Introduction
Agenda – April 22 Community Meeting

• How tonight’s meeting fits into the process
• Planning context
• Market context
• Discussion
## Process: Meetings

- **Sept. 20, 2012**  Preliminary Meeting
- **March 12, 2013**  Roundtable with Developers
- **Apr 16, 2013**  Development Principles for Church Street South
- **Apr 22, 2013**  Planning Context & Market Study Findings
- **May 29, 2013**  Church Street South Planning Workshop  
  (Wilson Library, 6 pm)
- **Jun 25, 2013**  Concept Plans for Hill-to-Downtown Study Area
- **Aug 27, 2013**  Draft Hill-to-Downtown Master Plan Review  
  *(tentative)*
- **Sep 24, 2013**  Final Hill-to-Downtown Master Plan Review  
  *(tentative)*
Share your ideas online too........with MindMixer

www.hilltodowntownnewhaven.com

(“Hill to Downtown New Haven dot com”)
Questions for Discussion

• How can the district be improved to make a more positive contribution to the city as a whole, in terms of jobs, tax base for city services and sense of place?

• What improvements would have the most positive impact on residents?

• What improvements would have the most positive impact on retail businesses?

• What are the potential risks and impacts of development and how can they be addressed?

• What improvements would attract regional investors and funding?
PLANNING CONTEXT:

THE DISTRICT TODAY
The District Today—key facts

- **JOBS**: 15,700—one of the region’s most important employment centers

- **HOUSING**: 790 housing units, including 429 senior units

- **RAIL**: more than 2 million riders annually; #11 Amtrak station nationally; #2 Metro North Station; 6,000 riders per day

- **PARKING SPACES**: More than 6,500
The District’s strengths
The District’s strengths

• **Strong economic base**— jobs at every level in meds and eds
  – Yale New Haven Hospital
  – Yale Medical School
  – Gateway Community College

• **Excellent regional access**
  – Amtrak
  – Metro North
  – Highways

• **Near downtown New Haven** and its amenities

• **Near Hill and Trowbridge neighborhoods**

• **Potential to grow jobs, businesses, tax base for city services**
The District’s weaknesses
The District’s weaknesses

- Lack of amenity/sense of place
- **Feels disconnected from the Hill and Downtown**; most development is inward looking — creating a very fragmented district
- **Hard to get around** — street grid does not serve district well resulting in local traffic tie-ups and indirect pedestrian routes
- **Feels like a parking lot** — because of the large amount of surface parking, and more parking will be needed to support growth and Union Station
- Underutilized parcels
- Poor conditions at Church Street South
- Few retail or other amenities that serve neighborhood or institutions
- **Housing is limited within the district and isolated**; too few residents today to support retail and other services
**Existing Parking**

- **Surface Parking**
- **Structured Parking**
- **Central Study Area**
- **Study Area**

**Overall:**
- 44.1 ac devoted to parking uses
- (21.6% of study area)
- 41.1 ac of surface parking

**Central Study Area:**
- 33.6 ac devoted to parking uses
- (33.3% of central study area)
- 30.6 ac of surface parking

**SOURCE:** City of New Haven GIS, 2008 (updated January 2013)
Shift from surface to structured parking: increase supply but shrink the footprint to support expansion of other uses

Surface parking: 600 spaces
Structured parking: 850 spaces
Remaining land available for new development and open space
Current and planned changes: new connections and opportunities....in process or underway

• 100 College Research facility
• Downtown Crossing project (already underway)
• New Connections
  – Temple Street
  – Orange Street
• Coliseum Site redevelopment
• Union Station improvements
Existing connections
......and new connections
and better local street connections
...can strengthen local access
Union Station

- **Station upgrades/rehab** can provide direct benefits to the local community
- **Add new retail** and services—with potential to serve travelers and residents
- **Add parking structure** to address current shortages/future needs
- **Add transit oriented development** to bring additional life and vitality to the area
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MARKET CONTEXT:

WHAT ARE THE OPPORTUNITIES
Potential Markets

- Research/Lab
- Office
- Residential
- Retail
Research/Lab: Medical District

• Yale-New Haven Hospital
  – Includes Children’s Hospital, the Psychiatric Hospital, Smilow Cancer Center and campus of Saint Raphael
  – 9,140 employees - one of the largest Hospitals in the US
  – Ranked by US News and World Report as one of the best hospitals in the US

• Yale School of Medicine
  – Includes the Schools of Nursing, Epidemiology and Public Health
  – $370 million in NIH funding in 2012
  – 5th among medical schools in NIH funding
  – Ranked by US News and World Report as one of the best medical schools in the US

• Investing in Study Area
  – 2003: Anlyan Center for Medical Research and Education (456,000 sf)
  – 2007: Amistad Bldg (120,000 sf)
  – 2009: Smilow Cancer Hospital (497,000 sf)
Research/Lab: Market Context

- New Haven is home to the largest cluster of bioscience companies in Connecticut.
- Study Area is “ground zero” for the biotech industry.
- Laboratory/research space clustered near the Medical District & in Science Park.
- The corporate lab/research tenants are generally “young” companies occupying adaptive re-use space either near Medical District or Science Park.
- The medical/academic tenants are institutional and often require space adjacent to the Medical District.
Research/Lab: Opportunity

- 100 College Street – 420,000 sq ft potential for 550-650 Alexion jobs by 2017
- Additional, 600,000 – 1,000,000 square feet of lab/research space potential in Study Area by 2022
- Buildings of 300,000 – 500,000 sf – very expensive ➔ taxes
- Relatively low parking ratios @ 2 spaces per 1,000 Sq Ft
- Every PhD supports 6 to 12 employees
- Proximity to YNHH & Medical School key – existing parking lots on very valuable land
Office: Context

• Downtown office market has remained quite stable over time.

• Approximately 20% of the Metro’s premiere office space is located in Downtown New Haven.

• There are approximately 450K square feet of office space in the Study Area today and occupancy is high.
Office: Opportunity

- Jobs are projected to grow in those industries that drive New Haven’s office market.
- Employment growth results in the potential for 300,000-500,000 square feet in Downtown New Haven and environs.
- Downtown is better positioned to capture near term office investment with its urban amenity package (walkable, goods and services nearby, public parking)

Over the longer term, the Study Area will be a strong contender for office development particularly with a more mixed-use, walkable environment.

Office buildings will likely be 60,000 to 100,000 square feet in size (not skyscrapers) and require structured parking.

Public parking garages will be critical.
Residential: Context

- Study Area housing concentrated at Church St South (301 affordable units), Robert T. Wolf Apartments (93 affordable units) and Tower One-Tower East (336 units of senior housing)

- The Study Area is a competitive residential location because of its proximity to jobs, goods & services and transit.
Residential Market Opportunity

1,050 - 1,300 New Multi-Family Units over the next 10 years

758 to 918 Rental Apartments and Lofts
$1,250 to $3,500 per month base rent

302 to 382 Condominium Apartments and Lofts
$200,000 to $525,000 base sales price

15% - 25% Study Area units affordable
Rental Rates $700 - $1,500 /Month
Condo Prices $150,000 - $225,000
Residential: Sample Product Types
Retail: Principles

- Focus on neighborhood goods and services
  - Daily “errands”, casual eateries, cafes, etc.

- Existing sub-markets gravitate to existing clusters
  - Hill: Howard Avenue/Kimberly Square
  - YNNH: 66 York, 2 Howe Street
  - Downtown: Chapel, Church, etc.
  - Study Area: Union Station

- Need at least 6,000 residents (15,000 sq ft store)
  - C-Town (Kimberly Square)
  - New Haven Register site (Sargent)
  - Super Stop & Shop (Whalley)
  - Edge Of The Woods (Whalley)
  - Elm City Market (Lower Chapel)
  - U.S. 1 Farm Market (Boulevard)

- New cluster only possible with...
  The right location, good design (for retail, traffic and safety) and high resident and worker densities
Market Conclusions

• There are near term development opportunities in the Study Area

• These opportunities will generate jobs, grow the tax base and strengthen the market in the Study Area

• With proper planning and ‘place making’ these near term opportunities can leverage community amenities such as...
  • Additional goods and services
  • Quality public spaces
  • Safe environments
  • Better connections

• Parking plan necessary to unlock and leverage market potential
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Spanish translation available here