of by 994 rooms (13.7% -- 1.7% average per year) since 1991. Growth nationally has been about 3.0%, per year.
- Growth has been primarily in extended stay and limited service categories in the suburbs, which typical of national trends.
- Room night demand has grown at an average 2.8% annually (heavily weighted 1997-1998), compared to about 2.0% nationally during the period.
- The 1997 average occupancy for the region was 65 percent at an average daily room rate of \$60. The newly renovated Embassy Suites property is achieving superior occupancy and ADR.
- City Center Columbia has limited lodging facilities. The Adams Mark is the only upscale property in the CBD; this property is achieving less than 55 percent annual occupancy at an average daily room rate of \$82.00. A vintage Holiday Inn adjacent to the USC Coliseum serves the middle market. In addition, there are several small properties in City Center including the Clarion Hotel near the State House and the University of South Carolina.
- The Columbia Metropolitan Convention and Visitors Bureau is responsible for generating bookings for conventions and meetings. The Bureau receives funding from the 5.0 percent bed tax imposed on hotel room rentals. (3.0 percent dedicated to the proposed Convention Center)
- In 1997, the CVB booked 55 meetings attended by 40,000 delegates. Local officials cite the lack of adequate convention and conference facilities and the lack of promotion dollars for the modest delegate count.
- Columbia is often a meeting site for South Carolina state associations. Columbia competes with cities such as Raleigh, Knoxville, Chattanooga, Asheville, Charleston, and Savannah for conventions. Of note, all of these cities already have--or are planning -- expanded convention facilities. A local effort to build a state-of-the-art

convention center of 100,000-115,000 square feet in the Arena District is underway.

- A regional initiative is underway to “package” and market the area’s many visitor attractions. The Riverbank’s Zoo, Columbia Art Museum, State Museum of South Carolina, and Historic Columbia, along with excellent restaurants and recreational activities, are key venues.
- The current convention center development proposal contains plans for a new upscale hotel. CVB officials contend there is a market void which could be filled with a top-quality, high-service property adjacent to the new Convention Center. Construction of the hotel/convention center in City Center is estimated to make available about one-half of its room nights for business and tourism travelers.
- Lake Murray offers outdoor recreation and boating near Columbia. The state-chartered Lake Murray Tourism Association actively promotes this destination.

## **Issues**

- Economics of first class, full-service hotels can be difficult and, therefore, usually require direct or indirect subsidies for their completion.
- Future demand growth is estimated at 2.8% annually, though that rate could just as legitimately be set as low as 2.0% -- which would result in higher occupancy rate (70% vs. 75%) by 2007.
- Demand could be positively affected by booming convention business at new hotel/convention center, increased heritage tourism, construction/expansion of convention center.
- Hotel construction typically comes in waves tied to the economic cycle, driven more by capital flows than by demand. Using an industry rule of thumb, hotel operations are generally considered to be profitable at 70-75% occupancy. The combination of the ebb of the building cycle and rising occupancies will make new construction possible again by 2003.
- To more fully understand the expenditure potential of this market segment requires a thorough investigation of the “total annual visitor count” as promoted by the Columbia Metropolitan Convention & Visitors Bureau. Tourist counts and estimated tourism spending levels are inconsistent.
- Future research might attempt to measure the level of interaction with City Center Columbia by visitors in order to accurately assess the expenditure potential of this market segment.

**Table B-1: Columbia Metropolitan Area  
Office Supply: Historical and Projected (1987-2007)**

	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	Average '87-98
<b>Net Absorption</b>																						
Central Business District	25,485	544,531	184,729	92,550	24,600	53,729	4,464	-37,838	67,089	79,054	148,316	30,000	60,000	60,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	101,392
Non-CBD Submarkets	291,950	154,388	240,361	177,392	104,730	137,937	29,036	109,231	213,860	57,958	261,392	150,000	140,000	140,000	150,000	150,000	150,000	150,000	150,000	150,000	150,000	160,686
Metropolitan Area	317,435	698,919	425,090	269,942	129,330	191,666	33,500	71,393	280,949	137,012	409,708	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000	263,745
CBD Share of Metro Market	8.0%	77.9%	43.5%	34.3%	19.0%	28.0%	13.3%	-53.0%	23.9%	57.7%	36.2%	15.0%	30.0%	30.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%	25.0%	38.4%
<b>Rentable Space</b>																						
Central Business District	2,744,173	3,411,490	3,988,430	4,054,361	4,045,745	4,095,360	4,123,655	4,240,269	4,224,682	4,307,452	4,337,416	4,337,416	4,478,716	4,782,416	4,782,416	4,783,416	4,783,416	4,783,416	4,783,416	4,883,416	4,883,416	4,883,416
Non-CBD Submarkets	3,479,821	3,545,962	4,366,573	4,621,948	5,081,102	5,340,439	5,312,612	5,339,449	5,523,309	5,474,410	5,570,018	5,570,018	5,847,862	6,000,036	6,163,079	6,326,123	6,489,166	6,652,210	6,815,253	6,978,297	7,141,340	7,141,340
Metropolitan Area	6,223,994	6,957,452	8,325,003	8,676,329	9,126,847	9,435,799	9,436,267	6,579,718	9,747,991	9,781,862	9,907,434	9,907,434	10,326,278	10,783,452	10,946,495	11,109,539	11,272,582	11,435,626	11,598,689	11,861,713	12,024,756	12,024,756
CBD Share of Metro Market	44.1%	49.0%	47.9%	46.7%	44.3%	43.4%	43.7%	44.3%	43.3%	44.0%	43.8%	43.8%	43.4%	44.4%	43.7%	43.1%	42.4%	41.8%	41.2%	41.2%	40.6%	40.6%
<b>Occupied Space</b>																						
Central Business District	2,378,181	2,922,712	3,244,514	3,427,628	3,475,656	3,607,710	3,612,174	3,574,336	3,579,798	3,688,852	3,837,168	3,867,168	3,927,168	3,987,168	4,037,168	4,087,168	4,137,168	4,187,168	4,237,168	4,287,168	4,337,168	4,337,168
Non-CBD Submarkets	2,709,101	2,863,489	3,365,590	3,772,047	4,076,786	4,491,993	4,415,965	4,525,196	4,740,683	4,828,641	5,090,033	5,240,033	5,380,033	5,520,033	5,670,033	5,820,033	5,970,033	6,120,033	6,270,033	6,420,033	6,570,033	6,570,033
Metropolitan Area	5,067,282	5,786,201	5,610,104	7,199,675	7,552,442	8,099,703	8,028,139	8,099,532	8,320,481	8,517,493	8,927,201	9,127,201	9,307,201	9,507,201	9,707,201	9,907,201	10,107,201	10,307,201	10,507,201	10,707,201	10,907,201	10,907,201
CBD Share of Metro Market	46.7%	50.5%	49.1%	47.6%	46.0%	44.5%	45.0%	44.1%	43.0%	43.3%	43.0%	42.4%	42.2%	41.9%	41.6%	41.3%	40.9%	40.6%	40.3%	40.0%	39.8%	39.8%
<b>Vacancy Rate</b>																						
Central Business District	13.3%	14.3%	18.7%	15.5%	14.1%	11.9%	12.4%	15.7%	15.3%	14.4%	11.5%	10.8%	12.3%	16.6%	15.6%	14.6%	13.5%	12.5%	11.4%	12.2%	11.2%	11.2%
Non-CBD Submarkets	22.1%	19.2%	22.4%	18.4%	19.8%	15.9%	16.9%	15.2%	14.2%	11.8%	8.6%	5.9%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%	8.0%
Metropolitan Area	18.3%	16.8%	20.6%	17.0%	17.3%	14.2%	14.9%	15.5%	14.6%	12.9%	9.9%	7.9%	9.9%	11.8%	11.3%	10.8%	10.3%	9.9%	9.4%	9.7%	9.3%	9.3%
<b>New Construction</b>																						
Central Business District													141,000	205,000	0	0	0	0	0	100,000	0	0
Non-CBD Submarkets													277,844	152,174	163,043	163,043	163,043	163,043	163,043	163,043	163,043	163,043
Metropolitan Area													418,844	457,174	163,043	163,043	163,043	163,043	163,043	263,043	163,043	163,043

Source: Keenan Company, "Office Market Review"  
Central Carolina Business Review & Investment Guide  
Projections by Lipman Frizzell & Mitchell LLC

**Table B-2: Columbia Metropolitan Area  
Hotel Performance: Historical and Projected (1991-2007)**

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007
Occupied Rooms	60.3%	64.0%	65.9%	65.0%	66.6%	67.9%	66.5%	64.0%	85.8%	67.6%	68.0%	69.9%	71.8%	73.8%	71.6%	73.6%	75.6%
Growth Rate	4,378	4,515	4,529	4,462	4,471	4,630	4,932	5,282	5,427	5,577	5,731	5,889	6,052	6,219	6,391	6,567	6,749
Room Rate		3.1%	0.3%	-1.5%	0.2%	3.5%	6.5%	7.1%	2.8%	2.8%	2.8%	2.8%	2.8%	2.8%	2.8%	2.8%	2.8%
RevPAR	\$40.84	\$42.07	\$42.12	\$43.68	\$46.59	\$49.45	\$50.87	\$52.34									
Room Nights	\$24.63	\$26.92	\$27.74	\$28.39	\$31.04	\$33.56	\$33.85	\$33.48									
Room Supply	2,649,221	2,575,043	2,508,645	2,505,655	2,450,508	2,488,627	2,706,920	3,012,162									
	7,258	7,055	6,873	6,865	6,713	6,818	7,416	8,252	8,252	8,252	8,427	8,427	8,427	8,427	8,927	8,927	8,927

Assumptions: Arena/Conference Center Hotel of 350 rooms to be built in 2001; 50% of its room nights available to public.  
Average 1992-1998 annual demand growth of 2.8% will be continued.  
500 new hotel rooms to be built in 2003-2008 period.

Source: Smith Travel Research, compiled by Lipman Frizzell & Mitchell LLC



### **B-3 Regional Retail Overview**

Columbia's traditional Main Street retail strength diminished when the three variety department stores closed their Center City flagship locations. Suburban retail development is extensive, as are some urban specialty retail areas such as Five Points.

- The Columbia MSA currently has more than 21 square feet of shopping center GLA per capita excluding freestanding retail space and Main Street retail areas. This local average exceeds the national average of 18 square feet per capita.
- Columbia's retail market is somewhat saturated on a per capita basis and local income characteristics. It is the hub or a regional market which may account for this saturation.

#### ***Suburban Retail Landscape***

Columbia's four regional malls collectively offer 3.2 million square feet of contemporary retail space. The department store dynamics are in transition following the purchase of Mercantile Stores (J.B. White) by Dillard's. Recently departed Belk has re-entered the market. Department store chains operating in the market include:

- Parisian (Proffitt's)
- Belk
- Dillard's (recently purchased J.B. White which will be sold to Belk)
- Rich's (Federated Department Stores)
- Sears
- JCPenney

#### ***Regional Mall Square Footage Columbia, South Carolina MSA***

	<b><i>Square Feet</i></b>
Columbiana Center	600,000
Dutch Square	525,000
Columbia Mall	1,300,000
Richland Mall	800,000
<b><i>Total</i></b>	<b><i>3,225,000</i></b>

**Columbiana Center** opened in 1990 with Belk's and Sears as anchors. Since that time the mall has added, rearranged, and changed anchors as department stores have entered, left and re-entered the market. It is currently anchored by Dillard's, Belk, Parisian, and Sears. The center's upscale specialty store assortment includes highly selective national chain retailers. The mall has generated significant additional investment in retailing in this area.

**Dutch Square** is a 1970 vintage center which is currently functioning as a sub-regional mall. Its in-line specialty store vacancy rate is high. Belk is the sole full-line department store anchor and has recently been converted from a J.B. White after its purchase by Dillard's. Its strength is the new multiplex cinema which has been added in recent months.

**Columbia Mall** offers Rich's, Dillard's, Sears, and JCPenney. The region's super-regional center opened in 1977. While not upscale in its fashion mix, the center offers a broad assortment of moderate to better apparel stores and is a strong performer.

**Richland Mall** opened in 1988 and offers Dillard's, Belk's, and Parisian as anchors. Again, Belk has taken over the operation of the former J.B. White store. This center is well located with respect to some of Columbia's finest residential neighborhoods yet the current in-line store vacancy rate is high.

### ***Urban Specialty Areas***

Columbia's dual urban specialty areas straddle the CBD. Five Points and the Congaree Vista district are very vibrant restaurant and entertainment oriented districts in distinct contrast to the Main Street Corridor of City Center.

- **Five Points** is a student-dominated restaurant and retail area at the intersection of Saluda, Harden, College, Devine, and Greene streets. This district is several blocks east of the main campus of USC. Few national chains have discovered Five Points. The merchants here reflect the unique "college town" flavor of Columbia. A limited number of upscale specialty stores have clustered along Devine Street to the east of Five Points.
- **The Congaree Vista District** has become a vibrant collection of restaurants, brew pubs, and entertainment venues with specialty retail and galleries located in historic buildings. Warehouses, train depots, and 19th century industrial buildings are being converted into attractive commercial facilities, with more conversion and new construction being planned. This area is the site of many fine dining and casual restaurants with extended regional drawing power. The Vista district is located in the area bounded by Assembly, Huger, Senate and Hampton Streets with Gervais Street serving as its primary axis. Although within 3-5 blocks of the State Capitol and Main Street, the topography makes the walk somewhat strenuous. A trolley links the Vista with other areas in City Center during lunch hours.

## Retail and Restaurant Sales Performance

At a macro level, total retail sales in the Columbia MSA have increased at an annual rate of 5.5 percent since 1993.

- The GAFO (General Merchandise, Apparel, Furniture and home furnishings, and Other merchandise related to these classifications) component of increased at an average annual rate of 4.8 percent since 1993. Eating/Drinking Place sales escalated at an average annual rate of 5.7 percent during this period.

### 1993-1997 Total Sales Columbia MSA

	<i>Richland County</i>	<i>Lexington County</i>	<i>Columbia MSA</i>
1993	\$6,307,147.5	\$3,074,357.2	\$9,381,504.7
1994	6,225,604.1	3,322,348.8	9,547,952.9
1995	6,681,876.0	3,751,741.6	10,433,617.6
1996	7,111,840.8	4,152,124.0	11,263,964.8
1997	7,199,576.4	4,407,035.5	11,606,611.9
Compound Growth	3.4%	9.4%	5.5%

Source: SC Department of Revenue and Taxation  
H. Blount Hunter Retail & Real Estate Research Co.

### 1993-1997 GAFO and Eating/Drinking Place Sales Columbia MSA (in millions)

	<i>Total GAFO Sales</i>	<i>Eating/Drinking Place Sales</i>
1993	\$959.8	\$447.9
1994	1,073.4	476.0
1995	1,155.0	497.3
1996	1,160.9	529.1
1997	1,158.6	558.5
Compound Growth Rate	4.8%	5.7%

Source: SC Department of Revenue and Taxation  
H. Blount Hunter Retail & Real Estate Research Company

## *Issues*

- Little is known about sales performance or sales trends for individual businesses in City Center. As a result, the City of Columbia faces a distinct disadvantage in its planning and marketing process as well as its determination of cost-benefit ratios in conjunction with public funding and incentives for private commercial development.
- The City of Columbia should create a comprehensive analyses of City Center districts as follows:
  1. Total first floor square footage inventory
  2. Total building square footage summary
  3. Periodic measurements of occupancy
  4. Total sales by retailers, restaurants, and services
  5. Summary of total assessed valuation of districts
  6. Employment
  7. Work force levels (including income information)
- Urban areas with unique retail mixes in other markets have demonstrated their ability to draw suburban traffic. Retail employment and tax generation within City Center can be highly beneficial. A goal for the share of sales to be generated by local residents is 40-50 percent of volume.

## **B-4 Residential Market**

Total number of new residential construction permits issued between 1989-1997:

- MSA total of 29,914 or an average of 3,328 per year.
- Columbia total of 3,900 or 13.0% of the MSA, or an average of 433 per year.

Single family (1-4 units) new construction permits, issued between 1989-1997:

- MSA total of 24,795 or 82.9% of total residential units.
- Columbia total of 1,674 or 6.8% of the MSA.

Multi-family (5+ units) new construction permits, issued between 1989-1997:

- MSA total of 5,119 or 17.1% of total residential units.
- Columbia total of 2,226 or 43.5% of the MSA.

Population growth is estimated/projected by S.C. State Data Center:

- 1990-1995: +38,269
- 1995-2000: +33,200
- 2000-2005: +30,500
- 2005-2010: +32,100

Projection of new residential construction through 2007 in the MSA is estimated at over 3,000 units per year based on continued strong population growth.

### **Issues**

- Columbia's share of the overall MSA market is small: and it is difficult to shift established patterns of consumer demand.
- Columbia's share of the multi-family market is substantial: if the bulk of new construction is market rate, there is a possibility of capturing those renters for new middle income ownership or rental development in City Center.
- The metropolitan residential market overall is predominately single family: developers should be cautious with high density and/or alternate ownership (condo/coop) formats.

**Table B-4a: Residential Building Permits by Jurisdiction (1989 - 1997)**

	1989	1990	1991	1992	1993	1994	1995	1996	1997	89-97 Total	Annual Average
Fairfield County	124	84	74	73	62	56	48	134	67	722	80
Keshaw County	314	300	197	226	211	207	221	270	237	2183	243
Newberry County	112	125	94	105	4	6	90	117	111	764	85
Other Counties	550	509	365	404	277	269	359	521	415	3669	408
Lexington County	888	1081	1130	1479	1727	1652	1384	1508	1540	12389	1377
Richland County	1578	1399	1741	1649	1500	2041	2162	2385	3137	17592	1955
MSA Counties	2466	2480	2871	3128	3227	3693	3546	3893	4677	29981	3331
	<b>1989</b>	<b>1990</b>	<b>1991</b>	<b>1992</b>	<b>1993</b>	<b>1994</b>	<b>1995</b>	<b>1996</b>	<b>1997</b>	<b>89-97 Total</b>	<b>Annual Average</b>
MSA Total	2466	2480	2871	3128	3227	3693	3546	3893	4677	29981	3331
Other Counties	550	509	365	404	277	269	359	521	415	3669	408
Columbia	431	164	335	410	144	544	466	567	839	3900	433
Columbia as % of MSA	17.5%	6.6%	11.7%	13.1%	4.5%	14.7%	13.1%	14.6%	17.9%	13.0%	13.0%

Source: U.S. Bureau of the Census, C-40 Reports, compiled by Lipman Frizzell & Mitchell LLC

**Table B-4b: Columbia and Surrounding Counties  
Single Family Construction (1-4 Units)  
Residential Building Permits by Jurisdiction: 1989 - 1997**

	1989	1990	1991	1992	1993	1994	1995	1996	1997	89-97 Total	Annual Average
Fairfield County	76	84	74	73	62	56	48	62	67	602	67
Keshaw County	266	252	197	226	211	207	221	270	237	2087	232
Newberry County	112	125	94	105	4	6	90	117	111	764	85
Other Counties	454	461	365	404	277	269	359	449	415	3453	384
Lexington County	888	913	1116	1473	1517	1434	1154	1439	1408	11342	1260
Richland County	1038	1171	1075	1358	1350	1505	1766	2181	2009	13453	1495
MSA Counties	1926	2084	2191	2831	2867	2939	2920	3620	3417	24795	2755
	1989	1990	1991	1992	1993	1994	1995	1996	1997	89-97 Total	Annual Average
MSA Total	1926	2084	2191	2831	2867	2939	2920	3620	3417	24795	2755
Other Counties	454	461	365	404	277	269	359	449	415	3453	384
Columbia	127	164	91	127	128	136	214	400	287	1674	186
Columbia as % of MSA	6.6%	7.9%	4.2%	4.5%	4.5%	4.6%	7.3%	11.0%	8.4%	6.8%	6.8%

**Table B-4c: Columbia and Surrounding Counties  
Multi-Family Construction (+5 Units)  
Residential Building Permits by Jurisdiction: 1989 - 1997**

	1989	1990	1991	1992	1993	1994	1995	1996	1997	89-97 Total	Annual Average
Fairfield County	48	0	0	0	0	0	0	72	0	120	13
Keshaw County	48	48	0	0	0	0	0	0	0	96	11
Newberry County	0	0	0	0	0	0	0	0	0	0	0
Other Counties	96	48	0	0	0	0	0	72	0	216	24
Lexington County	0	168	14	6	210	218	230	69	132	1047	116
Richland County	540	228	636	291	150	536	396	167	1128	4072	452
MSA Counties	540	396	650	297	360	754	626	236	1260	5119	569
	1989	1990	1991	1992	1993	1994	1995	1996	1997	89-97 Total	Annual Average
MSA Total	540	396	650	297	360	754	626	236	1260	5119	569
Other Counties	96	48	0	0	0	0	0	72	0	216	24
Columbia	304	0	244	283	16	408	252	167	552	2226	247
Columbia as % of MSA	56.3%	0.0%	37.5%	95.3%	4.4%	54.1%	40.3%	70.8%	43.8%	43.5%	43.5%



***Appendix C: Housing Demand Analysis Survey***

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**Downtown Housing Demand Survey  
Columbia, South Carolina**

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September 1998

Hello. My name is \_\_\_\_\_ and I work for \_\_\_\_\_. Today, we are not selling anything, but we are asking selected households here in the Midlands area about housing. Your answers will be used to determine the type of housing that will be built in the near future in your area.

**Are you 18 years or over?**

*[If no, thank and terminate. If yes, continue.]*

**Are you the female (male) head of the household?**

*[If yes, continue. If no, ask to speak to either household head.]*

1. What is your home Zip Code? \_\_\_\_\_
2. In the past 30 days, how many times have you gone to Downtown Columbia (or City Center Columbia) for work or any other reason? *(Record exact number – no ranges.)*  
  
\_\_\_\_\_

3. How many years have you lived in the Columbia area? *[Read list.]*

Less than 1 year     \_\_\_\_\_  
1 to 3 years         \_\_\_\_\_  
4 to 6 years         \_\_\_\_\_  
7 to 9 years         \_\_\_\_\_  
10 or more years    \_\_\_\_\_

Refused                 \_\_\_\_\_

4. Do you own or rent the place you live?

Own                         \_\_\_\_\_  
Rent                        \_\_\_\_\_

5. Rounding to the nearest \$100, what is your total monthly mortgage payment or rent? \_\_\_\_\_ *[Record exact amount. Do not record range.]*

6. How likely are you to buy a home within the next 24 months?

- Very likely \_\_\_\_\_
- Somewhat likely \_\_\_\_\_
- Somewhat unlikely \_\_\_\_\_
- Very unlikely \_\_\_\_\_
- Don't know \_\_\_\_\_

7. If new housing were built in or near City Center Columbia at a price or level of rent that was affordable, how likely is it that you would consider moving into or new Downtown Columbia in the next 5 years? *[Read list.]*

- Very likely \_\_\_\_\_ *[Go to Q. 8]*
- Somewhat likely \_\_\_\_\_ *[Go to Q. 8]*
- Somewhat unlikely \_\_\_\_\_ *[Skip to Q. 9]*
- Very unlikely \_\_\_\_\_ *[Skip to Q. 9]*
- Don't know \_\_\_\_\_ *Skip to Q. 9]*

8. If new housing were built in or new City Center Columbia at a price or level of rent that was affordable, how likely is it that you would consider moving into or new Downtown Columbia in the next 3 years? *[Read list.]*

- Very likely \_\_\_\_\_ *[Go to Q. 8]*
- Somewhat likely \_\_\_\_\_ *[Go to Q. 8]*
- Somewhat unlikely \_\_\_\_\_ *[Skip to Q. 9]*
- Very unlikely \_\_\_\_\_ *[Skip to Q. 9]*
- Don't know \_\_\_\_\_ *Skip to Q. 9]*

9. You mentioned that you would consider living in City Center Columbia. What are the main reasons you are likely to consider moving into or near City Center? *[Probe. Do not read list.]*

- Like downtown location \_\_\_\_\_
- Close to work \_\_\_\_\_
- Convenient \_\_\_\_\_
- Affordable \_\_\_\_\_
- Like urban lifestyle \_\_\_\_\_
- Restaurants/Activities \_\_\_\_\_
- Other (specify) \_\_\_\_\_

10. You mentioned that you would not consider living in City Center Columbia. What are the main reasons you are not likely to consider moving into or near City Center?

*[Probe. Do not read list.]*

- Satisfied with current home \_\_\_\_\_
- Like current neighborhood \_\_\_\_\_
- Prefer country \_\_\_\_\_
- Prefer the suburbs \_\_\_\_\_
- Dislike downtown area \_\_\_\_\_
- Dislike urban lifestyle \_\_\_\_\_
- Too noisy/congested \_\_\_\_\_
- Not safe \_\_\_\_\_
- Not a place to raise children \_\_\_\_\_
- Too many undesirable people \_\_\_\_\_
- Other *[Specify.]* \_\_\_\_\_

11. What would it take to make you consider moving into or near City Center?

- Less crime \_\_\_\_\_
- More shopping \_\_\_\_\_
- More restaurants/activities \_\_\_\_\_
- Fewer undesirable people \_\_\_\_\_
- Affordable housing costs \_\_\_\_\_
- New/nice housing \_\_\_\_\_
- Improved parking \_\_\_\_\_
- Less traffic/noise/congestion \_\_\_\_\_
- If I worked there \_\_\_\_\_
- Nothing \_\_\_\_\_
- Other *[Specify.]* \_\_\_\_\_

12. If you were to move into or near City Center, what one type of housing would you prefer to live in? *[Read list. Select only one response.]*

- Single family dwelling \_\_\_\_\_
- Townhouse style apartment \_\_\_\_\_
- Garden apartment \_\_\_\_\_
- Townhouse style condo \_\_\_\_\_
- Garden condo \_\_\_\_\_
- Mid-rise of 3-6 stories \_\_\_\_\_
- High-rise of 7 or more floors \_\_\_\_\_
- Loft style apartment \_\_\_\_\_
- Other *[Specify.]* \_\_\_\_\_

13. If you were to move into or near City Center, would you most likely buy or rent?

Buy \_\_\_\_\_  
Rent \_\_\_\_\_  
Not Sure \_\_\_\_\_

14. How much, to the nearest \$100, would you be willing to pay each month for rent or a mortgage? [Record exact amount. Do not record a range.]

\_\_\_\_\_

15. How many bedrooms would you want?

One \_\_\_\_\_  
Two \_\_\_\_\_  
Three \_\_\_\_\_  
Four \_\_\_\_\_  
Five \_\_\_\_\_  
Other \_\_\_\_\_

16. How many full bathrooms would you want?

One \_\_\_\_\_  
One \_\_\_\_\_  
Two \_\_\_\_\_  
Three \_\_\_\_\_  
Four \_\_\_\_\_  
Five \_\_\_\_\_  
Other \_\_\_\_\_  
Three \_\_\_\_\_  
Four \_\_\_\_\_  
Five \_\_\_\_\_  
Other \_\_\_\_\_

17. On a scale of 1 to 10, with 1 being *not at all important* and 10 being *extremely important*, how important would you rate each of the following concerns when choosing a place to live? You can choose any number between 1 and 10 for each concern. [Read list.]

Investment or tax benefits \_\_\_\_\_  
Convenient to work \_\_\_\_\_  
Easy parking \_\_\_\_\_  
Overall price \_\_\_\_\_

- Neighborhood quality \_\_\_\_\_
- Floor plan or design \_\_\_\_\_
- Size of house or apartment \_\_\_\_\_
- Financing or interest rates \_\_\_\_\_
- Close to shopping/restaurants \_\_\_\_\_
- School district \_\_\_\_\_
- Safety of area \_\_\_\_\_
- Cleanliness of downtown \_\_\_\_\_

18. On a scale of 1 to 10, with 1 being *not at all important* and 10 being *extremely important*, how important would you rate each of the following features when choosing a place to live? *[Read list.]*

- Fireplace \_\_\_\_\_
- Ceiling fans \_\_\_\_\_
- Garage \_\_\_\_\_
- Swimming pool \_\_\_\_\_
- Tennis courts \_\_\_\_\_
- Community clubhouse \_\_\_\_\_
- Built-in bookshelves \_\_\_\_\_
- Built-in microwave \_\_\_\_\_
- Washer/dryer \_\_\_\_\_
- Storage space \_\_\_\_\_
- Security system \_\_\_\_\_
- Balcony or patio \_\_\_\_\_

**The following question will help us group our questionnaires.**

19. Please tell me which group best represents your age. *[Read list, except last response.]*

- 18 to 24 \_\_\_\_\_
- 25 to 29 \_\_\_\_\_
- 30 to 34 \_\_\_\_\_
- 35 to 39 \_\_\_\_\_
- 40 to 44 \_\_\_\_\_
- 45 to 49 \_\_\_\_\_
- 50 to 54 \_\_\_\_\_
- 55 to 59 \_\_\_\_\_
- 60 to 64 \_\_\_\_\_
- 65 or over \_\_\_\_\_
  
- Refused \_\_\_\_\_

20. What was the last grade of school you completed? *[Read list, except last response.]*

- Less than high school graduate \_\_\_\_\_
- High school graduate \_\_\_\_\_
- Special/technical school (not college) \_\_\_\_\_
- Some college (not graduate) \_\_\_\_\_
- College graduate \_\_\_\_\_
- Post graduate education \_\_\_\_\_
- Refused \_\_\_\_\_

21. What is your current marital status?

- Single \_\_\_\_\_
- Married \_\_\_\_\_
- Separated \_\_\_\_\_
- Divorced \_\_\_\_\_
- Widowed \_\_\_\_\_
- Refused \_\_\_\_\_

22. How many children under age 18 live in your household?

\_\_\_\_\_

23. Finally, which group best represents your household's total income before taxes last year? *[Read list, except last response.]*

- Up to \$20,000 \_\_\_\_\_
- \$20,000 to \$29,999 \_\_\_\_\_
- \$30,000 to \$39,999 \_\_\_\_\_
- \$40,000 to \$49,999 \_\_\_\_\_
- \$50,000 to \$59,999 \_\_\_\_\_
- \$60,000 to \$69,999 \_\_\_\_\_
- \$70,000 or more \_\_\_\_\_
  
- Refused/don't know \_\_\_\_\_

Thank you for your time and cooperation.

## ***Appendix D: Analysis Drawings***

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## ***Appendix E: GIS Data Samples***

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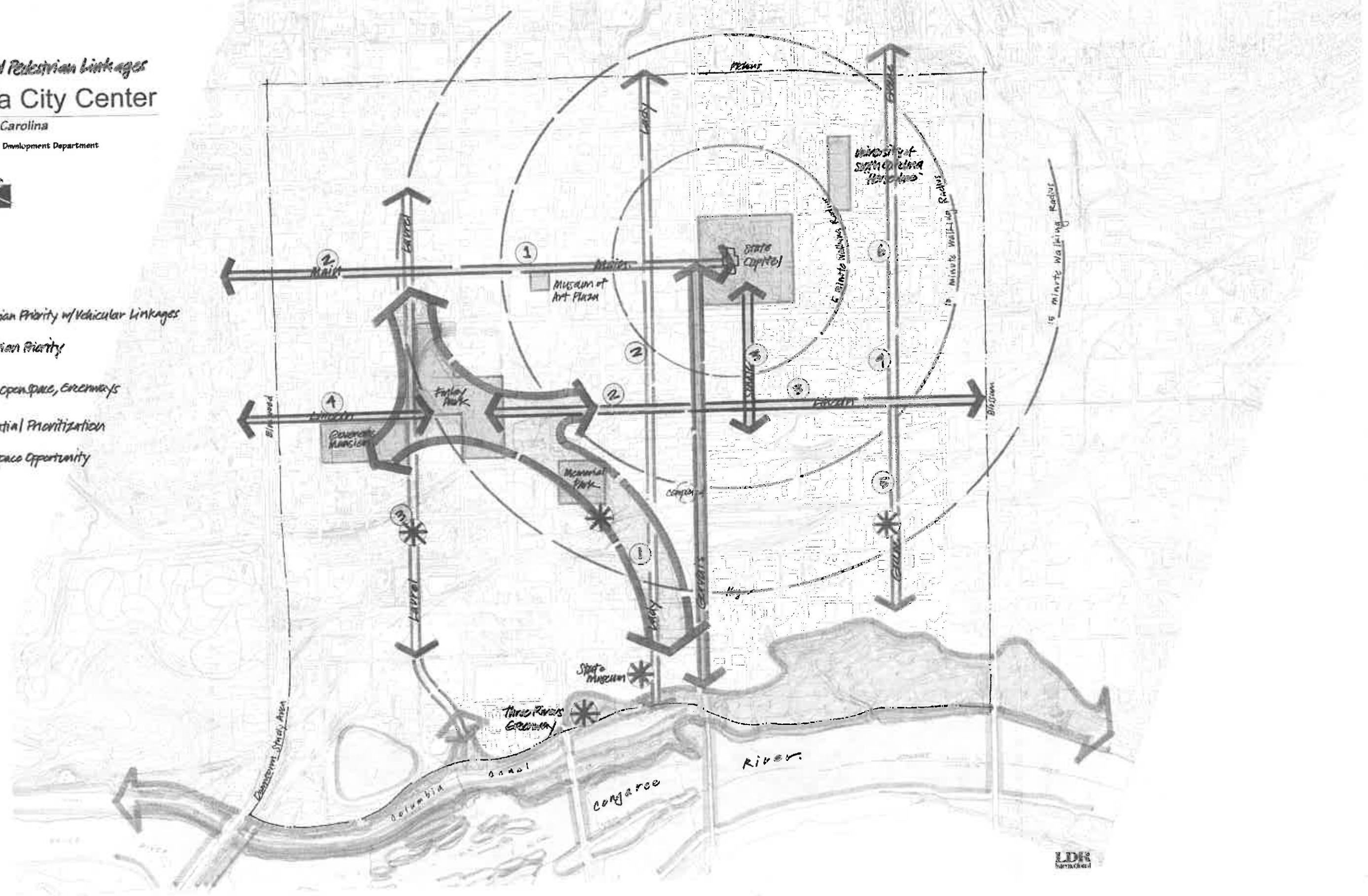
# Open Space and Pedestrian Linkages Columbia City Center

Columbia, South Carolina

City of Columbia Economic Development Department  
LDR International, Inc.



- Key:**
- Pedestrian Priority w/ Vehicular Linkages
  - Pedestrian Priority
  - Parks, Open Space, Greenways
  - Sequential Prioritization
  - Open Space Opportunity

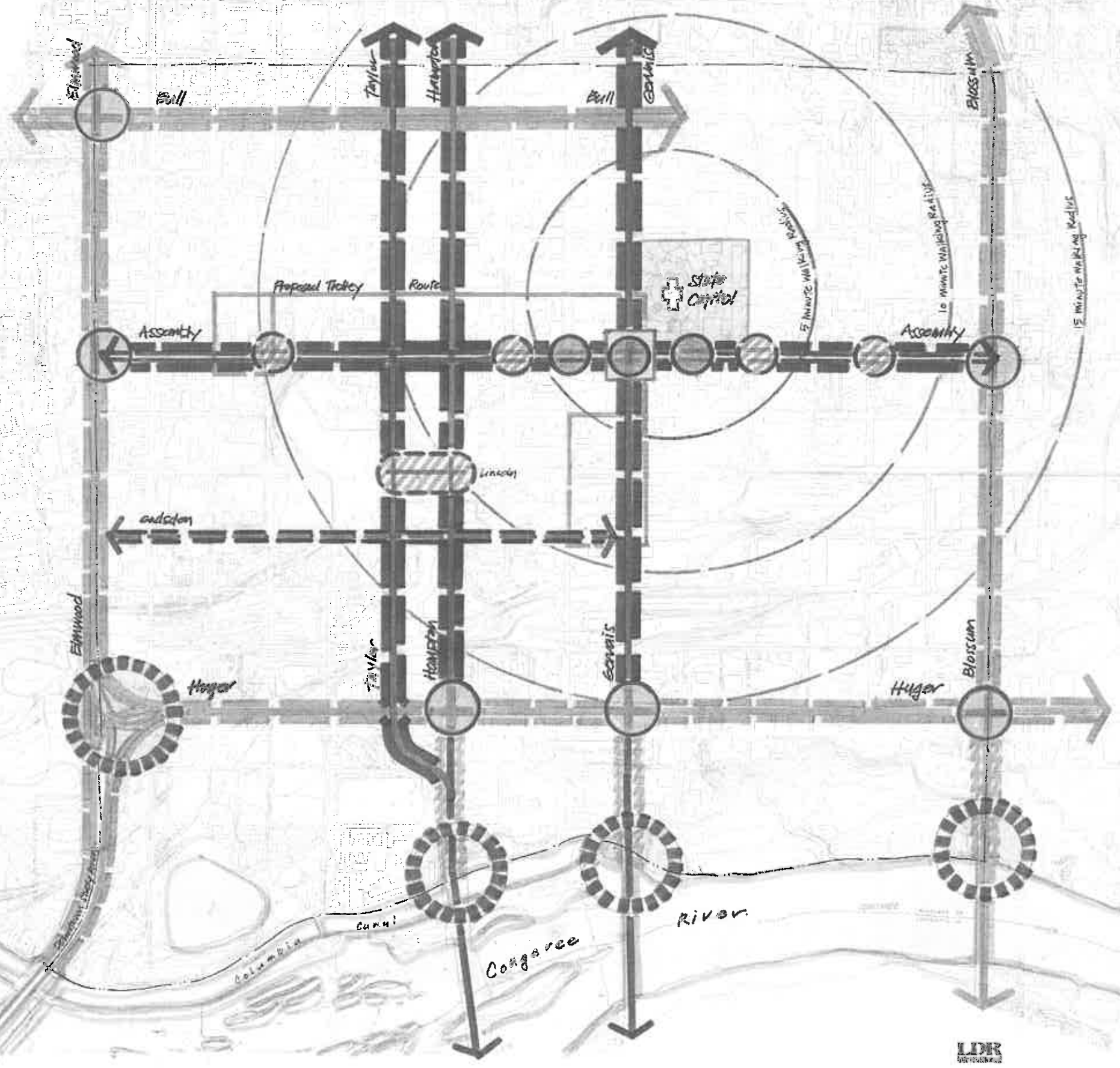


# Satellite Vehicular Circulation Columbia City Center

Columbia, South Carolina  
City of Columbia Economic Development Department  
LDR International, Inc.

Scale 1"=300'  
August 31, 1990

- Key:**
- Primary Pedestrian/Vehicular Intersections
  - ◐ Secondary Pedestrian/Vehicular Intersections
  - Downtown "Portals" in City Center
  - ⊙ Downtown Endways
  - Primary Vehicular Streets
  - City Center Vehicular Streets

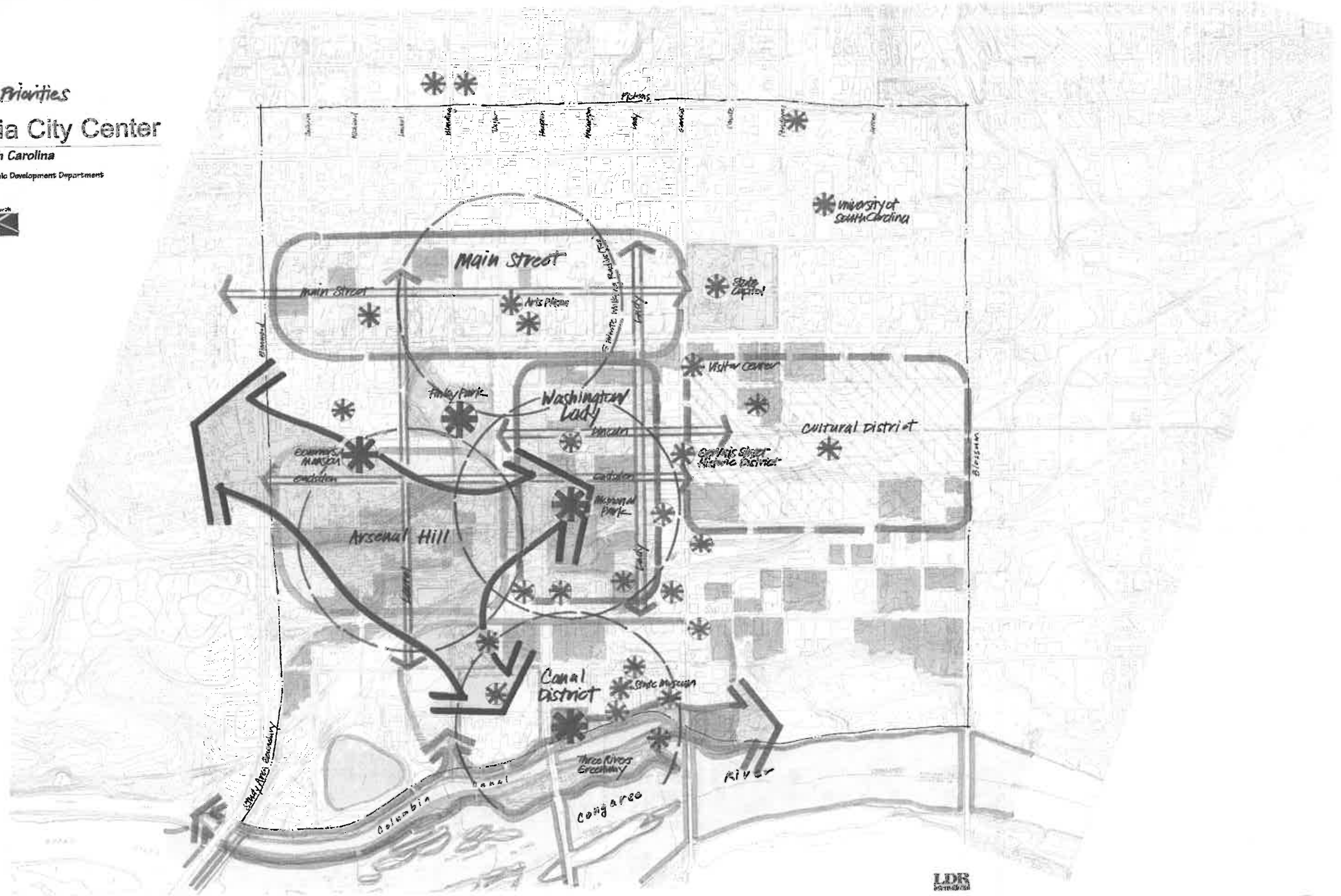
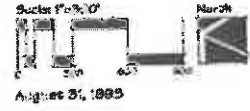


# City Center Priorities

## Columbia City Center

Columbia, South Carolina

City of Columbia: Economic Development Department  
LDR International, Inc.



## City Center Districts/Neighborhoods

### Columbia City Center

Columbia, South Carolina

City of Columbia: Economic Development Department  
LDR International, Inc.



#### ■ Main Street/CBD

- Region's most concentrated employment center.
- Historical and symbolic core of Columbia's City Center.
- Home to a concentration of public institutions.
- Location of a number of public amenity spaces.
- Lack of infrastructure investment in recent years.

#### ■ The Vista

- Existing historic preservation district.
- Benefiting from substantial public and private sector investment.
- Strong mixed use neighborhood with office, retail, entertainment, and some emerging residential.

#### ■ Arsenal Hill

- Strong residential character such as Governor's Hill and Parishes.
- Anchored by the Governor's mansion and Finlay Park.
- Mixed income neighborhood.
- Strategic location between river-oriented development and Main Street.
- Good street network.
- Railroad cut is a challenge to area.
- Mixed uses are encroaching on area.

#### ■ Canal District

- Columbia's primary riverfront gateway and western boundary of City Center offering outstanding views of both the City's skyline and the river area.
- Untapped amenity in the historic Columbia Canal.
- Anchored by the State Museum.

#### ■ City Center East

- Mixture of residential character, office uses, and major institutions.
- Has remained relatively stable in recent years.
- Presents few sites for economic investment.
- Community fabric encourages small incremental projects.

#### ■ State Capitol

- Largely built-out area consisting of the Capitol Building and a core of legislative office buildings and institutions.
- Primary activity generator between the University area with the rest of City Center.
- Large green park around Capitol Building.

#### ■ University of South Carolina

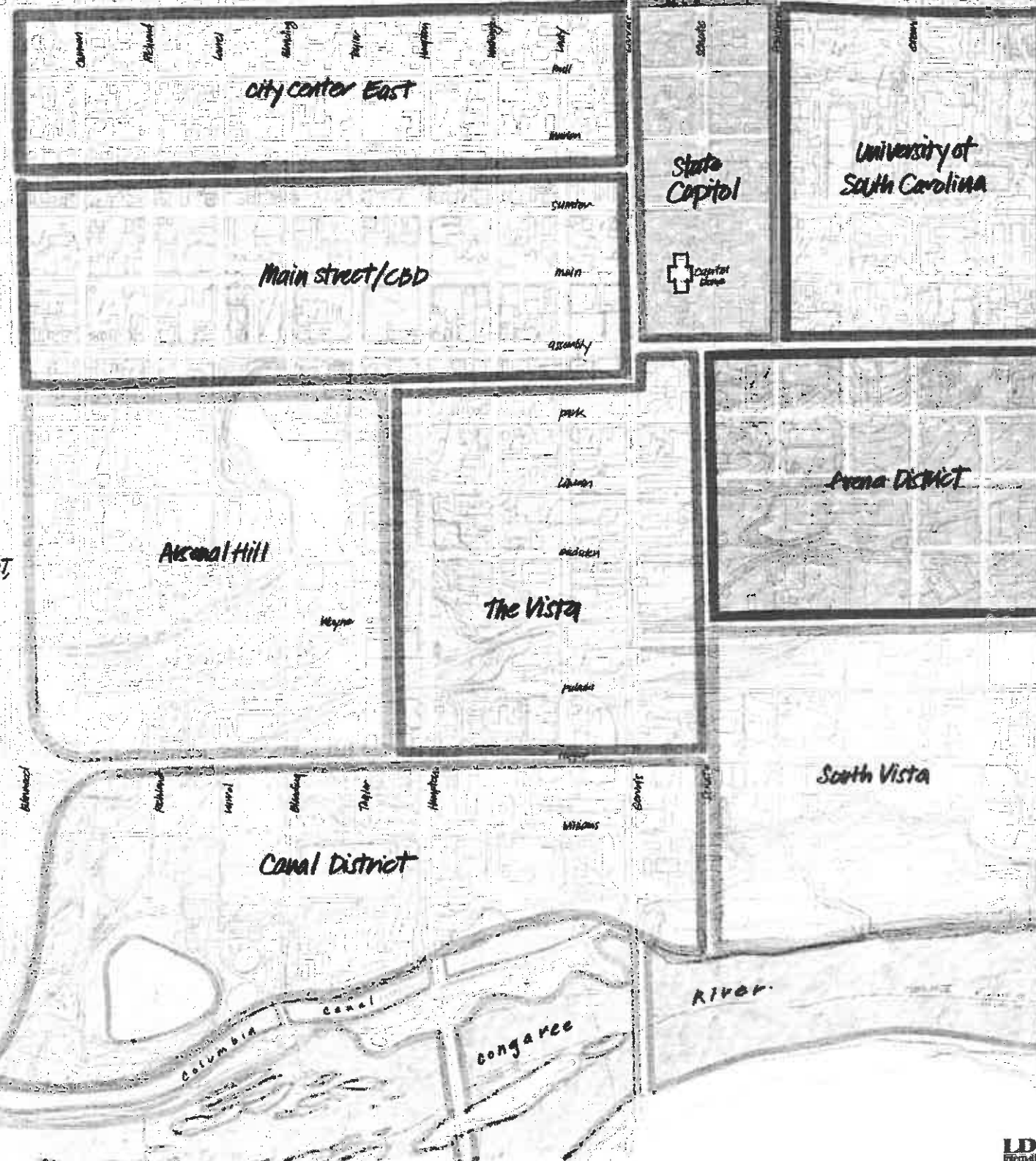
- Core campus of the University dominated by institutional uses.
- Major activity generator with 26,000 students.
- Links the city center with Five Points district.

#### ■ Arena District

- Subject to major changes after the new hotel, conference center, and arena is constructed.
- Area is characterized by a mixture of uses including industrial, cultural, and governmental buildings.

#### ■ South Vista

- Warehouse district characterized by a mix of uses.
- Lacks some continuity of infrastructure.
- Will fluctuate in development as the University of South Carolina continues to shift non-essential administrative functions to the area.



## **Appendix E: GIS Data Samples**

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The following are examples of the type of data that can be analyzed in GIS. These categories are taken from a City that has used GIS data for a number of years. Those that are starred should be a priority for Geocoding so that Columbia has an effective GIS program for Economic Development and Planning.

### ***City Library Contents***

Airport  
Addresses, Site Specific  
Billboards  
City Council Districts, current  
City Limits\*  
Community Planning Areas\*  
Community Patrol Areas  
Enumeration Districts  
Elderly Care Facilities  
Fire Districts  
Fire Stations  
Roads for Geocoding\*  
Health Care Facilities  
Street Lights  
Major Roads\*  
National Historic Register\*  
Parks\*  
Police Districts  
Post Office Locations  
Design/Preservation Overlay Areas\*  
Recycling Locations  
Recycling Routes  
Rehabilitation Areas  
School Locations  
Senate Districts  
Staging Areas  
Street Centerlines\*  
Tax Increment Financing Districts\*

### ***CIVIL Library Contents***

Building Footprints\*\*  
City Owned Buildings\*  
Elevation Contours\*  
Elevation Points\*  
Features (planimetric)\*

Flood Base  
Flood Centerline  
Flood Index  
Flood Way  
Flood Zone  
Landuse\*  
Parcels\*  
Soils  
Utility Points

### ***COUNTY Library Contents***

Bus Routes  
Census Block Groups\*  
Census Block Populations\*  
County Limit  
County Major Roads  
County Roads  
County Water Bodies  
Census Tracts  
Census Tracts & Blocks

### ***DWNTWN Library Contents***

Central Business District\*  
Expanded Central Business Districts  
Parking Lots, Garages, Decks\*  
On Street Parking\*

### ***TRAN Library Contents***

Bridge Buffers  
Bridge Point Locations  
De-icing Locations  
Pavement Resurfacing by Year  
Scenic Corridors  
Traffic Counts\*  
Traffic Signal Locations

The following functions are just some goals of the City of Columbia's GIS system as it relates to Economic Development and Planning Functions:

- Building Permits should be tracked by planning areas to determine investment in specific areas of the City.
- Property values per the Tax Assessor's office should be tracked by parcels within planning areas to determine comparative values and growth.
- A demographic data set should be purchased and updated at least every other year to track block group population, housing, income, and other demographic data. GIS can be configured to produce demographic reports for radii around any selected site.
- An investor looking for specific sized parcel of land can be supplied with a printout of parcels that match his/her description.
- Complete data sets on buildings and sites can be tied to GIS data points so that reports can be generated through GIS.

***Appendix F: City Center Task Force Members***

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## ***Appendix F: City Center Task Force Members***

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### **City Council**

The Hon. Robert D. Coble, Mayor  
The Hon. E.W. Cromartie II  
The Hon. Sam Davis  
The Hon. Hamilton Osborne Jr.  
The Hon. Jim Papadea  
The Hon. Anne M. Sinclair  
The Hon. Frannie B. Heizer

Ms. Alice Appleby  
Dr. Sheila Ards, Director  
Mr. James H. Baker III  
Mr. John Baker  
Ms. Rebecca Best  
Ms. Betty Boyd  
Ms. Brenda Brannic  
Mr. Peter Bristow  
Mr. Earl F. Brown  
Mr. Mike Carrier  
Mr. Durham Carter  
Mr. Charlie Compton  
Mr. Hal Cottingham  
Ms. Arrington Cox  
Ms. Susan DeFoe  
Mr. Fred Delk  
Mr. Andrew H. Diggins  
Mr. Scott Diggs  
Mr. Terry Dosier  
Ms. Carlissa Faust  
Mr. John Finan  
Mr. John Folsom Jr.  
Mr. Charles Gary  
Ms. Danielle Gadow  
Mr. Bobby Gist  
Ms. Myrtle Gordon  
Ms. Catherine Hampton  
Ms. Cynthia Pryor Hardy  
Ms. Doris W. Hildebrand  
Dr. Gail Anderson Holness  
Ms. Benzina Hopkins  
Ms. Margaret Jordan

### **City Staff**

Mr. Jim Gambrell, Economic  
Development Director  
Mr. John Dooley, Utilities & Engineering  
Mr. Chip Land, Zoning Administrator  
Mr. Lee Miller, Planning  
Mr. Mark McCain, Public Services

Mr. Henry Hopkins  
Ms. Bettye Davenport Koon  
Ms. Betty Leopard  
Mr. Jim Leventis  
Ms. Rachel Levinson  
The Hon. Wyman Mac Rish  
Mr. Ellis McDougall  
Mr. Ike McLeese  
Mr. Cary T. McSwain  
Mr. Harold Murray  
Mr. William Niblock  
Mr. Ned Pendarvis  
Mr. Gregory Plagens  
Mr. Doug Quackenbush  
Dr. Lonnie Randolph  
Ms. Patty Russell  
Ms. Gloria St. James  
Mr. Thomas Savory  
Mr. Wayne Shuler  
Mr. A. Randolph Smith II  
Ms. Edna Harrison  
Ms. Martha Thompson  
Mr. Bruce Todd  
Ms. Katherine Trimnal  
Ms. Irene Dumas Tyson  
Mr. Billy Way  
Ms. Sharon Williams  
Mr. Jeremy Wilson  
Mr. Randy Wilson