

EXISTING LAND USE

Existing Land Use	Acres	% of Total Parcel Area	Land Use based on Planned Development	% of Total Parcel Area
Single-Family Detached	134.5	32%	134.5	32%
Single-Family Attached	10.2	2%	10.2	2%
Mixed-Use	0	0%	4.5	1%
Multi-Family Residential	0	0%	29.4	7%
Mobile Home Park	32.1	8%	32.1	8%
Retail/Commercial	47.4	11%	50.56	12%
Industrial	7.9	2%	7.9	2%
Institutional/Civic Facility	28	7%	28	7%
Parks/Open Space	9.1	2%	9.1	2%
Vacant/Undeveloped	109.8	26%	109.8	26%
Planned Development/Under Construction	37.1	9%		
	416.1		416.1	

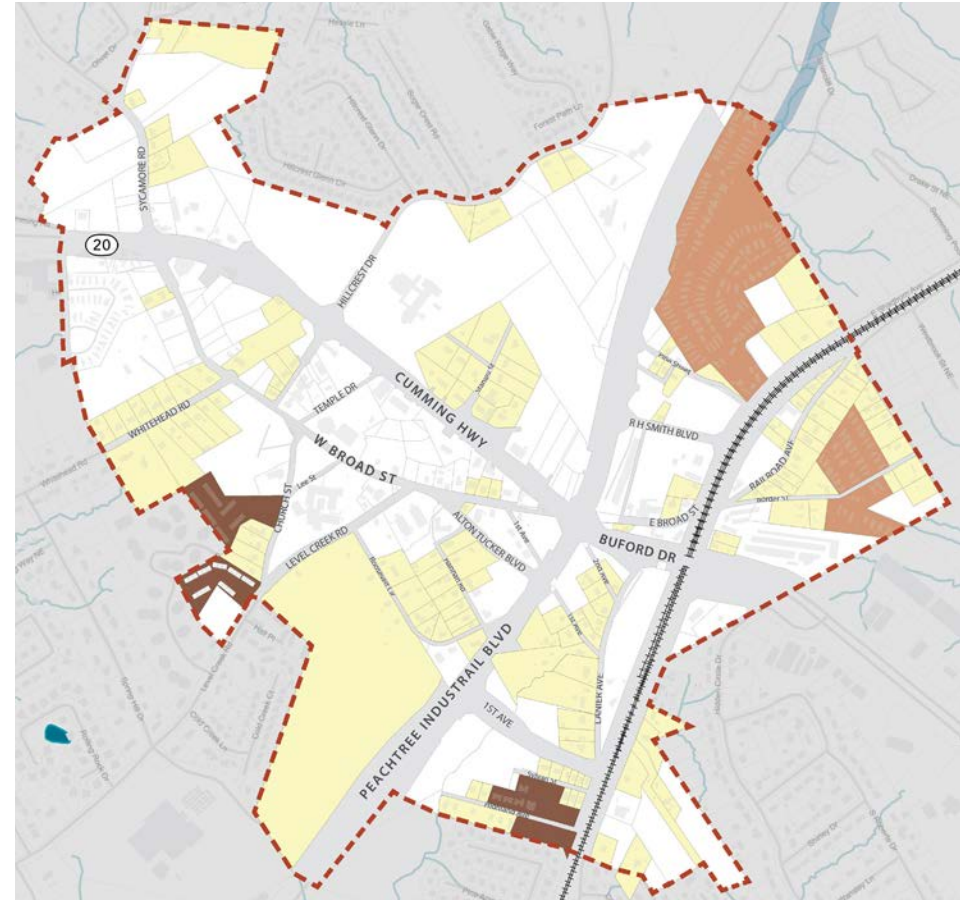
E-Center 43,000 SF Retail/Commercial

Dogwood Forest, Holbrook, and Broadstone

Iconic Mixed-Use Development

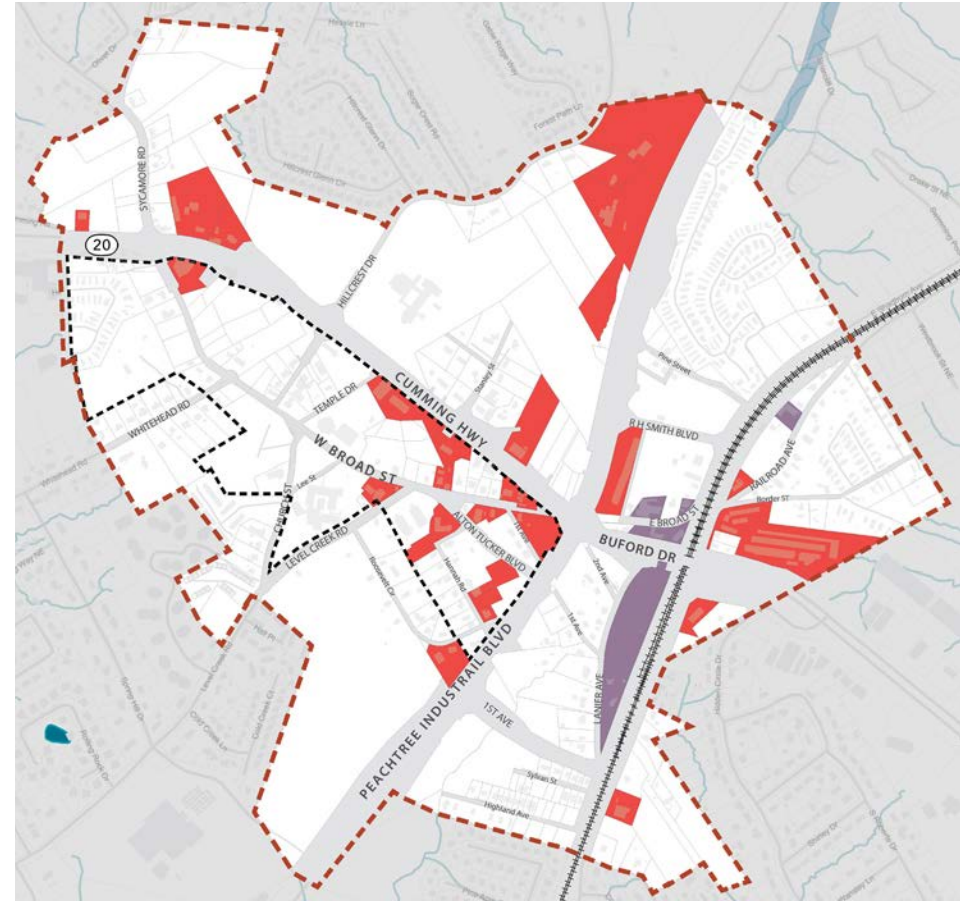


EXISTING HOUSING TYPE



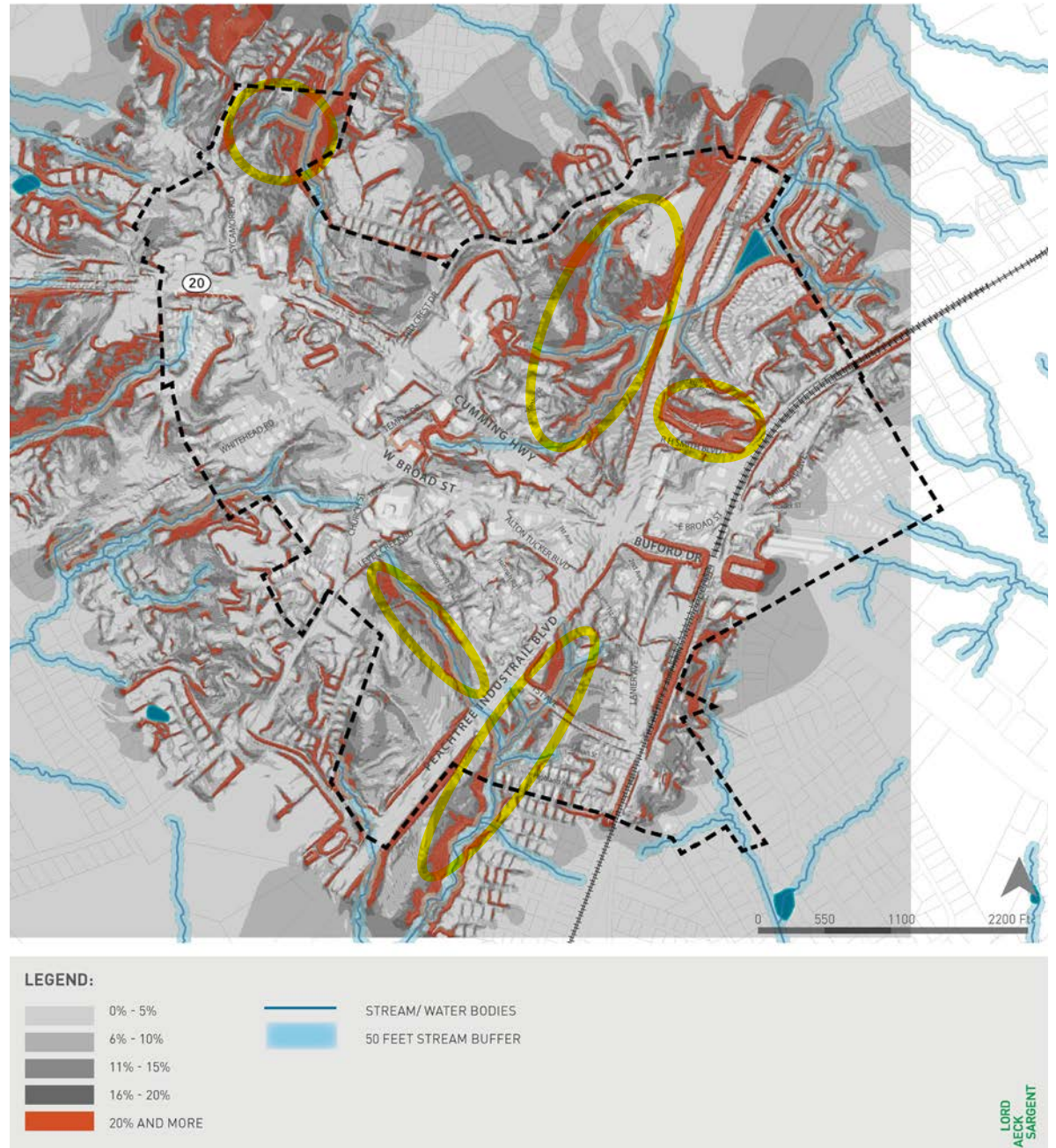
Castlegate Townhomes and Plantation Ridge Apartments Outside LCI Area

EXISTING COMMERCIAL/INDUSTRIAL



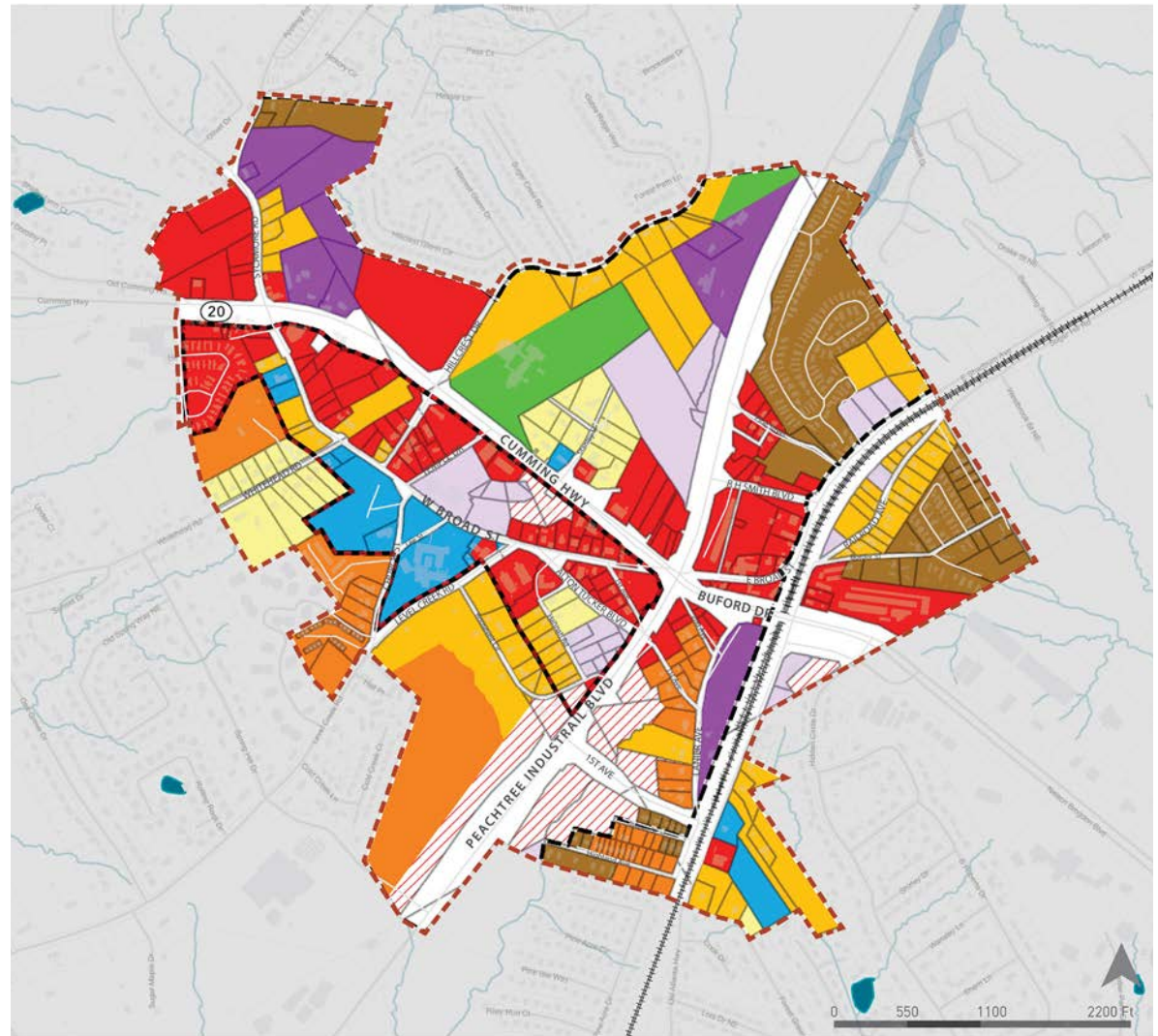
NATURAL FEATURES

- Several vacant and underutilized properties have major topographical issues
- Pedestrian and bike connectivity could be challenging between Downtown and the areas with steep slope



ZONING

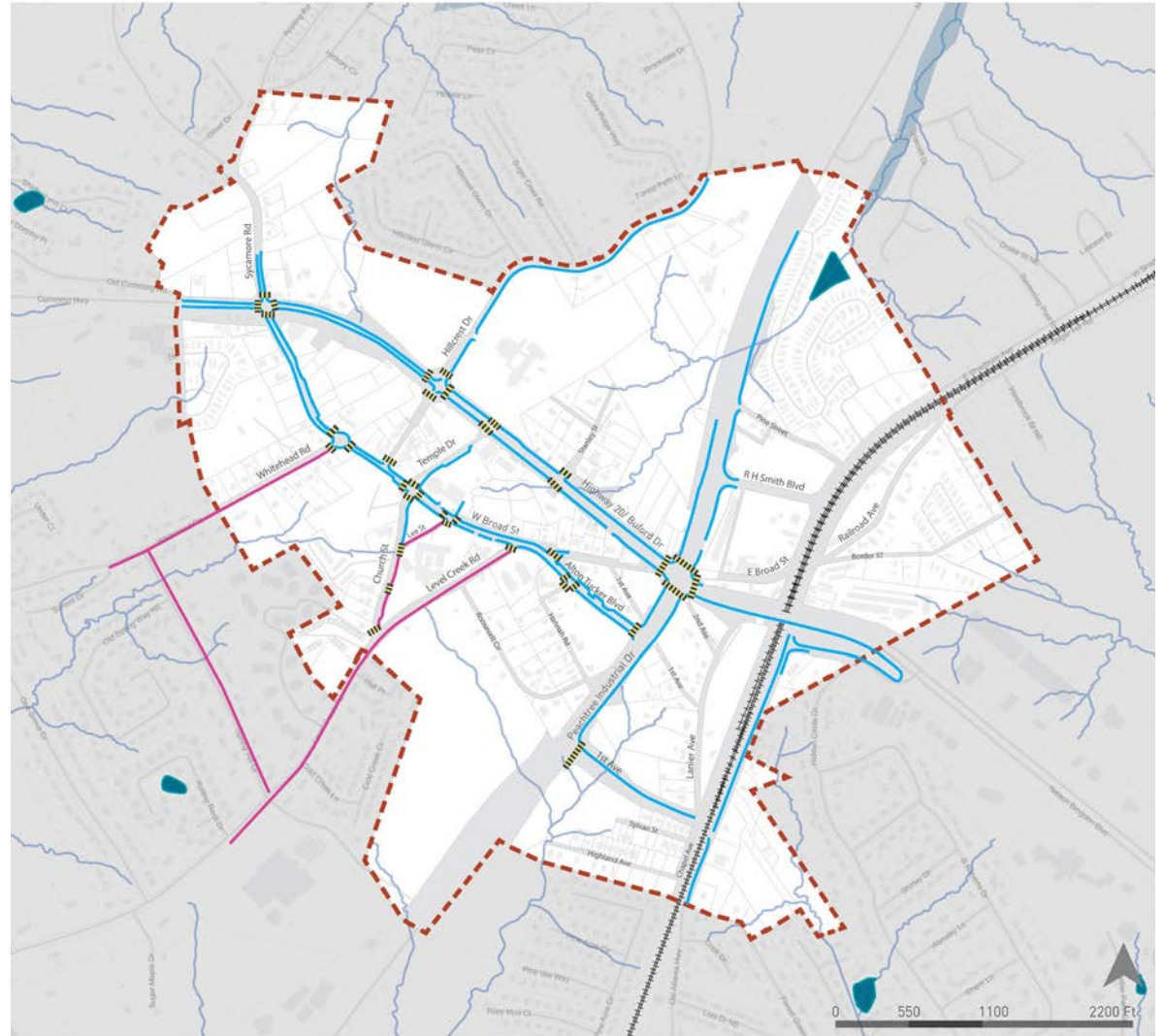
- Majority of the LCI area is part of Town Center Overlay District
- Downtown core is in Central Business District Overlay
- Both overlay districts' intent is to achieve LCI goals and create traditional architecture of the original small town
- Focus on integrating architectural and urban design features to raise property values, attract new businesses and residents, and enhance the quality of life
- Promote compact mixed-use growth to create pedestrian-oriented development
- Rehabilitate and revitalize vacant and underutilized properties
- Design review process



LEGEND:

	RM: RESIDENTIAL MULTI-FAMILY		HSB: HIGHWAY SERVICE BUSINESS		COMMERCIAL BUSINESS DISTRICT
	R150: LOW DENSITY SINGLE FAMILY RESIDENTIAL		LM: LIGHT MANUFACTURING		LCI STUDY BOUNDARY
	R100: MEDIUM DENSITY SINGLE FAMILY RESIDENTIAL		HM1: HEAVY MANUFACTURING		
	MH: MOBILE HOME PARK		OI: OFFICE-INSTITUTIONAL		
	BG: GENERAL BUSINESS				

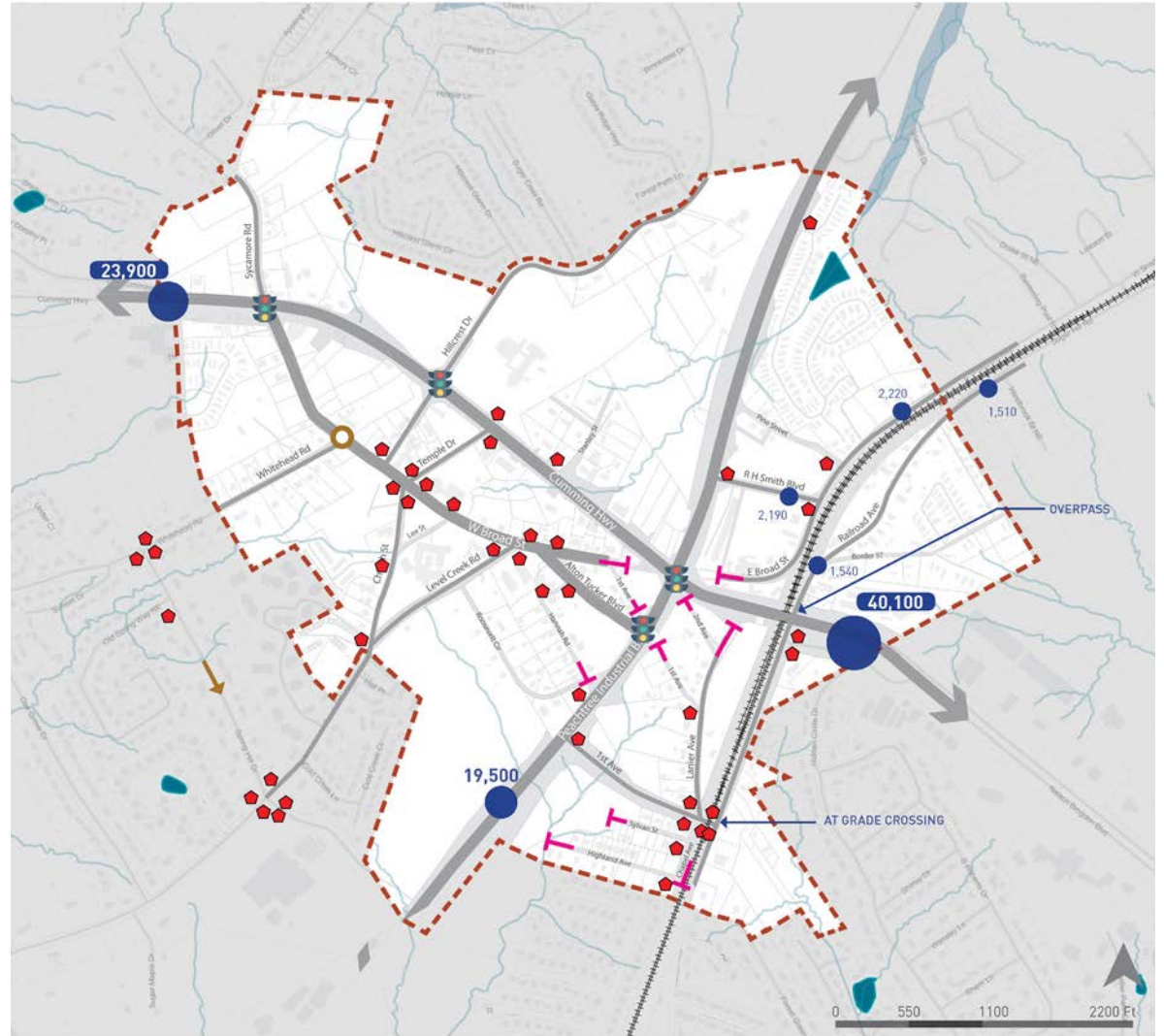
PEDESTRIAN CONNECTION



LEGEND:

- EXISTING SIDEWALKS : SUFFICIENT WIDTH/ STREET SCAPE
- EXISTING SIDEWALKS: NARROW AND/OR SUBSTANDARD
- - - CROSS WALKS

VEHICULAR CONNECTIONS



LEGEND:

- GDOT 2016 TRAFFIC COUNTS
- TRAFFIC SIGNAL
- STOP SIGNS
- DEAD END STREETS

- TRAFFIC CIRCLE
- ONE-WAY TRAFFIC

PHYSICAL BARRIERS



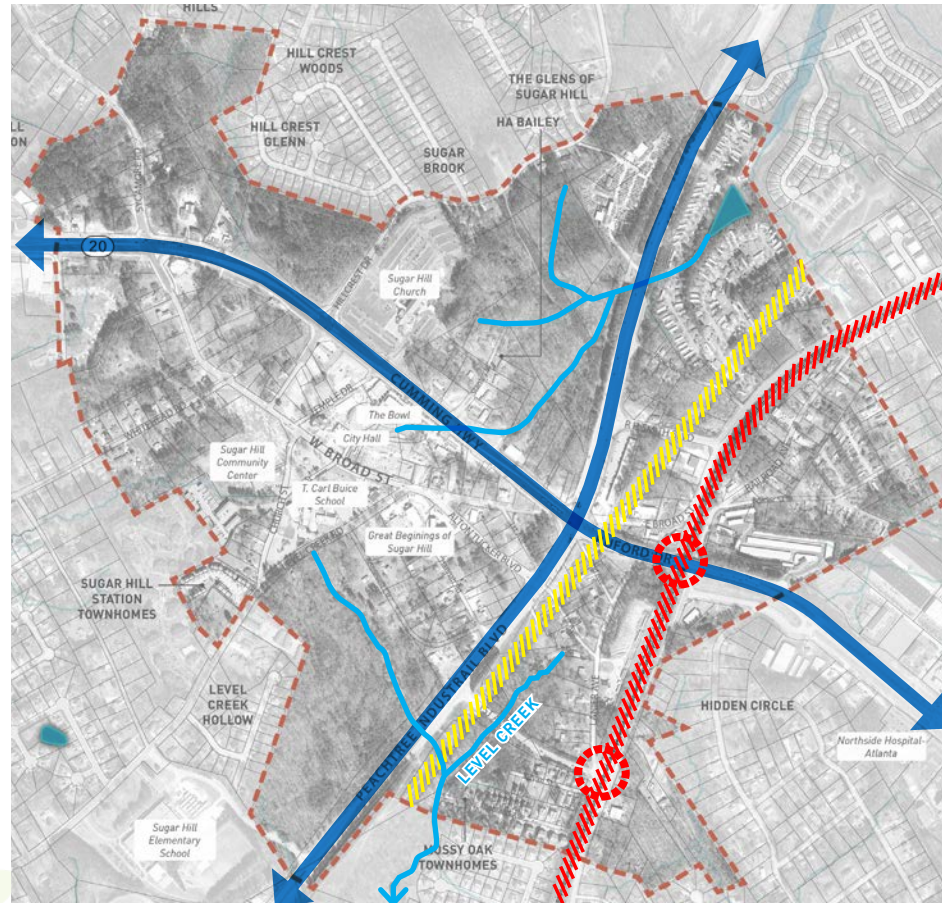
Dead-end street on 1st Avenue



Topographical challenge between power easement and PIB



Power easement along PIB



Railroad as a major connectivity barrier



At grade crossing at 1st Avenue



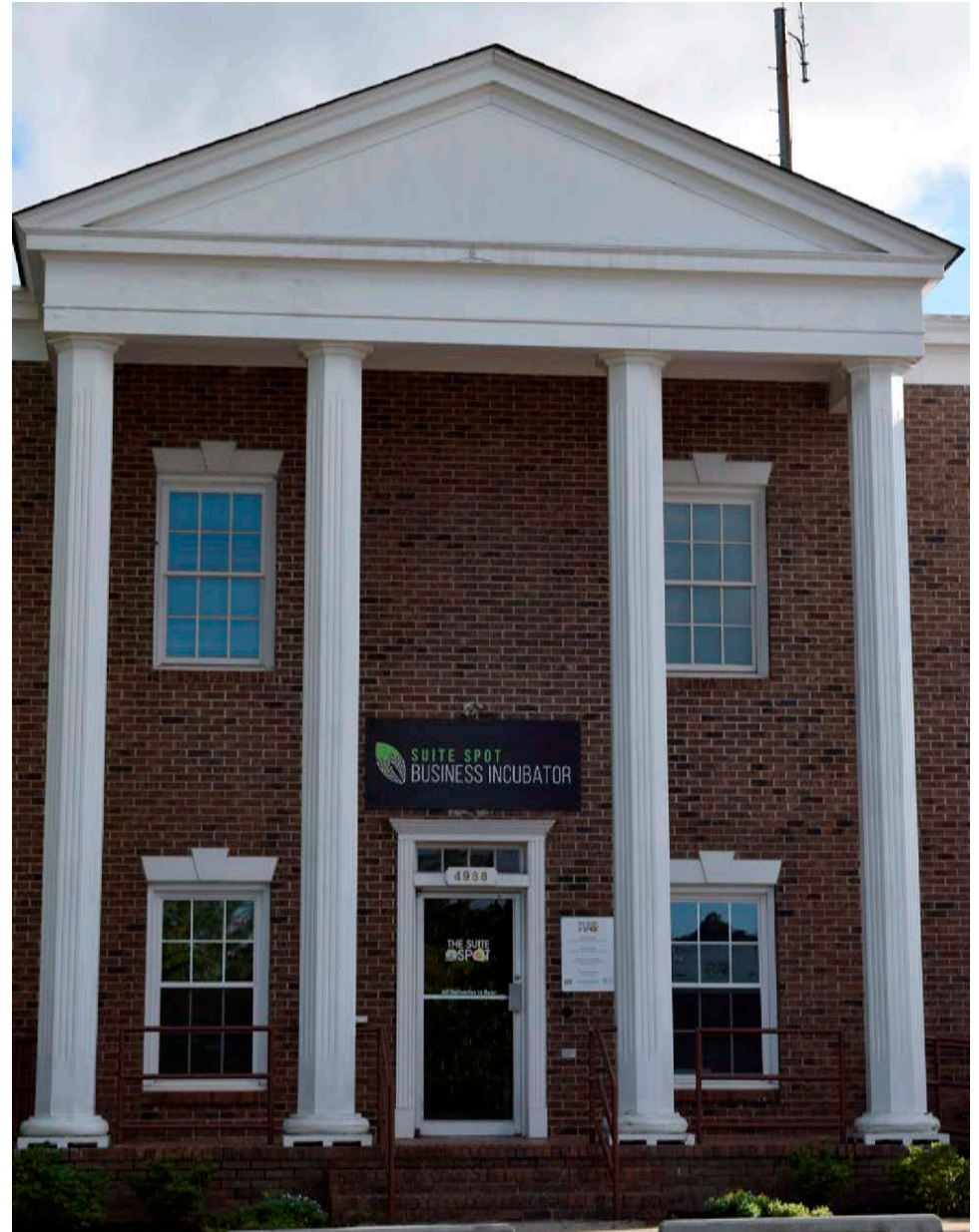
Highway 20 overpass bridge on Railroad Avenue

WHAT WE ARE HEARING SO FAR

STRENGTHS OF DOWNTOWN:

Some of the comments by stakeholders

- City's commitment and leadership
- Community support for progressive growth and embracing the change
- Downtown core - development character and vibrancy
- Downtown events (Ice Rink, concerts)
- Youth program
- Small town feel
- Sense of community
- Southern style/inviting Downtown
- High performing schools



WHAT WE ARE HEARING SO FAR

NEEDS/OPPORTUNITIES:

Land Use Development

- More residents in/around Downtown core
- Restaurants, bars, and services in walking distance
- Medical offices/facilities
- Retrofit existing housing and infill housing strategy to stabilize older neighborhoods
- Diversity of housing for multi-generation and income-level
- Focus on architectural character
- Transit-oriented development

NEEDS/OPPORTUNITIES:

Mobility


- Improve walkability and connectivity
- Pedestrian/bike-friendly environment on Highway 20 and PIB
- Complete sidewalk network to extend pedestrian connectivity to Downtown
- Pedestrian bridge on Highway 20
- Bike infrastructure and amenities
- Explore transit options on PIB



ISSUES AND OPPORTUNITIES

Exercise for the Core Team Members:

- List of issues and opportunities compiled based on Stakeholder Interviews and LCI booth comments
- Review, validate and prioritize issues and opportunities
- Use **2 BLUE** dots to prioritize issues/concerns and **3 GREEN** dots to prioritize needs/opportunities on each board
- Add any missing issues and opportunities



LAND USE AND DEVELOPMENT

SUGAR HILL LIVABLE CENTER INITIATIVE || DOWNTOWN MASTER PLAN

November 01, 2017

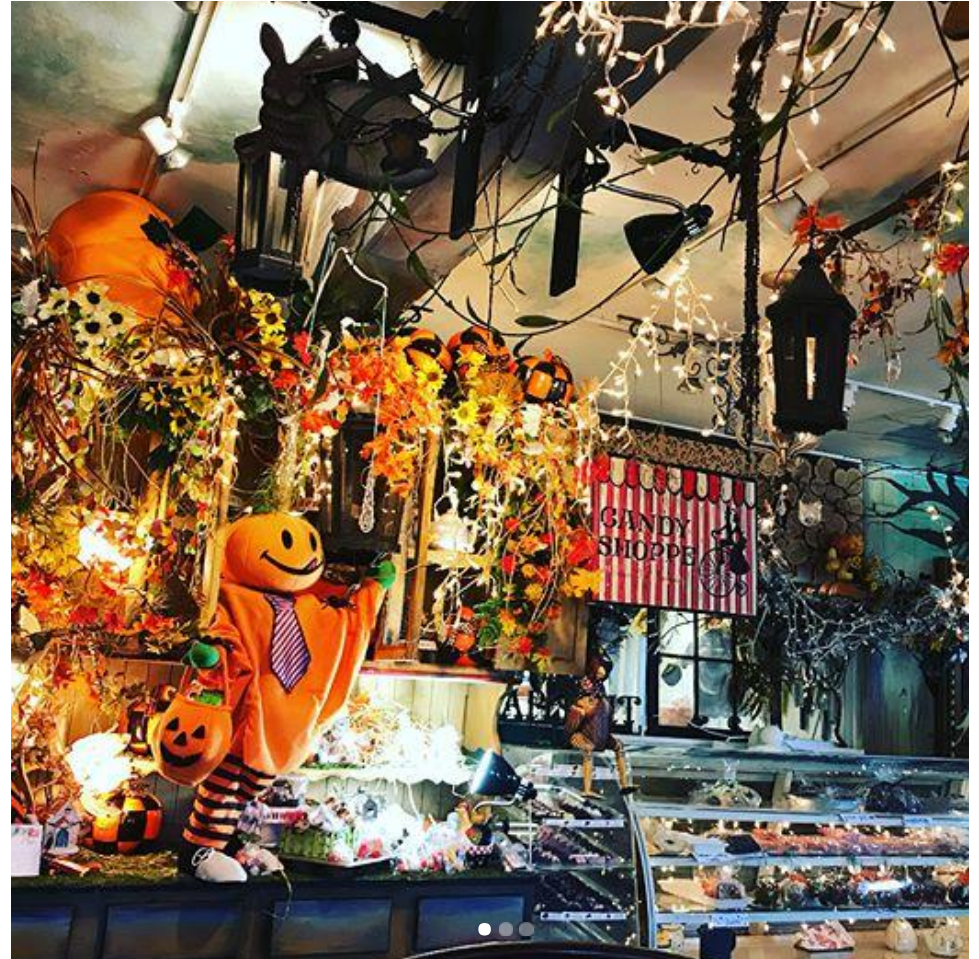
Use **BLUE DOT ()** to prioritize Issues/Concerns & **GREEN DOT ()** to prioritize Needs/Opportunities for Land use and development

Issues/ Concerns	
Lack of restaurants and shopping options in Downtown	
If residential population increases in future, the noise pollution from events should be evaluated	
Physical constraints for Downtown growth are cemetery, wide transit corridors, railroad, and sewer capacity	
Concerned about the amount of retail proposed in the planned development if there is a lack of critical mass in Downtown	
Concerned about public safety along Level Creek Road, Church Street and Springhill Drive.	
Lack of regional level economic development/business opportunities to attract large number of jobs in and around Downtown	
Neighborhood stability, housing conditions and redevelopment potential in mobile home parks and older neighborhood areas.	

Needs/ Opportunities	
More residents in/around Downtown core	
Attract more businesses such as bars, restaurants, and services in walking distance	
Opportunity to tap into the growing filming industry	
Potential for transit-oriented development on the south side of Peachtree Industrial Boulevard and Buford Drive	
Mixed-use development on north of Highway 20/Cumming Highway	
Retrofit existing housing stock and infill housing strategy as a way to supply diversity of housing, and to improve development	
Diversity of housing type for multi-generation and income-level such as townhomes, cottages, small lot single family, and urban style	
Focus on architectural character of the future mixed-use and housing development	
Need for medical offices and facilities near Downtown	
Attract small tech companies or professional services	
Explore opportunity for satellite campus of a college/university	

NEXT STEPS

- Compile and summarize online survey results
- Market assessment and demand analysis
- Existing Conditions Report
- Development opportunities map
- Public Workshop #2 on 12/6
- Core Team Meeting #2 on 12/21



Source: Instagram Post #myatlantamomsclub @sugarhillbakeryandcafe





CORE TEAM MEETING #2
December 21, 2017

LORD
AECK
SARGENT



AGENDA

- Introduction
- Community Input Summary
- Market Assessment & Analysis
- Planning Exercises
- Next Steps



LCI AREA

Downtown Master Plan Area

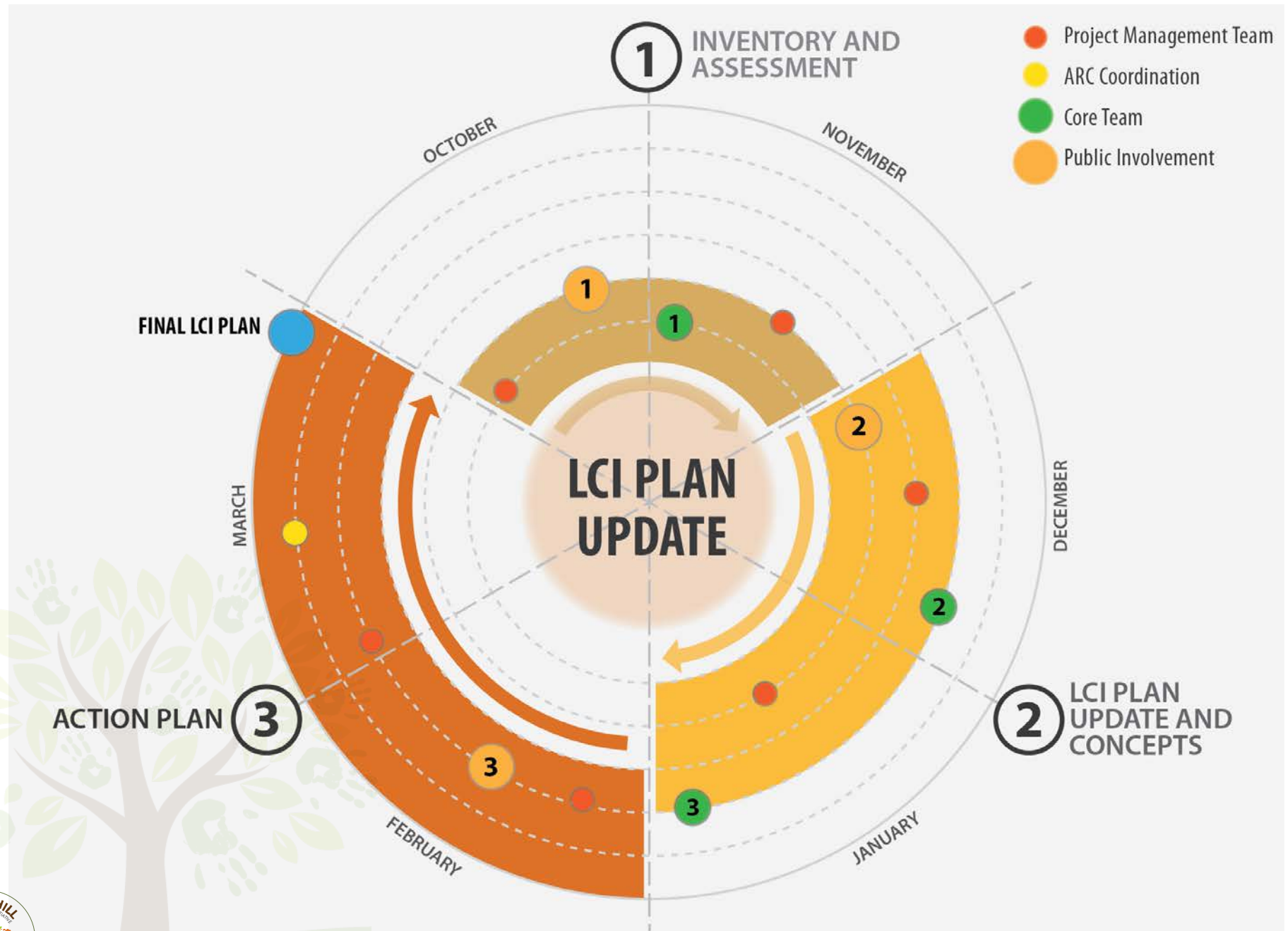
+/-520 Acres; about a mile or so along Highway 20 and Peachtree Industrial Boulevard (PIB)

LCI Area Assets:

- Downtown Core - City Hall and The Bowl
- West Broad Street
- High visibility and accessibility from Highway 20 and PIB, proximity to railroad
- Sugar Hill Church
- E-Center - ongoing commercial mixed-use
- Sugar Hill Cemetery
- Older residential neighborhoods
- Natural features - tree canopy and streams



PROCESS



SCHEDULE

PUBLIC INVOLVEMENT SCHEDULE

- | | | | |
|-----|--|-----|--|
| ✓ 1 | Public Kick-Off Meeting
October 21, 2017, 11 am - 5 pm
<i>Issues, Opportunities and Vision</i> | ✓ 1 | Core Team Meeting #1
November 1, 2017, 6 pm - 7:30 pm
<i>Preliminary Vision and Stakeholder Input Summary</i> |
| ✓ 2 | Public Workshop
December 6, 2017, 6 pm - 7:30 pm
<i>Development and Mobility Concepts</i> | ✓ 2 | Core Team Meeting #2
December 21, 2017, 6 pm - 7:30 pm
<i>Draft Framework Plans</i> |
| 3 | Public Open House
February 15, 2018, 4:30 pm - 7:30 pm
<i>Framework Plans, Strategies, and Priorities</i> | 3 | Core Team Meeting #3
January 24, 2018, 6 pm - 7:30 pm
<i>Refined Framework Plans and Design Concepts</i> |

Project Information:
<http://cityofsugarhill.com/2018lciplan/>



PUBLIC WORKSHOP #1 - SUGAR RUSH



CORE TEAM MEETING #1

Priority of Issues and Needs

Land Use and Development:

- **Lack of restaurants and dining** options; attract more businesses such as bars, restaurants, and services in walking distance
- **Neighborhood stability**, housing conditions and redevelopment potential in mobile home park and older neighborhoods
- **Focus on architectural character** of the future mixed-use and housing development
- **More residents** in/around Downtown core

Mobility:

- Due to the major traffic corridors and railroad, **walkability** is the biggest challenge
- Need a **pedestrian bridge** over Highway 20 to connect the northern neighborhoods to Downtown
- **Pedestrian-friendly environment** on Highway 20 and Whitehead Road

Identity/Branding/Open Space:

- Alton Tucker Road should be renamed to West Broad Street
- Lack of **urban parks and plazas**
- Need more **activities for youth**
- **Cohesive branding** for the City
- Connect Downtown and surrounding neighborhoods through **art walk and living wall**





ONLINE SURVEY



The City of Sugar Hill is updating our Downtown Master Plan.

WE WANT TO **HEAR** FROM YOU!

Provide your input through our surveys.

<https://cityofsugarhill.com/lcisurvey/>

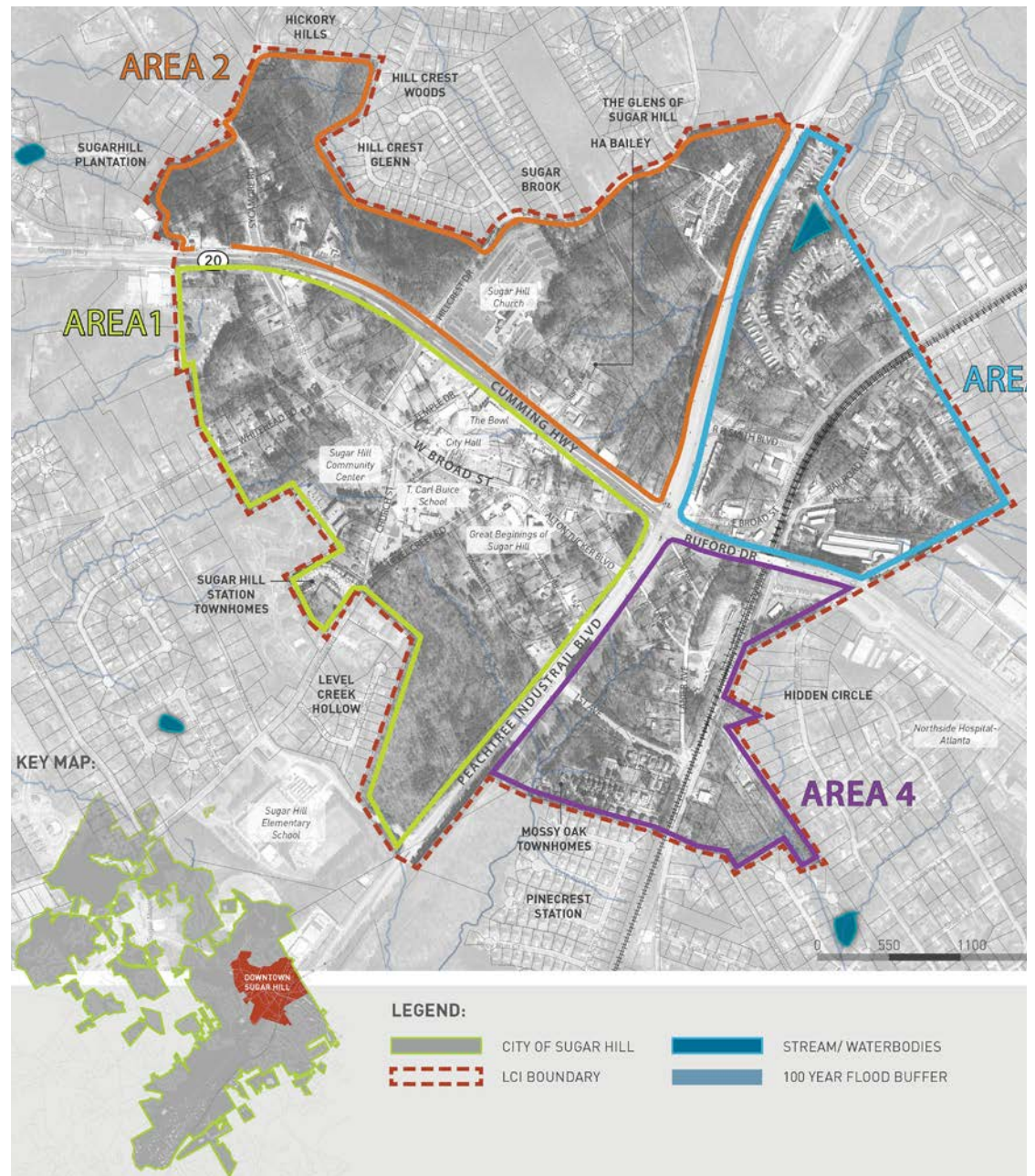


ONLINE SURVEY SUMMARY

200+ survey responses

Profile of Respondents:

- 96% live within 5-mile of Sugar Hill
- 73% live in the City of Sugar Hill
- 44% living in Sugar Hill for over 10 years
- 92% own a single family house
- 63% never walk/bike/skate to Downtown
- 73% drive to work
- 56% between 18 - 45 year old
- 32% between 46 - 65 year old



Preserve One Thing



- ## Creating One New Thing

- Restaurants
- Shopping
- Grocery
- Variety of Open Spaces

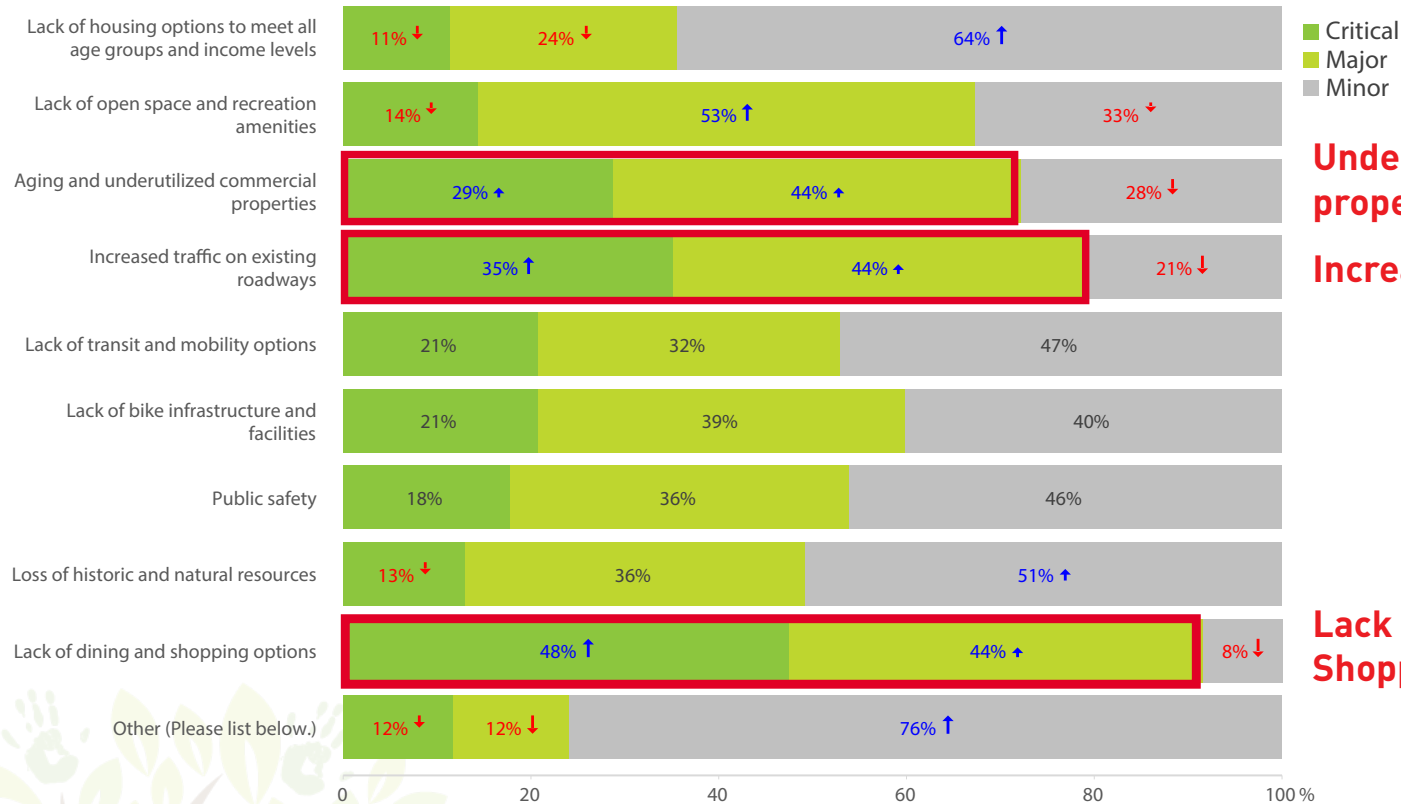
Precedents for Downtown

- Suwanee
- Duluth
- Avalon
- Greenville



ONLINE SURVEY SUMMARY

Issues for Future Development over 5-10 Years



Underutilized Commercial properties

Increased Traffic

Lack of Dining & Shopping options

What is the impact to development in Downtown Sugar Hill over the next 5-10 years for each of the listed issues? (X) SUMMARY
sample size = from 145 to 202; total sample size = 204; 59 missing; 95% confidence level

Potential Desirable Uses in Downtown

- Retail/Commercial
- Mixed-Use Development
- Single Family Residential

Future Need for Retail Use

- Local Chef-Driven Restaurants
- Boutique Shops
- Entertainment
- Craft Brewery/Brew Pub

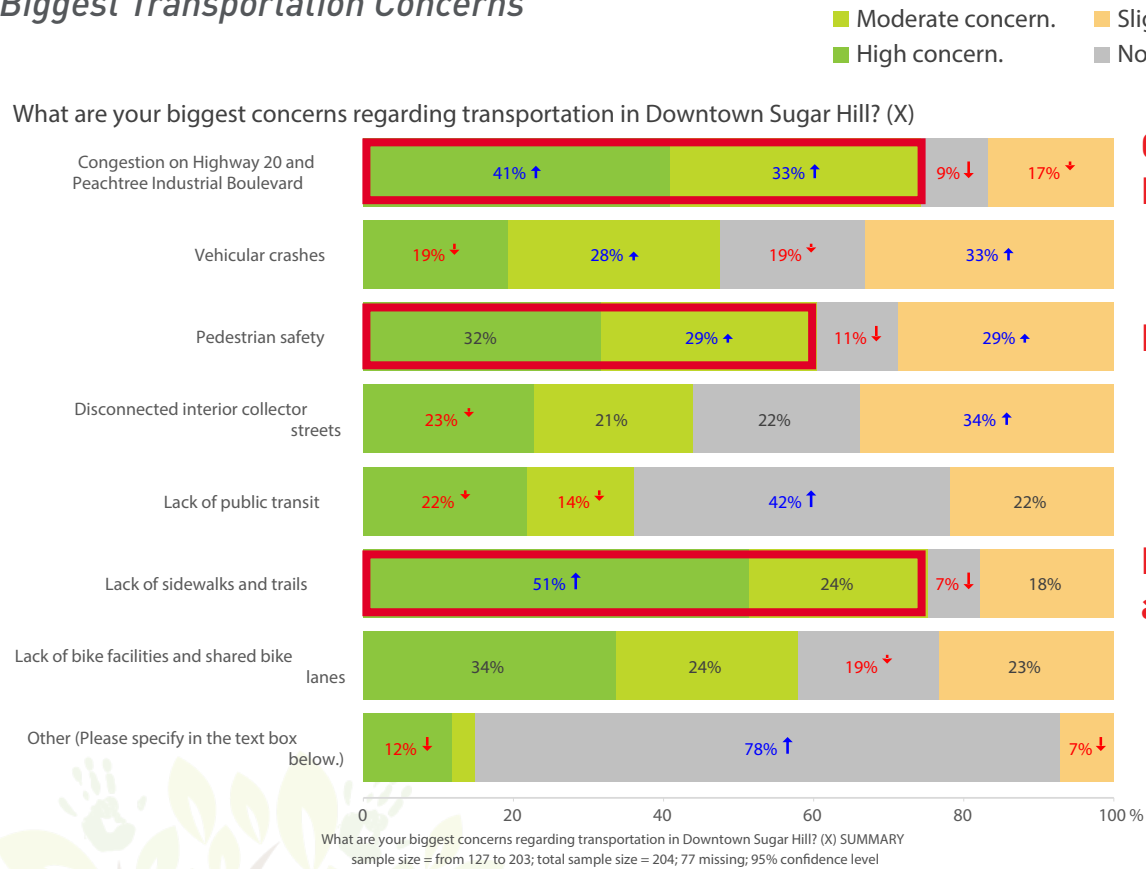
Potential Desirable Residential Type

- Housing above Retail
- Townhomes
- Smaller Single Family (Cottages, Ranch)



ONLINE SURVEY SUMMARY

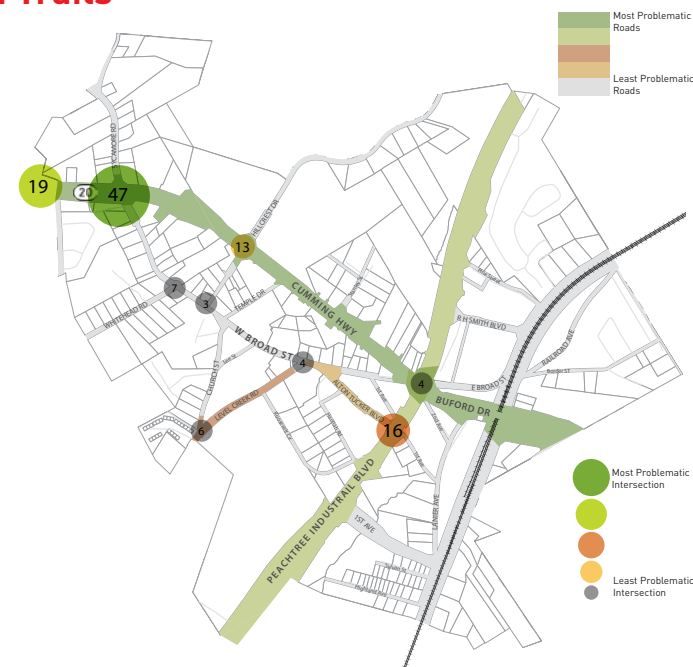
Biggest Transportation Concerns



Congestion on Highway and PIB

Pedestrian Safety

Lack of Sidewalks and Trails



ONLINE SURVEY SUMMARY

Sidewalk Improvement Priorities

- Level Creek Road
- Church Street
- Whitehead Road

Pedestrian Improvements to PIB and Highway 20

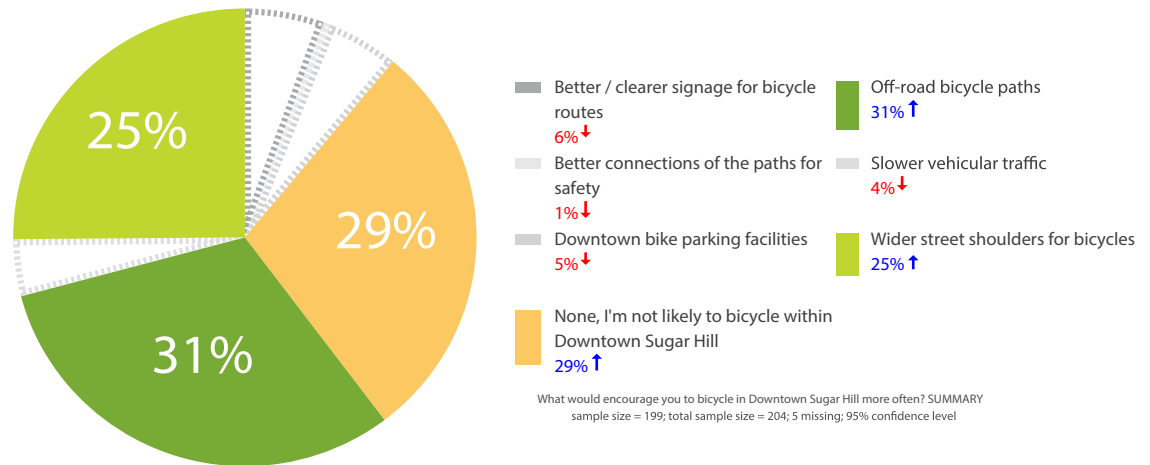
- Add pedestrian-activated signalized crosswalks
- Add pedestrian refuge islands
- Construct pedestrian bridge over the road

Mobility Improvement Priorities

- More complete sidewalk network
- Wider sidewalks
- Outdoor/sidewalk dining

Future Bicycle Facilities Needs

What would encourage you to bicycle in Downtown Sugar Hill more often?

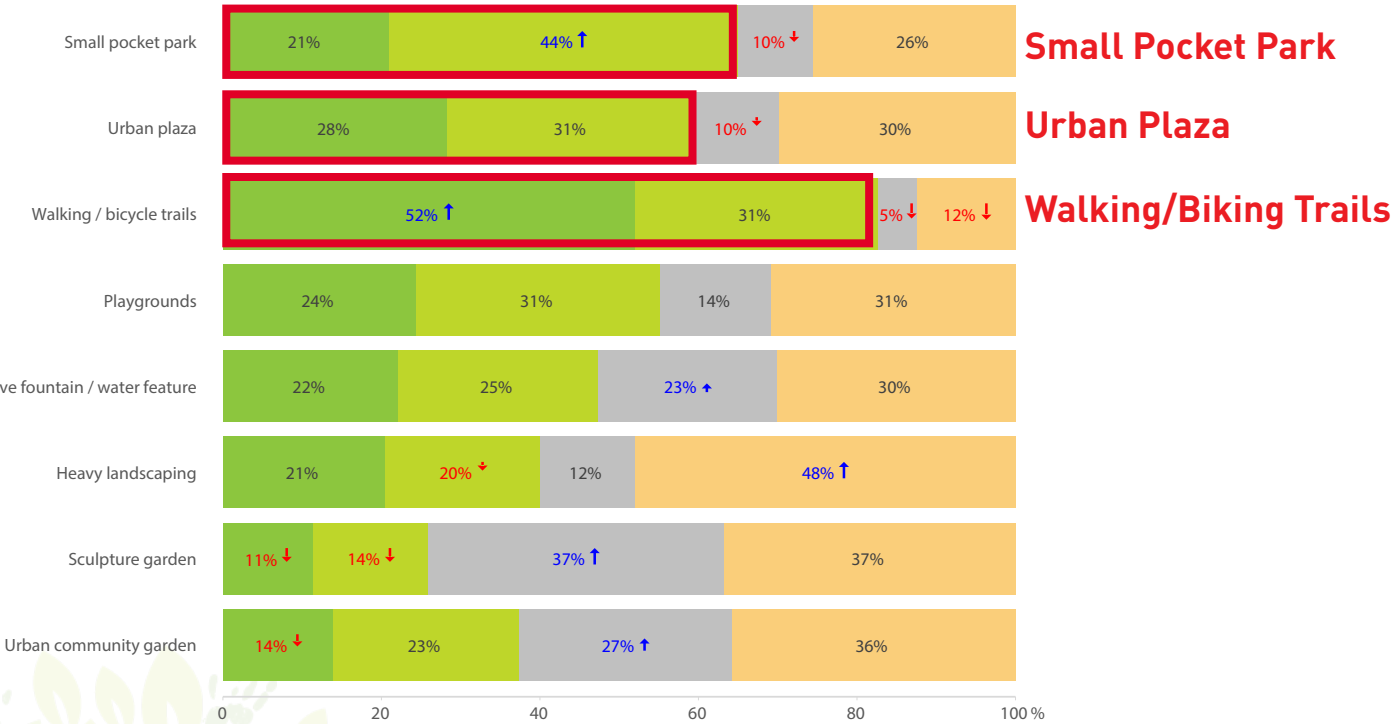


ONLINE SURVEY SUMMARY

Recreational and Open Space Need

Which types of recreation or open space are needed in Downtown Sugar Hill? (X)

Need More Slightly Need
High Need No Need



Which types of recreation or open space are needed in Downtown Sugar Hill? (X) SUMMARY
sample size = from 200 to 203; total sample size = 204; 4 missing; 95% confidence level



REAL ESTATE MARKET ANALYSIS





CITY OF SUGAR HILL DOWNTOWN LCI REAL ESTATE MARKET ANALYSIS

December 2017



Prepared by:  **Bleakly** Advisory Group

LORD
AECK
SARGENT

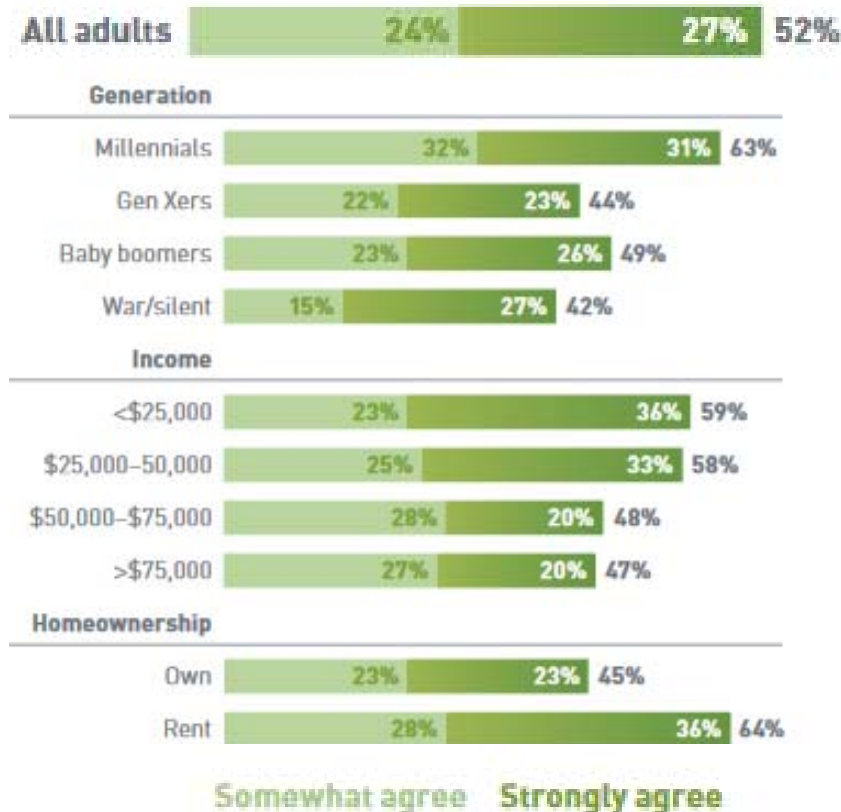
Prepared for: **City of Sugar Hill**

WALKABLE REAL ESTATE TRENDS



52%

of Americans would like to live in a place where they do not need to use a car very often.



America in 2015 A ULI Survey of Views on Housing, Transportation, and Community

WALKABLE REAL ESTATE TRENDS



Millennials Favor Walkable Communities, Says New NAR Poll



Seniors want walkability, too, survey says

WALKABLE REAL ESTATE TRENDS

The WalkUP *Wake-Up Call*:

Atlanta

“Walkable Urban Places” = WalkUPs

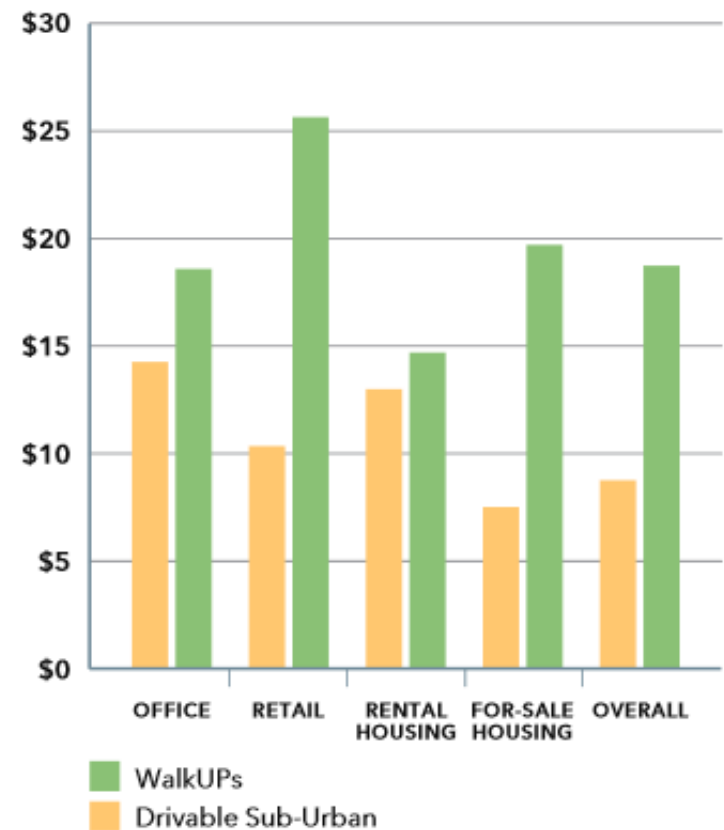
By Christopher B. Leinberger

The George Washington University
School of Business

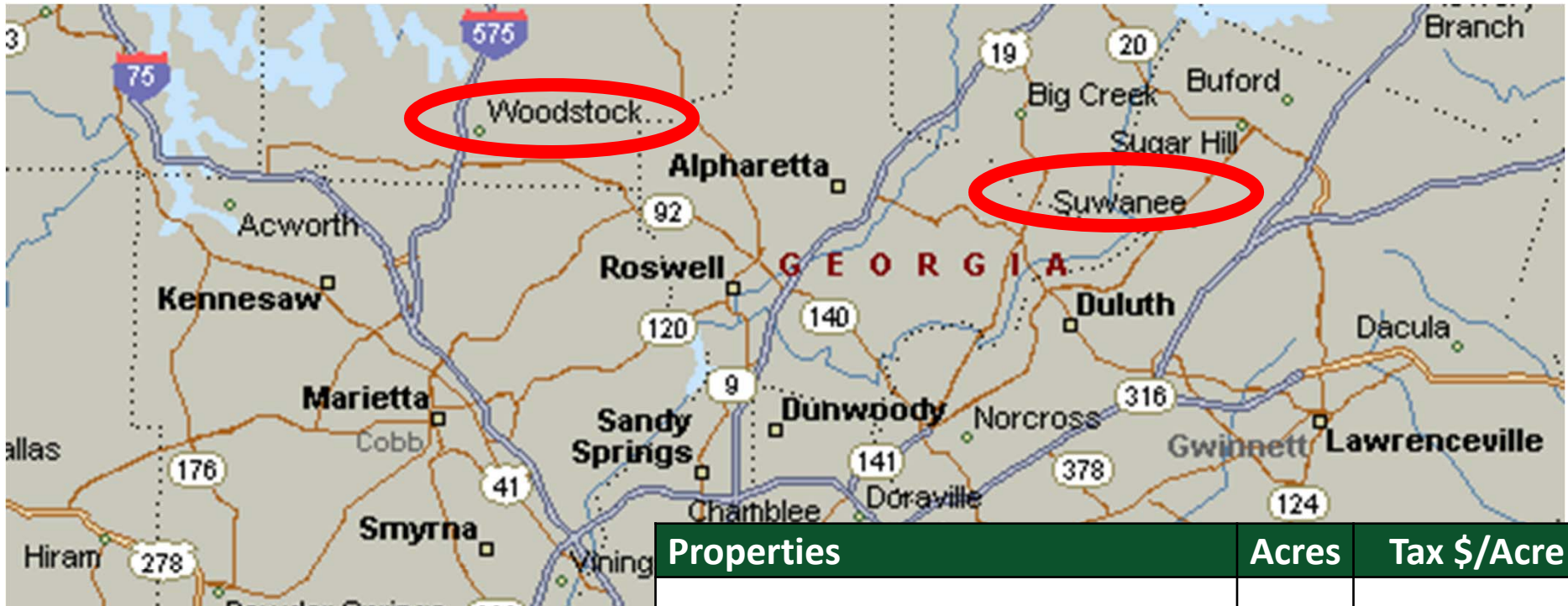
WalkUP development
in metro Atlanta:

- 1992-2000: 14%
- 2001 to 2008: 26%
- **2009 to 2013: 60%**

WalkUPs vs. Drivable Sub-Urban
Comparing Average Rents per Sq. Ft.



WALKABLE REAL ESTATE TRENDS



Properties	Acres	Tax \$/Acre
Suwanee Town Center	9	\$1,508,391
Downtown Woodstock	16	\$1,460,409
Avg. nearby drivable retail center	28	\$612,123



WALKABLE REAL ESTATE TRENDS

What's Hot: Trends in the Pipeline for 2018



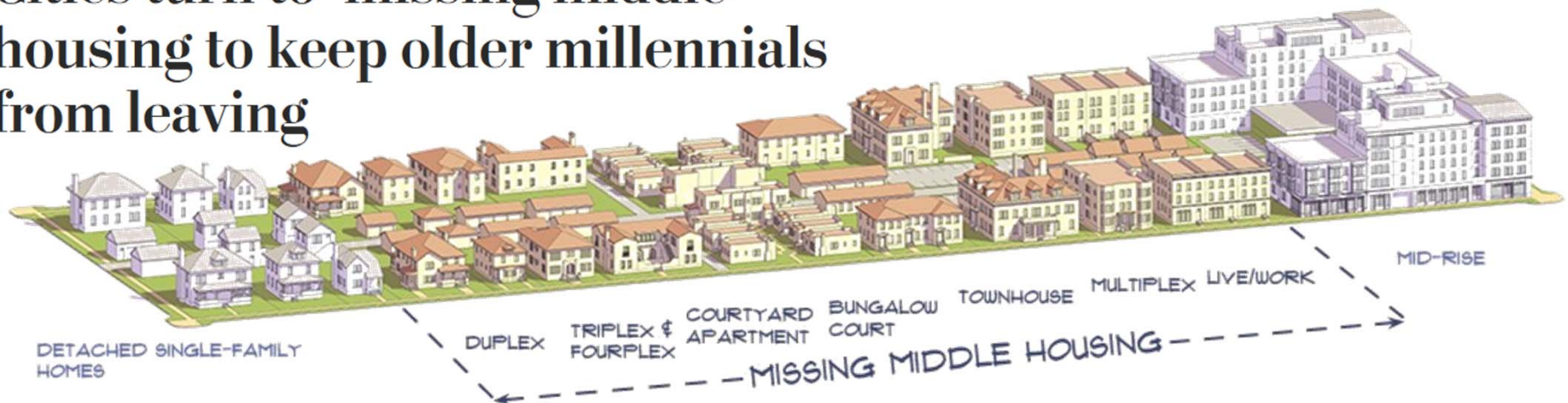
NATIONAL
ASSOCIATION of
REALTORS®

Missing Middle Housing

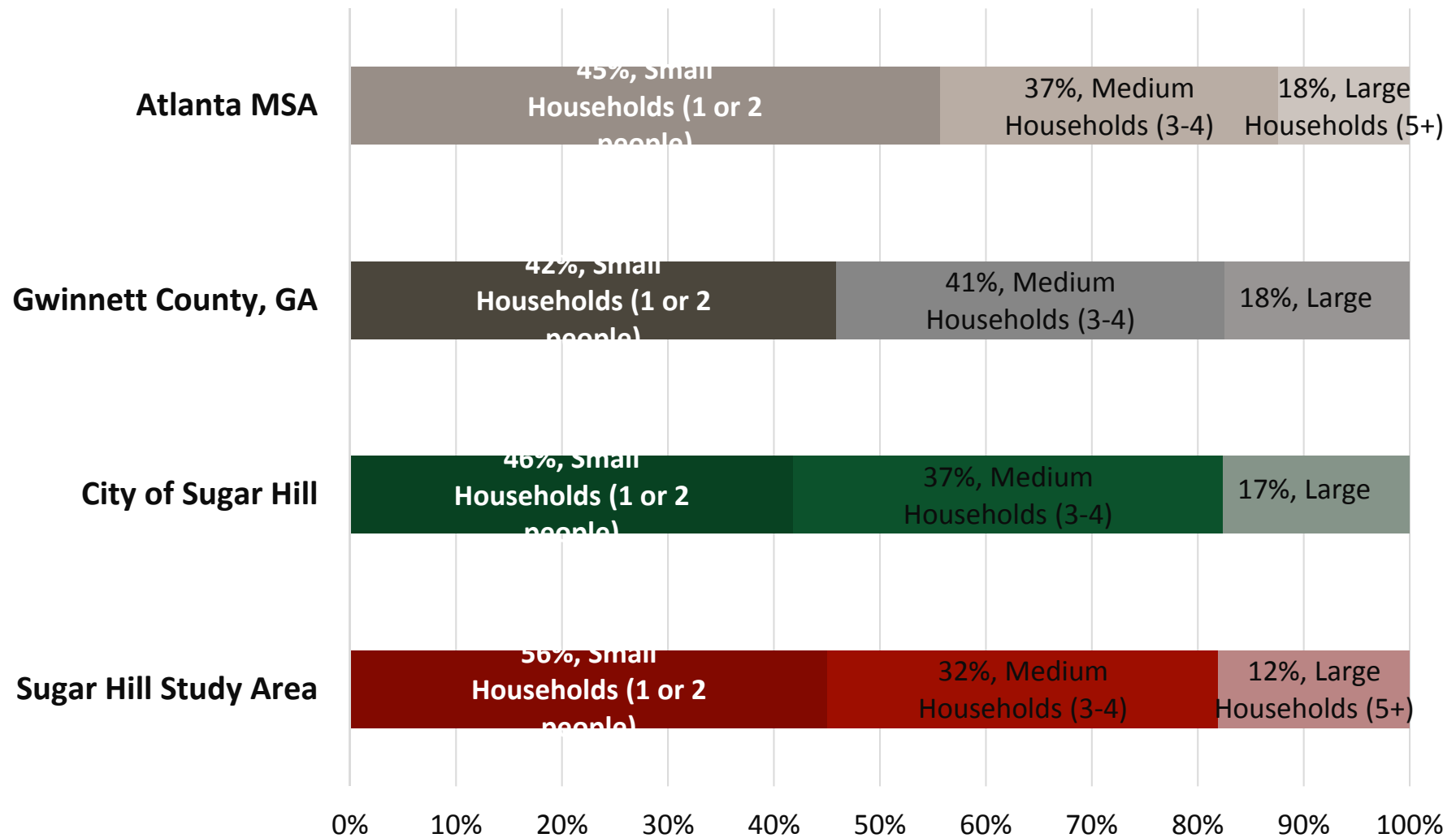
Why now: Architect Daniel Parolek, principal at Opticos Design in Berkeley, Calif., sees a solution emerging for the mismatch between demand and the housing that's actually been delivered over the last 20 to 30 years. "Thirty percent of home buyers are single, and their numbers may swell to 75 to 85 percent by 2040,



Cities turn to 'missing middle' housing to keep older millennials from leaving



HOUSEHOLD CHARACTERISTICS



Source: Envirionics Analytics

MISSING MIDDLE



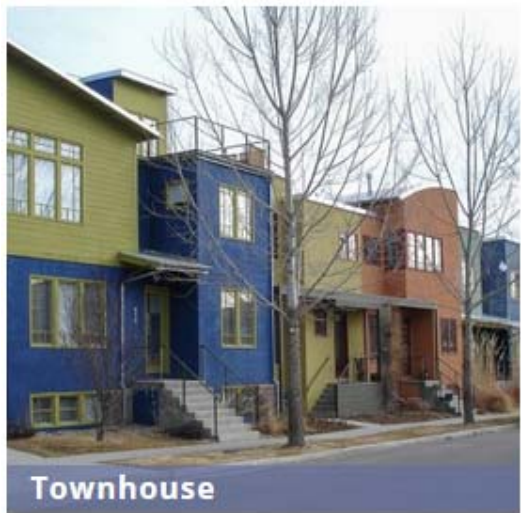
Carriage House



Fourplex



Multiplex: Small



Townhouse



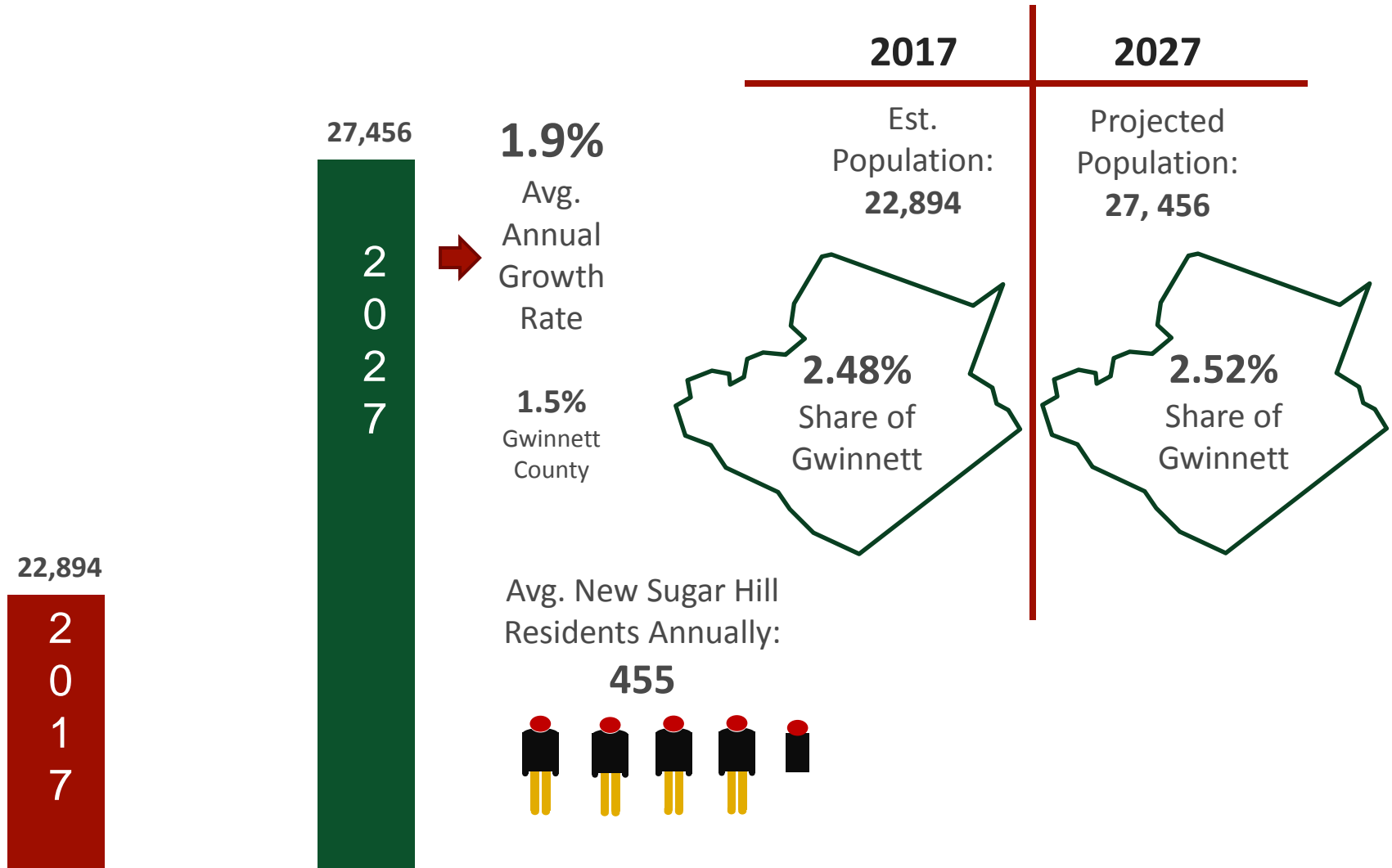
Live/Work



Courtyard Apartments



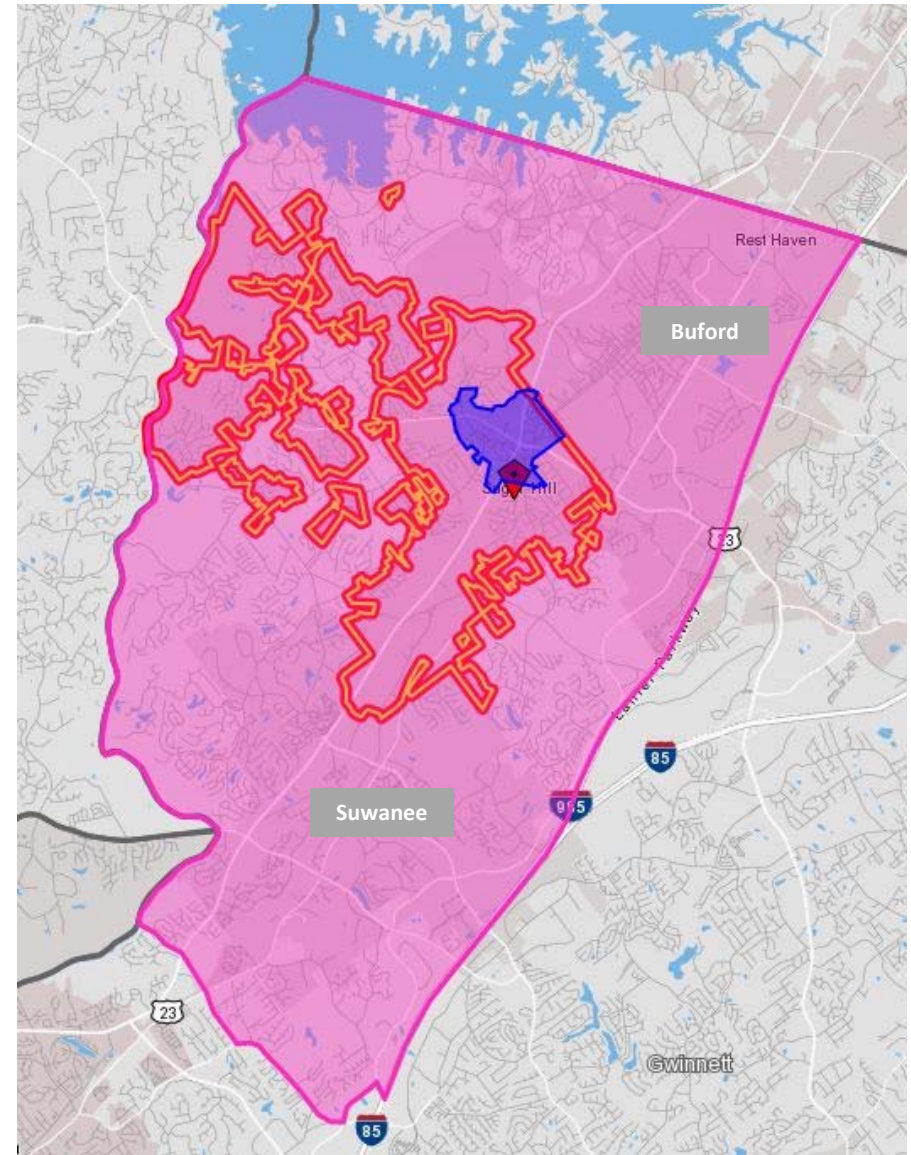
SUGAR HILL POPULATION



PRIMARY AREAS FOR ANALYSIS

- Sugar Hill Downtown LCI Study Area
- Sugar Hill City Limits
- Primary Market Area

- The Primary Market Area (PMA) is the area from which the majority of household demand is expected to emanate.



AGE AND INCOME

- Currently in the Primary Market Area higher-income “mid-career” households proliferate.
- The prevalence of these households bodes well for the potential future growth of the City of Sugar Hill, as they are a desirable target market.

Households by Age and Income, Primary Market Area, 2017

Age		25-34	35-44	45-54	55-64	> 64	
Income	< 25	Young Households	Move-Up Households	Prime Earners/ Empty Nesters	Prime Earners/ Empty Nesters	Boomers+	TOTAL
< \$35K	269	751	989	990	933	1,590	5,522
\$35K-\$65K	241	812	1,237	1,605	1,234	1,099	6,228
\$65-\$100K	101	833	1,450	2,053	1,389	894	6,720
> \$100K	32	1,273	3,367	3,714	2,204	1,157	11,747
TOTAL	644	3,668	7,043	8,362	5,759	4,740	30,216

Young Households



Move-Up Households



Prime Earners / Empty Nesters

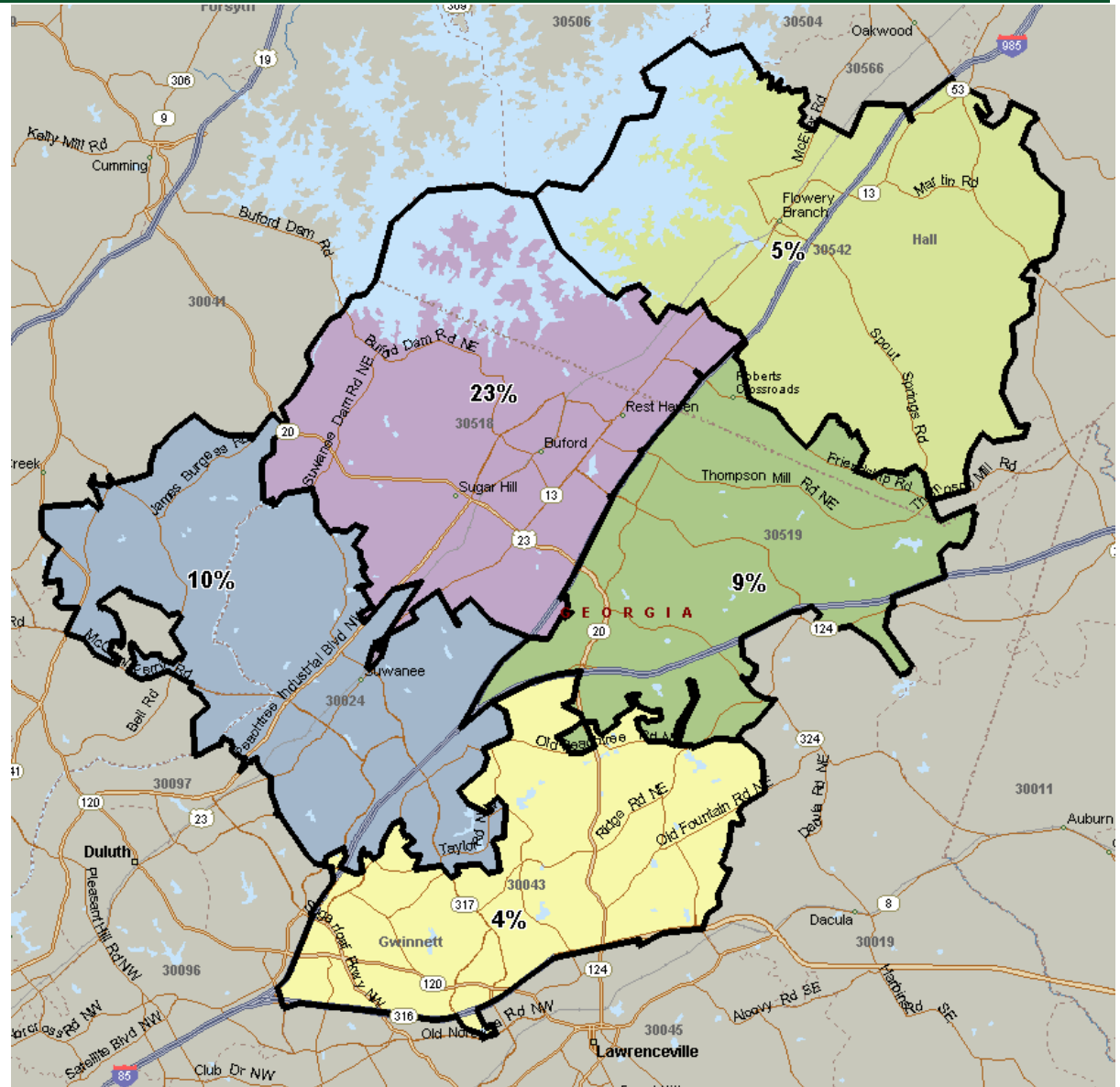


Boomers

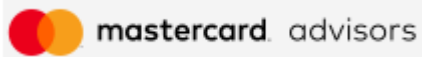


RETAIL SPENDING IN SUGAR HILL

- More than half of the retail spending in Sugar Hill comes from households that live in the zip codes highlighted at right.



Based on data from:



HOUSEHOLD SPENDING ASSESSMENT

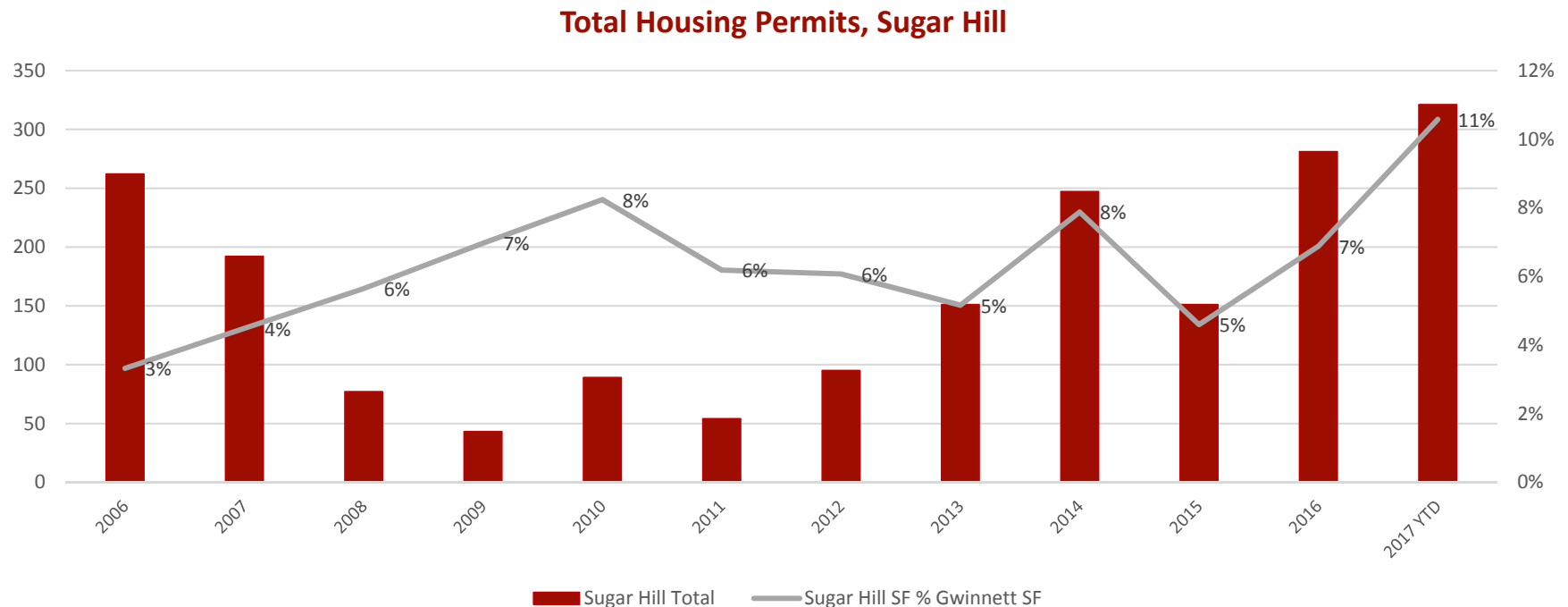
Total Retail Spending in the Primary Market Area: **\$1,400,000,000**

Spending by PMA Households / Spending in the PMA, 2017



HOUSING PERMITS

- Since 2010, Sugar Hill has captured (on average) 6% of total housing permits and 6.8% of single family permits annually in Gwinnett County.
- In 2017, housing permits are at their highest since before the Great Recession with 321 permits issued to date.



Source: HUD SOCDS Building Permits Database

NEW HOME SALES: PRIMARY MARKET AREA

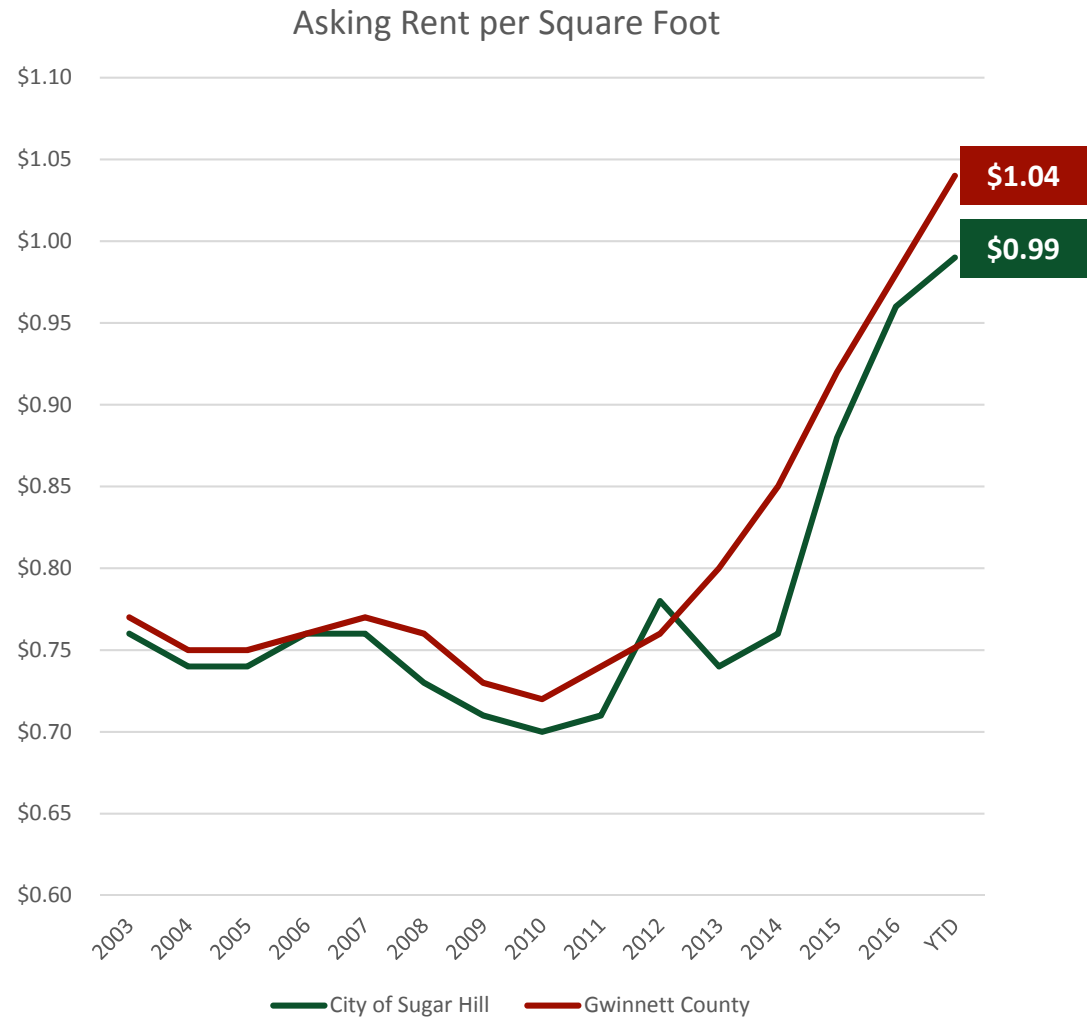
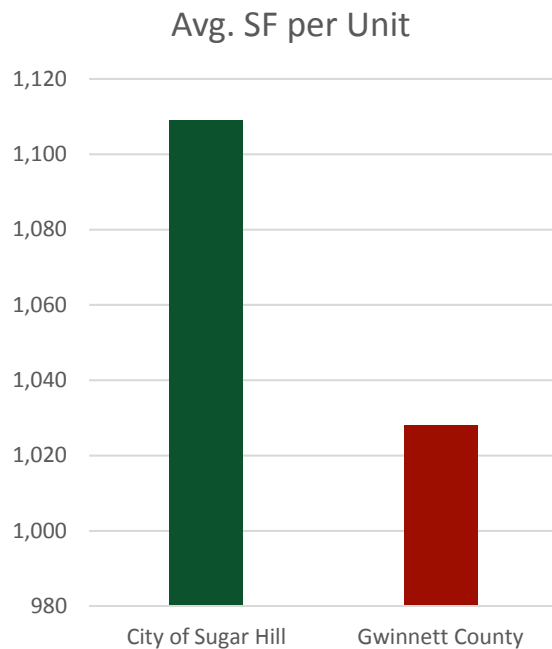
New Construction Home Sales in PMA by Price and Product, 2011-2017



Based on data from SmartREdata.
2017 data through Q3

MULTIFAMILY MARKET ASSESSMENT

- There are 577 multifamily units in 5 apartment communities in Sugar Hill.
- With larger unit sizes in Sugar Hill, the per square foot rent price is lower.



MARKET STUDY CONCLUSIONS

TARGETED OPPORTUNITIES 2017 - 2027

- The Study Area can expand the opportunity to become a sought-after mixed-use walkable node in Gwinnett Co. by capturing demand for the following:
 - For-Rent Residential
 - For-Sale Residential
 - Single-family and Attached
 - Retail
 - Office

MARKET DEMAND POTENTIAL SUMMARY

	Market Rate Rental: \$875+/month	For-Sale Single-Family: \$150K+	For-Sale Attached: \$150K+
New Units 2017-2027	875 - 925	150 - 200	160 - 210
TOTAL POTENTIAL NEW HOMES: 1,185 – 1,335			

	“Dry Goods” Retail	Food and Beverage Stores	Restaurants
New Sq. Ft. 2017-2027	25,000 – 29,000	11,000 – 15,000	23,000 – 27,000
TOTAL POTENTIAL NEW RETAIL SF: 60,000 – 70,000			
TOTAL POTENTIAL NEW OFFICE SF: 40,000 – 50,000			

MARKET STUDY CONCLUSIONS

RESIDENTIAL OPPORTUNITIES 2017 - 2027

	Market Rate Rental: \$875+/month	For-Sale Single-Family: \$150K+	For-Sale Attached: \$150K+
New Units 2017-2027	875 - 925	150 - 200	160 - 210
TOTAL POTENTIAL NEW HOMES: 1,185 – 1,335			

- For Rent Residential: Mix of attached housing types and accessory dwelling units
- For Sale Residential: Mix of single-family, townhomes and other “missing middle” housing types



MARKET STUDY CONCLUSIONS

RETAIL OPPORTUNITIES 2017 - 2027

	"Dry Goods" Retail	Food and Beverage Stores	Restaurants
New Sq. Ft. 2017-2027	25,000 – 29,000	11,000 – 15,000	23,000 – 27,000
TOTAL POTENTIAL NEW RETAIL SF: 60,000 – 70,000			

- Grocery, pharmacy, and other store types to serve growing local populace
- Additional restaurants to serve both locals and visitors



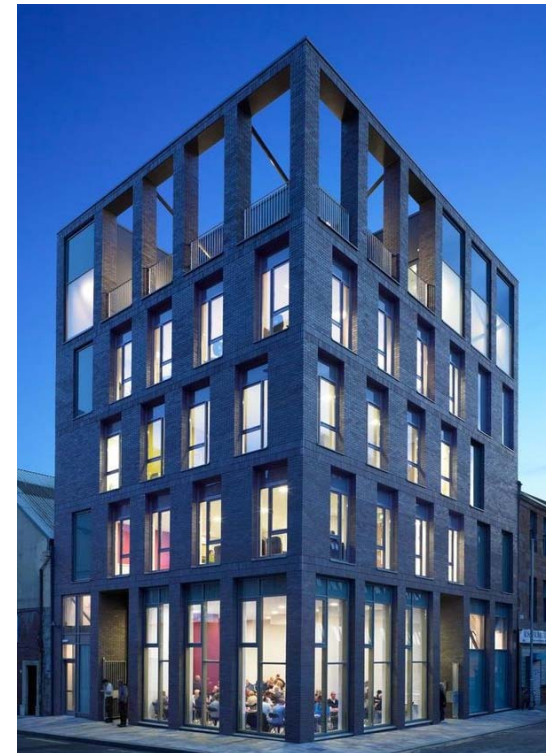
Sidewalk Cafes: “Silver Bullets of Walkable Places”

MARKET STUDY CONCLUSIONS

OFFICE OPPORTUNITIES 2017 - 2027

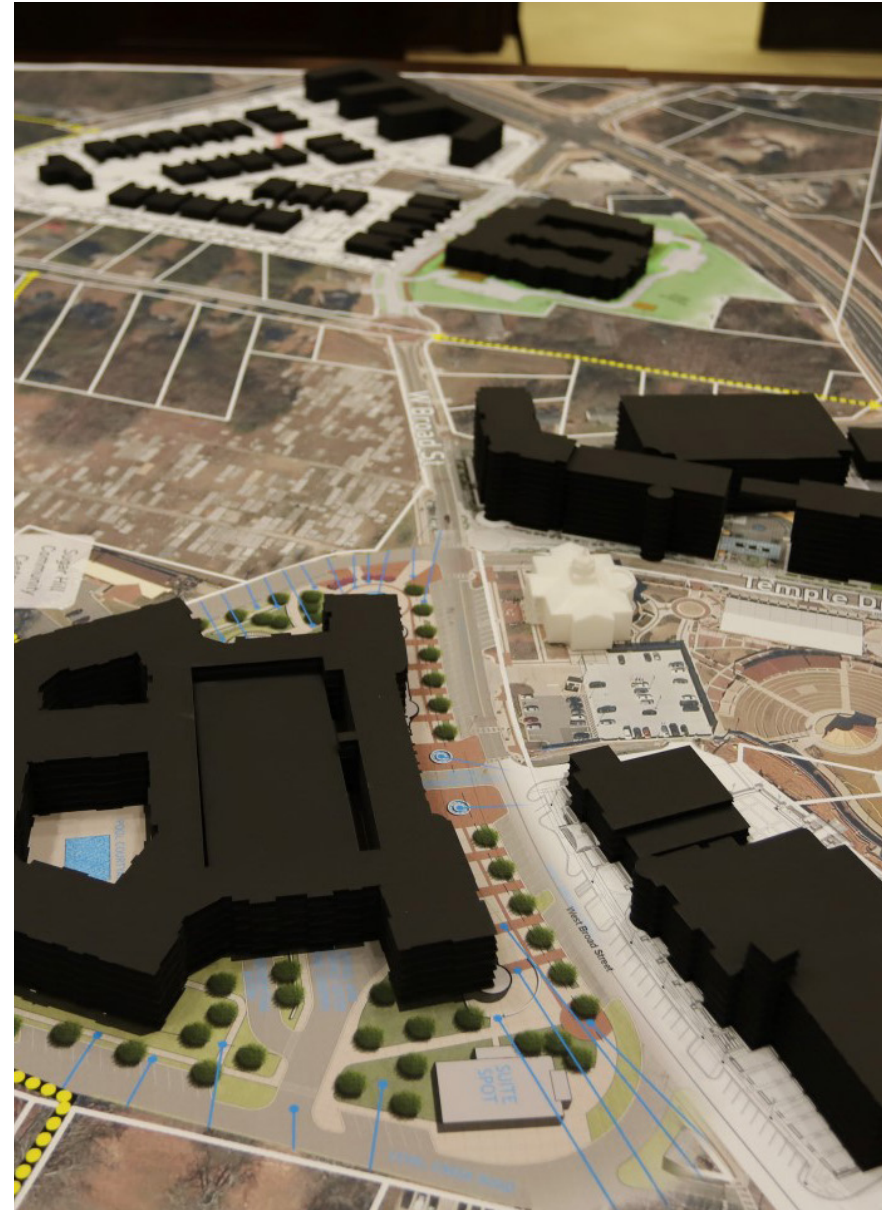
TOTAL POTENTIAL NEW OFFICE SF: 40,000 – 50,000

- Buildings in mixed use setting targeting professional service companies
 - Doctors
 - Lawyers
 - Insurance Agents
 - Real Estate Agents
 - Architects
 - Engineers
 - Bank
 - Start-ups



PLANNING EXERCISES

- Land Use Character (10 min.)
 - Select desired development character images for Downtown subareas
- Mobility/Streetscape Improvements (15 min.)
 - Select desired streetscape improvement images and provide input on street sections
- Identity/Branding/Open Space (5 min.)
 - Select desired images for type of open space, identity and branding for Downtown
- Downtown Buildout Concepts (20 min.)
 - Use various development and housing blocks for future buildout scenarios



NEXT STEPS

- Development and Mobility Framework Plan
- Downtown Growth Strategies
- Preliminary Design Concepts
- Core Team Meeting #3 on 01/24/18
- Public Workshop #3 on 02/15/18





CORE TEAM MEETING #3
January 24, 2018

LORD
AECK
SARGENT

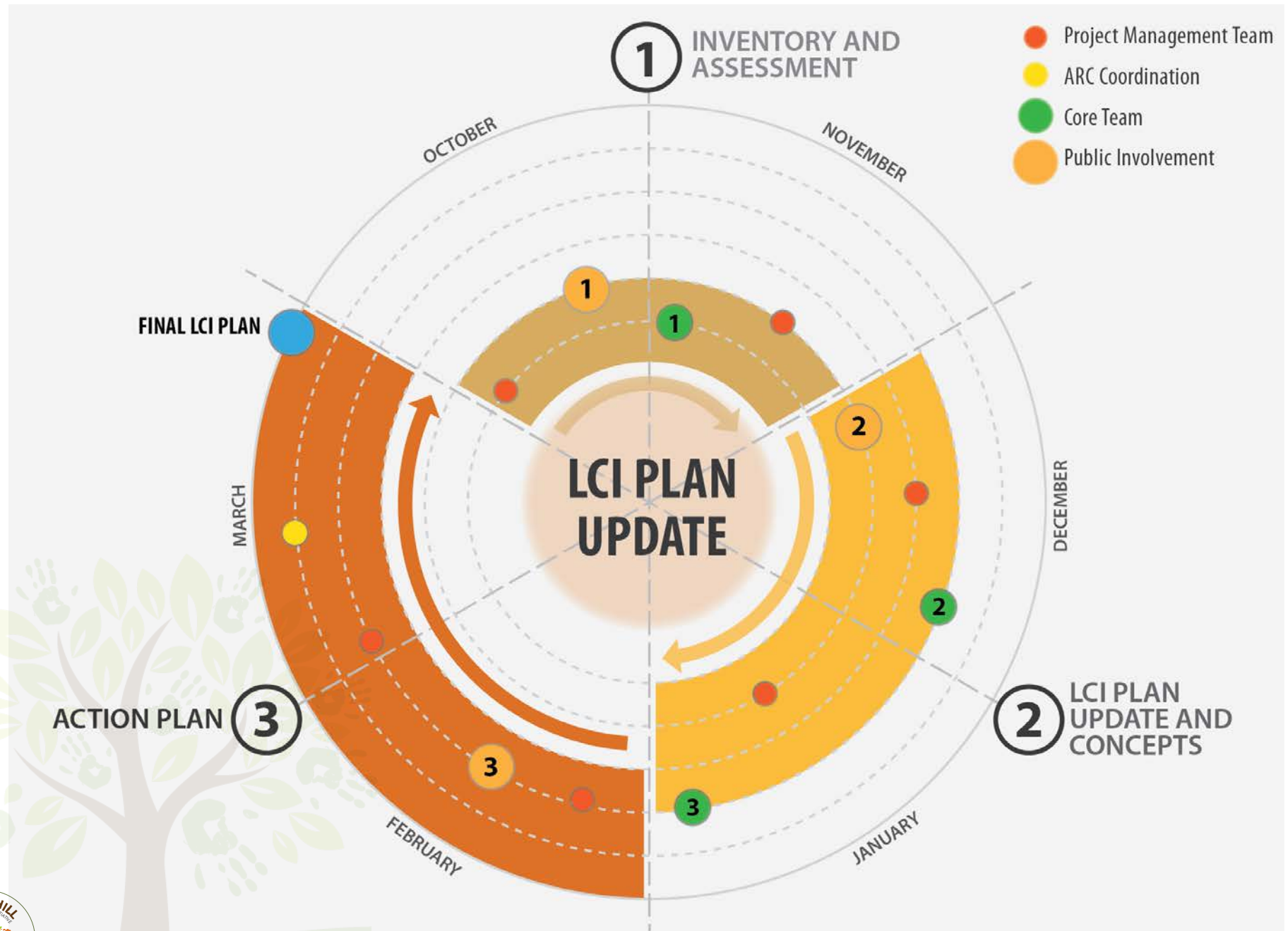


AGENDA

- Process Update
- What are the BIG Themes
- Mobility Framework
- Downtown Growth
- Development Framework
- Discussion
- Next Steps



PROCESS



SCHEDULE

PUBLIC INVOLVEMENT SCHEDULE

- | | | | |
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| 3 | Public Open House
February 15, 2018, 4:30 pm - 7:30 pm
<i>Framework Plans, Strategies, and Priorities</i> | ✓ 3 | Core Team Meeting #3
January 24, 2018, 6 pm - 7:30 pm
<i>Refined Framework Plans and Design Concepts</i> |

Project Information:
<http://cityofsugarhill.com/2018lciplan/>

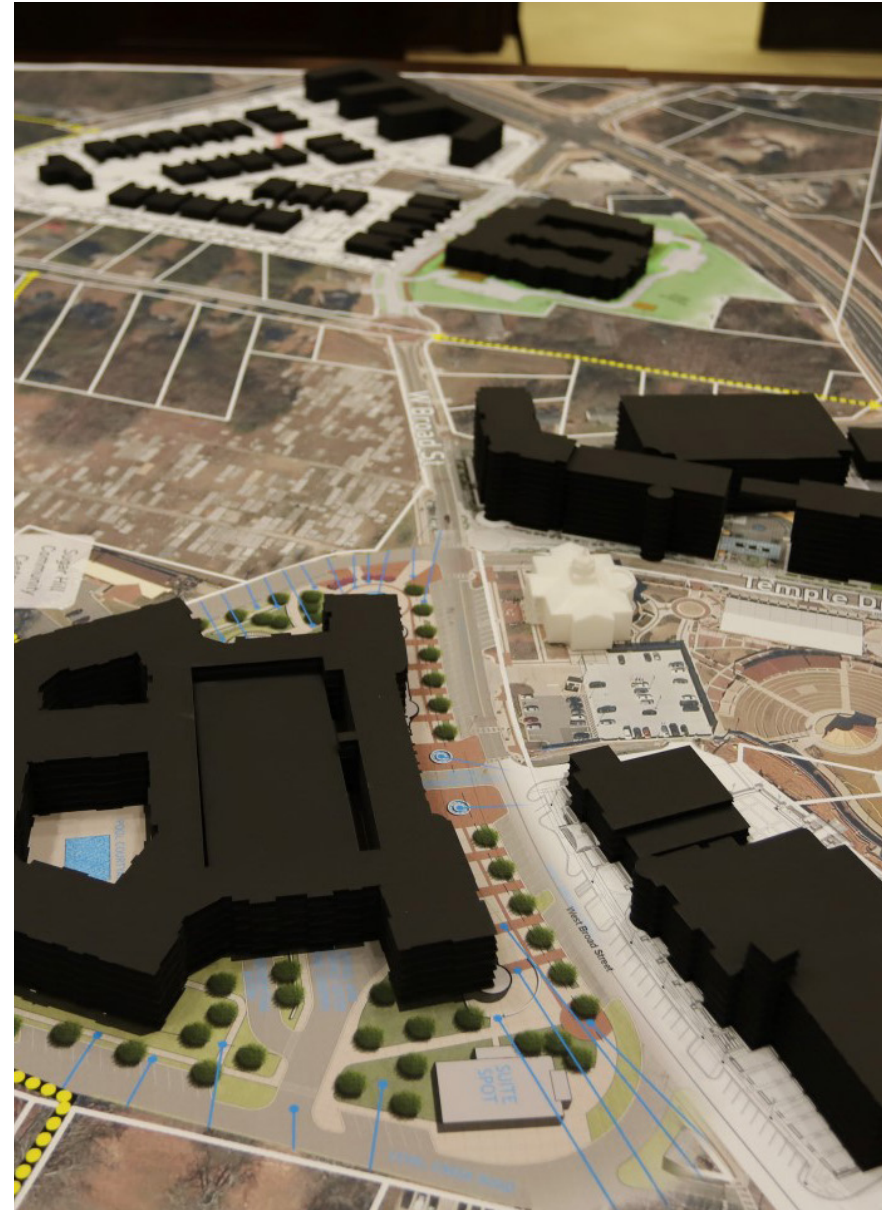


PUBLIC PARTICIPATION PROCESS



PLANNING EXERCISES

- Land Use Character
 - Select desired development character images for Downtown subareas
- Mobility/Streetscape Improvements
 - Select desired streetscape improvement images and provide input on street sections
- Identity/Branding/Open Space
 - Select desired images for type of open space, identity and branding for Downtown
- Downtown Buildout Concepts
 - Use various development and housing blocks for future buildout scenarios

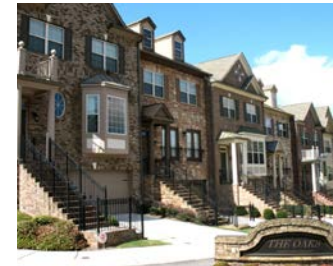


WHAT ARE THE BIG THEMES

DREAM BIG and THINK LONG TERM

Land Use and Development:

- Create vision for long term development growth beyond the CBD boundary
- Create a vibrant downtown core with a variety dining and shopping options
- Maximize development potential with mix of uses to create critical mass within a 5-min walk
- Develop “transitional” housing density between the “dense” core and suburban residential areas
- Revitalize aging commercial and residential areas through redevelopment and infill strategies
- Focus on architectural character of the future mixed-use and housing development



WHAT ARE THE BIG THEMES

DREAM BIG and THINK LONG TERM

Mobility:

- Improve connectivity between downtown core and future growth areas
- Extend pedestrian and bike infrastructure throughout downtown and beyond
- Traffic calming and pedestrian safety improvements on Highway 20 and PIB



WHAT ARE THE BIG THEMES

DREAM BIG and THINK LONG TERM

Identity/Branding/Open Space:

- Incorporate a variety of open spaces such as urban plazas, neighborhood parks, pocket parks as part of new development
- Plan more activities for youth and families
- Create cohesive branding for the City by incorporating history and public art

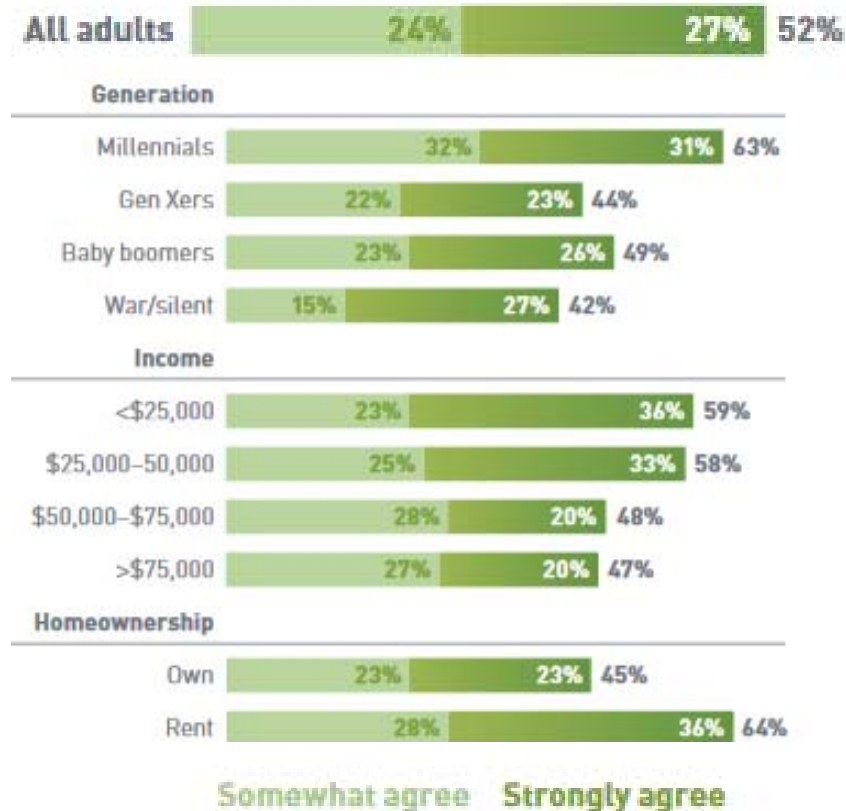


WALKABILITY TRENDS



52%

of Americans would like to live in a place where they do not need to use a car very often.

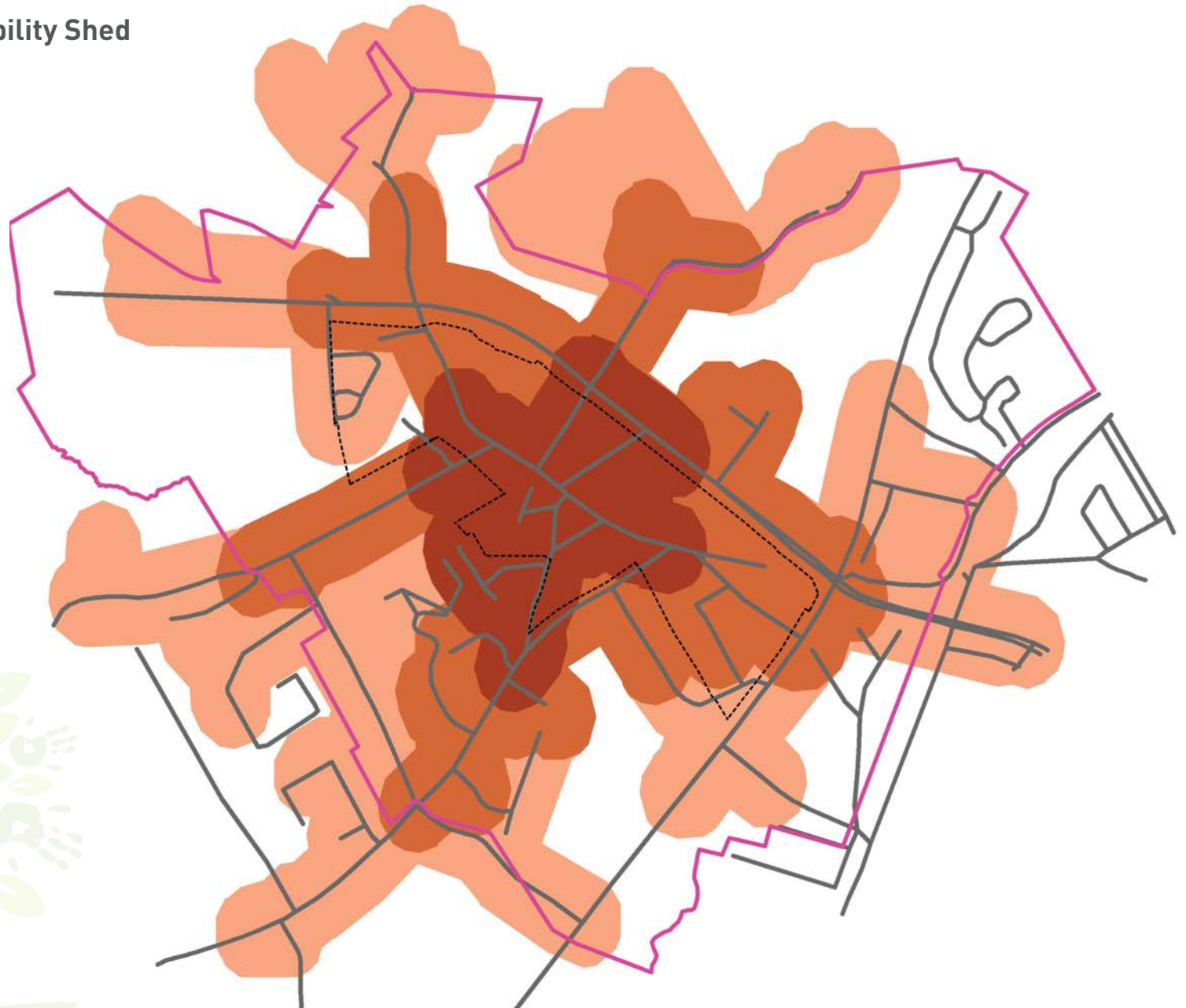


America in 2015 A ULI Survey of Views on Housing, Transportation, and Community

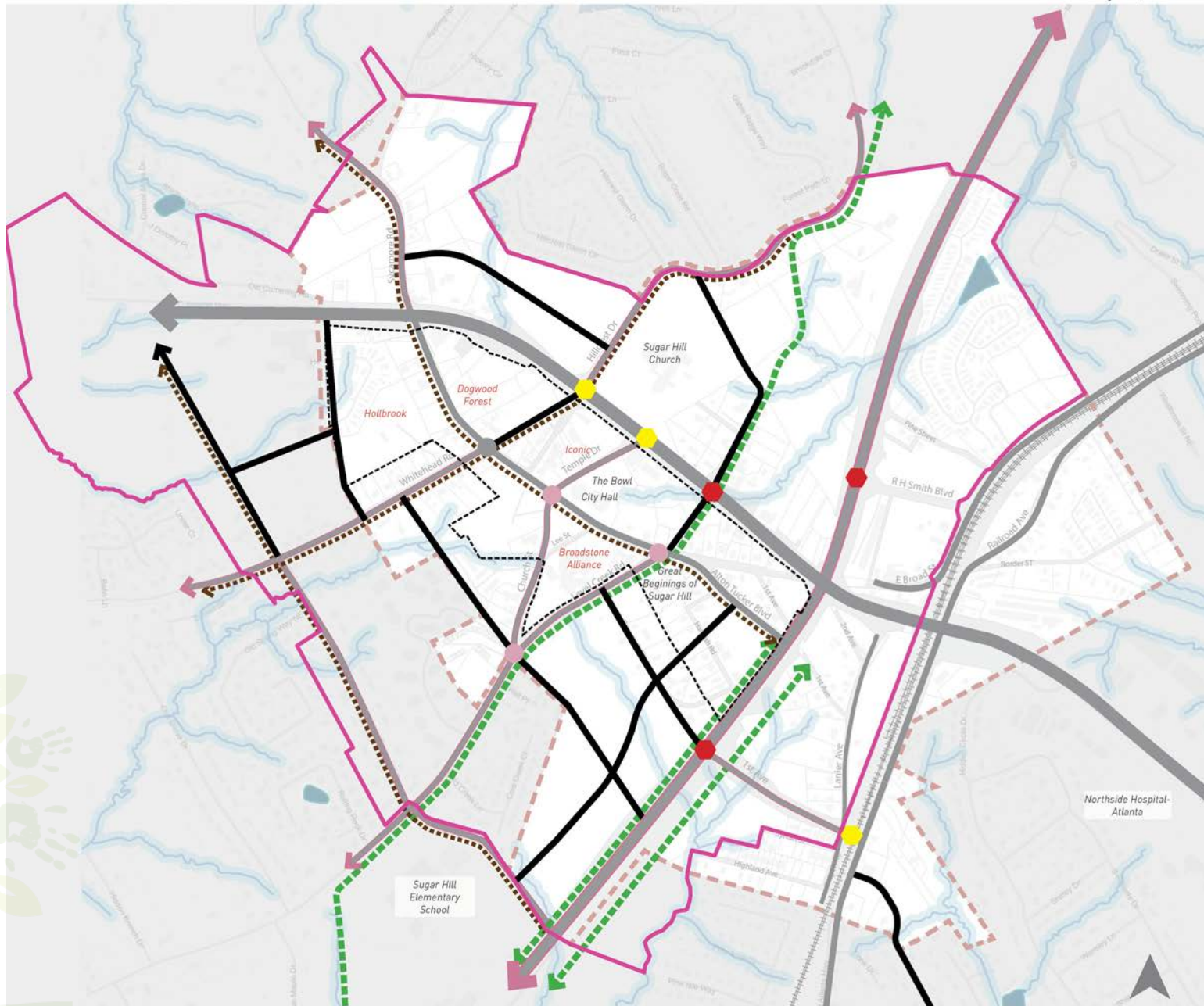


MOBILITY FRAMEWORK PLAN

5, 10, and 15 Minute Walkability Shed



MOBILITY FRAMEWORK PLAN (DRAFT)



MOBILITY FRAMEWORK PLAN

- Close mobility gaps with new streets, pedestrian and bike connections
- Streetscape improvements on major downtown streets - Whitehead, Level Creek, Church, Sycamore, Hillcrest, Temple, 1st Avenue, Spring Hill
- Bike infrastructure on major streets - West Broad, Whitehead, Level Creek, Spring Hill, Hillcrest, Sycamore
- Sidewalk and streetscape improvements throughout downtown, including Highway 20 and PIB
- Pedestrian friendly environment and safety measures on Highway 20 and PIB - traffic calming, landscaped median, street trees, and pedestrian lights



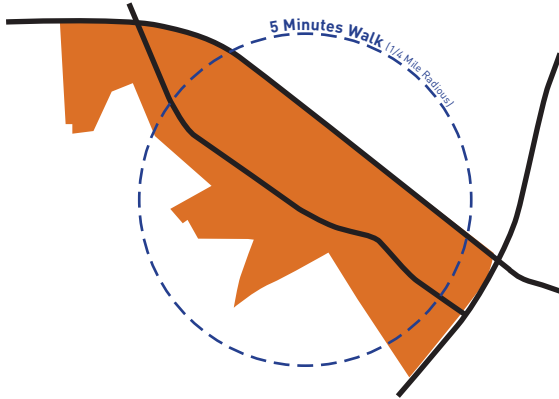
Highway 20 Street Section



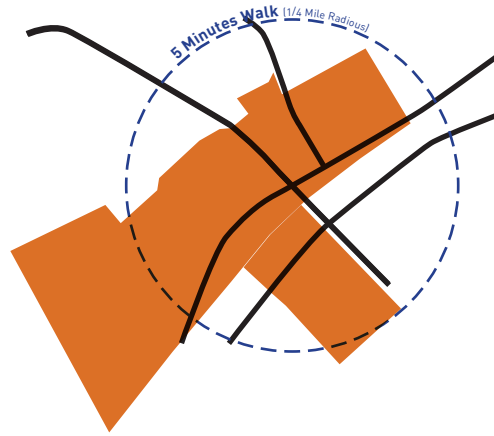
Level Creek and Whitehead Street Section

DOWNTOWN GROWTH

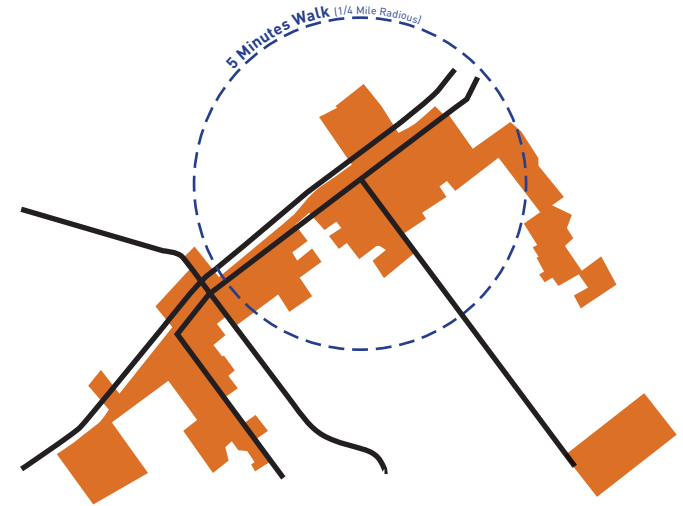
SUGAR HILL



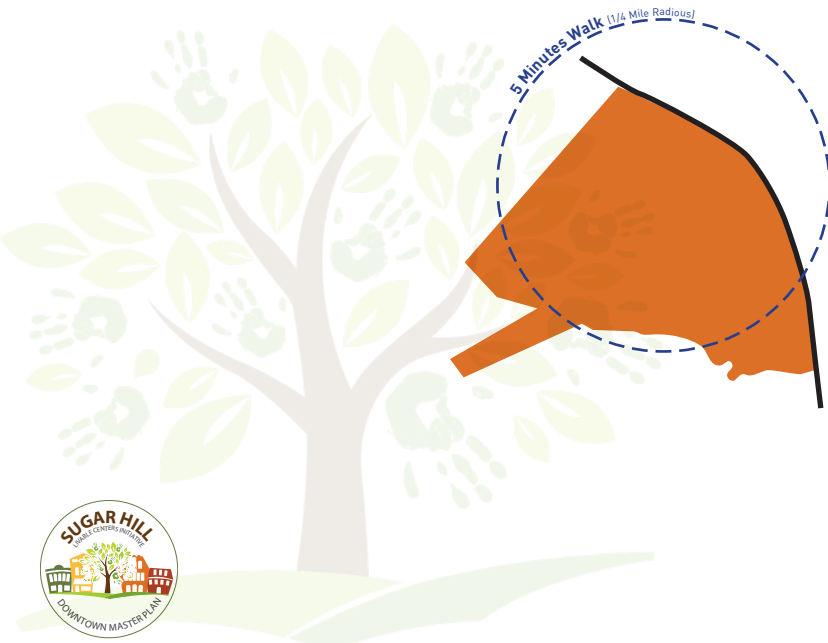
DULUTH, GA



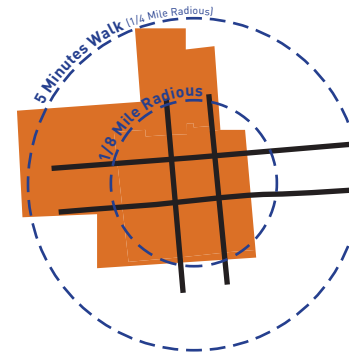
BUFORD, GA



SUWANEE, GA

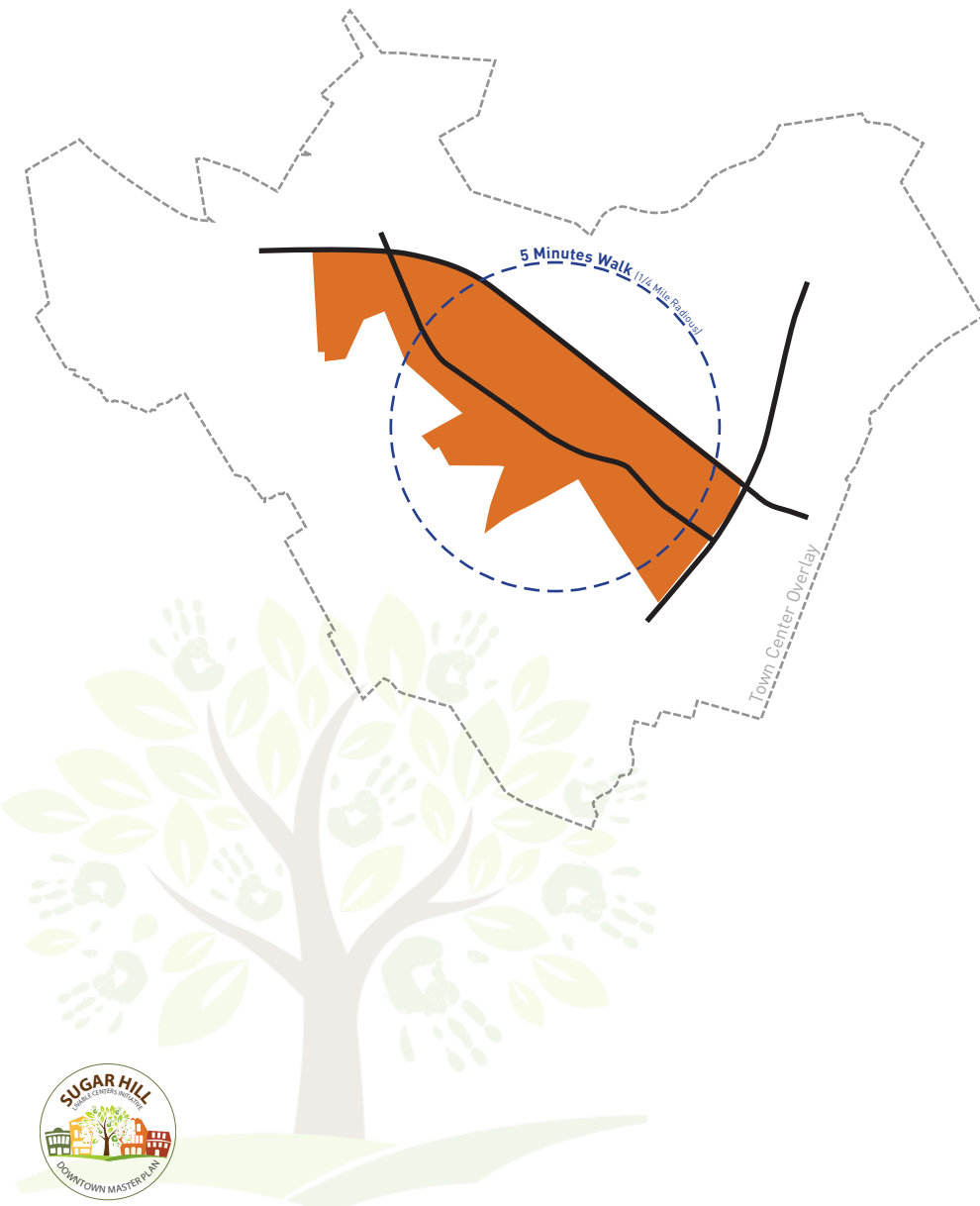


LAWRENCEVILLE, GA

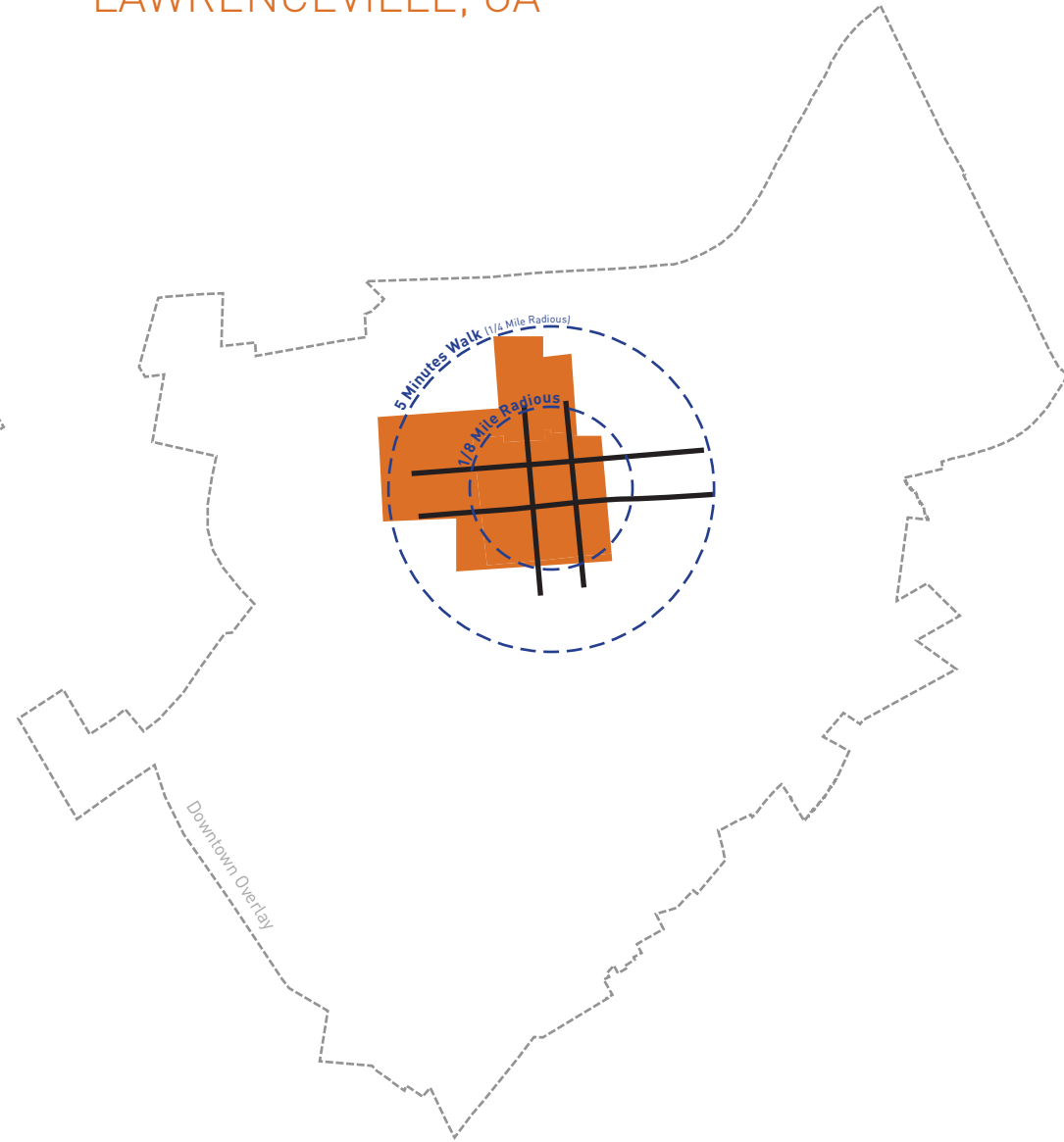


DOWNTOWN GROWTH

SUGAR HILL, GA

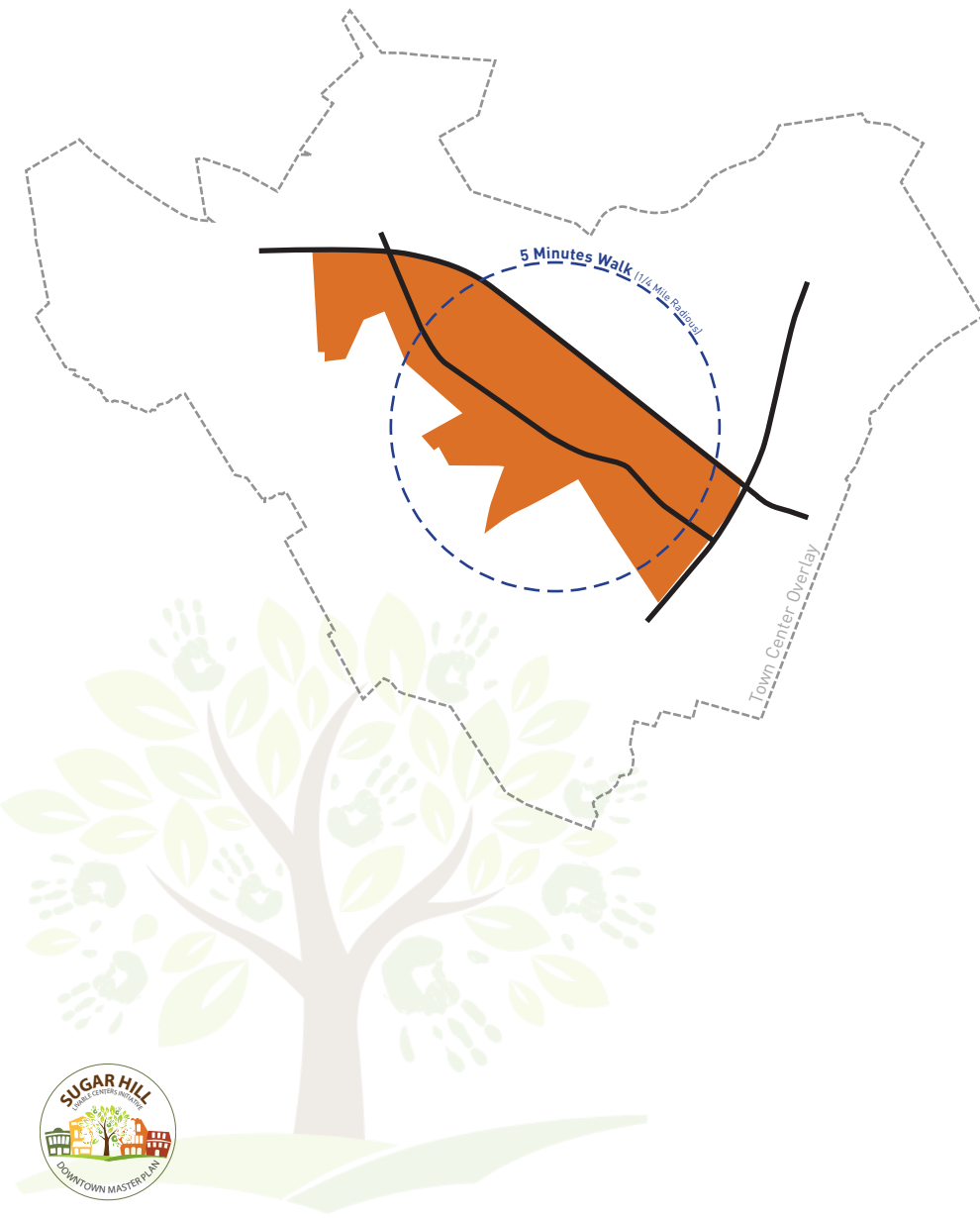


LAWRENCEVILLE, GA

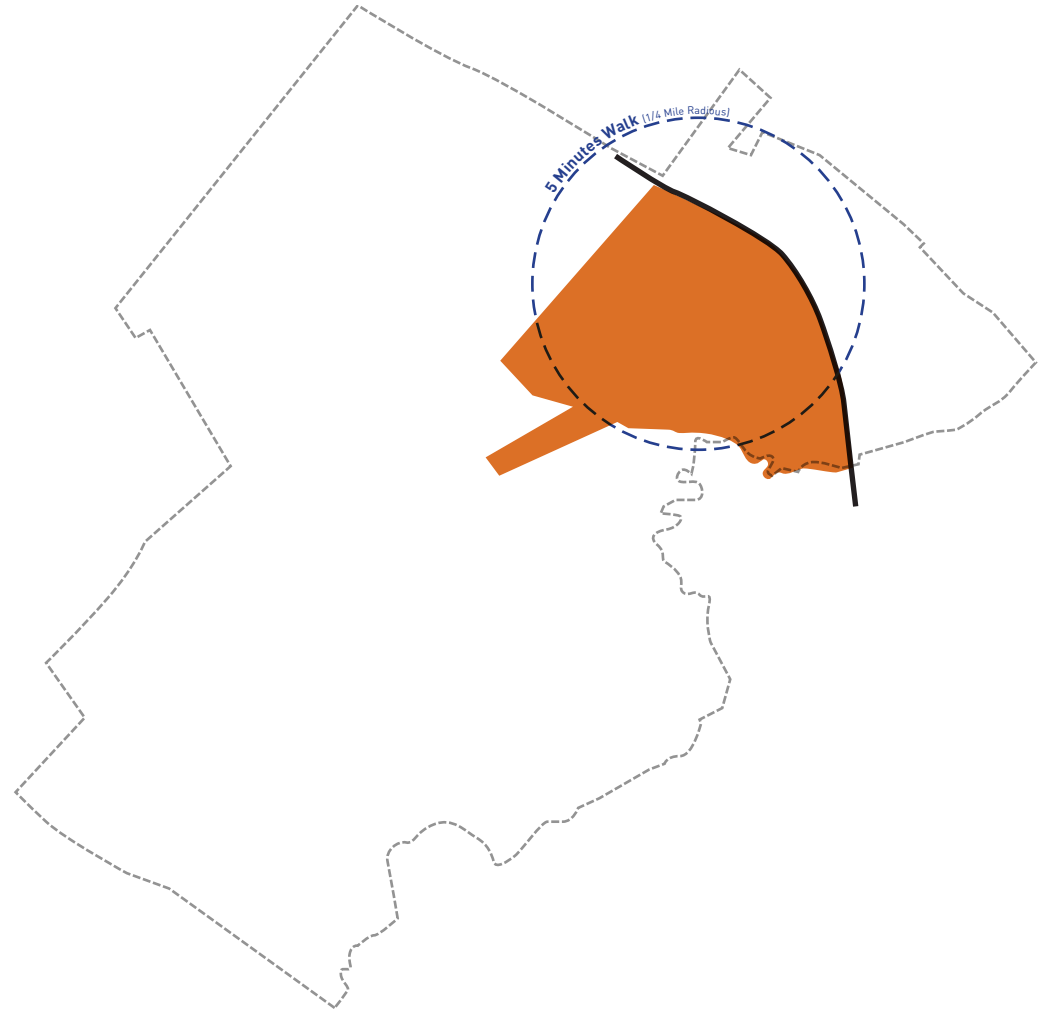


DOWNTOWN GROWTH

SUGAR HILL, GA

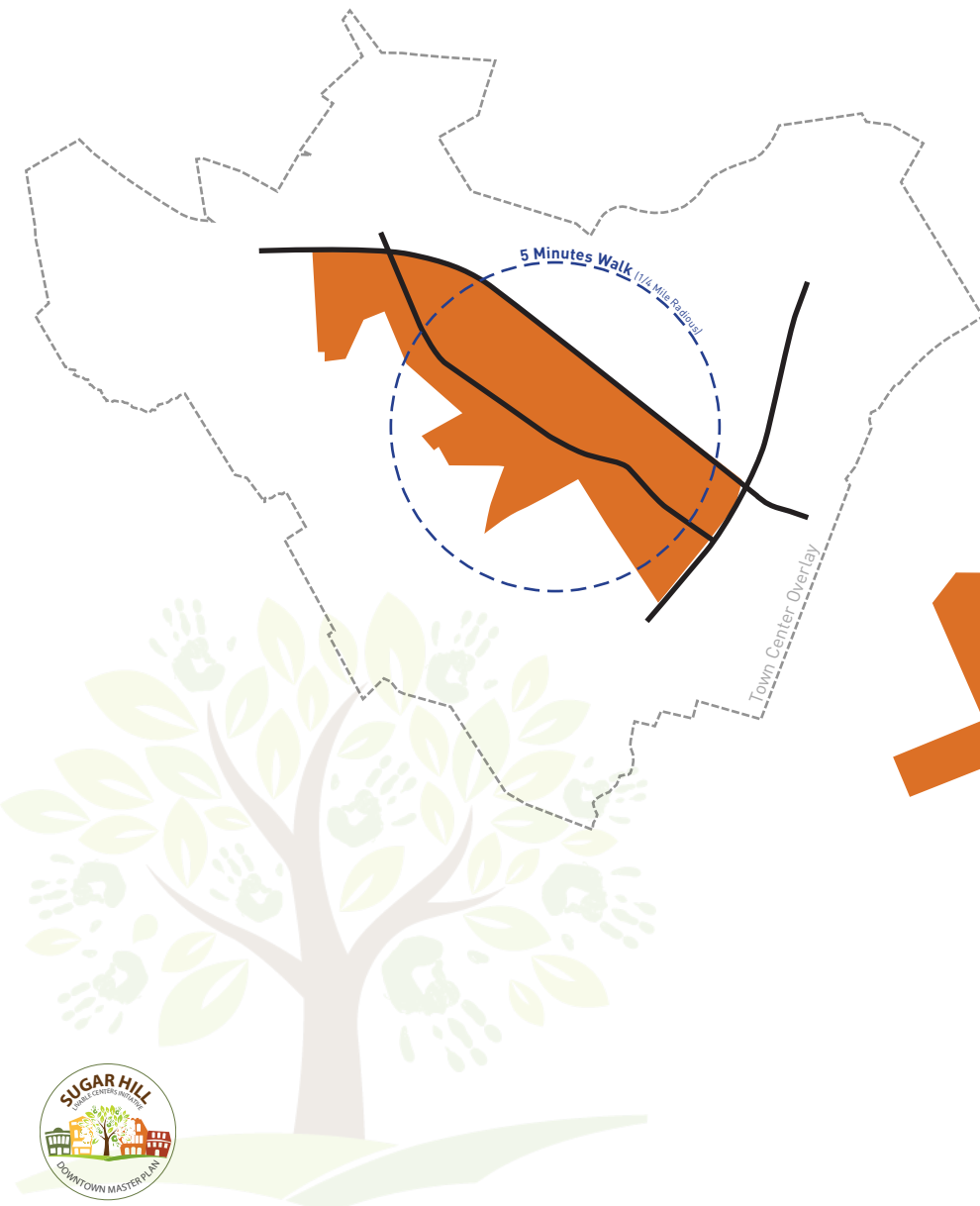


SUWANEE, GA

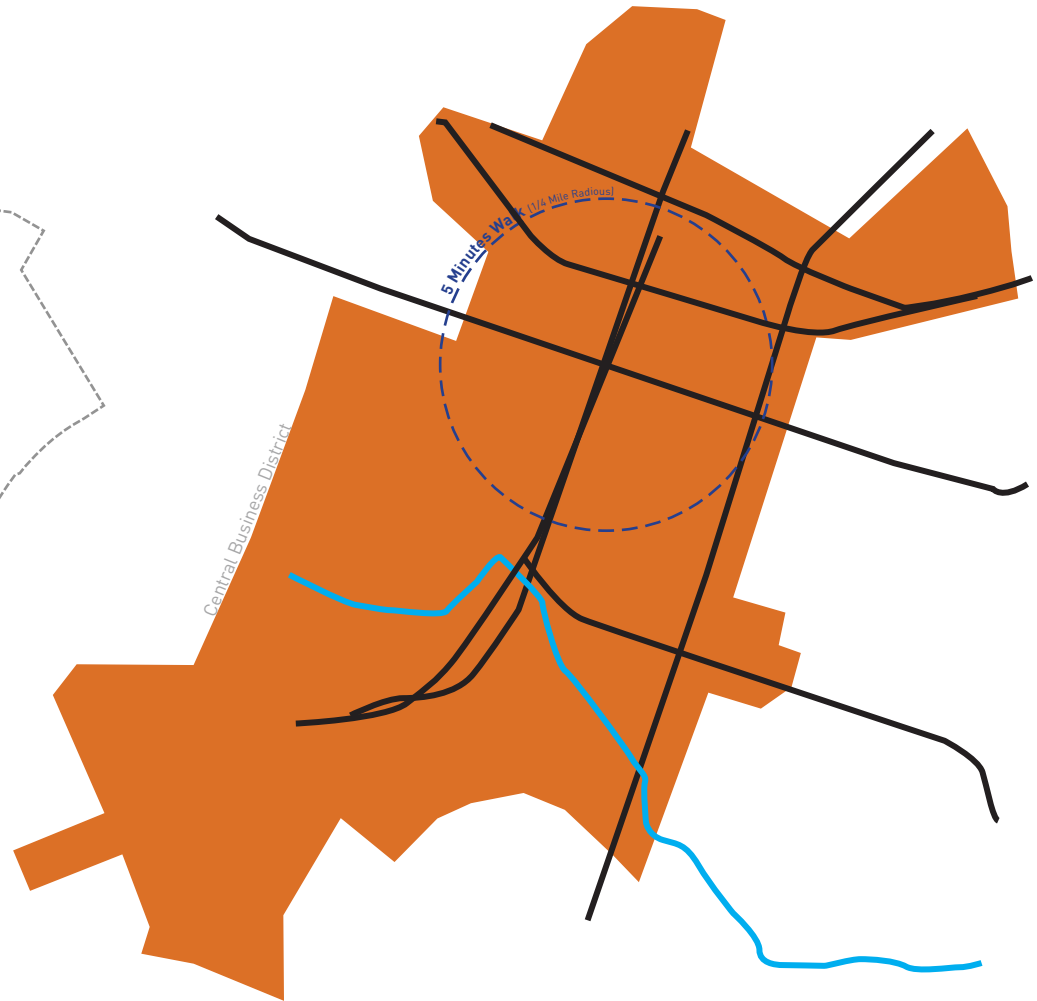


DOWNTOWN GROWTH

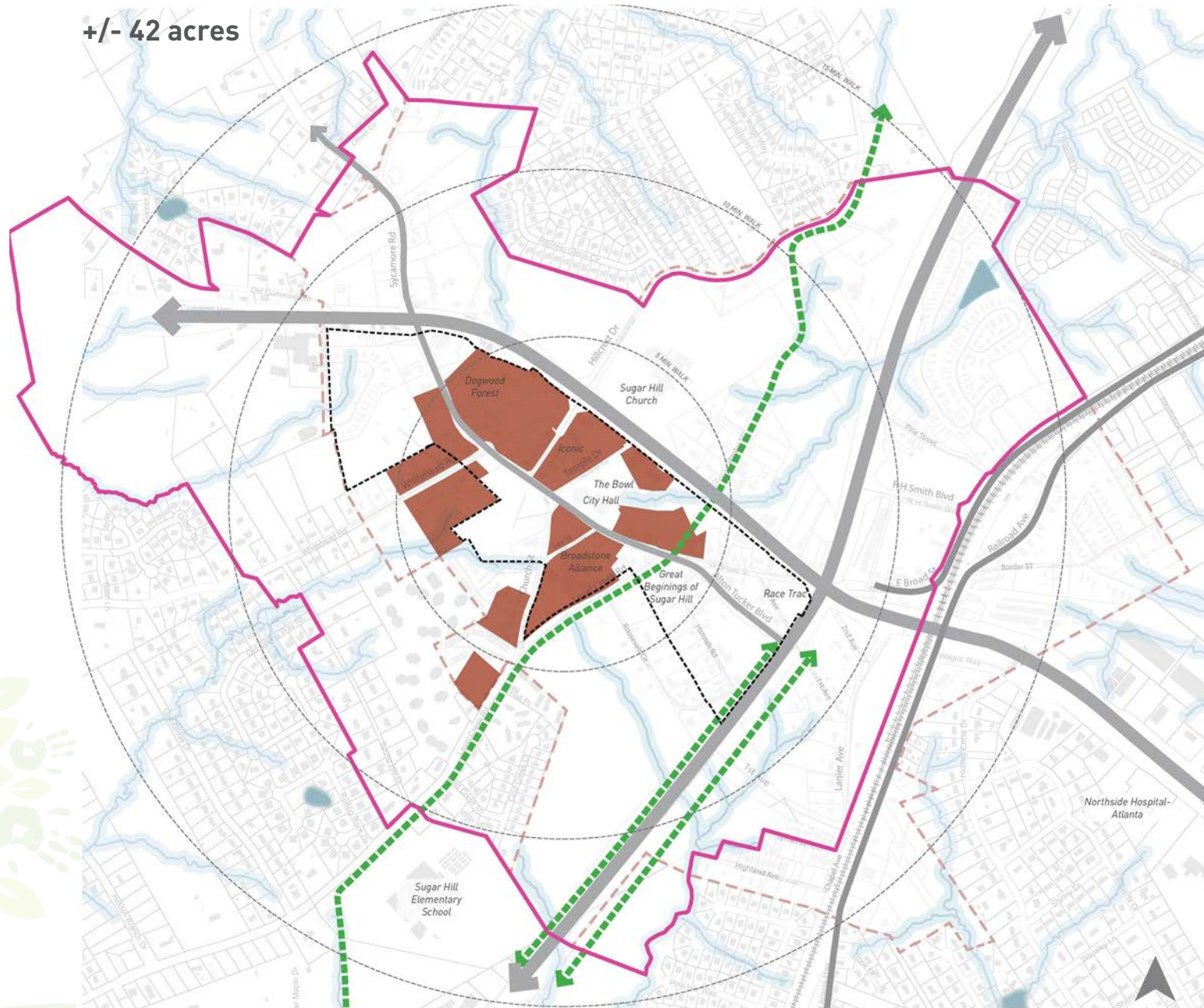
SUGAR HILL, GA



GREENVILLE, SC

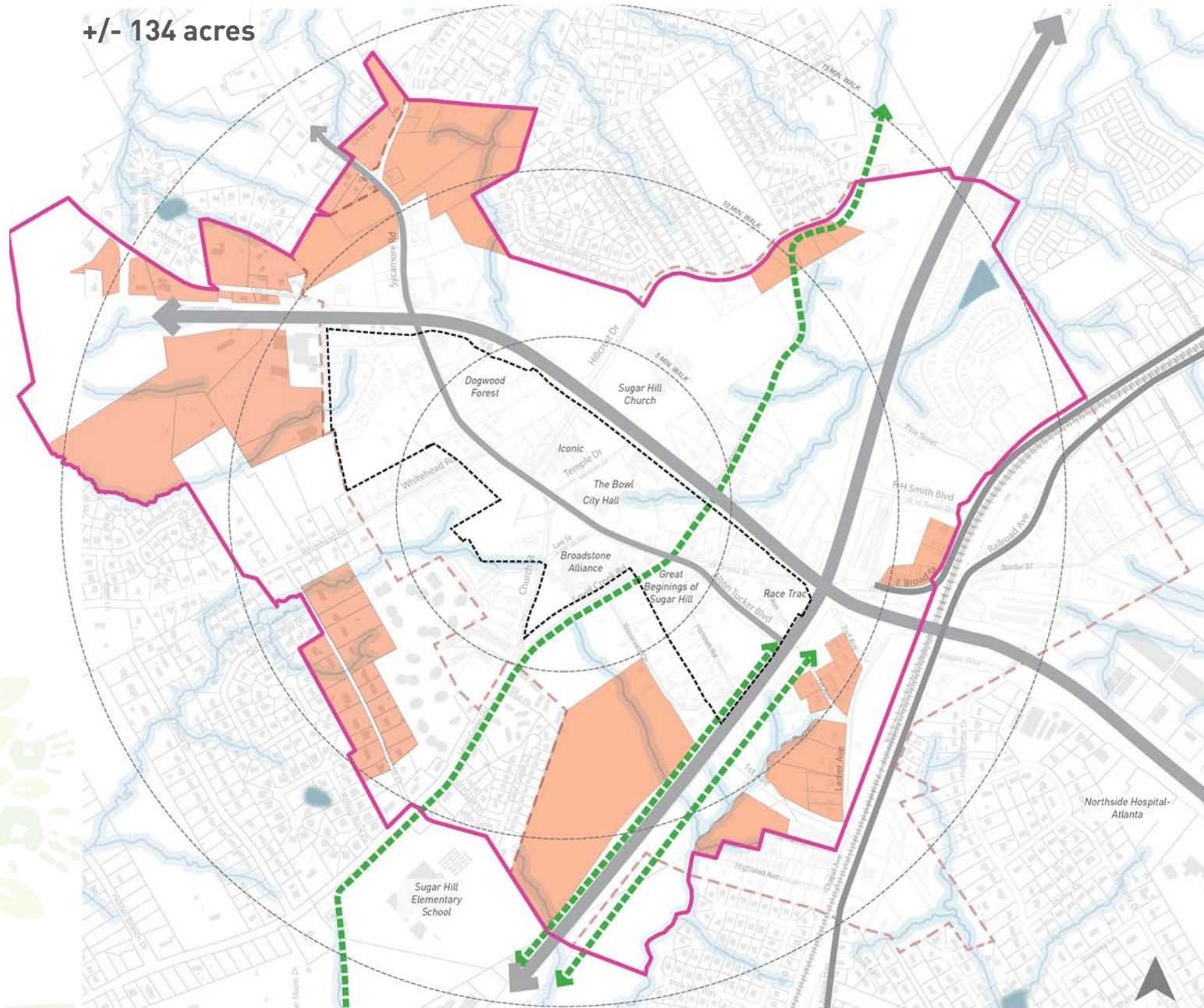


SUGER HILL DOWNTOWN GROWTH?





SUGER HILL DOWNTOWN GROWTH?





DEVELOPMENT FRAMEWORK PLAN (DRAFT)

