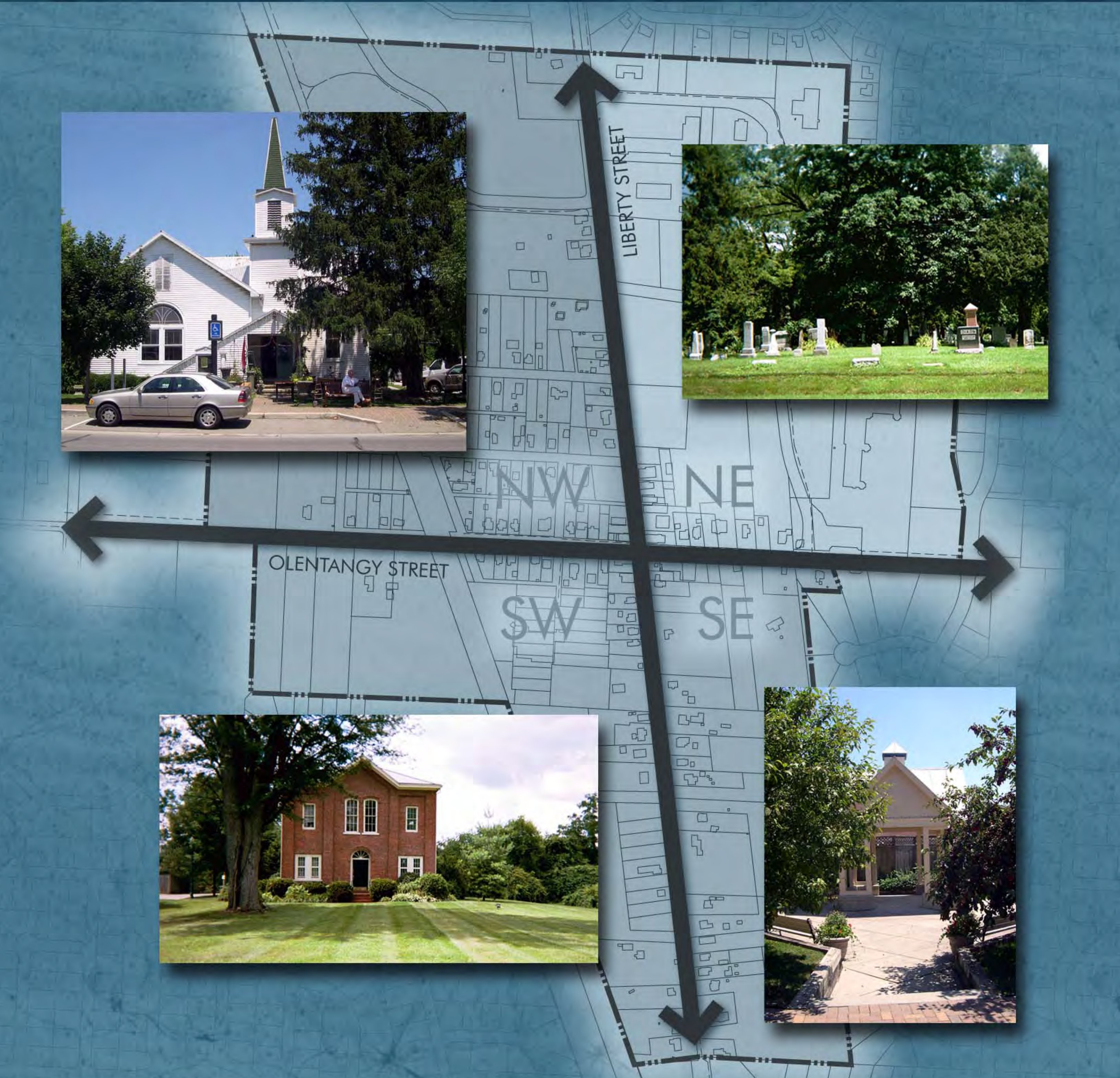
DOWNTOWN POWELL REVITALIZATION PLAN



FINAL DOCUMENT
FEBRUARY 2004

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Acknowledgements

Our planning team would like to take a moment to recognize those individuals who gave their time, knowledge, creativity, and support for this planning initiative.

The City of Powell Development Department should be commmended for providing proactive leadership in authorizing this strategic plan and for the commitment they have made to redevelopment in the City of Powell.

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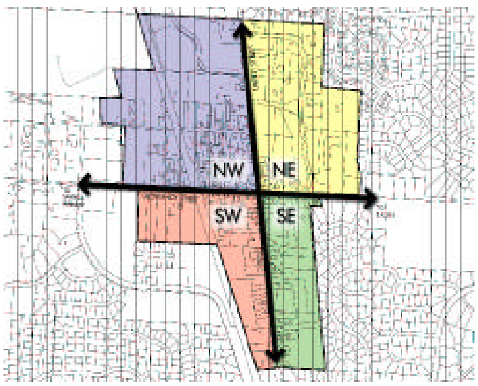
Introduction



Target Area Map

The Target Area is organized by quadrant based upon the 1995 Powell Comprehensive Plan.

The old Powell church was relocated to W. Olentangy Street where it currently is an antique shop.

Background

In July of 2003, The City of Powell retained the consulting firm of Kinzelman Kline to prepare a strategic action plan for a targeted area located in downtown Powell. The Target Area is defined as the area located adjacent to the crossroads of Olentangy Street and Liberty Street. The Target Area includes the Powell Historic District Overlay Zone and large areas of vacant or under-utilized land located throughout the downtown.

Kinzelman Kline assembled a planning team with The Whittaker Group. The Whittaker Group's primary responsibility was to address current market potential, trends, and opportunities of the planning area. Together, Kinzelman Kline and The Whittaker Group have provided redevelopment recommendations and an implementation strategy for revitalization in Powell.

History

The following denotes the historic timeline for Powell.

The City of Powell was first settled circa 1801 and was named Middlebury because the first settlers came from the Middlebury, Connecticut area.

Powell cemetery was laid out in the early 1800's before the establishment of the Village.

In 1857, Judge Thomas Powell was influential in establishing the first Post Office, therefore, the townspeople decided to rename the Village after him.

The first school and churches were established very early in Powell. In 1859, the Emery Chapel was built along S. Liberty Street, and was later relocated to its current location at 50 W. Olentangy Street. Mills, blacksmith shops, and a tanyard were industries prevalent in Powell.

In 1876, A.G. Hall, who owned most of the land in Powell, had Powell surveyed. On March 29, 1876 the Village plat was recorded.

Powell was incorporated as a municipality in February 1947. The population remained stable at approximately 400 until the early 1980's when residential development in the northern parts of the Columbus metropolitan area reached Powell.

The City of Powell, encompassing approximately 4.8 square miles, is located on rolling highlands between the Scioto and Olentangy River valleys, approximately fourteen miles north of downtown Columbus. The city is located near the intersection of scenic State Route 315 and State Route 750, with State Route 750 bisecting the city. The city's strategic location in southern Delaware County has promoted its development as a semi-rural, suburban, greenbelt town. Residential developments, combined with open space preservation and minimized commercial and industrial development, has made Powell one of the premier residential communities within central Ohio.

Note: History is taken from the 1995 Powell Comprehensive Plan and the City of Powell website: www.ci.powell.oh.us.

Prior Studies & Reports

In 1995, City Council adopted the **'Powell Comprehensive Plan'.** The primary focus of this plan, centered on preserving and enhancing the unique character of Powell.

The Powell Comprehensive Plan identified six fundamental goals for development strategy:

Goal 1	Establish Powell's identity as a rural greenbelt town.
Goal 2	Redevelopment of the Village Green Town Center.
Goal 3	Establish an access management program.
Goal 4	Achieve a balanced land use mix.
Goal 5	Create a small town economic development program.
Goal 6	Provide City services.

In July of 2000, The City of Powell produced a report titled **'Powell's Roadway Roadmap to the Future'**. This report summarizes the action the city has taken regarding traffic management and discusses future roadway management. The purpose of this report was to inform residents of how the proposed roadmap of Powell would protect the distinct rural character of Powell while addressing the current modern lifestyle of the residents.

Technical Report #2 Community Survey was a survey used as an update to the 1995 Powell Comprehensive Plan. In October 2002, the survey was sent out to business owners and residents of Powell to gain public insight into the needs and values of Powell residents. The report, in general terms, lists issues and concerns that are prevalent to the community as a whole. The report was "intended to gain input and people's perceptions of the city as it relates to development, the services the city provides to its community, and how the people of the community perceive their satisfaction with the city in which they live, work, and play."

Note: Information taken from the Powell Comprehensive Plan - Technical Report #2.

Study Goals & Objectives

Our planning team met with the City of Powell and Powell stakeholders to identify specific goals and planning objectives that would designate the strategic direction for the Downtown Powell Revitalization Plan. The following highlights these goals and objectives.

Goal 1: Identify redevelopment opportunities that respond to a comprehensive market analysis.

Articulate the appropriate future market position for downtown Powell.

Goal 2: Determine the physical issues and opportunities affecting long term development and viability.

Identify potential redevelopment opportunities including key tenants.

Goal 3: Prepare a long term vision for downtown Powell.

Forecast land assemblages for development implementation.

Goal 4: Identify short and long term action steps toward the strategic vision of downtown Powell.

Develop a strategic development plan.

Goal 5: Prepare a realistic implementation strategy.

Create a realistic time and responsibility matrix for ease of implementation through community buy-in.

Goal 6 Enhance the overall quality of life for the community.

Community Input

Town Meeting

On July 17, 2003, Kinzelman Kline led a public input session on the Downtown Revitalization Plan at the Powell Village Green Municipal Building. Participants included downtown residents, business owners, property owners, and city staff representatives contributing to the planning study and review process.

The public meeting began with an overview of the Powell Downtown Revitalization project and process. The design team of Kinzelman Kline and the Whittaker Group discussed the purpose of the project and gave a brief analysis of the project target area.

The meeting continued with Kinzelman Kline leading participants through an examination / survey of the target area. The purpose of the survey was to identify what the participants perceive to be the strengths, weaknesses, opportunities, and threats for the downtown area. The survey was then utilized to inform and direct the planning team and public officials regarding the most appropriate planning concepts, strategies, and recommendations for downtown Powell. Observations and conclusions drawn from this meeting include the following:

Strengths:

- The architecture in Powell is of a unique character.

- The implementation of streetscape improvements has created a 'sense of place' for the downtown area.
- The school system (public and private) is a strong, positive influence in the community.
- The retail component mainly consists of niche - antique and gift shops.
- The police department has a strong presence in the community.
- Existing city organizations create a positive impact. (Business Assoc., Chamber of Commerce)
- Downtown events are well promoted.
- The downtown area consists of a comfortable walkable distance.
- Location.
- The community has a large youth population.
- Land is readily available for development.
- The community has a high median household income.
- The downtown area is clean.
- Good parking is available east of Liberty Street.
- There is heavy visitor traffic from outside of Powell for shopping.
- Infrastructure is present.

Weaknesses:

- Retail services lack variety.
- There is a lack of property and building maint-enance in the historic downtown Powell area.
- Lack of Powell resident support for local stores and retail.
- The streetscape improvements (bike trail and

sidewalk amenities) are incomplete creating a fractured downtown area.

- Traffic congestion is high in the downtown area.
- Residential land use is lacking in the target area.
- Wayfinding and informational signage is not prevalent in the downtown area.
- The park gazebo is under-utilized.
- Lack of parking perception.
- Vacant / derelict properties.
- No informal contact with city officials.
- Lack of attention to aesthetic architecture and landscaping.

Opportunities:

- Development of a Village Green Park.
- Create a stage for youth focused events and promote youth oriented businesses.
- City Development Involvement (e.g. Economic Development Council, and the Community Development Council)
- Provide property improvement incentives.
- Create new retail services and office land use in Powell.
- Provide paved parking lots.
- Land is available downtown for development.
- Create an organization for business recruitment.
- New design development guidelines that balances historic integrity and private interests.
- Mass transit (COTA and DATA).
- Expand traditional grid street pattern.
- Traffic by-pass around downtown for thru-traffic.

Threats:

- There is a 'perception' that development is difficult in Powell.
- The sewer capacity for the downtown area may be insufficient.
- Stormwater detention requirements that must be made for new development.
- Loss of quality of life experience and character of the rural environment.
- The continuation of commercial 'edge' development.
- Traffic by-pass.
- Recruiting employees for businesses.
- Land is readily available for development.

Stakeholder Interviews

Throughout the process the Kinzelman Kline team has met with numerous groups and individuals to gain insight into their perspective on current conditions and future directions of downtown Powell.

Group meetings have included:

City of Powell City Council
City of Powell Planning and Zoning Commission
City of Powell Historic District Commission
Powell Business Association
Area Real Estate Developers

Individuals have included property owners, government officials and area residents too numerous to mention.

In many of the interviews proprietary information was shared with our team which was not to be included in this document but was offered to provide our team with an accurate understanding of the economic conditions within downtown.

Below are a few comments made during our stakeholder interview process that were significant to our planning team as we crafted the vision and recommendations for the revitalization strategy. They are listed in no particular order or priority but rather to offer the reader a representative list of some of the issues of importance from downtown stakeholders.

- Business downtown has declined over the years
- No left turn at RR and Depot Street is not good for business
- Attitude of Powell and Liberty Township is anti- business
- Signs for parking are needed to direct customers
- Long standing position that "residents rule Powell; not merchants"
- Historic Board has too much power – forces developers to look elsewhere
- East of cross roads / Grace Drive seems detached and not a part of downtown
- Lack of $ commitment to East of Liberty streetscape
- Formal meetings from the city, no informal working sessions to educate/communicate
- Crosswalks are not noticeable
- Wayfinding issue: signing, welcoming, gateways, vehicular / pedestrian directional
- Majority of customers come from out of town; Powell residents less likely to shop downtown.
- Customers come from a variety of areas:
    - Texas
    - Michigan
    - Northern Ohio
    - Upper Arlington
    - Worthington & Dublin
- The downtown traffic has improved over the past few years
- Downtown is NOT pedestrian friendly
- Promotions are needed to take advantage of the demographics
- Downtown needs restaurants
    - 10-5 issue, 5:00 its dead

- Business Recruitment? Who is responsible?
- Business focus change discussion. Who is responsible for downtown management?

  Need diversity of business
  - Beads, collectables, antiques
  - Specialty Shops
  - Kids related stores

  Organizational Issues; A variety of groups should/could play a role in downtown
  - Powell Business Association
  - City of Powell
  - School District
  - Clergy
  - Residents

Real Estate Round Table

In the interest of gaining critical insight and in order to assist in the development of a comprehensive redevelopment strategy, the planning team conducted a round-table focus group discussion with representatives of the area real estate development community on November 21, 2003. The meeting began with a review of the Downtown Powell Revitalization Plan followed by a discussion of the planning team's proposed concept sketches.

The primary objectives of the Real Estate Round Table were to:

- Receive candid and confidential feedback on development opportunities in Downtown Powell from the developer community.
- Solicit comment on issues and opportunities surrounding economic development and investment in the community.
- Identify roadblocks and disincentives to development within Powell.
- Identify potential development incentives, partnerships, initiatives, project opportunities, tenants, and funding mechanisms.

Comments from developers and downtown property owners that were brought to light are as follows in paraphrased fashion.

- The demographics of the Powell area are recognized as being strong and having potential financial benefit to developers and property owners, but they must have assistance to make “deals” work.

- In the present condition, there is not sufficient enticement either in readily available / assembled parcels or significant economic benefit to attract development.

- The review / approval process of the City is difficult and time consuming, further dis-incentivizing development.

- The city and only the city has the necessary time, resources, and incentive to foster development through purchase, assemblage, property takes (if necessary) infrastructure improvements, and process streamlining. The economics associated with this ‘up-front’ effort render it infeasable for the private development community to become involved.

- The opportunities for increased and broadened offering of residential product downtown are recognized and thought to be of interest but limited in its appeal to the broader developer community due to the lack of scale of their developments (largely infill).

- The city must take a leadership role in brokering joint development arrangements among neighboring property owners in aggressive and timely fashion.

- The completion of the downtown streetscape and the addressing of the traffic congestion issue at the intersection of Liberty and Olentangy is critical to downtown development moving forward.

Market Analysis

Market Analysis Overview:

As a component of the planning process, market analysis helps guide the visioning by offering quantitative and qualitative assessment of current market conditions.

Items included in market analysis:

- Summary Demographics of Powell compared to the State of Ohio and U.S. Statistics
- Drive Time Analysis of Market Size
- Consumer Lifestyle Segmentation Analysis
- Tourism Assessment
- Residential and Workforce Housing Analysis
- Rental and Office Market Analysis
- Merchant and Property Owner Questionnaire Responses
- Retail Supply and Demand Analysis
- Competitive Retail Around Powell
- Qualitative Assessment of Powell Retail
- Recommendations of Retail Configuration and Merchandising

Market Analysis Methodology

The market analysis was compiled from a variety of sources including the following:

- Demographic and psychographic data from the U.S. Census, ESRI, Scan/US and Claritas
- On street field work
- Interviews with business owners, operators, residents and property owners
- Information from the City of Powell Development Officials
- Information from the Delaware County Auditor and other county officials
- Multiple Listing Services of Columbus
- The Columbus Dispatch, Business First and other local publications

Market Analysis Key Findings

- Powell is an extremely affluent, very homogeneous community made up of family households.
- The city has experienced dramatic growth over the past 20 years due to the construction of higher-end, single-family housing and annexation by the city. There is very little multifamily or lower priced ‘workforce’ housing.
- The core downtown is quaint and offers a selection of quality merchants. The product selection is limited to predominately home-goods and antiques and should be expanded to engage the local community.
- Powell’s office space shows significant vacancy - like the entire northwest Columbus area. The conversion of retail space to office use should be discouraged in the core shopping areas. This use is better left for upper floors and periphery locations to the core shopping areas.
- Businesses in Powell generally report business is ‘better’ this year than last. They express concerns about a number of ‘business environment’ issues such as traffic and parking.
- Powell should consider the traffic flowing through downtown as an opportunity to market itself.
- There is opportunity to infill the existing merchant environment with other complimentary and extension retailers and service providers. Specialty retail, entertainment, arts and food service are good candidates for strengthening Powell’s retail offering.

Summary Demographics

Population, Households, Age and Race

Census 2000 reported Powell's population to be 6,247 persons - an increase of 190% from the previous decennial census. This growth far surpasses the rate experienced by the state of Ohio and the United States and has been the trend for Powell from the growth started in the 1980s. The 1980 Census reported Powell's population as 387. The expansion of Columbus' housing market north of the outerbelt has been the driving force of Powell's growth.

Similar to the growth in population, the number of households in Powell nearly doubled from the 1990 Census to the 2000 Census. Powell reported 1,975 households in 2000.

The Powell population is slightly older on average than the population of Ohio and the U.S.

The Powell population is very homogeneous in terms of race - approximately 95% white.

Conclusion: The Powell population has experienced a significant growth in the past decade. The rate of growth may slow as developable land becomes scarce.

	Powell, Ohio		State of Ohio		United States	
Subject	Number	%	Number	%	Number	%
Total Population	6,247		11,353,140		281,421,906	
Total Population - 1990 Census	2,154		10,847,115		248,709,873	
Percent Change 1990-2000	190%		5%		13%	
Total Households	1,975		4,445,773		105,480,101	
Total Households - 1990 Census	708		4,087,546		91,947,410	
Percent Change 1990-2000	179%		9%		15%	
Median age (years)	34.7		36.2		35.3	
Race - White	5,890	94	9,645,453	85	211,460,626	75
Race - Non-White	357	6	1,707,687	15	69,961,280	25

Source: Census 2000

Summary Demographics

Household Type

Nearly all of the 1,975 households in the 2000 Census were reported to be Family Households. Of these 1,119 reported children under 18 in the household. This proportion is much higher than the State of Ohio and the U.S.

	Powell, Ohio		State of Ohio		United States	
Subject	Number	%	Number	%	Number	%
HOUSEHOLDS BY TYPE						
Total households	**1,975**	**100**	**4,445,773**	**100**	**105,480,101**	**100**
Family households (families)	1,789	91	2,993,023	67	71,787,347	68
With own children under 18 years	1,119	57	1,409,912	32	34,588,368	33
Married-couple family	1,700	86	2,285,798	51	54,493,232	52
With own children under 18 years	1,062	54	996,042	22	24,835,505	24
Female householder, no husband present	65	3	536,878	12	12,900,103	12
With own children under 18 years	44	2	323,095	7	7,561,874	7
Nonfamily households	186	9	1,452,750	33	33,692,754	32
Householder living alone	142	7	1,215,614	27	27,230,075	26
Householder 65 years and over	26	1	446,396	10	9,722,857	9

Source: Census 2000

Population, Households, Age and Race

Powell residents tend to be educated with over two thirds reporting having attained a bachelor's, graduate or professional degree.

The majority of the population is employed in the management, professional, sales and office related field.

	Powell, Ohio		State of Ohio		United States	
Subject	Number	%	Number	%	Number	%
EDUCATIONAL ATTAINMENT						
Population 25 years and over	**3,850**	**100**	**7,411,740**	**100**	**182,211,639**	**100**
Less than 9th grade	9	0	331,801	5	13,755,477	8
9th to 12th grade, no diploma	39	1	930,284	13	21,960,148	12
High school graduate (includes equivalency)	321	8	2,674,551	36	52,168,981	29
Some college, no degree	599	16	1,471,964	20	38,351,595	21
Associate degree	242	6	439,608	6	11,512,833	6
Bachelor's degree	1,672	43	1,016,256	14	28,317,792	16
Graduate or professional degree	968	25	547,276	7	16,144,813	9
Percent high school graduate or higher	98.8		83		80.4	
Percent bachelor's degree or higher	68.6		21.1		24.4	
OCCUPATION	**2,999**	**100**	**5,402,175**	**100**	**129,721,512**	**100**
Employed civilian population 16 years and over						
Management, professional, and related occupa	1,918	64	1,672,257	31	43,646,731	34
Service occupations	159	5	786,725	15	19,276,947	15
Sales and office occupations	767	26	1,423,755	26	34,621,390	27
Farming, fishing, and forestry occupations	0	0	18,627	0	951,810	1
Construction, extraction, and maintenance occu	105	4	471,714	9	12,256,138	9
Production, transportation, and material moving	50	2	1,029,097	19	18,968,496	15

Source: Census 2000

Summary Demographics

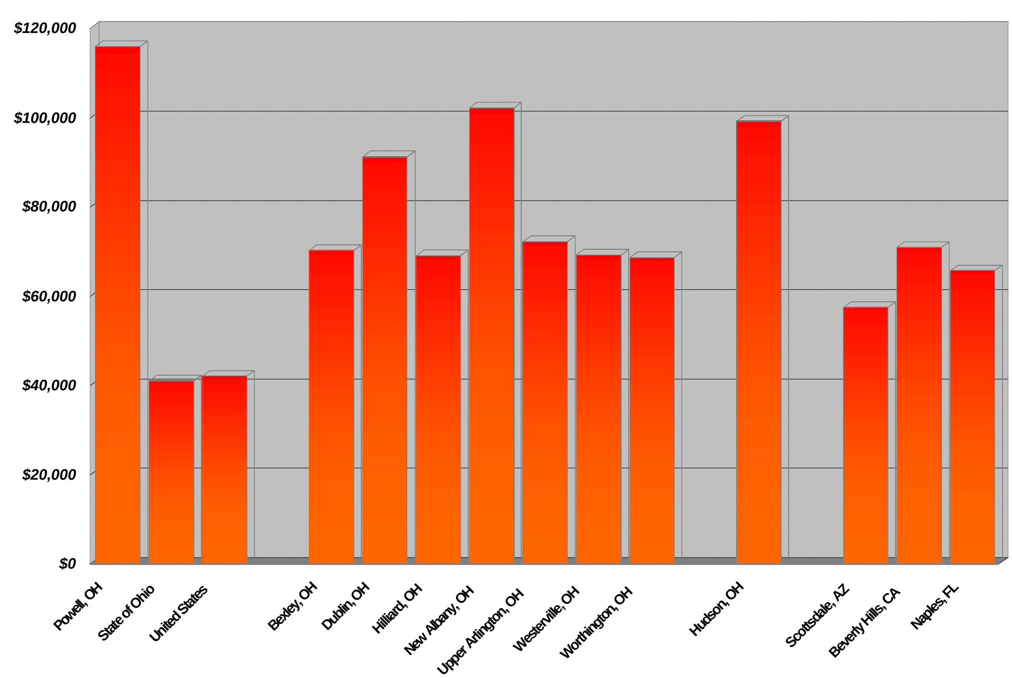
Household Income

The more compelling census statistic for the profile of the Powell market is income. The median household income for Powell in the 2000 Census was $115, 904 - nearly three times that of the State of Ohio and the U.S. Furthermore, this level of household income is greater than the majority of other communities in central Ohio and the U.S. The small size of the Powell market relative to these comparative areas magnifies the difference and underscores the homogeneity of the Powell population.

	Powell, Ohio		State of Ohio		United States	
Subject	Number	%	Number	%	Number	%
Household Income 1999	1994	100	4446621	100	105539122	100
Less than $10,000	0	0	406,698	9	10,067,027	10
$10,000 to $14,999	17	1	285,372	6	6,657,228	6
$15,000 to $24,999	51	3	594,143	13	13,536,965	13
$25,000 to $34,999	42	2	602,996	14	13,519,242	13
$35,000 to $49,999	83	4	771,129	17	17,446,272	17
$50,000 to $74,999	238	12	905,323	20	20,540,604	20
$75,000 to $99,999	332	17	444,599	10	10,799,245	10
$100,000 to $149,999	665	33	289,049	7	8,147,826	8
$150,000 to $199,999	237	12	71,062	2	2,322,038	2
$200,000 or more	329	17	76,250	2	2,502,675	2
Median household income (dollars)	115,904		40,956		41,994	

Source: Census 2000

Median Household Income



Source: Census 2000

Summary Demographics

Household Tenure

A high proportion of the Powell households reported moving into their homes from 1995 or later. This is due largely to Powell's dramatic growth in single family development over the past 15 years.

	Powell, Ohio		State of Ohio		United States	
Subject	**Number**	**%**	**Number**	**%**	**Number**	**%**
YEAR HOUSEHOLDER MOVED INTO UNIT						
1999 to March 2000	476	24	794,777	18	21,041,090	20
1995 to 1998	854	43	1,208,067	27	30,479,848	29
1990 to 1994	431	22	710,098	16	16,948,257	16
1980 to 1989	175	9	686,301	15	16,429,173	16
1970 to 1979	18	1	492,686	11	10,399,015	10
1969 or earlier	23	1	553,844	13	10,182,718	10
RESIDENCE IN 1995						
Population 5 years and over	**5,483**	**100**	**10,599,968**	**100**	**262,375,152**	**100**
Same house in 1995	2,245	41	6,095,656	58	142,027,478	54
Different house in the U.S. in 1995	3,174	58	4,383,727	41	112,851,828	43
Same county	401	7	2,792,785	26	65,435,013	25
Different county	2,773	51	1,590,942	15	47,416,815	18
Same state	2,054	38	1,002,292	10	25,327,355	10
Different state	719	13	588,650	6	22,089,460	8
Elsewhere in 1995	64	1	120,585	1	7,495,846	3

Source: Census 2000

Market Size - Drive Time Radii

Retail Market Size

An analysis of the transportation network provides a more accurate sizing of the market that will support retail in Powell. Traditional concentric ring studies, ignore the physical constraints that consumers must face when travelling to shopping areas.

Powell is located along a major east-west corridor on the north side of Columbus's outer belt highway (I270). As such, the geographic region that is within 15-minutes drive of Powell spans the entire northern half of the Columbus area.

It is difficult to decide on a single market size for Powell retail purchases since consumer s shop for different types of goods and services at varying lengths of travel. For instance, consumers will generally shop very near their homes or workplaces for groceries and other day-to-day necesseties but will travel much greater distnace for other types of purchases such as clothing or entertainment. Today many of the antique and home goods merchants in Powell are drawing customer traffic from great distances.

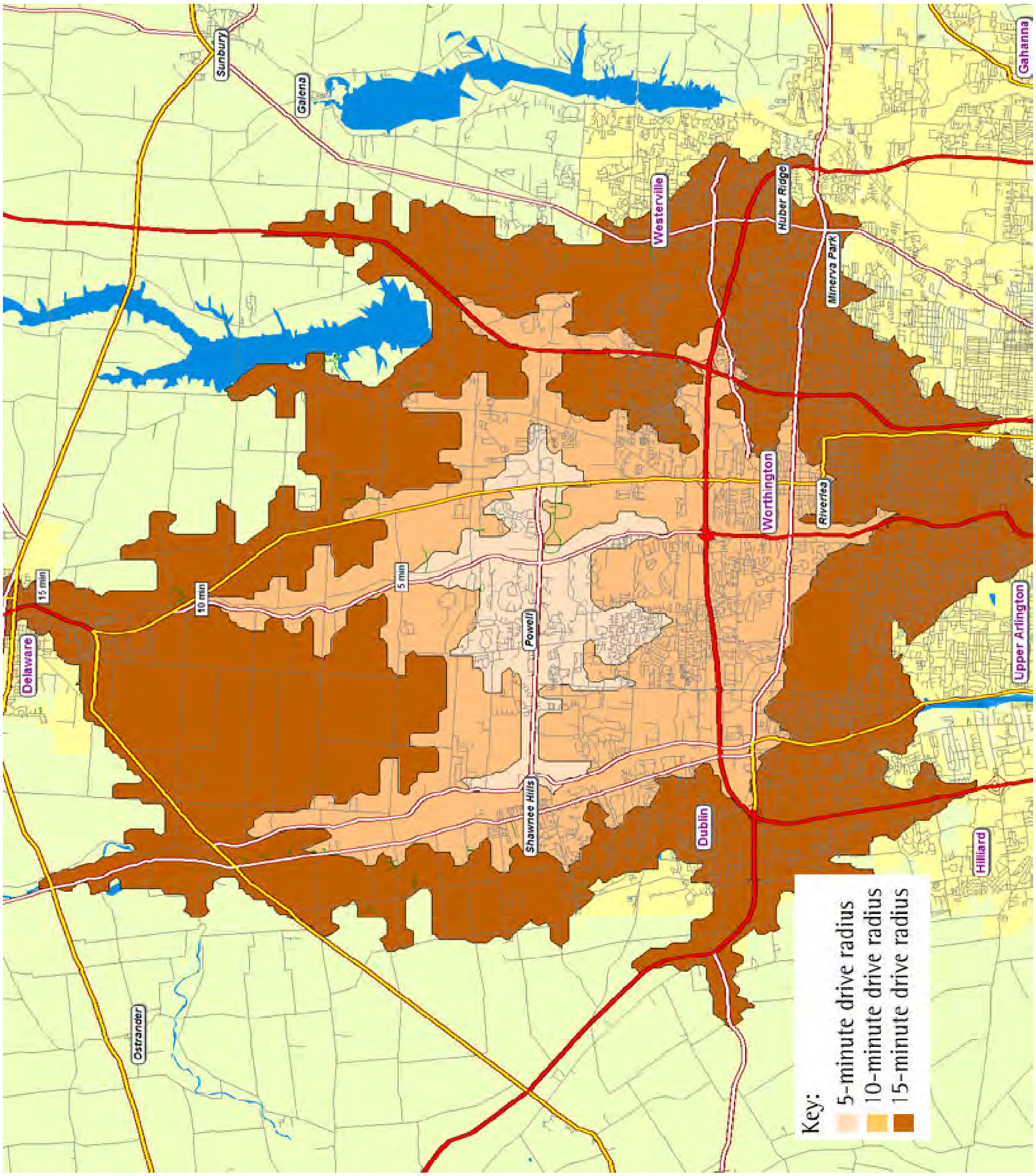
The following table summarizes the demographic and spending characteristics of the 5-minute, 10-minute and 15-minute drive radii. This information is presented in addition to the earlier section of Summary Demographic data to quantify the potential for customer draw in the local area.

There are nearly 100,000 households within 15-minutes travel time from Powell. These households have a median income of over $50,000 and annually spend over $5 billion on consumer expenditures include significant dollars on entertainment, food away from home, apparel, personal care products and reading materals. Such categories represent logical extensions of the Powell merchant mix to engage the local market.

Demographic/Spending Summary

		Drive Time Radii Approximations		
	Powell Ohio	5-Minutes	10-Minutes	15-Minutes
Population 2000	6,247	16,865	79,706	207,251
Population 1990	2,350	11,090	67,071	176,834
Growth %	166%	52%	19%	17%
Households 2000	1,975	5,815	31,729	91,069
Households 1990	787	3,579	24,863	75,834
Growth %	151%	62%	28%	20%
% White 2000	94%	92%	88%	84%
Median Income	$115,904	$88,040	$71,628	$52,232
Consumer Expenditures (000s)				
Total Annual Consumer Expenditures	$389,497	$820,689	$1,810,359	$5,034,920
Food At Home	$46,970	$52,423	$120,773	$359,908
Food Away From Home	$22,995	$48,492	$107,051	$296,503
Apparel	$17,848	$37,447	$82,140	$226,958
Entertainment	$20,182	$42,278	$92,568	$253,350
Personal Care Products & Services	$3,977	$8,626	$19,659	$57,492
Reading Materials	$1,549	$3,234	$7,061	$19,290

Source: US Census, Claritas, CEX, ScanUS



Key:
5-minute drive radius
10-minute drive radius
15-minute drive radius
Sunbury
Galena
Westerville
Huber Ridge
Minerva Park
Gahanna
Worthington
Riverlea
Upper Arlington
Hilliard
Dublin
Shawnee Hills
Powell
Delaware
Ostrander
15 min
10 min
5 min

Consumer Segmentation

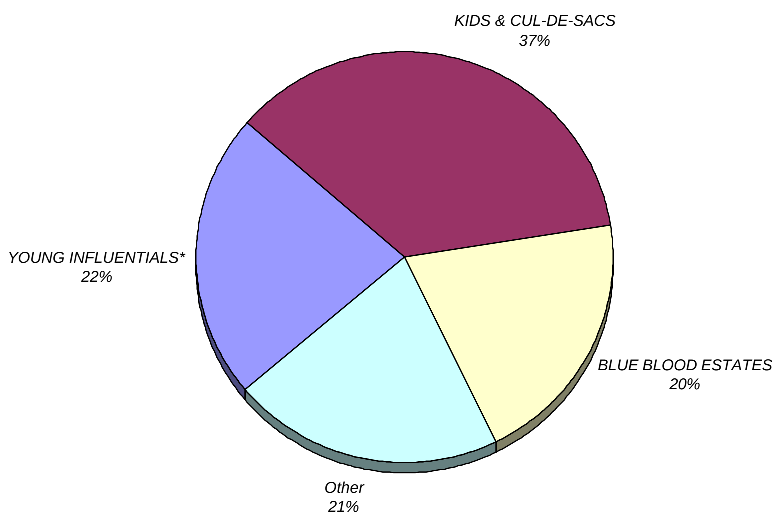
Powell Consumer Segment Profile

As an extension of the demographic analysis offered by Census data, consumer segmentation analysis provides additional insight into the profile and behaviors of consumers. Claritas' PSYCLE segmentation system groups consumers by similar demographic and purchase behaviors. It allows for profiling by geographic region.

The Powell market (as defined by a three-mile radius) is composed almost exclusively by three segments: Kids and Cul-de-sacs, Blue Blood Estates and Young Influentials. This consolidated profile confirms the homogeniety suggested by the previous demographic analysis.

Furthermore, when looking strictly at the Powell municipal area, households fall evenly between Kids & Cul-de-sacs and Blue Blood Estates. All Young Influential households are located outside of the city limits - likely in the lower priced homes and apartments to the south west of Powell along Sawmill Road and Smokey Row Road.

Powell Segmentation Summary
Households within a 3-Mile Radius



All "Young Influentials" Households are located outside the city limits of Powell.
Source: Claritas Psycle

The following pages detail the summary profile for the segments in and around Powell. This information suggests, as the previous demographic data does, that Powell is a young, affluent community with residents largely divided between families with children and older families without children. The lifestyles tend toward family oriented and active pursuits, travel and entertainment.

Kids and Cul-de-sacs

This cluster ranks high on all affluence measures. Although married couples with children still dominate this cluster, some married couples without children are moving into *Kids and Cul-de-Sacs.* These suburban folks lead busy lives centered around family activities.

Summary Characteristics:

Population (% US)	9,208,711 (3.42%)
Households (% US)	2,945,411 (2.93%)
Demographic Caption	Upscale Suburban Families
Ethnic Diversity	Predominantly White, High Asian
Family Type(s)	Married Couples with and without Children
Predominant Age Range(s)	Under 18, 35–44, 45–54
Education Level(s)	Some College, College Graduate
Employment Level(s)	White Collar or Professional
Housing Type(s)	Owner of Single Unit
Density Centile	57 (1=Sparse, 99=Dense)
Median Income	Affluent $68,900

Lifestyle

Shop online
Take 3+ domestic business trips per year
Go online 4–19 hours per month
Buy contemporary Christian music
Go downhill skiing
Visit Disney theme parks
Rent a car
Belong to a business club

Products and Services

Shop at the Disney Store
Own an Audi/BMW/Mercedes bought new
Own a Nissan truck bought new
Own a burglar alarm
Own a sailboat
Buy 7+ software programs per year
Drink champagne
Own an ink jet printer

Radio/TV

Listen to news/talk radio
Listen to soft contemporary radio
Listen to CHR/rock radio
Watch pay-per-view sports
Watch the Disney Channel
Watch The Movie Channel
Watch Bob Vila's Home Again
Watch The X-Files
Watch TV horse racing
Watch the U.S. Open (Golf)

Print

Read Boating
Read USA Today
Read Smart Money
Read PC Computing
Read Discover
Read National Geographic Traveler
Read Entrepreneur
Read Bon Appetit

Blue Blood Estates

Established executives, professionals, and "old money" heirs that live in America's wealthiest suburbs. They are accustomed to privilege and live luxuriously—one-tenth of this group's members are multimillionaires. The next affluence level is a sharp drop from this pinnacle.

Summary Characteristics:

Population (% US)	3,573,114 (1.33%)
Households (% US)	1,189,374 (1.18%)
Demographic Caption	Elite, Super-Rich Families
Ethnic Diversity	Predominantly White, High Asian
Family Type(s)	Married Couples with or without Children
Predominant Age Range(s)	45–54, 55–64
Education Level(s)	College Graduate
Employment Level(s)	Professional
Housing Type(s)	Owner of Single Unit
Density Centile	66 (1=Sparse, 99=Dense)
Median Income	Elite $135,900

Lifestyle

Play tennis 20+ times per year
Visit Eastern Europe
Contribute $50+ to public broadcasting
Belong to a frequent flyer program
Belong to a health club
Use household cleaning services
Buy classical music

Products and Services

Shop at Lord & Taylor
Own a SAAB/Volvo/VW bought new
Own a sailboat
Own a burglar alarm
Own a fax machine
Own an espresso maker
Buy brie cheese
Drink imported wine

Radio/TV

Listen to news radio
Listen to classical music
Listen to all sports radio
Watch Wimbledon
Watch the PGA Championship
Watch Wall Street Week
Watch Masterpiece Theatre
Watch Siskel & Ebert
Watch Frasier
Watch LateNight with Conan O'Brien

Print

Read Tennis
Read The New Yorker
Read Fortune
Read Architectural Digest
Read Conde Nast Traveler
Read Gourmet
Read Chicago Tribune Magazine
Read Sunset

Young Influentials

Young Influentials are high-tech, educated folks with managerial and professional jobs and live in rented urban high-rises. Although many of their contemporaries have married and settled down, these childless, live-together couples prefer their sophisticated urban lifestyle, supported by dual incomes. They are the last of the Yuppies.

Summary Characteristics:

Population (% US)	2,971,766 (1.10%)
Households (% US)	1,356,015 (1.35%)
Demographic Caption	Upwardly Mobile Singles and Couples
Ethnic Diversity	Predominantly White, High Asian
Family Type(s)	Singles, Married Couples
Predominant Age Range(s)	25–34, 35–44
Education Level(s)	College Graduate
Employment Level(s)	Professional
Housing Type(s)	Renter of Multi-Unit 2–9 and 10+
Density Centile	64 (1=Sparse, 99=Dense)
Median Income	Upper Middle $51,700

Lifestyle

Use online financial/stock services
Attend rock/pop concerts
Contribute $50+ to public broadcasting
Belong to a frequent flyer program
Visit Japan/Asia
Belong to a health club
Lease 1+ cars
Use a home pregnancy test

Products and Services

Own $250+ drapes/curtains
Own a convertible bought new
Own an Audi/BMW/Mercedes bought new
Own a portable CD player
Shop at Macy's
Own graphics software
Shop at Eddie Bauer
Use whole bean coffee

Radio/TV

Listen to soft contemporary radio
Listen to classical radio
Listen to progressive rock radio
Watch the NCAA Basketball Championship
Watch the America's Cup race
Watch Star Trek Deep Space 9
Watch Saturday Night Live
Watch Frasier
Watch CBS's Face the Nation
Watch Wall Street Week

Print

Read Audubon
Read USA Today
Read PC Magazine
Read Wall Street Journal
Read Discover
Read US News & World Report
Read Runner's World
Read Colonial Homes

Tourism

Powell's location relative to regional events and attractions offers opportunity to capture traffic travelling through...

– Columbus Zoo/Wyandot Lake is located just west of Powell. This attraction drew 1.3 million visitors in 2002.

– Memorial Golf Tournament

– Olentangy Caverns

– Delaware Fair/Brown Jug

– Many Local and Regional Festivals and Events such as the Powell Festival and Antique Flea Markets

Powell's merchants draw a significant portion of their business from customers outside of the municipal boundaries. The antiques marketplace is one that typically has a large radius of customer draw. Antiques shoppers will travel significant distances to enclaves of shops.

Tourism and through moving traffic visiting the zoo or other local attractions can provide important support for downtown activity. Every effort should be made to leverage Powell as a viable 'stop' on the way to local events and attractions. The traffic moving through downtown can be an important marketing opportunity for the business district. Showing travellers an inviting retail environment with shops, entertainment and eating places will provide incentrive for the travellers to stop, visit and spend.

Residential Housing Market

Powell has experienced strong growth in single-family housing over the past 15-20 years. In the early 1980s, the Retreat became one of central Ohio's premier suburban subdivisions and was a catalytic event in the life of Powell Village. Since then, other large subdivisions have been developed and/or annexed into the municipal boundaries.

City of Powell
Single Family Building Permits

Year	Permits
1995	103
1996	130
1997	150
1998	165
1999	141
2000	103
2001	105
2002	127
2003 through November	343
Total:	1,367

Source: City of Powell

The City reports than there have been a total of 1,367 new building permits for single family construction from 1995 through November of 2003. The rate in 2003 is on pace to be the largest single year for home construction.

The other component of Powell's growth has been annexation. Significant growth has been realized as adjacent development has occurred.

The single family home is the primary type of residential housing in Powell. Of the over 2,000 housing units in the 2000 Census over 98% were classified as single unit structures. 95% of the housing units are owner-occupied with only 2% renter occupancy. This rate of renter occupancy is much lower than the 20% renter occupancy rate in Delaware county.

The mean price of property transfers in Powell is over $300,000 - significantly higher than Delaware county ($222,108) and nearly three times that of the nation ($111,833). The market is appreciating at a rate above inflation. An analysis of Delaware County Auditor data suggest the figure to be in the 3% - 4% range. This analysis was not sufficient to accurately track appreciation since the auditor data does not differentiate between improved and unimproved transfers.

Powell Property Transactions

	Number	Mean	Median
2001	268	$433,331	$263,252
2002	291	$313,618	$261,500
2003 through March	66	$320,992	$294,061
Annual Price Appreciation			3-4%

Source: Delaware County Auditor

Workforce Housing

The lack of affordable housing is no longer an issue impacting only poverty stricken households. As the costs of residential housing have continued to rise, the "workforce heros*" in our communities - police officers, fire fighters, nurses and teachers - are unable to afford housing in the communities they serve.

This is particularly true in communities such as Powell where housing prices are significantly above average and rental housing is scarce.

The following analysis is fashioned after the 2003 Delaware County Affordable Housing study. This study compared the housing supply from the 2000 Census with an estimate of housing demand. Demand was modelled from income data on the 2000 Census with standard assumptions on the ability to afford the cost of debt service, insurance and taxes. The resulting supply and demand analysis illustrated the gaps that exist between the type of housing available in Delaware County and the type of housing needed. This model has been applied to the data for the city of Powell to illustrate the same supply and demand analysis for the city.

The US Department of Housing and Urban Development (HUD) has established that households should not spend more than 30% of their gross monthly income on housing expenses. The following table details the available owner-occupied and rental housing in the Powell municipal limits from the 2000 Census.

Based on this information, it is apparent that the owner-occupied housing in Powell tends toward the higher end of the pricing spectrum. There are less than 20 housing units available for less than $100,000 or approximately $900 per month.

There are very few rental units in the Powell municipality. Of the 56 rental units reported in the 2000 Census, only 13 fell below $844 per month. The majority of units available were priced over $1,200 per month. These units are likely rental single-family homes.

*'Workforce Heroes' Often Find Home Prices Out of Reach; National Mortgage News, June 23, 2003 v27 i39 p10

Housing Supply

City of Powell. Census 2000 figures.

Housing Available By Cost of Residence		Approximiate Monthly Housing Costs*		Owner Occupied		Renter Occupied	
				Number	Percent	Number	Percent
Low	High	Low	High	1,915	100%	2,534	100%
$0	$10,000	$0	$84	0	0%	0	0%
$10,000	$14,999	$84	$127	0	0%	0	0%
$15,000	$19,999	$127	$169	0	0%	0	0%
$20,000	$24,999	$169	$211	0	0%	0	0%
$25,000	$29,999	$211	$253	0	0%	0	0%
$30,000	$34,999	$253	$295	0	0%	0	0%
$35,000	$39,999	$295	$338	0	0%	0	0%
$40,000	$49,999	$338	$422	0	0%	0	0%
$50,000	$59,999	$422	$506	8	0%	0	1%
$60,000	$69,999	$506	$591	0	0%	4	0%
$70,000	$79,999	$591	$675	0	0%	0	0%
$80,000	$89,999	$675	$759	9	1%	9	0%
$90,000	$99,999	$759	$844	0	0%	0	0%
$100,000	$124,999	$844	$1,055	32	2%	8	1%
$125,000	$149,999	$1,055	$1,266	75	4%	0	2%
$150,000	$174,999	$1,266	$1,477	61	3%	21	3%
$175,000	$199,999	$1,477	$1,688	57	3%	0	2%
$200,000	$249,999	$1,688	$2,110	632	33%	7	8%
$250,000	$299,999	$2,110	$2,531	405	21%	7	26%
$300,000	$399,999	$2,531	$3,375	340	18%	0	28%
$400,000	$499,999	$3,375	$4,219	172	9%	0	11%
$500,000	$599,999	$4,219	$5,063	106	6%	0	10%
$600,000	$999,999	$5,063	$8,438	18	1%	0	4%
$1,000,000	HIGHER	$8,438	HIGHER	0	0%	0	3%

*Assumptions: *30-year mortgage, 95% loan to value, 8% Interest Rate, Taxes/Insurance 15% of payment.*

Summary of Available Housing Supply:	Owner Occupied		Renter		Total	
Units available for less than $675 per month:	8	0%	4	7%	12	1%
Units available for between $675 and $844 per month:	9	0%	9	16%	18	1%
Units available for between $844 and $1,266 per month:	107	6%	8	14%	115	6%
Units available for between $1,266 and $1,688 per month:	118	6%	21	38%	139	7%
Units available for between $1,688 and $2,531 per month:	1037	54%	14	25%	1051	53%
Units available for between $2,531 and $3,375 per month:	340	18%	0	0%	340	17%
Units available for between $3,375 and $5,063 per month:	278	15%	0	0%	278	14%
Units available for more than $5,063 per month:	18	1%	0	0%	18	1%
Total Units Available:	1915		56		1971	

Source: Census 2000

The following table details the demand for housing based on an analysis of the income of households from the 2000 Census as well as an estimate for current year figures and a 5-year projection from ESRI. Since the Census price ranges do not correspond directly to the income ranges, the data has been distributed to allow for analysis between like ranges.

Housing Demand

City of Powell

Households by Income		Maximum Monthly Affordability*		Census 2000		2003 Estimate		2008 Forecast	
				Number	Percent	Number	Percent	Number	Percent
Low	High	Low	High	1,994	100%	2,597	100%	3,733	100%
$0	$9,999	$0	$250	0	0%	2	0%	2	0%
$10,000	$14,999	$250	$375	17	1%	18	1%	15	0%
$15,000	$19,999	$375	$500	9	1%	22	1%	18	1%
$20,000	$24,999	$500	$625	42	2%	44	2%	38	1%
$25,000	$29,999	$625	$750	0	0%	32	1%	30	1%
$30,000	$34,999	$750	$875	42	2%	23	1%	23	1%
$35,000	$39,999	$875	$1,000	35	2%	44	2%	33	1%
$40,000	$44,999	$1,000	$1,125	32	2%	18	1%	29	1%
$45,000	$49,999	$1,125	$1,250	16	1%	20	1%	14	0%
$50,000	$59,999	$1,250	$1,500	94	5%	89	3%	87	2%
$60,000	$74,999	$1,500	$1,875	144	7%	141	5%	152	4%
$75,000	$99,999	$1,875	$2,500	332	17%	393	15%	361	10%
$100,000	$124,999	$2,500	$3,125	336	17%	450	17%	718	19%
$125,000	$149,999	$3,125	$3,750	329	17%	396	15%	563	15%
$150,000	$199,999	$3,750	$5,000	237	12%	399	15%	667	18%
$200,000	$249,999	$5,000	$6,250	329**	17%	174	7%	389	10%
$250,000	$499,999	$6,250	$12,500	N/A**		248	10%	384	10%
$500,000	HIGHER	$12,500	HIGHER	N/A**		84	3%	210	6%
Median Household Income				$115,904		$125,121		$138,943	
Average Household Income				$146,707		$161,805		$195,020	

*Based on HUD standard of 30% of gross income. ** The 2000 U.S. Census reported income at an upper range of $200,000 or higher.

Source: Census 2000, Estimates and Forecast from ESRI.

Summary of Housing Needs Demand:	Census 2000		2003 Estimate		2008 Forecast	
Units needed for less than $625 per month:	68	3%	86	3%	73	2%
Units needed for between $625 and $875 per month:	42	2%	55	2%	53	1%
Units needed for between $875 and $1,250 per month:	83	4%	82	3%	76	2%
Units needed for between $1,250 and $1,875 per month:	238	12%	230	9%	239	6%
Units needed for between $1,875 and $2,500 per month:	332	17%	393	15%	361	10%
Units needed for between $2,500 and $3,125 per month:	336	17%	450	17%	718	19%
Units needed for between $3,125 and $5,000 per month:	566	28%	795	31%	1230	33%
Units needed for more than $5,000 per month:	329	16%	506	19%	983	26%
Total Units Needed:	1994		2597		3733	

This analysis suggests that there were over 100 units of housing required for less than $825 per month in the 2000 Census. Current year estimates put the size this group at 136 households. The 5-year projection suggests this group will remain at roughly 125 households.

The following table lists the shortage and surplus by category:

Shortage/(Surplus) of Housing**	Census 2000
Units costing less than $650* per month:	56
Units between $625 and $875 per month:	24
Units between $875 and $1,250 per month:	(32)
Units between $1,250 and $1,875 per month:	99
Units between $1,875 and $2,500 per month:	(719)
Units between $2,500 and $3,375 per month:	(4)
Units between $3,125 and $5,000 per month:	288
Units over $5,000 per month:	311
Total	**23**

*Figures represent surplus or undersupply in housing based upon income ability to pay.

**All figures of monthly rates approximate due to differences in scaling.

The points to two important shortcomings in the Powell residential market: higher priced housing and lower priced (or "workforce") housing.

In the Census 2000 data, there appears to be more than 300 households with incomes that would support houses priced at $5,000 per month and higher. Only 124 units in this price range are reported in the market by the census. Since the current year estimates and five year projects indicate growing demand, there is opportunity for Powell to absorb higher priced housing.

This analysis also shows that the City of Powell can absorb and the market indicates that "workforce" housing can be successful in Powell. Appropriate locations within the city are certainly available within the study area as shown on the maps in the recommendations section. Opportunities exist at these locations for a higher density type of housing - a use most appropriate within the downtown area of the City. The Historic District provides the ability to manage the design of these units to compliment the architectural fabric of Downtown Powell.

Apartment Living In and Around Powell

There are no high density rental housing complexes located in Powell's municipal boundary. While there are some rental housing units, they appear to be single-family houses being rented.

There are traditional apartment complexes near Powell. BearPoint and Greenbrier, the two closest complexes, report 93% occupancy and rents for $600 to $615 for two-bedroom apartments and $550 for one-bedroom apartments.

Bear Pointe Apartments

Greenbrier Apartments

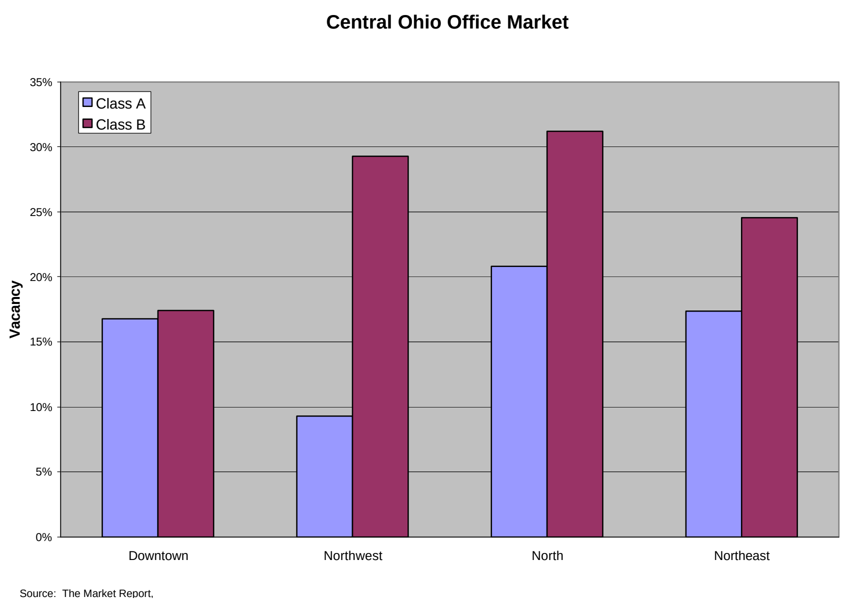
Office Market

Office vacancy rates in Central Ohio are extremely high. The north side of Columbus has experienced a significant period of building new office space over the past five to ten years. The Market Report from Business First reports that vacancy of class A space for the northwest quadrant of the Columbus area is just under 10% while the vacancy of class B is nearly 30%. Vacancy in the north corridor of Columbus, which encompasses the Polaris area, is even greater.

Powell's office property is currently configured as Class B space and is showing significant vacancy. Anecdotal evidence of conversations with local professionals and the sheer number of 'For Lease' signs supports this. Office space is available in nearly all the larger buildings and parks.

Since retail space is presently being used for office space, it is difficult to quantify the amount of available space or the vacancy rate. We estimate that there is between 10,000 and 20,000 square feet of available space in the core downtown area, Grace Drive and Powell Center.

Conversion of merchant spaces along the primary retail thoroughfare detracts from the concentration of retail. The Powell Center has been converted almost in total to non-retail uses. This non-retail use should be discouraged in the core downtown are.



The Urban Land Institute, a noted authority on commercial land uses, says the following about these classifications in its *Office Development Handbook*. Class A space can be characterized as buildings that have excellent location and access, attract high quality tenants, and are managed professionally. Building materials are high quality and rents are competitive with other new buildings. Class B buildings have good locations, management, and construction, and tenant standards are high. Buildings should have very little functional obsolescence and deterioration.

Merchant/Property Owners Surveys

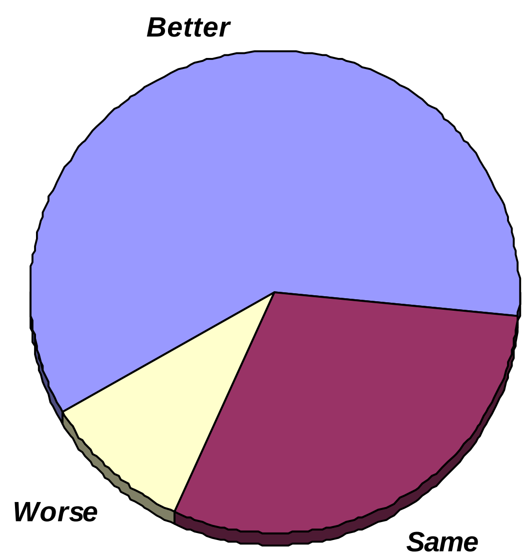
As a part of the research, informal surveys were distributed to merchants and property owners to gain insight on general factors impacting the marketplace.

Of the 87 business owner surveys distributed, approximately 30 were returned. Likewise, 15 property owner surveys were returned from a distribution of 131. The resulting returns do not provide sufficient sample size for statistical analysis. The returns do offer directional insight on the issues and conditions facing merchant and property owners.

Merchants were asked how their business is this year compared to the performance last year. The majority responded that business was better. Only a small portion said that business was worse.

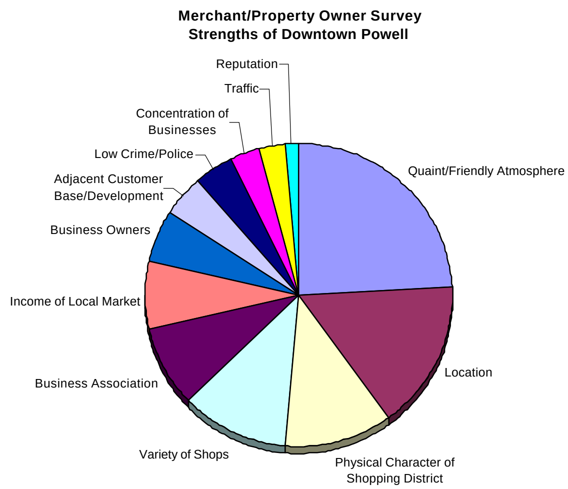
Merchant Survey Business Barometer

How the merchant rates their business performance this year relative to last year.



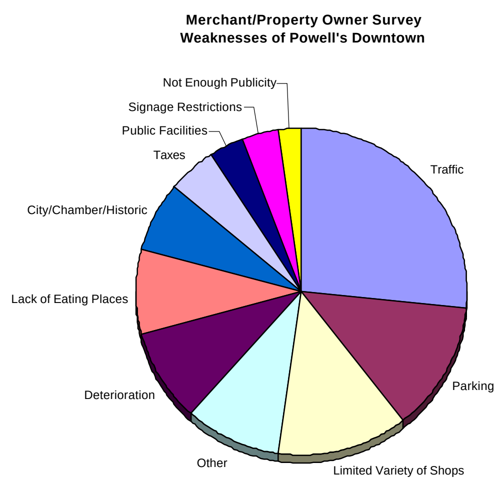
Source: 2003 Merchant Survey. N=27

Both merchants and property owners were asked to give the strengths of Powell's downtown. The atmosphere of the downtown was the largest response category. The location, physical character and variety of shops were frequently mentioned.



Source: 2003 Merchant/Property Owner Survey. N=41

Respondents were also asked about the weaknesses of the downtown. Traffic and parking issues were mentioned frequently. The limited variety of stores, deterioration and lack of eating places was also mentioned.



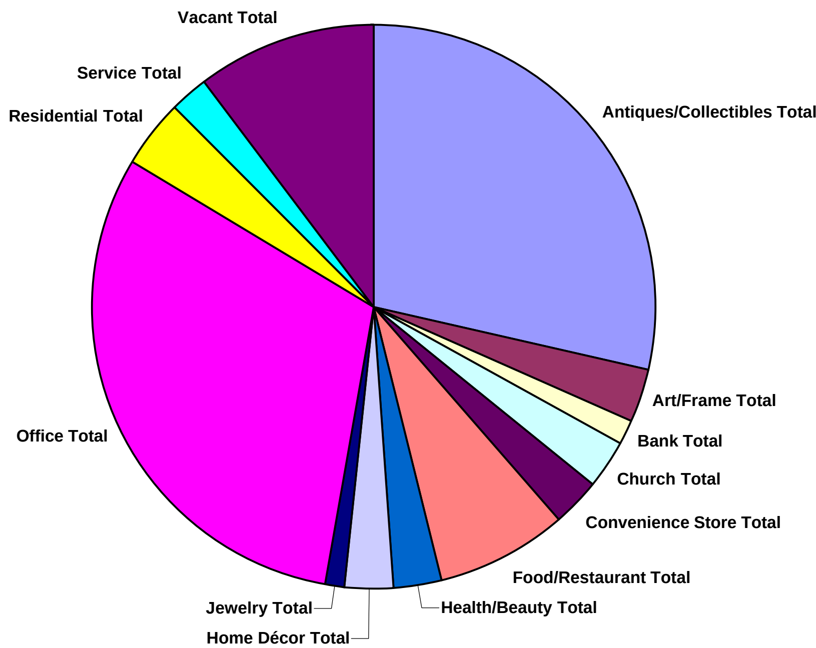
Source: 2003 Merchant/Property Owner Survey. N=41

Retail Supply and Demand

Households in Powell have significant retail needs. The total retail expenditures for the market totals over $300 million. Based on estimates from available sources, the total retail sales in customer categories in Powell is just over $40 million. These figures underscore the common observation that the consumers in Powell are travelling beyond Powell to meet their retail needs.

Downtown Retail Audit - Percent of Existing Available Space

Estimated Space Type in the Core Downtown*



***The core downtown for this analysis is defined as Olentangy from the tracks to Grace, and Liberty from the Village Green offices to the cemetary. This represents the existing 'walkable' retail area.**

The tenant base at Powell Center has transistioned to largely office and service uses from retail uses. New retail development at Grace Drive provides some day-to-day retail and food-away-from-home needs. The downtown merchant base is centered on antiques and home decor. The downtown business district does not get much in the way of direct benefit from their proximity to such an affluent potential base.

The following illustration is an analysis of Powell retail supply and demand by category. This exhibit demonstrates the number of categories that are underserved or overserved by Powell businesses.

Powell Retail Sales Supply and Demand

Retail Category:	Supply (Retail Sales)	Demand (Retail Potential)	Surplus/ (Deficit)
Motor Vehicle & Parts Dealers	$150,942	$38,187,862	$38,036,920
Automobile Dealers	$0	$27,175,883	$27,175,883
Other Motor Vehicle Dealers	$0	$5,972,863	$5,972,863
Auto Parts, Accessories, and Tire Stores	$150,942	$5,039,116	$4,888,174
Furniture & Home Furnishings Stores	$934,339	$5,618,272	$4,683,933
Furniture Stores	$466,884	$3,107,844	$2,640,960
Home Furnishings Stores	$467,455	$2,510,428	$2,042,973
Electronics & Appliance Stores	$2,594,375	$5,211,005	$2,616,630
Bldg Materials, Garden Equip. & Supply Stores	$1,082,981	$8,845,342	$7,762,361
Building Material and Supplies Dealers	$62,747	$6,867,899	$6,805,152
Lawn and Garden Equipment and Supplies Stores	$1,020,234	$1,977,443	$957,209
Food & Beverage Stores	$5,729,064	$33,114,649	$27,385,585
Grocery Stores	$5,276,801	$31,519,874	$26,243,073
Specialty Food Stores	$16,517	$487,130	$470,613
Beer, Wine, and Liquor Stores	$435,746	$1,107,645	$671,899
Health & Personal Care Stores	$1,009,206	$5,021,682	$4,012,476
Gasoline Stations	$0	$15,007,768	$15,007,768
Clothing and Clothing Accessories Stores	$1,092,750	$6,222,062	$5,129,312
Clothing Stores	$599,300	$3,968,073	$3,368,773
Shoe Stores	$0	$1,525,040	$1,525,040
Jewelry, Luggage, and Leather Goods Stores	$493,450	$728,949	$235,499
Sporting Goods, Hobby, Book, and Music Stores	$1,955,241	$5,088,039	$3,132,798
Sporting Goods/Hobby/Musical Instrument Stores	$1,955,241	$2,781,322	$826,081
Books, Periodical, and Music Stores	$0	$2,306,717	$2,306,717
General Merchandise Stores	$0	$18,714,598	$18,714,598
Department Stores (Excluding Leased Depts.)	$0	$10,911,488	$10,911,488
Other General Merchandise Stores	$0	$7,803,110	$7,803,110
Miscellaneous Store Retailers	$3,121,489	$5,653,633	$2,532,144
Florists	$307,175	$129,438	($177,737)
Office Supplies, Stationery, and Gift Stores	$700,262	$1,851,545	$1,151,283
Used Merchandise Stores	$1,275,024	$1,070,852	($204,172)
Other Miscellaneous Store Retailers	$839,028	$2,601,798	$1,762,770
Nonstore Retailers	$0	$5,598,357	$5,598,357
Electronic Shopping and Mail-Order Houses	$0	$4,952,927	$4,952,927
Vending Machine Operators	$0	$139,276	$139,276
Direct Selling Establishments	$0	$506,154	$506,154
Food Services & Drinking Places	$5,934,041	$27,805,695	$21,871,654
Full-Service Restaurants	$3,794,542	$13,579,436	$9,784,894
Limited-Service Eating Places	$1,843,514	$9,442,898	$7,599,384
Special Food Services	$295,985	$1,546,037	$1,250,052
Drinking Places (Alcoholic Beverages)	$0	$3,237,324	$3,237,324

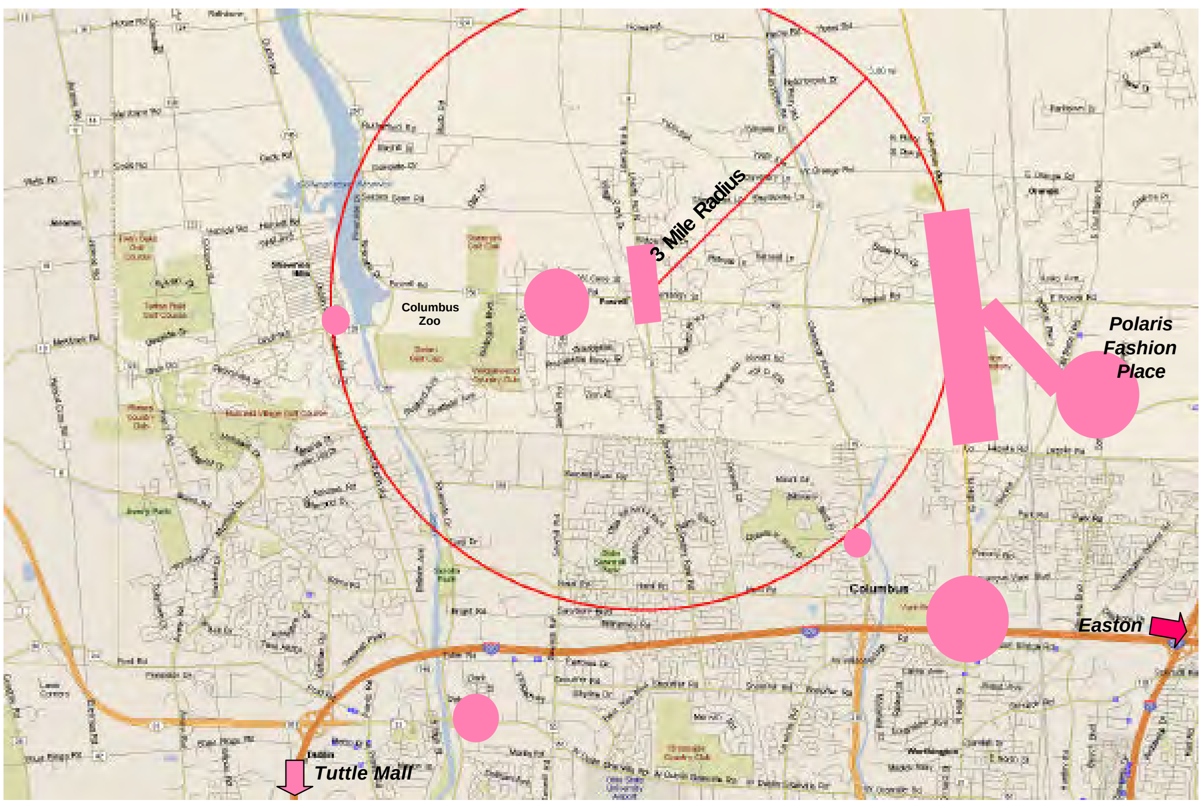
Source: 2002 Survey of Consumer Expenditures, InfoBase USA, ESRI, The Whittaker Group.

Where Powell Shops

Residents of Powell can have their day-to-day retail needs met by travelling to a large concentration of retail at Sawmill Parkway and Powell Road- just west of the downtown. This is home to a large supermarket as well as other convenience retail. Other proposed retail development along Sawmill Parkway will further increase the availability of everyday shopping in the vicinity.

For apparel shopping, residents of Powell are a short drive from both Polaris Fashion Place and Tuttle Mall. Additionally, shopping for apparel, home furnishings, autos and nearly all other needs can be accommodated along Sawmill Road just to the south of Powell. Route 23, just to the east of Powell offers a similar selection of 'big-box' retailers including Meijer, Wal-Mart and Kohls.

Easton Town Center and its surrounding retail offers a wide variety of merchants, restaurants and entertainment opportunities. The Columbus downtown including The Short North, Arena District and Brewery District are less than 30 minutes from Powell.



Shaded Areas Indicate Shopping Around Powell

Powell Retail Analysis - Quality, Price and Appeal

Generally, the merchants along Liberty Street and Olentangy Street offer a pleasant and appealing retail experience in their stores. Their product selection is a welcome departure from 'mainstream' department store fare. The caring of local owners shows in their store design, merchandising and customer contact.

The product lines tend away from 'discount' merchandise. The offering is generally higher end art, antique and home decor items.

The tenant mix is too concentrated and should be expanded. There is opportunity for other types of retail to be added to complement and extend the appeal of the shopping district. The merchant community would benefit from an increased offering that would provide incentive to local residents to explore the community more. Eating places and other types of specialty retail would help enhance the draw of residents to once again 'Rediscover Powell'.

The downtown is disconnected from the other retail districts in town. Liberty and Grace Plazas and the Powell Center do not benefit from any of the shopping traffic in the core downtown.

The development along Powell Road west of downtown toward Big Bear Farms includes retail shopping among light industrial uses. The demand for this retail space will continue as developers and merchants seek space along the high traffic route. However every effort should be made to concentrate the retail in and around the downtown area in a way that strengthens the district's walkable character. The illustration below depicts the scale footprint of the Polaris Mall over the downtown.

Shopping center developers have long understood the value of creating an inviting pedestrian environment. They design and price the space within malls to leverage 'anchors' (high traffic producing tenants) connected by other higher income retail space.

Recommendations for Retail Configuration and Merchandising

The retail environment in Powell should take some cues from the concepts behind shopping mall development.

- Create a pedestrian friendly environment - covered in *Issues & Analysis* and *Recommendations* sections.
- Leverage Anchors such as the municipal building and the new park facilities to allow sharing of parking and encourage shared circulation with the shopping district.
- Concentrate the retail so shoppers can easily circulate among shops. A sense of exploration can be enhanced by providing retail in back-lot, alley or other connected thoroughfares.

- Be careful to manage 'missing teeth' in the retail fabric. You will notice that mall managers take great care to mask vacancies. This is because they understand that consumers tend to shy from passing such blanks. To the degree possible, look for creative ways to limit vacant buildings, encourage office users to upper floor or adjacent areas from the shopping district, and management traffic and parking such that pedestrians get every encouragement to freely circulate the stores.
- Connect the core downtown to other retail on Grace and Powell Center. The Powell Center shopping center could be an anchor for the downtown offering parking and shopping that could be linked to that along Olentangy Street and Liberty Street.

- Provide easily identifiable and well maintained parking. Shopping at Polaris or Tuttle Mall involves more actual walking than does parking at Liberty Plaza on Grace Drive and walking to Olentangy Street and Liberty Street. The difference is the sense of where the parking is located and where the shopping is located. There is a significant area for parking within the district - it should be reconfigured to provide are clear availability for shoppers. Take cues from shopping districts on the organization of parking (Grandview and Short North) and the signage for parking (Westerville).

Parking Directional in Westerville

- Explore the possibility of creating a southern Delaware County transit system with service to and around Powell. This system would benefit the retailers in Powell by providing easy access for consumers through an alternative transportation system.

Retail Variety Extension

A number of potential categories are strong candidates for adding to the selection of downtown merchants in Powell. The following are illustrations of other retail concepts in similar suburban markets.

Powell can support additional casual dining alternatives. While professionaly run local establishments could make a good fit, some regional and national names for example would be:

- Graeter's
- Scotty McBeans
- Panera
- Montana Bread
- COSI
- Old Bag of Nails

Specialty Apparel-
Alternatives to Mall Shopping

Retail that focuses on providing a high quality alternative to traditional mall shopping would be successful in Powell.

The following list of national and regional women's, children's and men's apparel and specialty goods is intended as an example of the type of retail that could be successful :

- Talbots
- Casual Corner
- Larson's Toys
- Orvis
- The Rusty Putter

Other locally owned retailers could also be successful if they provide a middle to upscale product line focused on the needs of consumers in and around Powell.

Other Specialty Retail

It is difficult to point to specific examples of named specialy retailers that would be successufl in Powell. Travel is one specific type of retail that could be appropriate given the profile of travel among Powell residents.

The types of specialy retail that could be considered is only limited by the imagination of the leadership tasked with recruitment and the business people engaged in business in Powell already. The following list represents categories of possibilities for specialty retail:

- Children's Apparel
- Specialty Toy's and Games
- Outdoor Pursuits, Travel and Apparel
- Specialty Gardening/ Outdoor Environments
- Art Gallery and Live/Work Space
- Specialty Bookstore/Cafe
- Pottery /Art Clay Workshop
- Specialty Home Furnishings
- Gourmet Kitchen Shop
- Religious Bookstore

Addendum: The following pages detail a long listing of spending and purchase behaviors for residents in and near Powell. These items are listed as indexes against the national norm and are color coded to denote high and low propensities.

This listing can be a valuable guide in helping to encourage new retail to focus on the unmet needs of the community in relationship to the larger retail offering in the region.

Red = Propensity for Powell Consumers is Significantly Higher than Average

Yellow =Propensity for Powell Consumers is Above Average

No Color=Propensity for Powell Consumers is Average

Blue = Propensity for Powell Consumers is Below Average

Segmentation Purchase/Use Behaviors

Source: Claritas 2003

100=Average

Propensity Toward Behavior:
- Significantly Above Average
- Above Average
- Significantly Less then Average

	Kids & Cul-de-Sacs	Blue Blood Estates	Young Influentials
Percent of Powell's 3-Mile Radius:	36%	20%	22%
Percent of Powell Village:	48%	48%	0%

Behavior	Kids & Cul-de-Sacs	Blue Blood Estates	Young Influentials
Any Fast Food,1mo (80.9%)	106	97	102
Any Fast Food,6mo (88.4%)	105	99	102
A&W,1mo (1.8%)	118	61	70
A&W,6mo (3.3%)	130	71	95
Fast Food Burger,6mo (79.5%)	107	95	103
Arby's,1mo (12.8%)	117	63	103
Arby's,6mo (19.1%)	121	66	113
Fast Food Fish,6mo (10.6%)	77	39	47
Boston Market,1mo (4.5%)	178	189	135
Boston Market,6mo (7.6%)	173	179	169
Burger Chef,6mo (0.7%)	100	109	60
Burger King,1mo (36.9%)	107	86	96
Burger King,6mo (47.5%)	111	89	99
Domino's Pizza,1mo (9.3%)	107	88	124
Domino's Pizza,6mo (13.5%)	110	84	126
Captain D's,1mo (2.8%)	60	29	53
Captain D's,6mo (4.3%)	69	29	51
Carl's Jr.,1mo (4.3%)	153	162	210
Carl's Jr.,6mo (6.1%)	149	156	199
Checkers,1mo (2.1%)	130	33	24
Checkers,6mo (3.3%)	125	47	42
Chick-Fil-a,1mo (4.5%)	133	102	158
Chick-Fil-a,6mo (7.0%)	131	94	173
Chuck E Cheese,1mo (1.9%)	114	92	84
Chuck E Cheese,6mo (3.6%)	127	130	119
Fast Food Pizza,6mo (43.9%)	111	83	110
Dairy Queen,1mo (12.2%)	97	54	96
Dairy Queen,6mo (18.0%)	110	65	100
Pancke/Donut/IceCrm,6mo (25.3%)	109	90	99
Del Taco,1mo (1.8%)	119	209	284
Del Taco,6mo (2.7%)	139	165	275
Fast Food Mexican,6mo (38.4%)	114	83	111
Dunkin Donuts,1mo (6.9%)	110	136	92
Dunkin Donuts,6mo (9.8%)	113	138	97
Krystal's Hamburgrs,1mo (1.6%)	52	47	77
Krystal's Hamburgrs,6mo (2.3%)	46	33	65
Fuddrucker's,1mo (1.5%)	231	154	163
Fuddrucker's,6mo (2.7%)	214	206	151
Godfather's Pizza,1mo (1.2%)	81	48	193
Godfather's Pizza,6mo (2.1%)	99	40	211
Hardee's,1mo (8.4%)	45	19	29
Hardee's,6mo (11.3%)	50	23	43
Jack-in-the-Box,1mo (6.3%)	150	122	202
Jack-in-the-Box,6mo (8.2%)	149	132	193
KFC,1mo (19.8%)	102	88	92
KFC,6mo (28.1%)	104	85	97
Little Caesar's,1mo (2.8%)	120	91	111
Little Caesar's,6mo (4.9%)	116	79	117
Long John Silver,1mo (4.3%)	78	32	34
Long John Silver,6mo (6.7%)	77	40	40
Roy Rogers,6mo (1.0%)	110	131	104
McDonald's,1mo (47.7%)	116	92	106
McDonald's,6mo (57.0%)	113	94	110
Papa John's,1mo (7.1%)	141	81	148
Papa John's,6mo (10.3%)	138	77	145
Pizza Hut,1mo (19.7%)	104	74	88
Pizza Hut,6mo (27.3%)	106	70	97
Pizza Inn,1mo (1.0%)	54	43	59
Pizza Inn,6mo (1.5%)	65	55	48
Popeyes,1mo (3.9%)	111	89	57
Popeyes,6mo (5.7%)	108	90	74
Rally's,1mo (1.6%)	144	13	62

Behavior	Kids & Cul-de-Sacs	Blue Blood Estates	Young Influentials
Round Table Pizza,1mo (1.5%)	164	237	186
Round Table Pizza,6mo (2.2%)	163	191	215
Sonic Drive-in,1mo (7.0%)	75	49	49
Sonic Drive-in,6mo (9.3%)	76	56	55
White Castle,1mo (2.8%)	129	54	56
White Castle,6mo (4.2%)	138	49	77
Subway,1mo (13.6%)	112	85	128
Subway,6mo (19.4%)	118	84	137
Taco Bell,1mo (27.4%)	114	80	103
Taco Bell,6mo (36.2%)	116	81	110
Taco Bueno,6mo (0.7%)	122	81	86
Taco Johns,6mo (1.4%)	98	2	118
Wendy's,1mo (23.1%)	120	95	93
Wendy's,6mo (30.7%)	121	93	104
Whataburger,1mo (2.2%)	106	64	49
Whataburger,6mo (3.1%)	110	74	69
Fast Food,KidDecide,6mo (15.3%)	135	116	94
Family Rest/Steakhs,1mo (59.4%)	117	109	110
Family Rest/Steakhs,6mo (70.9%)	114	109	110
Applebee's,1mo (13.2%)	114	85	116
Applebee's,6mo (20.6%)	122	91	129
Bennigan's,1mo (1.9%)	213	166	263
Bennigan's,6mo (3.4%)	180	178	218
Bertucci's,1mo (0.6%)	120	356	152
Bertucci's,6mo (1.1%)	136	261	133
Bob Evan's Farm,1mo (2.8%)	121	76	106
Bob Evan's Farm,6mo (4.4%)	116	69	108
Denny's,1mo (8.0%)	126	114	149
Denny's,6mo (12.1%)	130	99	137
Califrn Pizza Kitch,1mo (0.9%)	130	553	225
Califrn Pizza Kitch,6mo (1.6%)	160	485	237
Chevy's,1mo (1.1%)	317	371	309
Chevy's,6mo (1.9%)	313	343	294
Chi-Chi's,1mo (1.7%)	103	100	79
Chi-Chi's,6mo (3.1%)	131	106	120
Chili's Grill & Bar,1mo (5.5%)	162	183	142
Chili's Grill & Bar,6mo (9.1%)	158	162	165
Cracker Barrel,1mo (6.2%)	99	65	66
Cracker Barrel,6mo (10.0%)	109	76	91
LoneStar Steakhouse,1mo (2.1%)	118	131	96
LoneStar Steakhouse,6mo (3.7%)	128	97	116
Friendly's,1mo (2.5%)	110	160	53
Friendly's,6mo (4.1%)	112	155	64
Golden Corral,1mo (4.5%)	66	39	41
Golden Corral,6mo (6.7%)	68	36	48
Hooters,1mo (1.6%)	136	132	124
Hooters,6mo (2.7%)	137	86	148
Houlihan's,1mo (0.8%)	227	302	198
Houlihan's,6mo (1.5%)	181	202	252
IHOP,1mo (5.9%)	133	129	118
IHOP,6mo (9.7%)	137	140	132
Olive Garden,1mo (8.2%)	145	128	153
Olive Garden,6mo (13.8%)	142	125	164
Outback Steakhouse,1mo (6.3%)	150	154	163
Outback Steakhouse,6mo (11.0%)	142	149	174
Ponderosa,1mo (2.2%)	59	11	31
Ponderosa,6mo (3.5%)	72	21	46
Red Lobster,1mo (8.7%)	107	82	82
Red Lobster,6mo (14.0%)	117	82	112
Ruby Tuesdays,1mo (3.4%)	106	95	88
Ruby Tuesdays,6mo (5.9%)	116	88	91
Shoney's,1mo (3.2%)	42	27	32

Segmentation Purchase/Use Behaviors

Source: Claritas 2003

100=Average

Propensity Tow ard Behavior:

Significantly Above Average

Above Average

Significantly Less then Average

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Percent of Pow ell Village:	48%	48%	0%

Behavior	Kids & Cul-de-Sacs	Blue Blood Estates	Young Influentials
Sizzler Steakhouse,1mo (2.6%)	93	109	108
Sizzler Steakhouse,6mo (4.0%)	93	110	93
Steak N Ale,1mo (0.8%)	205	93	107
Steak N Ale,6mo (1.4%)	212	100	131
T.G.I. Friday's,1mo (6.3%)	151	161	170
T.G.I. Friday's,6mo (10.6%)	153	156	197
FamRstrnt,KidDecide,6mo (5.0%)	135	137	111
Dined Out,1yr (50.5%)	122	131	121
Dine Out,1+x/w k,1yr (22.6%)	135	155	130
Dine Out,1-3x/mo,1yr (17.4%)	122	109	112
Dine Out,<1x/mo,1yr (4.8%)	99	114	91
Go Camping,4+ Trips,1yr (4.5%)	108	45	111
Go Camping,1yr (16.7%)	109	80	99
Sleeping Bag (20.8%)	128	102	108
Sleeping Bag,1yr (2.7%)	133	125	160
Tent (16.7%)	133	97	118
Tent,1yr (2.5%)	113	61	140
Camp Stove (11.8%)	141	103	98
Camp Stove,1yr (1.0%)	90	86	121
Camping Equipment,1yr (8.6%)	128	108	119
Outboard Motor (4.2%)	110	81	113
Pow er Boat (2.6%)	122	118	101
Camper (3.5%)	112	69	76
Motor Home (1.2%)	107	85	82
Home Delivery Meals,1mo (11.7%)	129	86	144
Home Delivery Meals,6mo (13.5%)	124	85	138
Collectables,Ml/Phn,1yr (2.5%)	108	91	84
CD/Tapes,Mail/Phone,1yr (6.8%)	120	95	95
Flow ers,Mail/Phone,1yr (6.3%)	142	177	159
Craft Sply,Mail/Phn,1yr (2.3%)	113	97	107
Home Study,Mail/Phn,1yr (0.8%)	138	153	58
Pet Prod,Mail/Phone,1yr (1.2%)	103	142	193
Religious Music,M/P,1yr (1.7%)	120	40	70
Gardn Spply,Ml/Phn,1yr (3.1%)	120	128	51
Toys,Mail/Phone,1yr (3.4%)	111	142	95
Mail/Phn Order,Any,1yr (36.2%)	120	135	113
Collectables,Intnt,1yr (1.0%)	143	207	213
CD/Tapes,Intrnt,1yr (3.0%)	138	276	192
Flow ers,Intrnt,1yr (1.3%)	169	205	269
Craft Supply,Intrnt,1yr (0.7%)	139	232	100
Toys,Intrnt,1yr (2.0%)	151	232	181
Videos,Intrnt,1yr (1.5%)	149	246	168
Internet Order,Any,1yr (15.0%)	162	188	193
Videos,Mail/Phone,1yr (3.2%)	104	71	57
Mail/Phn Ordr,$200+,1yr (19.9%)	144	179	140
Sew from Patterns,6mo (3.9%)	96	72	70
Do Needlepoint,6mo (1.1%)	76	193	26
Montblanc/Waterman,1yr (1.0%)	123	299	185
Barber Shop,$40+ 6mo (14.1%)	132	167	116
Go to Barber Shop,6mo (25.1%)	116	124	100
Beauty Parlor,$100+,6mo (14.0%)	141	196	142
Go to Beauty Parlor,6mo (33.4%)	121	127	108
Flow ers,Flow r Shop,6mo (13.8%)	130	146	108
Flow ers,Wire,6mo (5.7%)	147	191	161
Quick Svc Copy/Prnt,6mo (7.7%)	134	142	159
Recorded Tape/CD,1yr (41.4%)	127	118	136
Alternative Music,1yr (8.5%)	139	99	174
Books on Tape,1yr (2.0%)	151	233	109
Classical Music,1yr (6.3%)	142	232	139
Christian Music,1yr (3.5%)	117	84	88
Country Music,1yr (12.7%)	115	104	94
Easy Listen Music,1yr (7.1%)	136	189	149

Behavior	Kids & Cul-de-Sacs	Blue Blood Estates	Young Influentials
Gospel Music,1yr (3.2%)	92	52	79
Jazz Music,1yr (4.9%)	162	201	177
New Age Music,1yr (3.1%)	156	200	159
New Wave Music,1yr (1.4%)	114	177	153
Hard Rock Music,1yr (7.0%)	123	78	144
Rap Music,1yr (5.7%)	104	55	208
Motivational Tapes,1yr (0.9%)	145	97	186
Soft Rock Music,1yr (6.8%)	128	121	159
Spanish/Latin Music,1yr (2.7%)	126	110	156
Urban/Contemp Music,1yr (0.9%)	76	119	206
1960s Nostalgia,1yr (1.7%)	105	192	134
1950s Nostalgia,1yr (1.0%)	103	184	179
1940s Nostalgia,1yr (0.7%)	102	192	159
Rent Videotape,Any,1mo (37.3%)	128	122	136
R/B Videos,1-3,1mo (13.8%)	121	127	131
R/B Videos,4-5,1mo (7.9%)	141	132	186
R/B Videos,6+,1mo (15.6%)	126	112	115
R/B Exercise Video,1mo (1.0%)	106	99	59
R/B Fmly/Kid Video,1mo (12.1%)	123	121	82
R/B Foreign Video,1mo (1.3%)	144	194	193
R/B Musical Video,1mo (1.6%)	136	148	126
R/B Video,Blckbustr,1mo (18.3%)	157	166	169
R/B Video,Hollyw ood,1mo (6.1%)	169	105	188
R/B Video,OthVidStr,1mo (10.5%)	93	105	101
R/B Video,CnvnceStr,1mo (1.2%)	66	44	51
R/B Video,GrocryStr,1mo (4.1%)	105	76	145
Any Books,1yr (52.9%)	118	135	114
Heavy Book Buyer,1yr (21.7%)	133	160	117
Paperback Book,1yr (40.9%)	123	139	116
Hardcover Book,1yr (28.7%)	127	160	124
Cookbook Book,1yr (10.5%)	106	159	107
Mystery Book,1yr (12.4%)	122	176	107
Novel,1yr (18.3%)	140	166	142
Sci Fi Book,1yr (4.7%)	127	101	132
Children's Book,1yr (14.3%)	130	133	101
Romance Book,1yr (8.1%)	110	109	120
Pers/BusSlfHelp Bk,1yr (8.0%)	143	167	138
Computer Book,1yr (9.7%)	155	150	139
Books,Book Club,1yr (7.6%)	115	122	83
TV Sets,3+ (37.8%)	145	148	103
TV Sets,4+ (15.8%)	170	195	93
Satellite Dish (11.6%)	71	85	27
Go to Movies,1+,6mo (59.5%)	117	125	124
Go to Movies,4+x/mo,3mo (2.9%)	100	133	132
Go to Movies,1+,3mo (47.5%)	122	134	118
Go to Movie,2-3x/mo,3mo (7.8%)	129	167	130
Go to Movies,1x/mo,3mo (9.9%)	126	121	126
Go to Movies,<1x/mo,3mo (27.0%)	121	129	110
Go to Musc/DanceShw ,1yr (24.2%)	126	139	157
Take Adult Ed Cours,1yr (7.1%)	123	128	126
Do Barbecuing,1yr (32.3%)	132	119	104
Go to Bar/Nightclub,1yr (20.0%)	124	79	169
Go to the Beach,1yr (25.1%)	127	149	130
Play Billiards/Pool,1yr (9.7%)	124	78	148
Do Bird Watching,1yr (4.9%)	95	122	73
Play Chess,1yr (4.1%)	128	112	145
Go Dancing,1yr (12.5%)	119	97	164
Go Dancing,1+x/mo,1yr (5.6%)	114	81	151
Entertain at Home,1yr (41.0%)	126	122	110
Do FurnitureRefinsh,1yr (4.6%)	119	101	115
Go to Live Theater,1yr (14.4%)	137	198	139
Do Arts/Crafts,1yr (12.3%)	106	99	103

Segmentation Purchase/Use Behaviors

Source: Claritas 2003

100=Average

Propensity Toward Behavior:

Significantly Above Average

Above Average

Significantly Less then Average

	Kids & Cul-de-Sacs	Blue Blood Estates	Young Influentials
Percent of Powell's 3-Mile Radius:	36%	20%	22%
Percent of Powell Village:	48%	48%	0%

Behavior	Kids & Cul-de-Sacs	Blue Blood Estates	Young Influentials	Behavior	Kids & Cul-de-Sacs	Blue Blood Estates	Young Influentials
Do Paint/Drawing,1yr (6.8%)	108	99	117	Jogging,1yr (10.1%)	139	168	185
Do Photography,1yr (11.9%)	127	136	121	Karate/Martial Arts,1yr (1.5%)	112	116	95
Play Bingo,1yr (5.3%)	94	68	66	Play Racquetball,1yr (1.3%)	153	194	304
Play Cards,1yr (23.9%)	108	87	119	Go In-Line Skating,1yr (3.7%)	159	136	155
Play Mus Instrument,1yr (7.5%)	128	144	136	Go Roller Skating,1yr (2.6%)	106	40	57
Read Book,1yr (40.5%)	123	137	122	Go Sailing,1yr (1.3%)	153	274	104
Play Trivia Games,1yr (6.8%)	133	120	130	Go Scuba/Snorkel,1yr (2.8%)	153	253	225
Do Woodworking,1yr (5.6%)	100	88	70	Go Snowboarding,1yr (1.0%)	191	168	204
Go to Zoo,1yr (12.9%)	146	137	142	Play Soccer,1yr (2.8%)	156	105	105
Collect Coins,1yr (13.1%)	97	74	82	Play Softball,1yr (4.6%)	114	78	168
Collect Stamps,1yr (3.4%)	96	142	100	Go Swimming,1yr (22.3%)	124	124	101
Do Indoor Gardening,1yr (17.7%)	113	129	109	Play Tennis,1yr (4.1%)	138	258	192
Tropical Fish (5.6%)	98	106	173	Play Volleyball,1yr (4.0%)	123	64	98
Greeting Cards,1mo (53.6%)	115	116	109	Walk for Exercise,1yr (36.6%)	121	130	98
Greeting Cards,6mo (66.7%)	111	110	108	Go Water Skiing,1yr (2.1%)	136	129	112
Large Baby Dolls,1yr (7.9%)	95	89	80	Do Weight Lifting,1yr (9.8%)	134	146	159
Action Figures,1yr (10.2%)	109	79	93	Go Whitewtr Rafting,1yr (1.2%)	141	96	187
Fashion Dolls,1yr (7.2%)	111	104	88	Exercise,Hme,2+x/wk,1yr (29.6%)	122	134	114
Plush Dolls/Animals,1yr (9.9%)	133	113	104	Exercse,Club,2+x/wk,1yr (9.1%)	158	212	194
Doll Clothing,1yr (5.1%)	124	110	81	Exercise,Otr,2+x/wk,1yr (6.8%)	108	120	141
Doll Accessories,1yr (4.9%)	114	134	79	Bowling Ball (10.1%)	155	85	104
Construction Toys,1yr (6.0%)	107	120	118	CrossCountry Boots/Skis (2.8%)	155	222	112
Educational Toys,1yr (15.0%)	123	117	120	Fishing Equipment (25.2%)	110	89	83
Mechanical Toys,1yr (4.6%)	109	105	94	Fishing Equipment,1yr (5.5%)	82	80	53
Model Kits,1yr (3.4%)	108	139	86	Racquetball Equipment (4.7%)	186	157	178
Action Games,1yr (4.7%)	114	96	116	Sportswatch/Chronograph (4.5%)	133	147	158
Board Games,1yr (14.1%)	129	100	103	Tennis Equipment (13.5%)	165	197	160
Electronic Games,1yr (9.5%)	130	114	92	Tennis Equipment,1yr (1.8%)	143	306	216
Infant Toys,1yr (9.3%)	105	107	106	Low Tickt Sports Eq,1yr (13.8%)	112	126	126
Pre-School Toys,1yr (9.1%)	122	124	80	Mountain Bicycle (12.0%)	138	134	137
Builder Sets,1yr (3.6%)	120	155	119	Road Bicycle (12.4%)	137	167	101
Toy Cars,1yr (8.3%)	109	72	117	Stationary Bike (7.8%)	135	166	98
Buy Electric Trains,1yr (1.6%)	121	150	126	Downhill Skis/Boots (4.8%)	186	243	144
Buy Swing Sets,1yr (1.6%)	58	103	12	In-Line Skates (7.0%)	172	149	155
Child's Bicycles,1yr (8.8%)	110	96	96	Treadmill (8.5%)	143	197	98
Tricycles,1yr (2.0%)	105	97	66	Treadmill,1yr (0.9%)	120	225	71
Water Toys,1yr (8.8%)	129	102	91	Stair Stepper (3.3%)	146	155	146
Any Children's Toys,1yr (38.3%)	114	108	100	Other Exercise Equip (11.3%)	133	144	110
Child Toy,<2yrs,1yr (13.0%)	110	112	106	Golf Clubs (12.1%)	157	193	168
Child Toy,2-5yrs,1yr (15.7%)	114	109	100	Golf Clubs,1yr (1.2%)	161	244	235
Child Toy,6-11yrs,1yr (17.3%)	123	110	93	Handgun (7.4%)	109	99	97
Child Toy,12-17yr,1yr (7.2%)	128	135	69	Rifle/Shotgun (12.9%)	91	80	77
Child Toy,<$200,1yr (15.9%)	114	97	97	Weight Lifting Equip (12.1%)	148	134	123
Child Toy,$200+,1yr (16.4%)	131	132	103	Hi Ticket Sports Eq,1yr (9.1%)	124	139	112
Do Aerobic Exercise,1yr (9.6%)	131	159	173	Go to Auto Race,1+/mo (1.9%)	79	65	82
Go Backpack/Hiking,1yr (7.7%)	132	149	130	Go to Baseball Gm,1+/mo (4.9%)	108	149	102
Play Baseball,1yr (5.6%)	99	81	111	Go to CollBsktbll,1+/mo (2.3%)	67	77	178
Play Basketball,1yr (9.7%)	102	75	143	Go to ProBasktbll,1+/mo (1.7%)	127	67	148
Go Mountain Biking,1yr (3.6%)	158	135	130	Go to CollFootbll,1+/mo (2.6%)	103	104	161
Go Bicycling,1yr (12.3%)	135	133	115	Go to ProFootbll,1+/mo (2.2%)	141	103	123
Go Road Biking,1yr (9.9%)	131	132	105	Go to HiSchlSprts,1+/mo (5.5%)	98	76	86
Go Power Boating,1yr (6.8%)	129	123	163	Go to Ice Hockey,1+/mo (1.2%)	146	198	139
Go Bowling,1yr (12.3%)	122	89	129	Conservative Outlook (31.4%)	109	114	82
Go Canoe/Kayaking,1yr (3.5%)	105	139	100	Liberal Outlook (15.1%)	113	129	136
Go CrossCountry Ski,1yr (1.2%)	136	225	115	Member,Fraternal Order (4.6%)	106	112	80
Go Downhill Skiing,1yr (3.0%)	157	250	176	Member,Religious Club (8.3%)	110	134	122
Go FreshWtr Fishing,1yr (15.3%)	98	69	71	Member,Civic Club (3.4%)	70	120	145
Go Fishing,1yr (17.6%)	102	76	78	Member,Veterans Club (3.9%)	86	79	60
Go Salt Wtr Fishing,1yr (4.8%)	101	97	83	Member,Country Club (2.3%)	85	391	127
Go Golfing,1yr (10.7%)	151	164	157	Member,Union (5.7%)	129	100	116
Go Horseback Riding,1yr (3.6%)	97	118	147	Member,Church Board (4.8%)	88	80	68
Go Hunting w/Gun,1yr (6.3%)	74	58	60	Contribute,PBS,1yr (7.7%)	129	217	130

Segmentation Purchase/Use Behaviors

Source: Claritas 2003

100=Average

Propensity Tow ard Behavior:

- Significantly Above Average
- Above Average
- Significantly Less then Average

	Kids & Cul-de-Sacs	Blue Blood Estates	Young Influentials
Percent of Pow ell's 3-Mile Radius:	36%	20%	22%
Percent of Pow ell Village:	48%	48%	0%

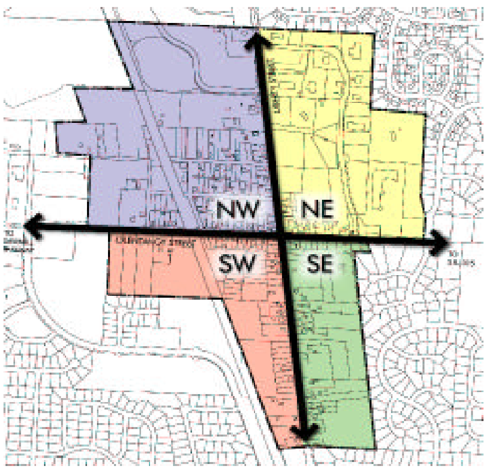
Behavior	Kids & Cul-de-Sacs	Blue Blood Estates	Young Influentials
Vote in Election,1yr (46.1%)	119	127	104
Write Mag/Nwspr Edt,1yr (4.2%)	125	163	163
Wrte/Phn Rad/TV Stn,1yr (6.8%)	112	111	141
Write Elected Offcl,1yr (6.3%)	127	179	107
Visit Elected Offcl,1yr (2.7%)	89	137	86
Local Civic Issue,1yr (5.4%)	103	178	91
Work for Pol Party,1yr (2.1%)	77	149	87
Non-Political Voltr,1yr (16.6%)	129	154	125
Environ Group/Cause,1yr (2.9%)	102	198	117
Recycle Products,1yr (36.1%)	132	140	125
Go Casino Gambling,1yr (19.8%)	133	138	129
Play Lottry,1-5x/mo,1yr (17.5%)	126	115	99
Play Lottry,6-9x/mo,1yr (3.9%)	105	75	93
Play Lottry,10+x/mo,1yr (8.6%)	92	80	79
Play Lottery,1+x,1mo (30.0%)	113	99	93
Play Lottery,1+x,1yr (38.5%)	116	97	99
Do Outdr Gardening,1yr (40.9%)	118	127	84
Ow n Dog (27.3%)	133	124	81
Ow n Cat (19.6%)	116	113	86
Ow n Bird (3.0%)	119	66	105
Ow n Horse (1.1%)	78	44	18
Ow n Any Pet (38.7%)	129	123	92
Flea/Tick Products,1yr (27.3%)	111	104	74
Dog Food,6mo (31.3%)	126	115	78
Cat Food,6mo (23.3%)	109	102	82
900 NumberCalls,Any,6mo (1.5%)	81	130	77
900 NumberCalls,1-4,6mo (0.9%)	82	170	85
Use Call Forw arding (12.3%)	118	105	141
Use Call Waiting (38.3%)	130	126	117
Use Caller ID (28.9%)	120	94	104
Use Three-Way Calling (13.1%)	133	109	124
Use Voice Mail (16.3%)	147	140	157
Phone,AT&T Store (8.1%)	120	143	91
Phone,Catalog (1.3%)	117	86	130
Phone,Dept Store (23.8%)	100	83	99
Phone,Disc Store (24.3%)	122	116	101
Cordless Phone (66.4%)	121	120	112
Cell/Digital Phone (34.0%)	156	162	143
Cell/Digital Phone,1yr (10.2%)	153	168	176
AT&T Cell Phone,1yr (0.8%)	124	127	41
Ercsn Cell Phone,1yr (0.7%)	166	213	236
Motorola Cell Phone,1yr (1.5%)	139	172	189
Nokia Cell Phone,1yr (3.3%)	175	174	189
Answ ering Machine (48.4%)	129	134	112
Pagers/Beepers (12.4%)	169	155	130
Ave LDis Bill,$26-$59 (18.1%)	116	132	118
Ave LDis Bill,$60-$99 (8.1%)	117	153	118
Ave LDis Bill,$100+ (5.0%)	120	195	161
LDis Svc,AT&T (47.1%)	110	115	98
LDis Svc,MCI (12.0%)	116	134	121
LDis Svc,Sprint (5.9%)	129	163	186
Dom LDis,1-4 Calls,1mo (21.0%)	115	89	75
Dom LDis,5-15 Calls,1mo (25.9%)	110	113	124
Dom LDis,16+ Calls,1mo (13.7%)	125	147	136
Dom LDis,Any Calls,1mo (60.6%)	115	113	110
Intl LDis,1-3 Calls,1mo (3.6%)	132	214	142
Intl LDis,4+ Calls,1mo (3.0%)	139	228	212
Intl LDis,Any Calls,1mo (6.6%)	135	220	174
AT&T Call Card (19.6%)	104	134	111
MCI Call Card (7.0%)	121	158	125
Sprint Call Card (2.9%)	121	149	195
Local Phne Co Call Card (4.4%)	99	115	78

Behavior	Kids & Cul-de-Sacs	Blue Blood Estates	Young Influentials
CallCrd,BusCall,<11,1mo (3.6%)	125	149	177
CallCrd,BusCall,11+,1mo (1.0%)	199	321	142
CallCrd,PersCall,<6,1mo (12.9%)	122	121	84
CallCrd,PersCall,6+,1mo (4.9%)	103	107	113
Pre-Paid Call Card,1yr (12.1%)	93	71	103
Any Theme Park,1yr (25.7%)	129	126	133
Any Busch Gardens,1yr (2.2%)	143	161	156
Disneyland,CA,1yr (3.2%)	178	247	213
Any Sea World,1yr (3.8%)	177	128	159
Any Six Flags,1yr (6.6%)	121	141	138
Any Universl Studio,1yr (4.1%)	142	149	156
Any Florida Disney,1yr (4.9%)	159	147	193
Ow n Valid Passport (22.1%)	145	242	192
Frgn Trvl,<$3000,1yr (7.7%)	157	207	205
Frgn Trvl,$3000+,1yr (3.4%)	159	399	190
Dom Trvl,<$3000,1yr (29.0%)	132	137	136
Dom Trvl,$3000+,1yr (3.8%)	164	332	181
Any Frgn Trvl,3yr (22.4%)	147	215	176
Frgn Trvl,3+Trips,3yr (6.0%)	162	306	189
Mexico,3yr (5.0%)	165	193	164
Caribbean,3yr (6.1%)	141	217	139
Bahamas,3yr (1.8%)	143	155	237
Jamaica,3yr (1.4%)	123	176	151
Puerto Rico,3yr (1.4%)	103	210	108
Virgin Islands,3yr (1.1%)	135	281	63
Alaska,3yr (1.2%)	133	257	175
Canada,3yr (3.9%)	172	225	202
Haw aii,3yr (2.4%)	174	283	239
Central/Sth America,3yr (1.7%)	132	288	244
Ireland/UK,3yr (2.9%)	172	314	185
Western Europe,3yr (6.7%)	154	295	203
France,3yr (2.3%)	154	374	260
Germany,3yr (1.8%)	163	222	229
Italy,3yr (1.9%)	132	276	144
Spain/Portugal,3yr (1.0%)	85	363	161
Japan/Asia/Other,3yr (1.8%)	186	409	203
Australia/New Zlnd,3yr (0.7%)	154	161	179
All Inclusive Pkg Trip (7.5%)	136	199	153
Frgn Trvl,Trvl Agnt,3yr (13.5%)	150	236	187
Frgn Trvl,15+Nights,3yr (5.2%)	131	273	204
Frgn Trvl by Raildr,3yr (1.0%)	109	300	192
Frgn Trvl,Jan-Mar,3yr (6.4%)	149	229	151
Frgn Trvl,Apr-June,3yr (8.3%)	171	270	196
Frgn Trvl,Jul-Sept,3yr (9.3%)	155	233	183
Frgn Trvl,Oct-Dec,3yr (6.0%)	160	252	217
Frgn Trvl,Bus,3yr (1.6%)	127	143	235
Frgn Trvl,Car,3yr (3.8%)	139	107	161
Frgn Trvl,Airplane,3yr (18.3%)	154	245	190
Frgn Trvl,Rentd Car,3yr (1.6%)	181	291	211
Frgn Trvl,AirFrance,3yr (0.6%)	116	405	222
Frgn Trvl,Brtsh Air,3yr (1.5%)	151	245	231
Frgn Trvl,Air,1Clss,3yr (1.6%)	172	386	141
Frgn Trvl,Air,Coach,3yr (15.4%)	159	235	184
Frgn Trvl,Cruise,3yr (6.8%)	142	216	143
Cruise,Royal Carbbn,3yr (1.5%)	178	289	231
Cruise,Carnival,3yr (2.4%)	144	107	156
Cruise, Norw egian,3yr (0.6%)	129	219	111
Cruise,Princess,3yr (0.8%)	155	375	0
Vac Hotel,Hilton,1yr (1.5%)	154	243	188
Vac Hotel,BestWstrn,1yr (5.5%)	128	159	132
Vac Hotel,ComfrtInn,1yr (4.3%)	117	121	116
Vac Hotel,Days Inn,1yr (4.1%)	95	70	84

Segmentation Purchase/Use Behaviors
Source: Claritas 2003
100=Average

	Kids & Cul-de-Sacs	Blue Blood Estates	Young Influentials
Percent of Pow ell's 3-Mile Radius:	36%	20%	22%
Percent of Pow ell Village:	48%	48%	0%
Behavior			
Vac Hotel,Red Roof,1yr (1.0%)	180	129	179
Vac Hotel,Hyatt,1yr (0.8%)	170	335	366
Vac Hotel,Marriott,1yr (2.3%)	136	281	129
Vac Hotel,Motel 6,1yr (2.0%)	107	46	110
Vac Hotel,Radisson,1yr (1.0%)	156	169	203
Vac Hotel,Ramada,1yr (1.8%)	123	86	75
Freq Flyer Prgm,1+ (15.8%)	176	278	215
Freq Flyer Prgm,2+ (6.9%)	176	345	242
Any Dom Trvl,1yr (54.3%)	127	143	133
Dom Trvl,15+ Nites,1yr (4.6%)	105	130	118
Dom Trvl,ME/NH/VT,1yr (3.2%)	129	251	84
Dom Trvl,MA/CT/RI,1yr (3.1%)	108	237	85
Dom Trvl,NY/PA/NJ,1yr (8.8%)	137	174	121
Dom Trvl,DE/MD/DC,1yr (3.6%)	131	153	165
Dom Trvl,CA,1yr (8.1%)	183	257	209
Dom Trvl,FL,1yr (10.8%)	133	153	123
Dom Trvl,UT/CO,1yr (3.8%)	153	148	209
Dom Trvl,AZ/NM/NV,1yr (8.1%)	162	200	130
Any Dom Busnss Trip,1yr (9.0%)	152	187	158
Any Dom Vac Trip,1yr (36.7%)	132	147	135
Dom Trvl,LastTrip,Plane (18.7%)	148	226	185
Dom Trvl,LstTripRntlCar (3.7%)	148	217	111
Dom Trvl,Last Trip,Car (30.4%)	119	106	111
Dom Trvl,<500 Miles,1yr (21.1%)	128	127	136
Dom Trvl,500+ Miles,1yr (40.1%)	132	153	133
Dom Trvl,Oct-Dec,1yr (20.0%)	130	160	156
Dom Trvl,Jan-March,1yr (18.8%)	140	169	137
Dom Trvl,April-June,1yr (26.1%)	124	144	132
Dom Trvl,July-Sept,1yr (28.6%)	133	143	137
Dom Trvl,Use Agent,1yr (13.1%)	138	194	153
Dom Trvl,Plane,1yr (23.9%)	153	215	184
Dom Trvl,Rental Car,1yr (5.2%)	155	222	161
Dom Trvl,Car,1yr (34.8%)	124	119	123
Dom Trvl,Bus,1yr (2.4%)	88	52	62
Dom Trvl,Railroad,1yr (0.8%)	96	150	175
Dom Trvl,Motor Home,1yr (1.0%)	73	117	109
Dom Trvl,Amercn Air,1yr (4.0%)	178	248	182
Dom Trvl,Contintal,1yr (2.4%)	149	318	108
Dom Trvl,Delta,1yr (5.1%)	138	216	220
Dom Trvl,Southw est,1yr (4.2%)	168	182	206
Dom Trvl,TWA,1yr (1.4%)	119	84	145
Dom Trvl,United,1yr (3.7%)	165	301	242
Dom Trvl,USAir,1yr (3.0%)	128	272	145
Dom Vac,Play Golf,1yr (2.3%)	191	247	168
Dom Vac,Visit Spa,1yr (0.9%)	162	251	178
Dom Trvl,South Rgn,1yr (29.3%)	121	134	123
Dom Trvl,N Cntl Rgn,1yr (15.1%)	122	107	150
Dom Trvl,N East Rgn,1yr (12.4%)	133	196	111
Dom Trvl,West Rgn,1yr (18.5%)	154	203	173
Dom Trvl,Pers Only,1yr (14.5%)	110	121	149
Bus Trip,Plane,3+,1yr (3.0%)	198	292	297
Pers Trip,Plane,3+,1yr (4.2%)	183	283	227
Travlrs Checks,1yr (8.6%)	136	171	108
Travlrs Chcks,$250+,1yr (7.1%)	141	183	112
Ow n Vac/Weekend Home (3.2%)	141	193	146
Ow n Timeshare Residence (2.7%)	197	197	154
Gamble,Atl City,1yr (3.6%)	122	169	90
Gamble,Lake Tahoe,1yr (0.8%)	175	213	172
Gamble,Las Vegas,1yr (5.8%)	192	232	214
Gamble,Reno,1yr (1.5%)	185	164	152

Issues and Analysis



The target area is organized by quadrant based upon the 1995 Powell Comprehensive Plan.

The Powell cemetery was laid out in the early 1800's. The cemetery is located in the core of the downtown.

Our design team toured the target area extensively to develop a thorough understanding of the physical conditions and characteristics of downtown Powell and the surrounding area. All assessment findings are organized by quadrant. The quadrants are based upon the crossroads of Olentangy Street and Liberty Street.

Overall Context:

A. The rural character and village-like atmosphere of downtown Powell is a very compelling community asset and should remain a key component to Powell's identity.

B. The 'sense of place' and rural character of Powell is attributed to existing frame structures, with some being over 100 years old, the Powell historic cemetery, narrow roads, informal town plan (formalized by streets), significant greenways, and the presence of the railroad.

C. The railroad is a very active line that has a significant impact on vehicular traffic flow. The frequent trains contribute to congestion in downtown Powell.

D. The physical presence of the train, as an integral part of daily life, contributes to the overall rural character of Powell.

E. The streetscape improvements located in the downtown core create a 'sense of place', through the use of sidewalk pavers, seating areas, decorative light fixtures, hanging baskets, and on street parking .

F. According to local resident's concerns, traffic congestion is a problem in Powell. However, the addition of 'bypass' roads are designed to alleviate the problem.

Northeast Quadrant

Northeast Quadrant:

A. The cul-de-sac communities (Olentangy Ridge) located adjacent to downtown Powell have not created sufficient physical and visual linkages to the Village core and downtown.

B. The cemetery is an interesting asset to downtown Powell as it provides historic significance into Powell's heritage.

C. The vacant land located along Grace Drive is a large relatively flat, contiguous parcel of land. The vacant land, developed properly, could unify the community by creating gathering spaces for civic functions and by creating linkages from the residential areas to the downtown Village Green.

The vacant land located along Grace Drive is prime developable land based on its proximity to the downtown, its relatively flat topography, and it is a large land parcel.

D. A large significant wooded green space is located adjacent to the cemetery. This parcel provides rural character through its sloping terrain and wooded appearance.

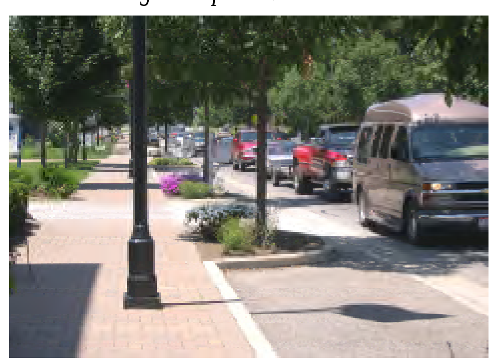
E. The Post Office is located along Grace Drive adjacent to the residential use areas. There is no short pedestrian access between the Post Office and the residential areas.

F. A commercial 'strip mall' and office space comprises most of the northeast quadrant along Grace Drive.

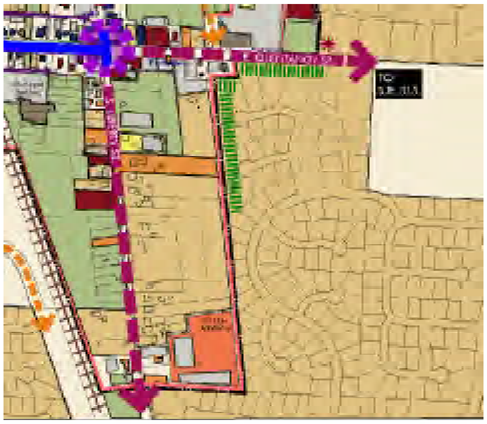
G. The bike trail system occurs along Grace Drive.

H. White picket fencing creates a gateway into Powell with a visual and physical rural 'sense of place.'

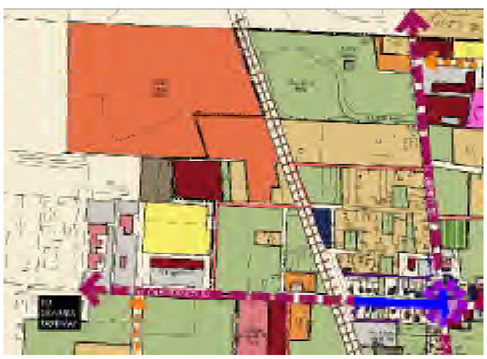
I. The former Mill is the Powell Day Care.



The streetscape along W. Olentangy Street includes decorative light poles, banners, pavers, benches, street trees, and on-street parking.



Southeast Quadrant



Northwest Quadrant

Contributing single family architecture located in the Historic Overlay Zone.

J. Proper building maintenance lacks for important properties at the four-corners intersection.

Southeast Quadrant:

A. The passive park and gazebo located on the corner of Olentangy Street and Liberty Street is under-utilized, possibly because it is privately owned.

B. Most of the southeast quadrant is comprised of residential and business uses located in residential structures.

C. A large parcel, located next to the bank, containing vacant land is an opportunity site for revitalization.

D. The bank is being relocated, therefore, another opportunity site exists for redevelopment.

E. The commercial and residential properties, located between the cul-de-sac communities (Bartholemew Run) and the downtown, are deep parcels that are very skinny in width. In order to utilize this property to its best potential, the parcels should be subdivided, in the rear, to create a transition from the residential area to the commercial core.

Northwest Quadrant:

A. Most of the residential component making up the northwest quadrant is located in the Historic District Overlay Zone. Many homes in this area lack significant upgrade, renovation, and maintenance. A 'sensitive redevelopment strategy' should be in place to benefit the village.

B. Streetscape improvements located along W. Olentangy Street unifies this section of the downtown, however, the streetscape is incomplete and fractured throughout the whole planning area.

C. Niche antique and specialty gift shops are a great asset for attracting regional visitors. However, shops to serve Powell residents are lacking.

D. The shops located along W. Olentangy Street have access to alleys that run behind the parcels. Designated parking should be considered in this area.

E. The Depot Street Antique Shop is located in an aesthetically pleasing barn structure.

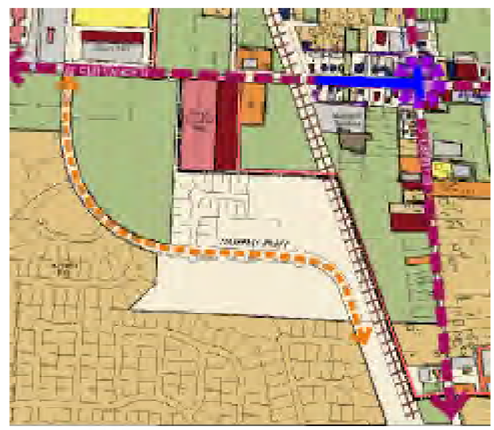
F. The streets located in the historic residential area are tree-lined and narrow providing a great opportunity for pedestrian linkage and amenities.

G. Off street parking areas are not defined and/or are gravel.

H. Memorial Park, Olentangy Swim Association Pool, and the Police Station comprise a large area of park land. Pedestrian access to this park is obtained through the existing bike trail.

I. The majority of the retail component, in this quadrant, consists of antique and gift shops and are also the primary business types located in Powell.

The bike trail is an asset linking the community to amenities, however, the trail is incomplete.



Southwest Quadrant.

Southwest Quadrant:

A. The Village Green and the Powell Municipal Building are located in this quadrant.

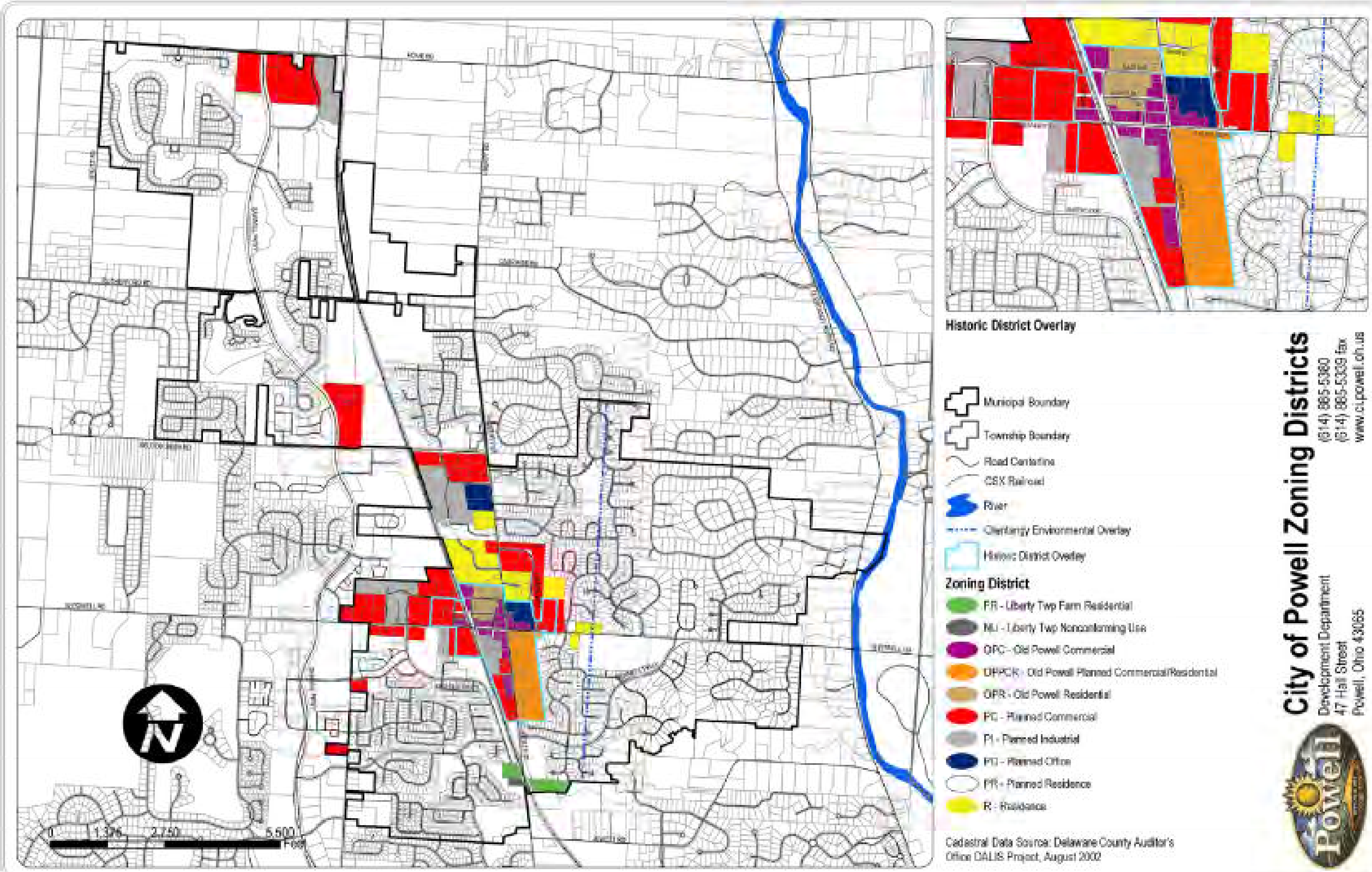
B. Streetscape improvements located along W. Olentangy Street unifies this section of the downtown, however, the streetscape is incomplete and fractured throughout the planning area.

C. A historical gateway marker is the only physical and visual clue announcing the city of Powell. This marker is hidden by overgrown shrubbery.

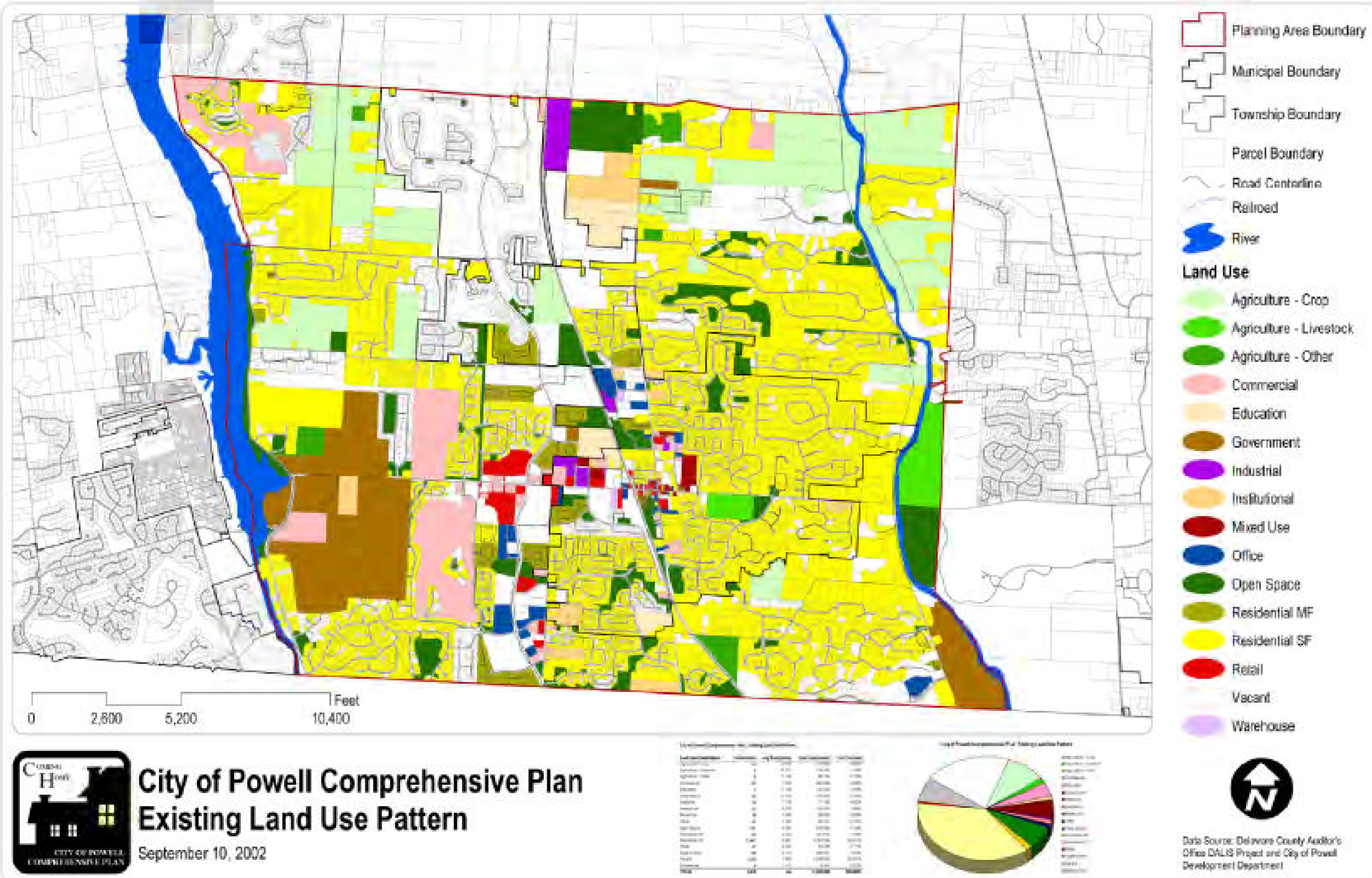
D. The old school is located in this district and now serves as an office building. The building provides historic architectural interest.

Note: Refer to the Appendix for the Analysis Map.

The old school building is located in the Southwest quadrant.



Zoning Map
Connecting Old Powell with Planned Commercial along Grace Street is a missed opportunity.



Land Use Map

There is no transition between the single family residential area and the commercial area in the northeast and southeast quadrants.

Map Source: Delaware County Dalis Project
City of Powell Development Department

Opportunities and Recommendations

Future redevelopment of Powell is to be strategically directed by this plan. This will foster the development of land uses, environmental characteristics, and aesthetic qualities that are intended to meet the overall vision.

Design Workshop

The planning team conducted a Design Workshop on September 24th and 25th with Powell stakeholders, business owners, residents, and city staff. During this meeting, the planning team shared the preliminary Market Assessment, Urban Assessment, and Redevelopment Opportunities for the city of Powell. The Design Workshop provided an opportunity for the planning team to test planning concepts, proposed land uses, solicit feedback, and gain consensus regarding the market study and proposed land use diagrams.

Overall Context:

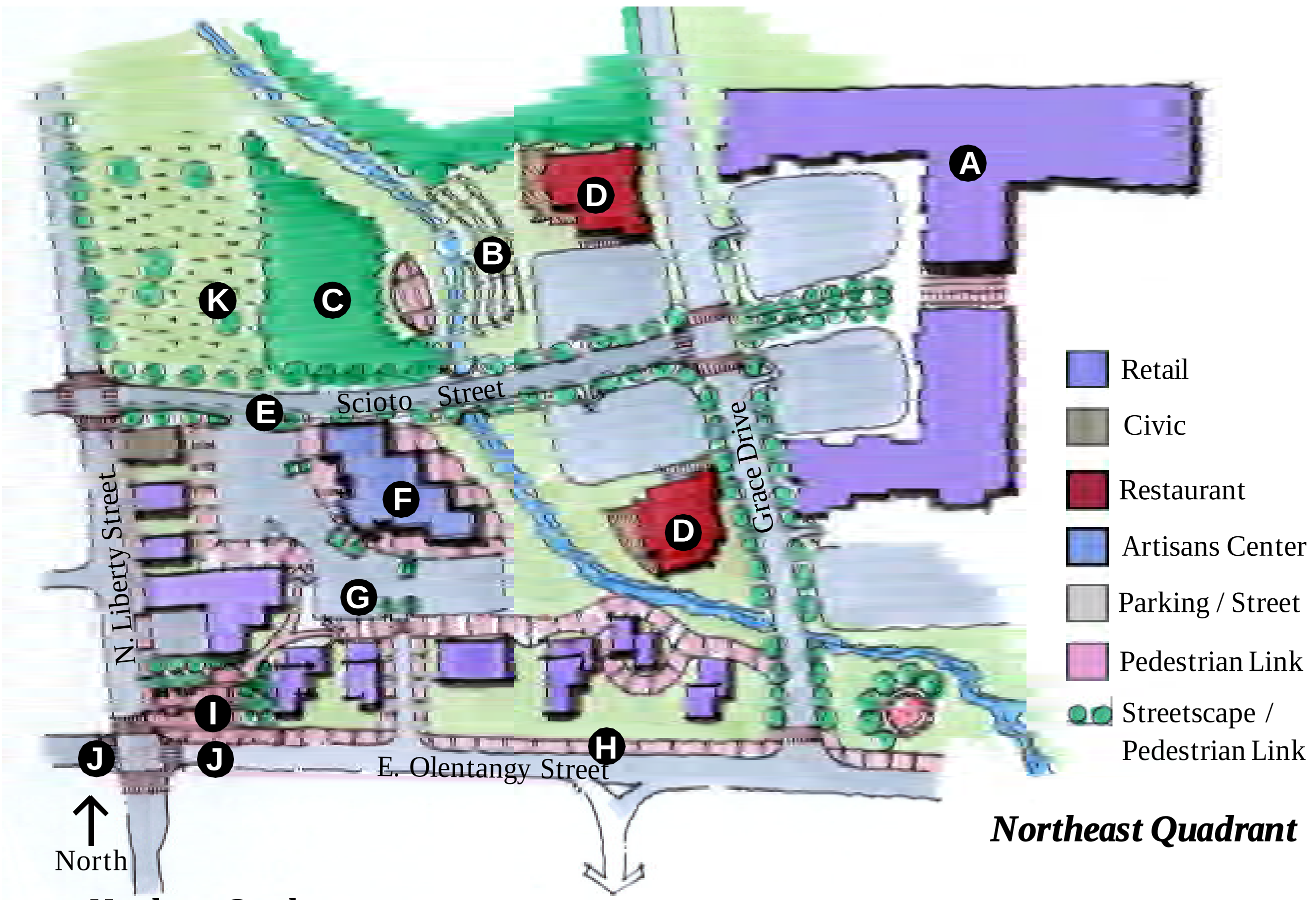
The following suggestions consist of improvements that would unify the City of Powell by linking the residential areas to the downtown. A 'new' market and economically driven land uses shall create an aesthetically pleasing downtown without compromising the unique rural quality of downtown Powell.

- Consider the extension of the existing residential street grid in the Historic Overlay Zone.
- Do not promote more high end single family

residential cul- de-sac communities, however, consider other residential options that are not currently offered in Powell.

- Link the residential areas to downtown Powell and the Village Green via a greenway consisting of a biketrail /walkway transportation network.
- Mark historical sites with plaques that identify the heritage of Powell throughout the city. (Cemetery, etc.)
- Develop a cultural Artisans Center to create a retail, entertainment, and educational opportunity.
- Develop convenient public parking at the rear of each commercial block. Consider several small lots in-lieu of one large lot.
- Create outdoor activity on the street (outdoor dining.)
- Provide wayfinding to alert drivers to public parking areas and provide historic district signage.
- The Powell Center mall does not engage the down-town. The mall should be oriented to engage the downtown core.
- Restrooms will be located at the Village Green. Provide wayfinding signage to visitors. Business owners may want to make their restrooms available upon request.

The Revitalization Plan, depicted on the following pages, shows proposed land use configurations for downtown Powell and important linkages between the downtown core and the residential areas.



Northeast Quadrant

A. The Powell Center should reposition itself to 'embrace' downtown Powell. Therefore, the Powell Center would provide retail frontage along Grace Drive. Direct pedestrian connections would link the Powell Center to the downtown core and residential areas. Parking would be provided with access off of Grace Drive.

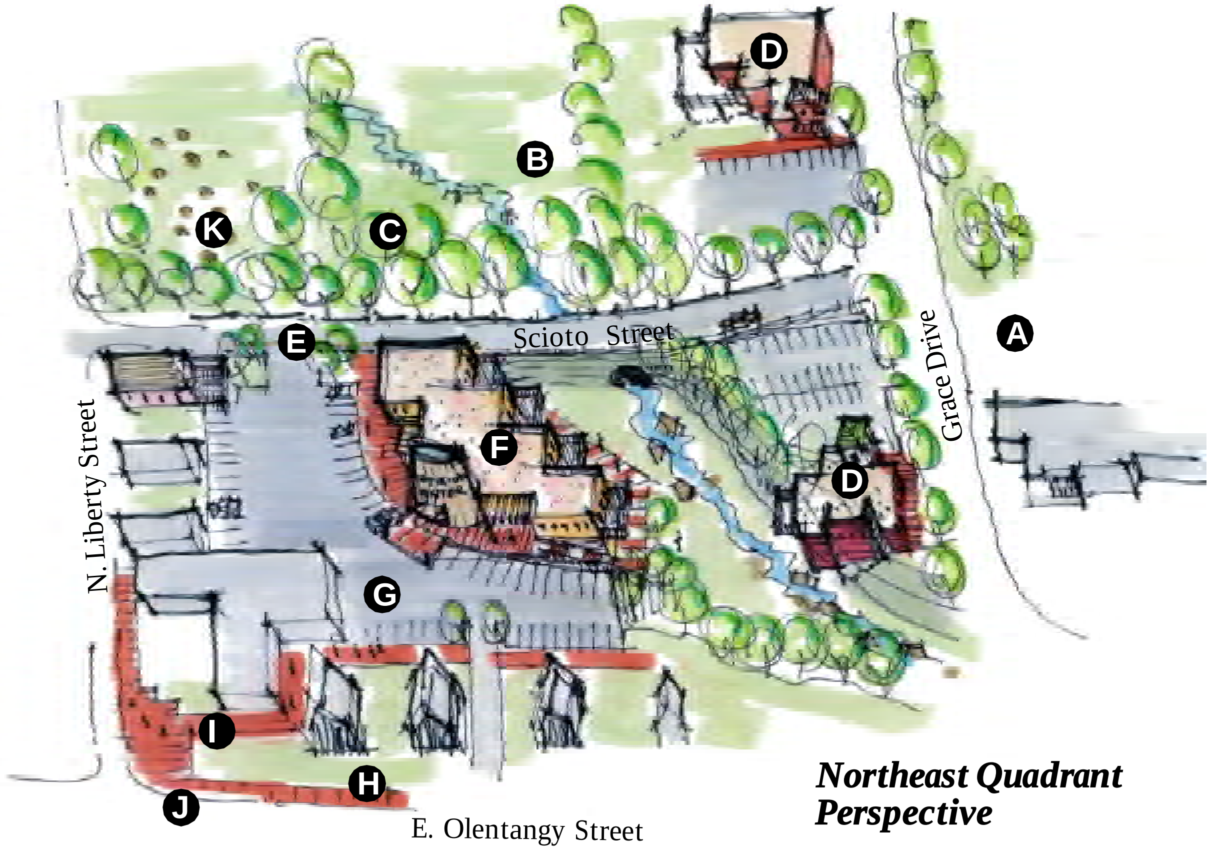
B. The existing topography creates a great opportunity for a small amphitheater to be nestled into the natural terrain. This amphitheater would serve as an outdoor exhibition area or learning venue for the Artisan Center. A pedestrian greenway shall connect the amphitheater to the cemetery. Parking for the facility shall be provided.

C. The wooded vegetation coupled with the extreme topography create great visual aesthetics. The vegetation creates a dramatic backdrop for the amphitheater stage inherent to the rural heritage of Powell.

D. The restaurants offer an amenity to downtown Powell. Patio dining should overlook the stream, natural terrain, and wooded area.

E. Scioto Street should be carried across Liberty Street to connect to Grace Drive and Powell Center. Scioto Street should be a tree-lined boulevard providing an important vehicular / pedestrian connection linking the downtown retail core.

F. The Artisan Center is an opportunity to link the complimentary use of art with the heavily oriented antique businesses. The Artisan Center has been suggested as an anchor that is currently non-



Northeast Quadrant Perspective

existent in Powell. The Artisan Center provides a complimentary land use with the antique businesses while providing family oriented services for downtown residents. However, when private developers find interest in this ground, additional research should be conducted to determine the highest and best land use.

G. Public parking is located behind the retail uses on E. Olentangy Street and Liberty Street. This creates a shared parking opportunity with the Artisan Center.

H. The streetscape enhancements shall continue along E. Olentangy Street to Grace Drive.

I. The building at the northeast corner of Powell Road and Liberty Streets should be removed based on its poor condition. This will 'open-up' the intersection promoting pedestrian connections from the Village Green and downtown core to the Artisan Center, amphitheater, restaurants, and Powell Center.

J. A left hand turn lane for east and west bound traffic should be explored and studied on Olentangy Street. This traffic study should analyze how the left hand turn lane would benefit downtown businesses and residents versus the potential of creating additional thru traffic that could make the current condition worse.

K. The Cemetery is an important element that recaptures Powell's heritage.

Southeast Quadrant

A. The commercial properties, located between Bartholemew Run and the downtown are deep parcels that are very skinny in width. In order to utilize this property to its best potential, the parcels should be subdivided in the rear to allowfor development.

B. A high density housing mix is proposed to provide a housing alternative in Powell. This higher density housing would create a transition between the single family residential area and the downtown commercial core. This could be a possible location for 'live-work' housing.

C. A large, dense landscape buffer should be located between the single family housing and the higher density housing.

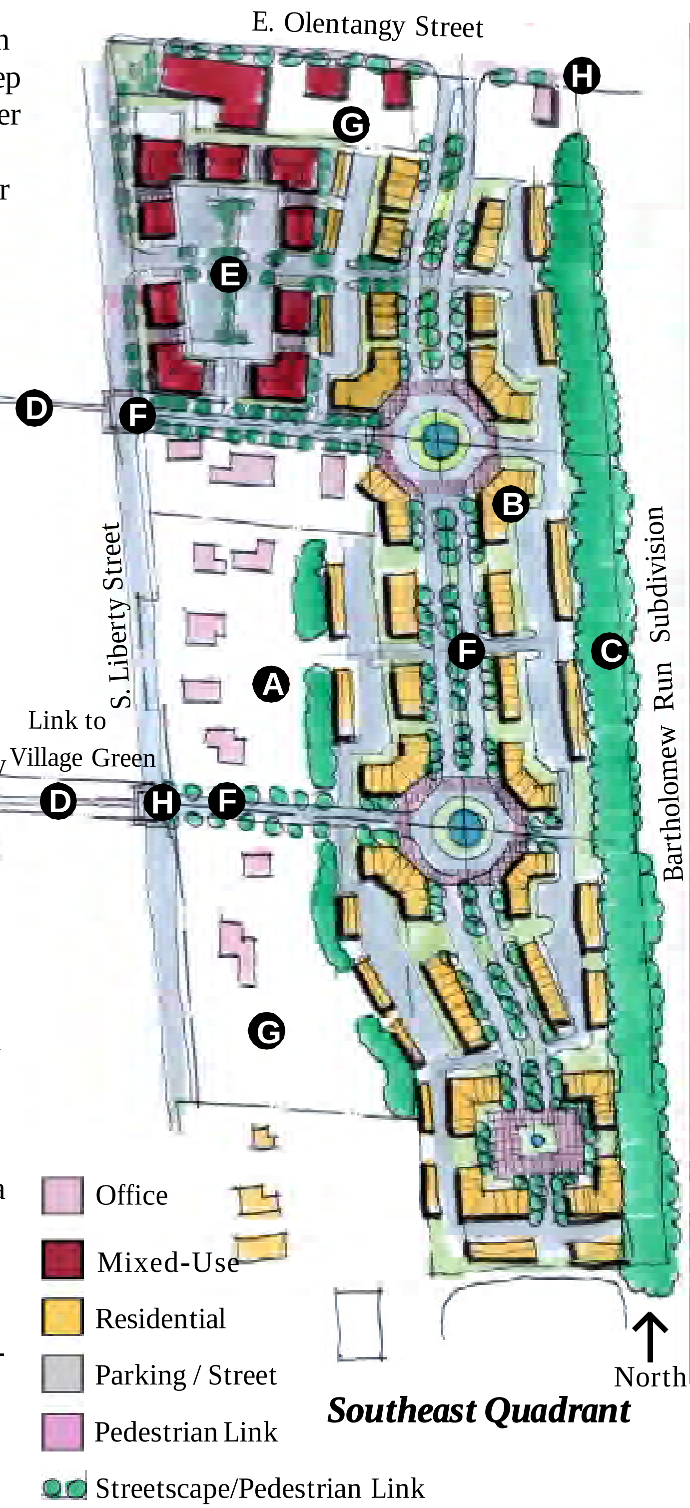
D. A strong pedestrian connection links the residential area to the Village Green.

E. The mixed-use development is strategically located at the corner of E. Olentangy Street and Liberty Street. The mixed use development would provide retail on the bottom floor with residential use above.

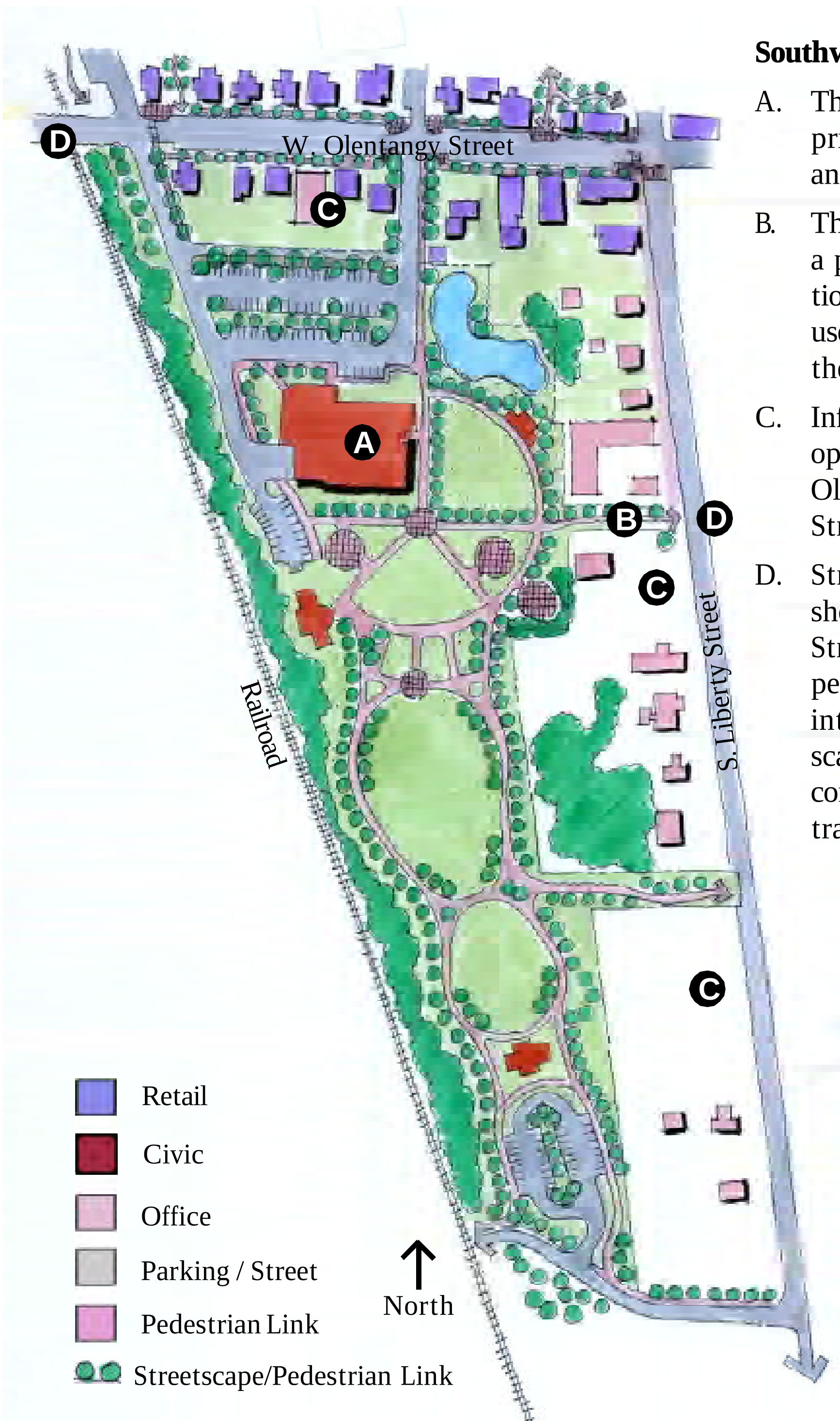
F. Vehicular access could be conveniently located off of E. Olentangy Street and Liberty Street. However, this access should be studied in more detail, in conjunction, with the left hand turn lane on Olentangy Street. To promote visual interest and pedestrian connections, the road should be a tree-lined boulevard incorporating water features and lush landscaping.

G. Infill retail opportunities exist along E. Olentangy Street and infill office opportunities exist along S. Liberty Street. The retail infill should be concentrated closest to the downtown core of Olentangy and Liberty Streets.

H. Streetscape enhancements should continue on S. Liberty Street to the south entrance of the housing development. Streetscape enhancements should continue on E. Olentangy Street to Grace Drive.



Southeast Quadrant



Southwest Quadrant

Southwest Quadrant

A. The southwest quadrant consists primarily of the Village Green and Municipal Center.

B. The opportunity exists to create a pedestrian/bikeway connection between the residential uses, the downtown core, and the Village Green.

C. Infill of retail, office, and service opportunities exist on W. Olentangy Street and S. Liberty Street.

D. Streetsccape enhancements should continue on S. Liberty Street to the intersection of the pedestrian/bikeway entrance into the Village Green. Streetscape enhancements should continue west over the railroad tracks on W. Olentangy Street.

Northwest Quadrant

A. The existing street grid is carried north, creating additional access to Liberty Street.

B. A vehicular and/or pedestrian connection exists between all of the quadrants, thereby, linking the City of Powell and all of its amenities together as a whole. Pedestrian connections link the residential areas to the Memorial Park, bike trail, Village Green, Artisans Center, Powell Center, and the downtown core.

C. A public restroom facility is centrally located to be utilized by all downtown users.

D. Infill commercial uses along Liberty Street.

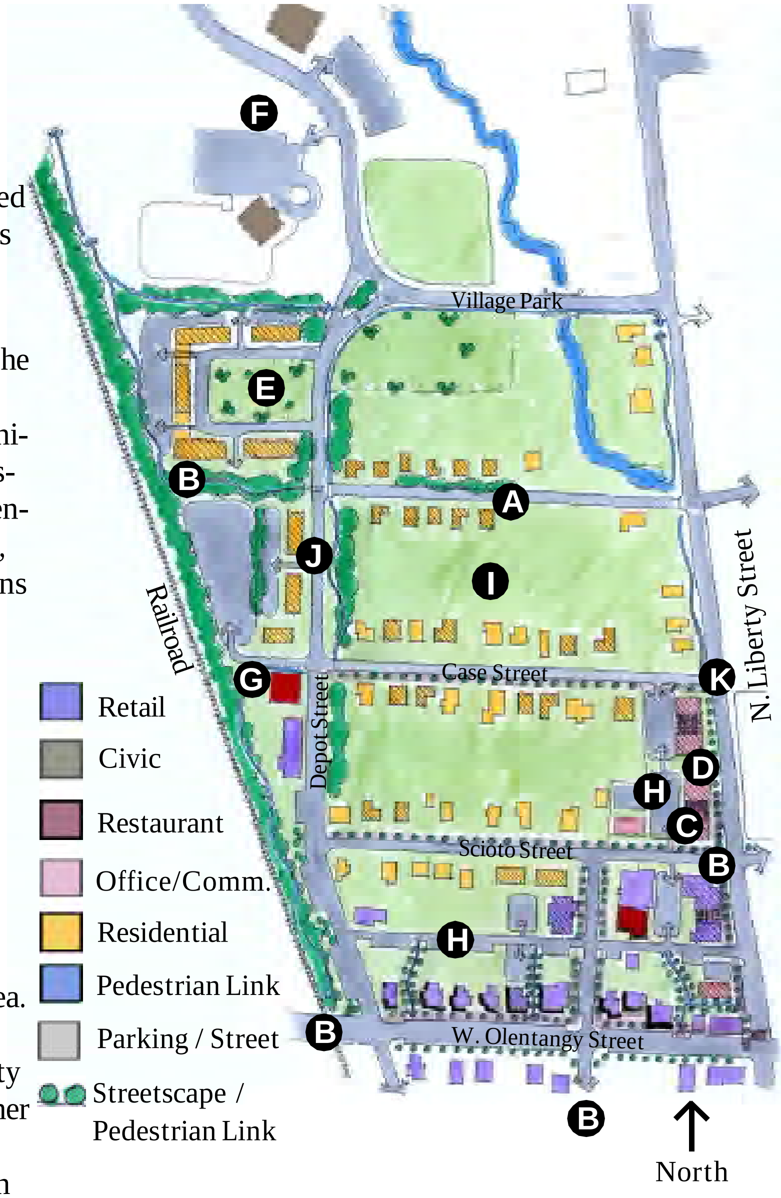
E. The proposed higher density residential use is strategically located adjacent to the park area. The residential use overlooks the park and is in close proximity to the downtown core. This higher density residential creates a housing alternative in downtown Powell.

F. Powell Memorial Park.

G. This building provides an opportunity for a restaurant reminiscent of the heritage of Powell.

H. Parking is located behind the proposed commercial uses.

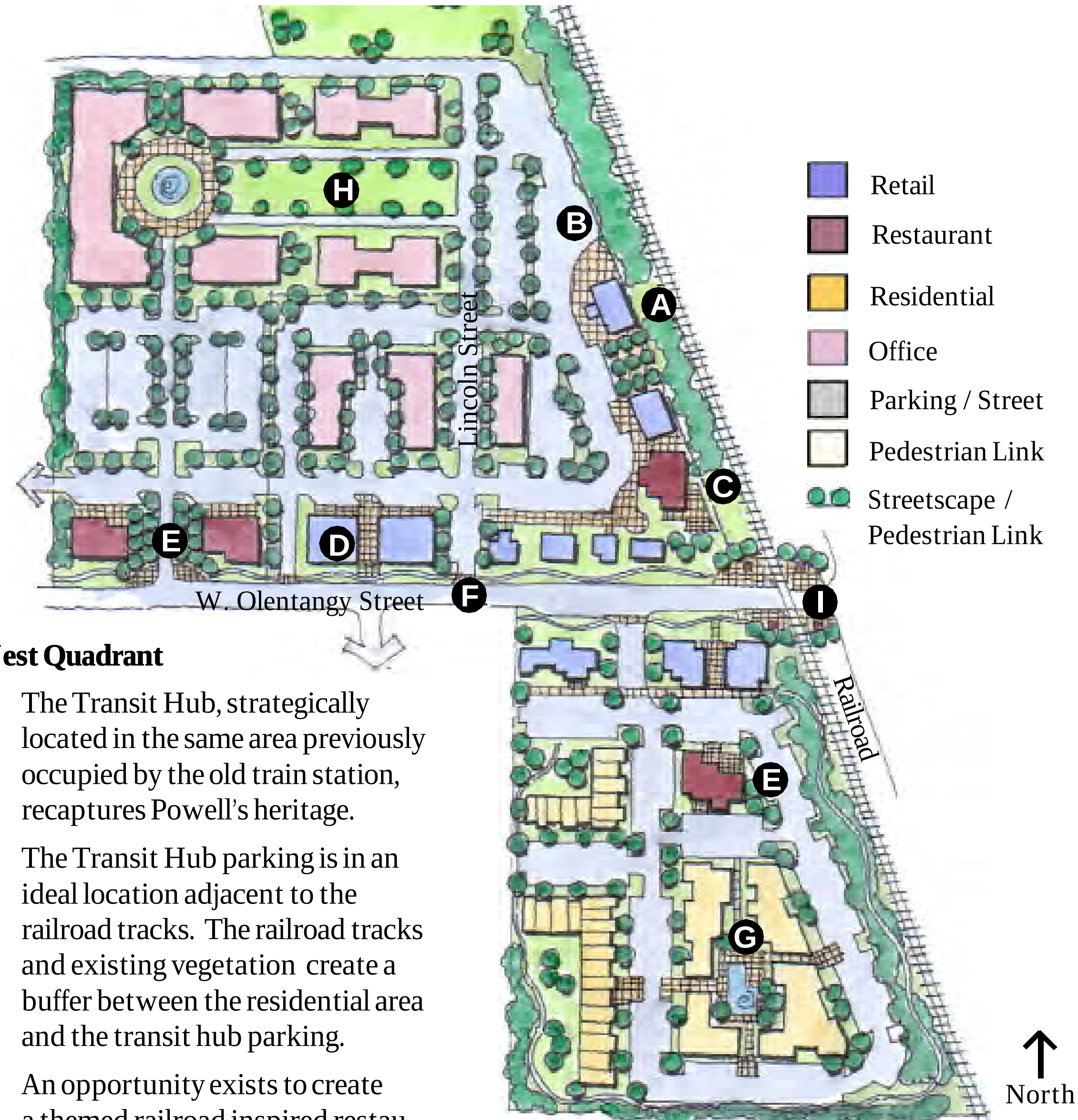
I. Infill single family residential structures complimentary in size and scale to the existing structures in this quadrant.



Northwest Quadrant

J. Depot Street is extended north to intersect with Village Park Drive. The street extension provides alternative pedestrian and vehicular access to the park.

K. Streetscape enhancements should continue north on Liberty Street to the intersection of Case Street.



West Quadrant

West Quadrant

A. The Transit Hub, strategically located in the same area previously occupied by the old train station, recaptures Powell's heritage.

B. The Transit Hub parking is in an ideal location adjacent to the railroad tracks. The railroad tracks and existing vegetation create a buffer between the residential area and the transit hub parking.

C. An opportunity exists to create a themed railroad inspired restaurant next to the train tracks.

D. Retail oriented uses should be located along Olentangy Street.

E. Restaurants should be located along Olentangy Street that provide a unique dining experience.

F. Streetscape enhancements should continue along W. Olentangy Street and extend to Lincoln Street.

G. A high density housing mix is located south of Olentangy Street, thereby, providing housing alternatives in Powell. Amenities such as a pool and walking trail should be provided.

H. The office park with a campus environment would provide additional office space in Powel and a complimentary land use to the adjacent office and retail.

I. A gateway plaza should provide a resting point for pedestrians walking across the railroad tracks.

Implementation Strategy

Recommendations Overview

Merchant diversification, recruitment and expanded retail space offerings are keys to the continued revitalization of downtown Powell. The town center is rich with a collection of historic architecture reminiscent of Powell's earlier days as well as several newer in-fill buildings developed over the years. Powell has many positive traits that include an attractive physical character, several strong regionally known antique destinations, and a profound history in the development of Delaware County.

However, in spite of these healthy traits, downtown lacks many of the characteristics necessary for attracting local and regional patrons [i.e. broader retail offerings, diversity of products & destinations, etc.]. Increased traffic volumes have continued to affect the pedestrian friendliness of downtown while providing increased patron exposer to the merchants along Olentangy and Liberty Streets.

Furthermore, development patterns to the west along Sawmill Parkway continue to threaten retail activity in the downtown business district. Powell's location makes it an ideal place for small town living within a greater metropolitan region.

Care must be taken in addressing a number of challenges such as merchant involvement, land-use controls, streetscape expansion and design & development guidelines. These challenges are critical for enhancing downtown and creating strong links within the community. A common vision and public consensus are the principle means of implementing many of the strategies for these challenges. The proposed development directions outlined in this document represents that vision.

The rich history of Powell's rural beginnings and railroad activity should be integrated into the downtown and community at large. These historic traits should influence physical design, promotional activities, graphic identities and icons, and community festivals.

By creating this focus the community draws attention to its roots, creating a deeper meaning and appeal for downtown attractions. These simple steps help to distinguish Powell from other regional communities. Increased public support for downtown attractions is necessary for strengthening downtown retail and regional attention to the town.

1.) Put the necessary organization, funding and staffing in place to implement the plan.

Involve the Powell Downtown Revitalization Committee, Property Owners, City Government Representation, Neighborhood Groups and Merchants.

The Powell Downtown Revitalization Committee and constituency have performed admirably in monitoring the development of the strategic revitalization plan to date. However, this committee along with other organizations as represented above, must fuse together and form an umbrella organization. This new downtown alliance will continue to guide the revitalization effort. Any one of the organizations mentioned above cannot accomplish the comprehensive revitalization on their own.

The volunteerism performed by the merchants group is not enough to stay abreast of the day-to-day promotional and management issues affecting downtown Powell. Similarly, the development guidance being performed by the Development Department of the City of Powell [and local brokerage community] is more re-active and less pro-active because of the community wide planning and development responsibilities. However, participants, members and functions of these groups are important to the downtown and should be retained as a part of the new organization.

As a new or reconstituted organization is put in place, care should be taken to carefully consider and address the needs and desires of this group as the voice of downtown and prevent its alienation.

To be most effective, a new group should be formulated to include all community segments involved with or affected by downtown. Successful revitalization is rooted in a commitment from political officials, residents, business leaders, community groups, merchants, and property owners who are all united in their revitalization vision.

Establish a 501(c) 3 not-for-profit corporation as the new organizational structure for implementing the Strategic Vision.

The most effective downtown revitalization programs concentrate responsibilities, authority and funding for the effort in a single organization with a board of trustees and a hired staff. The advent of the 501(c) 3 not-for-profit development corporation has been the genesis for the widespread acclaim given to the concept of public-private partnerships.

It is the most flexible management tool currently available for neighborhood commercial redevelopment and downtown economic revival. Contributions from individuals and for-profit enterprises are tax deductible as charitable donations. As a not-for-profit, it can also accept contributions from other not-for-profits that may be prohibited from investing in business ventures.

The critical philosophy is that long-term improvement is based upon support from a broad constituency and private property owner investment coupled with public infrastructure improvements. Development under this type of organizational structure is incremental, building-by building and parcel-by-parcel. As the downtown is gradually revitalized, this organization could evolve into a Special Improvement District [SID].

Simply stated a SID is a downtown management tool whereby a district [as designed and defined by the property owners within it] can assess themselves for the sole purpose of accumulating money to be used for any service the district owners agree will benefit the district.

Pattern the organization after the National Trust for Historic Preservation's National Main Street program.

To make certain that the revitalization objectives outlined in this plan are accomplished and efforts gain momentum, a Main Street Program should be established. The following is quoted from Downtown Ohio, Inc.'s "Downtown Revitalization Training Manual":

"In 1977, the National Trust for Historic Preservation undertook a demonstration project in which three small Midwestern towns were selected to serve as models for the development of a comprehensive approach to downtown revitalization. After three years of on-site analysis (economic and design) and implementation experience, a methodology was developed and titled, 'The Four Point Main Street Approach to Downtown Revitalization'.

The foundation of the "Four Point" or "Main Street Approach" to downtown revitalization is preservation: using those elements of quality that have survived as assets upon which we can build a lasting, positive physical and emotional image for everyone who uses downtown. Historic preservation is used as an economic development tool. It capitalizes on over-looked and underutilized assets, encourages imagination, sharpening of entrepreneurial skills, and strong participation by the private sector.

The principles of the Main Street philosophy are the following:

> **Comprehensive and Appropriate:** All aspects of the downtown must be considered when designing a revitalization program. And, the program must be appropriately scaled, taking into account the community's resources and local conditions.
>
> **Incremental:** The Main Street Approach does not produce instant change; it manages change over time. The decline and decay of the central business district did not occur overnight and by the same token, a revitalization program cannot be expected to produce immediate results. Careful realignment of every aspect affecting the downtown area takes effective decision-making and leadership development. Quick-fix solutions may produce short-term successes, however, over the long-run, one must address the underlying causes of decline.
>
> **Partnership:** In order for the downtown revitalization program to be successful, both the public and private sectors must be involved and committed. A project manager, someone who works exclusively for the downtown as an advocate for all aspects of the revitalization program, plays a key role in the process. Often, the establishment of this position is a joint public/private venture supported in a number of ways from each sector.
>
> **Quality:** The Main Street Approach emphasizes quality; taking the time and care to make changes in a "quality" way.
>
> **Education:** The negative attitudes prevailing in the downtown need to be changed through education and awareness. Projects should be chosen which are doable in nature so that their success may be promoted. People need to be constantly made aware and reminded of the assets that exist in the downtown and why they are important to the overall community. The new generation of users needs to know that a downtown exists, where it is, and what is available for them in the central business district.
>
> **Implementation:** Once a community is committed to conducting a downtown revitalization program, implementation is critical. Plans do not implement themselves, someone or group has to be the driving force to make things happen."

Form a board of trustees for the new organization.

The new non-profit Main Street Corporation should have a Board of Trustees that is comprised of experienced, dedicated and decisive individuals representing the major constituencies that are involved with or affected by downtown. Board members should be carefully chosen from among the following groups – downtown property owners, downtown retail and office tenants, major local employers, real estate professionals, cultural and historical organizations, financial institutions, community groups, and residents.

Paid staff and representatives of Delaware County and the city of Powell should serve as non-voting members. It is essential that membership be drawn from all sectors to ensure that all views are represented and a common vision/plan is supported and maintained.

An Executive Committee should be formed with membership to consist of the Chairman and/or Vice Chairman of the Board and the Chairs of each of the standing committees. A representative of paid staff would sit in on meetings on a non-voting basis.

The importance of this committee is to make certain that the efforts of each of the working committees and any related task forces are coordinated with the efforts of the other committees and the staff. This body would also provide more regular support and oversight of day-to-day activities of staff.

Establish and fund a three-year operating budget for the organization.

A budget should be established for the operation to run efficiently for three years. It should include sufficient amounts to hire experienced and capable staff, cover operating expenses and ongoing events. Ultimately the organization should become self sufficient through membership dues, revenues from special events and possible involvement in real estate development activities.

Community groups, tenants, and residents should be involved at a reduced dues amount [if at all] because they are not a business organization. Their involvement is important because of their particular perspective as consumers on the goods and services provided downtown as well as missed development opportunities.

Prepare a comprehensive resource development plan to maximize the opportunities for complete funding of the new three year plan with a combination of public, private and nonprofit financial contributions, in-kind services and incentive programs.

For this effort to be successful, the majority of the funding must come from the private sector. Sustainable revitalization only occurs in the presence of economic opportunity. At the same time, local public policy and investment throughout Powell has favored suburban development over the last several decades to support the immense growth of the area. New developments at the fringes are subsidized with publicly financed new infrastructure. In the meantime, downtown's infrastructure ages and deteriorates. Public support for and investment in downtown revitalization is necessary to create a level playing field.

Hire full-time staff to manage the organization and direct the implementation of the Strategic Vision.

The Main Street Program staff, ranging in size from one to four full-time professionals, would provide executive leadership, project direction, promotion, and office management to its members. Initially, staffing of the Main Street Corporation proposed for Powell's downtown would require at least one full-time position.

As a result, individuals selected for this position should be filled by a multi-talented individual capable of performing complex tasks. Staff can also be supplemented with program/project consultants and part-time persons such as loaned executives or retired community leaders. Job descriptions, desired qualifications and compensation parameters should be established for each position desired and a comprehensive recruitment effort initiated to identify and hire the best person(s) for the job.

Executive leadership of the organization would be carried out by an Executive Director or Main Street Manager who actively forges relationships both at the grassroots property owner level and with corporate and political leaders in the community. Leadership skills and the ability to communicate effectively regarding a broad range of goals and issues will be important.

Familiarity with economic development, urban planning, historic preservation and a host of other topics will be necessary.

Establish a permanent office in downtown for the Main Street Corporation.

Ideally, the office should be placed on the second floor of a building located in the downtown, not the city municipal building. Some first floor window(s) should be made available for displays, renderings and/or posters promoting the Strategic Vision and other positive changes taking place in downtown. The importance of an upper story location is to reinforce the need to preserve prime first floor space for retail. An effort should be made to identify an upper story location and/or furnishings and equipment that could be provided as an inkind contribution to the organization.

Initiate a public relations campaign to keep the community informed and build support and momentum for the revitalization effort.

Achieving consensus and maintaining momentum will require ongoing communication of the desired vision and efforts to achieve it. Emphasis should be placed on why the vision is important and how it will be benefit the various sectors of the community and the county.

As a renewed interest in the downtown is realized, consideration should be given to the creation of a Special Improvement District.

A Special Improvement District is a quasi-public organization formed by property owners who have agreed to an assessment on their property in order to generate revenue for services and capital improvements provided within a defined district. Special Improvement Districts provide a long-term financial base for marketing, capital improvements and management programs. They spell out the services and improvements to be delivered in a contract between the property owners and the organization charged with managing the Special Improvement District.

This contractual arrangement increases accountability and keeps the focus of the organization on achieving stated goals of property owners. It usually, though not always, incorporates the entire central business district, therefore spreading the cost and the benefits of the services among a broad base of property owners and tenants.

Sixty percent of property owners, or those representing roughly seventy-five percent of the linear footage, must agree to the assessment (amount to be determined by local area). The process of recruiting the property owners to agree to an assessment and how it will be spent is a time consuming effort requiring a high level of commitment from leadership at all levels in the downtown community.

A Special Improvement District is the only way to assure long-term funding but, since it involves a tax assessment on downtown properties, it may be desirable to await demonstration of the success of the program before seeking approval for it from private property owners.

Give future consideration to other responsibilities that could be placed under the control of the Main Street Corporation.

These could include such things as streetscape maintenance, litter control, sidewalk snow removal, parking enforcement, and lot management.

2) Prioritize downtown Powell in the community and in the region.

Downtown needs to represent the heart of Powell both physically and emotionally.
Build community pride through events and communication. Locate any future public-serving facilities for Powell downtown if physically possible. Recognize and promote your assets and seek early successes.

3) Provide property owners with the tools and incentives to rehabilitate their historic buildings.

Property owners and developers often perceive that preservation is too expensive, especially in comparison to new construction. In actuality when historic preservation methods are properly understood and applied, such developments can actually cost less and earn a higher rate of return than new construction.

As stated in Downtown Ohio, Inc.'s Downtown Revitalization Training Manual, "The foundation of the 'Four Point' or 'Main Street Approach' to downtown revitalization is preservation: using those elements of quality that have survived as assets upon which we can build a lasting, positive physical and emotional image for everyone who uses downtown. Historic preservation is used as an economic development tool. It capitalizes on over-looked and underutilized assets, encourages imagination, sharpening of entrepreneurial skills, and strong participation by the private sector."

Powell is blessed with a modest collection of distinctive rural vernacular historic buildings, many of which are located in downtown. It also has the benefit of knowledgeable local preservation advocates that can be of immeasurable value in implementing appropriate building rehabilitation practices as represented by the Powell Historic District Commission.

However, it must be understood that a more concise and timely process for plan review and approval must be designed and adopted to keep developer interest in the downtown redevelopment program. Often times, historic review commissions become entrenched in historic replication, attention on insignificant details and stand alone building concerns while losing sight of the value to the entire downtown brought about by the infusion of new investment dollars from the development community.

In contrast, the development community can often times assume that inclusion of any historic ornament on a building makes it historically appropriate. Frustration is certain to prevail as the two entities square off to defend their beliefs or platforms.

Much of the confusion can be removed from the process by clearly articulating the commissions true objectives, a minimum set of design & development standards and an acceptable process for applicants with maximum of a fourteen day no excuses decision turn around timeframe. Special zoning entitlements might be offered as an incentive to accomplish higher standard rehabilitation. Of particular concern in Powell is the constant struggle of finding a comfortable match between modern retailers' space demands with the small residential scale historic building stock in the downtown.

To this point, the commission must adopt acceptable and flexible guidelines on building renovations and additions to satisfy the retailer / developer demands.

Create a package of incentives and assistance programs for downtown property owners.

A combination of incentives and strict code enforcement to encourage upgrading and/or adaptive reuse of existing historic buildings in the downtown area should be utilized.

Implement a Facade Enhancement Program.

A facade enhancement program sponsored by the proposed Main Street organization or the city of Powell would be an excellent way to achieve dramatic improvements in downtown's appearance at relatively low cost. In some communities, grants are made available to a select number of downtown property owners each year. These grants are applied against the cost of enhancing their buildings' facades on a matching basis.

The grant funding pool for Powell could possibly be created from community development funds earmarked for economic development or physical improvements. Additional funding sources might include special impact fees attached to new development projects, or recycling of TIF monies collected after the maturity of the bond debt service.

Typically, these grants will cover fifty percent of the cost of the enhancement up to a fixed dollar amount of a few thousand dollars per facade. It is a tremendous incentive for properties and an excellent way to address such situations as covered over or painted facades and windows, holes from old signs, unattractive signage etc.

To encourage parking and access from behind, the rear facades of most downtown buildings should receive the same attention as the front facades.

Target select redevelopment properties in downtown for early redevelopment and catalytic impact.

- **S/E Quadrant boulevard and property investment (includes streetscape)**
- **N/ W Quad retail zone expansion into "Old Powell"**
- **Powell Center Conversion and expansion; Extension of Scioto Street**
- **West side of the Railroad**
- **Development of the N/E Quad rear property**
- **Streetscape expansion east along Olentangy**
- **Depot Street expansion**

Maintain the Historic District While Expanding the Design Review Territory Downtown

The overall goal of the historic district is to preserve the architectural design elements that give Powell its character. Non-historic buildings within or outside of the territory are as important in contributing to or detracting from the architectural quality of downtown. The overriding philosophy of the design review effort can be broken up into the following broad concepts:

a) Maximum retention of historic building[s], their material composition, details, vintage style and area context

b) Avoid the creation of false historic appearances
c.) Promote tasteful rehabilitation to buildings within the district [including historic & non-historic] or appropriate design for new in-fill projects that are approved for construction.
d.) Heighten the awareness of applicants concerning the importance of compliance and valued contribution to the integrity of the district.

Define a target area for district designation.
We recommend the entire vision plan be included in the broadened design review territory. This procedure outlines an area that will be the focus of heightened design review procedures.

Establish broader design and development standards for the entire territory to be used by the design review board.
Establish standards and a review process that support a positive, cooperative redevelopment process. Membership on the review board should be broadened to include select members of the development community, ex-officio professionals from outside the community, include one or more downtown property owners, merchants, and local design professionals. An effective review board would provide ideas and assistance and not be unnecessarily cumbersome or time consuming. Their goal would be to achieve an appropriate balance between historic and aesthetic considerations and the economic realities facing property owners and developers.

4) Improve the perception and reality of ample, convenient and available parking in the downtown area.

Parking is a top priority both because it was one of the biggest complaints of downtown merchants and community leaders interviewed for this report and because other initiatives to be recommended will depend upon satisfactory resolution of this problem.

Parking Availability: It appears that sufficient parking exists in the downtown area to serve current worker, resident, and visitor needs. However, more parking will probably be needed if revitalization efforts succeed in expanding the retail offerings, encouraging new developments and bringing in more visitors.

There is an ongoing perception that the downtown has inadequate parking for daily peak traffic. This perception is more likely the result of inconvenient or unrecognized parking rather than the lack of total spaces to serve current needs. Also, downtown visitors expect to be able to park in the immediate vicinity of their destination and are disappointed when they cannot.

Provide Quality Parking Lot Screening and Beautification: As part of a comprehensive downtown identity and signage program, clear and attractive signage should be installed in appropriate locations to direct visitors to public parking. Additional signage located in the public parking areas should clearly explain the zoned parking policy. Use singular logo signage to indicate all public-parking areas. Clearly identify private parking lots and service areas to prevent the necessity of towing. Lastly, without jeopardizing visual security, use low level screening such as masonry walls, wood or wrought iron fences and/or shrubs to minimize views into the interior of surface lots.

Strengthen Existing Lots and Add/Improve Parking Behind Buildings: To make the option of parking at the rear of buildings more appealing, consideration and support should be given to enhancing the appearance of the back sides of buildings visible from these lots and upgrading the appearance and lighting of passageways that lead from the lots to the street front. Sidewalks should be installed to lead the customer from rear parking areas to the front door. This would also support a strategy of reuse of upper levels of downtown buildings and the expanded retail areas. Rear entrances to downtown stores are normally not recommended since, for most retailers, this increases shrinkage risks and requires additional staffing.

Create Additional Lots: Opportunities should be explored for the creation of additional parking lots behind downtown buildings and/or on the edges of downtown. Several of these areas are currently underutilized lots and historically insignificant buildings that could be purchased and removed.

Wayfinding Signage System to Help Visitors Locate Parking: In an attempt to orient visitors to the parking lots and downtown destinations of importance, a high quality wayfinding signing system should be designed and integrated into the downtown area. Inspiration for the system should stem from the rural and railroad roots of Powell. Integration of these directions with the new Powell gateway entrance signing should result in an appropriate design direction.

A comprehensive vehicular and pedestrian directional/wayfinding system with a sign schedule defining exact locations and a list of destinations and attractions should be developed and implemented. This system should be city wide, colorful, comprehensive, and featuring the downtown as the town center.

The design of the signs should be developed with an environmental graphic designer who would work with the city's Public Service Department and state department of transportation. Tourism officials, the proposed Powell Main Street program, city parks and recreation representatives and the Chamber of Commerce could all be involved at the committee level.

The system should become part of a family of signage for the entire community. The consistency and quality should be thought through carefully and would demonstrate to visitors and residents alike the importance of Powell's humble beginnings, value of history and trust in the future growth of Powell.

Initiate a positive promotional campaign to encourage downtown workers to reserve streetfront parking for shoppers and visitors. Downtown workers should be encouraged to reserve street front parking for shoppers and visitors using a positive promotional campaign with a theme such as "It's important to you and your community."

Some creative downtowns have calculated the cost in lost sales of on-street spaces occupied by workers and place cards on the offending cars' windshields letting the drivers know how much they are costing themselves or their employers. These figures can amount to tens of thousands of dollars.

Plan for future parking needs: Additional parking will be required as more people come downtown to live, work, shop and to be entertained. Parking lot locations should be planned with principal parking areas behind buildings with attractive access to street fronts from alleyways and side streets. Public parking is available at the municipal lot and should serve as a convenient lot for downtown workers.

5) Dramatically improve the appearance of downtown.

The most successful retailers, restaurants and shopping centers pay close and careful attention to the appearance of their spaces – and with good reason. Consumers demand cleanliness, orderliness and an attractive environment in which to shop and dine. Most workers and residents value the same types of environments. Downtown's appearance could be improved dramatically and quickly by focusing on little things that make all the difference.

Establish a Higher Standard.

Downtown is, in a sense, the community's 'living room.' To be an appealing place to visit and linger, it needs to be clean, attractive and well maintained. Although downtown Powell has a quaint collection of modest historic buildings, its appearance suffers greatly from inconsistent maintenance of buildings, sidewalks, streets and streetscape elements. To become the attraction it has the potential to be and the source of pride its citizen's desire, a higher standard of maintenance, cleanliness and design must be established.

Expand Existing Streetscape.

The existing streetscape system should be expanded into the other areas of downtown to demonstrate a commitment to making downtown enhancements a priority.

Additionally, the planters (both ground and hanger type) should become a priority for an organization willing to adopt the responsibility to maintain these elements to the highest degree possible.
The streetscape system currently in place represents to the visitor the level of pride the community has in the downtown. Higher standards must be adopted.

Although the city does have a number of durable trash receptacles and benches, consideration should be given to eventually replacing them with a design that would be more reflective of the historic character of downtown. A program of public art could also be instituted. Many communities have successfully employed public art competitions to beautify areas of their downtowns.

Amend Building Design & Development Guidelines

To encourage renovations that are complimentary to surrounding buildings and the historic character of downtown, mandatory design guidelines should be amended and promoted as quickly as possible. An excellent resource to consider is the National Main Street Center's pamphlet "Keeping Up Appearances". Sample design guidelines are also available from Downtown, Ohio, Inc. and other sources.

Additionally, the design & development guidelines should address the acceptable standards for new in-fill buildings and mixed use developments.

Trying to respond to the development community's cry for standards that will allow larger buildings, acceptable expansions to existing buildings and less cumbersome review process, the design & development guidelines need to be creatively thought through to provide a comfortable fit between the historic residential scale of the existing downtown's context and the developer's market driven product.

Increase Storefront Activity

For decades, many successful downtowns have become shopping destinations because of their pedestrian focused environments. Outside dining or outside leisure enhanced businesses have helped to make this a reality. Downtown Powell can certainly capitalize from the benefits of this kind of marketing "sizzle" within the district.

6) Create higher density mixed-use in-fill projects with lower level retail and entertainment and upper story office and residential uses.

Where possible, look to develop higher density in-fill product to satisfy the demand for modern retail space and unique housing offerings for the Powell market. Area developers suggested through a real estate roundtable gathering that in order to keep up with area demands for available retail and office space and to bring a different type of housing product to the consumer, larger in-fill new construction should be built in downtown Powell.

Referring to an earlier section of these recommendations, design & development guidelines crafted with the contextual integrity of downtown Powell in mind will help to guide the in-fill development to the correct solution.

Promote downtown Powell as an exciting, convenient, intimate place to live among target population groups including young professionals and aging local residents. Downtown Powell, with its historic architecture, walkable streets and country charm offers a tremendous opportunity to create a unique and appealing living environment. Retirees and young professionals could all be candidates for newly constructed mixed-use projects with upper floor housing in downtown Powell. There is also an opportunity in downtown Powell to create 'workforce housing'.

Experiences in other communities have shown that office and retail development will follow the development of a meaningful housing component in an attractive, historic neighborhood. Powell's future vision should include a vibrant downtown that is a local draw from affluent residential neighborhoods and sub-divisions surrounding downtown. An emphasis on downtown housing will ultimately promote downtown retail and through continued planning and development enhance the global image of downtown.

7) Retain and strengthen existing retail establishments in downtown.

As mentioned previously, downtown Powell has many assets it can build upon. Included among these are the historic building stock, city government facilities, the new Village Green park currently under construction and a limited number of destination retailers.

Some retailers are struggling to make it. However, many have been in the community for generations. It is essential that the community actively work to maintain these businesses, governmental offices, churches, and financial institutions.

Retain Downtown's Anchor Businesses.

Too often energy is put into attracting additional business establishments while neglecting those significant businesses that already exist. It is much easier to build on an existing foundation than to start from scratch.

Downtown's destination retailers and other anchors are part of what makes it special and every effort should be made to retain them.

Strengthen Existing Retail.

For retailers, incremental increases in sales generally have a greater than proportional impact on their profits. They typically have a significant percentage of their income committed to fixed expenses such as rent, fixtures and equipment and, to a certain extent, wages and benefits. These expenses remain whether the retailer sells anything or not. Once fixed expenses have been covered, though, a greater percentage of sales can be transferred to the bottom line. In other words, higher sales usually mean a higher profit percentage.

For property owners, the impact of higher sales is more stable tenants and the potential for higher rents. Retailers are or should be more concerned about rents and other occupancy costs as a percentage of their sales than what the actual dollar amount of their rent is. As a general rule, total occupancy cost (rent, utilities, taxes,common area maintenance, etc.) of greater than fifteen percent of sales is an indication of a retailer in trouble. Less than fifteen percent is normally acceptable, with total occupancy cost of around ten percent of sales usually indicating a very healthy retailer.

What this means for the property owner is that every dollar of additional sales a retailer can generate translates into at least a ten-cent potential in increased rent for the space occupied. Increased sales are in both the retailer's and the property owner's best interest.

As mentioned earlier, the downtown has a limited number of retail operations that are considered mini-anchors. The obvious retailing focus has been the antique shops. Each of these operations has its own appeal and draws people into the downtown area specifically to patronize its business from far beyond the Columbus region.

Gradually add appropriate new retail in downtown-Recruitment Strategies:
Active Recruitment/Niche Retailer Identification

Prospecting for successful, small retailers in nearby business districts or downtowns, who might be interested in and capable of additional locations, would be an excellent way to develop a list of prospective tenants. Visits from the Powell Main Street Manager along with successful downtown Powell merchants to assist in recruiting merchants from other communities can be a very effective strategy.

Attend retailing industry events and conferences to identify retailers that might be looking in the area. An excellent one is held in the fall of every year in Chicago. It is the Midwest Regional Deal-Making session of the International Council of Shopping Centers (ICSC). More and more chain retailers are exploring urban markets and developing new formats to target them.

Working with area developers to help communicate the leasing / retail direction for Powell will provide insight into the overall re-positioning strategy for downtown.

Location of Retail: To the extent possible, concentrate retail in the downtown's core area, on the first floor and keep it contiguous. The amount of first floor retail space in downtown has been declining over the past several decades. Yet, the boundaries of downtown Powell have remained the same. Retail uses spread all over the downtown dilute the impact and image of downtown as a place to shop, eat, and relax. First priority should be given to expanding the retail territory off of Olentangy into Old Powell along Scioto Street. Additionally, extending Scioto Street from Liberty Street to Grace Drive will provide a unique opportunity to re-invent Powell Center and properties along Grace Drive into desirable retail locations. Where it is necessary to locate office space on the first floor, it should be placed in buildings at the fringes of downtown.

Types of Stores: Downtown must focus on 'destination' retail – special offerings and products unique to the area and differentiated from the typical suburban chain retail located south of the downtown. Avoid retail categories that compete directly with stores in the existing centers. Regardless of the store type, successful downtown merchants will offer superior customer service and product knowledge, unique specialty items, convenience, a pleasant atmosphere, and support for community causes.

Reference is made to the market research section of this document to focus on the retail categories our team feels should be concentrated on as an out growth of the research into area demographics.

8) Improve vehicular and pedestrian access, flow and environments.

As Yogi Berra was purported to have said, "Nobody goes there any more because it is too crowded!" Most retailers, especially the types of specialty stores one typically finds in downtown, depend on traffic driving by and walking by their stores to generate interest and store visits. Busy streets and sidewalks communicate success and vitality. The key concerns in downtown should be safety, ease of understanding and access and steady, even if slow, progress.

In an urban environment, cars, buses, pedestrians and bicycles all need to be taken into consideration.

Re-visit designated left turn lanes at the Olentangy Street & Liberty Street intersection

Downtown Powell presently has an extreme traffic congestion dilemma brought on primarily because of the immence amounts of traffic using Powell Road [Olentangy Street] as an east/ west pass-through route. This condition deteriorates even further when one introduces the impact of the train crossing to the west of downtown.

Although earlier downtown studies produced turn lane options for the intersection under review, town leaders and historic district commission representatives opted for streetscaping instead of turn lanes that would sacrifice sidewalk circulation space for the construction of turn lanes.

It is our opinion that complementary east and west bound left turn lanes from Olentangy Street onto Liberty Street would provide a greater good to the pedestrian and vehicular friendliness of downtown than the increased sidewalk width and gazebo park.

Our rationale is simply to say that less frustrated drivers and increased traffic movements should provide more opportunities for pedestrians to walk the streets without heavy volumes of traffic backed up along these key shopping streets.

9) Create economic development mechanisms to encourage private reinvestment and development into downtown Powell.

After initial strategic planning is completed, communities begin to prepare for redevelopment implementation. With this step comes the identification of financial tools and incentives to encourage private investment to commence. These financial incentives are designed to lessen the risk for those "early-in" developers and attract others like them to follow thus building more confidence in the downtown as an attractive financial investment.

Powell can create several such mechanisms which will help to build confidence in the downtown as a great place to develop and to send a clear message to the development community that the City of Powell and the Powell lending community is firmly behind the continual improvements and redevelopment of the downtown.

Create a Community Reinvestment Act District

The U.S. Congress passed the Community Reinvestment Act (CRA) in 1977 to encourage depository institutions to meet the credit needs of lower income neighborhoods. The CRA was built on the simple proposition that deposit-taking
banking organizations have a special obligation to serve the credit needs of the communities in which they maintain branches. At the time of the CRA's passage, banks and thrifts originated the vast majority of home purchase loans. The CRA's initial focus on areas where CRA-regulated institutions maintained branches made sense because restrictions on interstate banking and branching activities were limiting the geographic scope of mortgage lending operations. Today, the CRA continues to provide significant incentives for CRA-regulated institutions to expand the provision of credit to lower income and/or to minority communities where those institutions maintain deposit-taking operations.

CRA requires banks to be rated on their track record of making loans, investing in community development, and providing financial services to low and moderate-income neighborhoods and individuals. Banks that lend to businesses with revenues of $1 million or less or make loans through the certified development companies of the Small Business Administration receive automatic CRA credit for the economic development impact of those loans. Other business loans of up to $1 million, regardless of the size of the business, are eligible for CRA credit if the business is located in a low- and moderate-income neighborhood. Banks also receive credit for stimulating commercial revitalization through their community development lending.

To help implement the CRA across the United States, the National Trust for Historic Preservation formed a joint venture with Bank of America to stimulate community development investments. The $25 million Banc of America Historic Tax Credit Fund, which is managed by the National

Trust Community Investment Corporation (NTCIC), the for-profit subsidiary of the National Trust, uses federal and state tax credits to provide equity ranging from $500,000 to $5 million for rehabilitation projects identified by the National Trust's Heritage Property Services.

Further, in March 2003, the NTCIC received a $127 million allocation of New Markets Tax Credits to expand the Main Street program in lower income Through the Community Reinvestment Act (CRA), financial institutions can be a major catalyst for neighborhood commercial district revitalization.*

Working with area lenders, the City of Powell can create a designated CRA target area which will designate the area of focus for local lenders to provide capital for real estate investment while gaining points toward their CRA requirements.

Please note that the creation of a CRA may eliminate the ability to create a TIF district within the same geographic boundary. Careful thought should be given to the benefit and leverage ability of each of these concepts before establishing either.

* Main Street News; October, 2003

Create a Community Improvement Corporation

"Community development corporation", a not-for-profit corporation whose board of directors is composed of businesses, civic and community leaders, and whose primary purpose is to encourage and promote the industrial, economic, entrepreneurial, commercial, and civic development or redevelopment of a community or area, including the provision of housing and community development projects that benefit low-income individuals and communities.

CDC's are locally controlled, non-profit corporations existing for the purpose of pooling and generating resources to be used to stimulate economic development within a certain geographic territory. The organization can be multi-territorial, community wide or specific to a targeted district.

CDC's typically involve themselves in economic development and commercial business projects within it's service area as well as and/or housing and neighborhood revitalization.

CDC's can become involved in a variety of activities to assist in the development of the target area it serves. The CDC can serve as a property acquisition agent for the municipality it serves. It can develop real estate solely or in partnership with a development partner. It can act as a conduit to acquire and transfer property to property owners or developers within the designated target area. These are a few examples of the value a CDC brings to downtown development.

Some communities have taken a different, yet complimentary, approach to the development corporation idea and created a private "For-Profit" limited liability corporation. In effect, this LLC becomes a developer with a primary focuson the territory of interest. Unlike the not for profit CDC, the LLC is not restricted to real estate development activities within a geographic target area but can be formed to serve a territory within it's own by-laws.

Benefits to this approach include a risk reduction in downtown development through mass involvement of several property owners, developers and investors. In other words; spreading the risk of the development over several partners.

Utilize Available Financial Assistance and Incentives Programs

Programs, in addition to those already discussed, that could be considered to provide incentives and assistance for implementation of the above recommendations include:

Emergency Building Repair Assistance: A program of assistance for emergency repairs to existing buildings would help to prevent further deterioration. Several downtown buildings suffer from a lack of maintenance and deteriorating conditions. Continued deterioration may make their eventual rehabilitation difficult or prohibitively expensive. These buildings are an important part of what makes downtown special and are also the economic engine that will drive downtown revitalization. A program needs to be put into place to assure sufficient repair of these existing buildings to prevent further deterioration. Some combination of strict code enforcement and financial assistance or incentives should be put in place to address this situation.
Establish a Storefront Renovation Program: The objective of this program is to rehabilitate and upgrade downtown commercial/retail buildings. The program is designed to offer property and business owners low interest loans or grants, and personalized design and technical assistance.

Community Development Block Grants: With changes in the city's federal designation, these grants could be applied to building and infrastructure improvements, although many property owners view the restrictions that come with them as not worth the price. Several federal and state programs are available that could be sources for at least a portion of the funding for green space additions or improvements.

Low Interest Loans: Local financial institutions could be approached to jointly create a low interest loan pool for building stabilization, facade enhancement, and even re-development and new construction projects located in the downtown.

Micro-Loan Program: Develop a micro-loan program with a maximum of perhaps $5,000 per loan for downtown merchants and other businesses to encourage them and make it easier for them to make improvements in their stores or businesses.

TEA 21 Grants: Explore the potential for use of TEA 21 grants through the Ohio Department of Transportation for recommended transportation related enhancements. The Ohio Department of Natural Resources also offers grants that could be of use in funding such things as bikeways, pocket parks, etc.

Create a TIF District

Tax Increment Financing (TIF) is a redevelopment tool authorized by State statue and used by cities and development authorities to finance certain public redevelopment costs. Projects financed with TIF must serve a public purpose such as redeveloping blighted or underutilized properties, rehabilitating publicly owned non-municipal structures, relocating occupants, and constructing public improvements.

When a TIF district is established, the tax capacity of the properties located within the district is "frozen". For the district's duration, which varies depending on the type of district, the property taxes resulting from any increase in the tax capacity above the frozen level are available to Powell or the proposed Main Street organization to finance public project costs. Property taxes generated from the "frozen" tax capacity continue to be paid to the various tax jurisdictions.

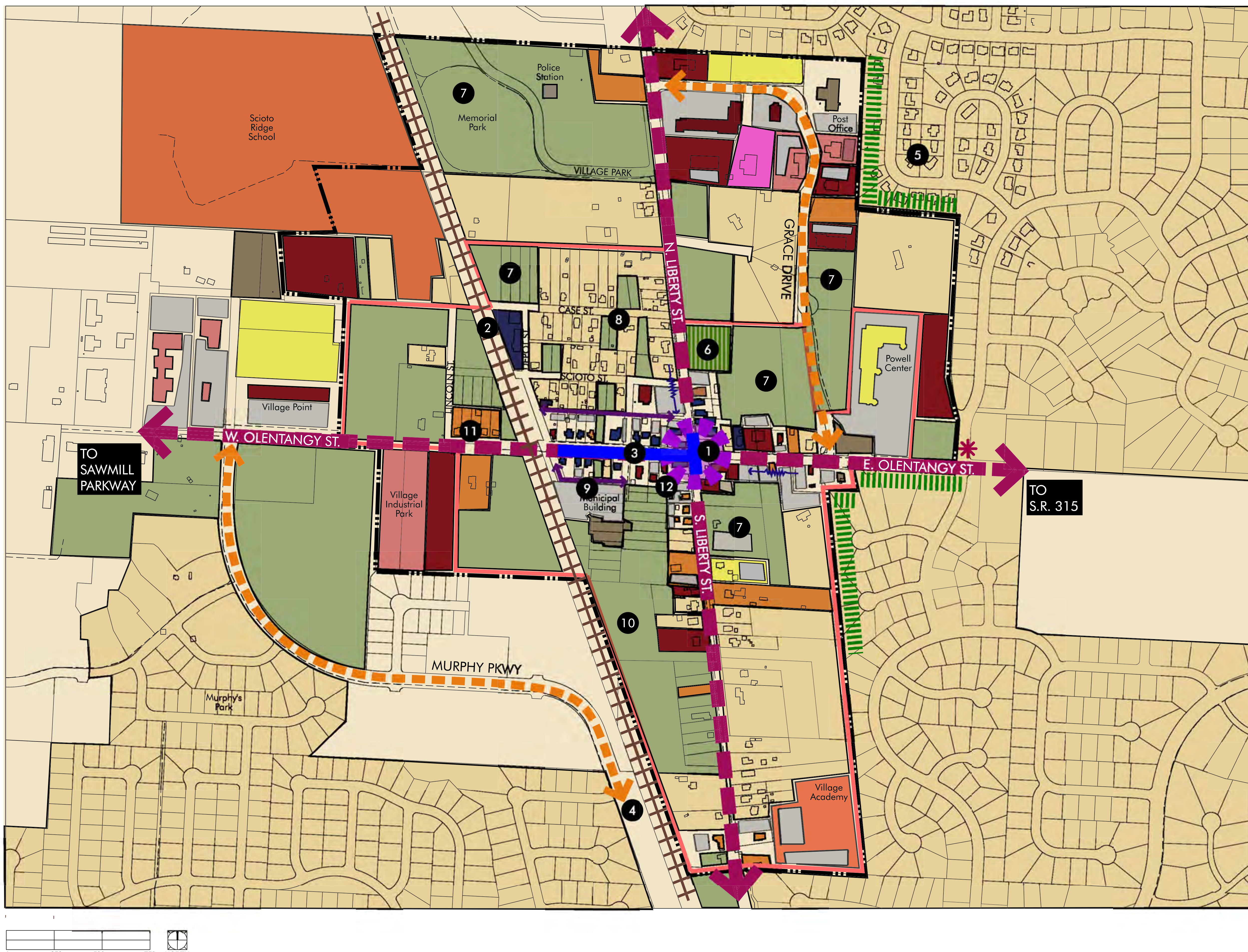
Ultimately, TIF could grant Powell and the proposed Main Street program with the ability to proceed with revitalization activities that the private sector is unwilling or unable to undertake. By using TIF, these entities have tools for: recycling infrastructure, enhancing the tax base, creating and retaining jobs, reclaiming Brownfields (polluted land), providing a broad range of housing opportunities, and enhancing district commercial enterprises.

Appendix

Best Practices
Analysis Map
Traffic Analysis

DOWNTOWN POWELL REVITALIZATION PLAN

ANALYSIS MAP

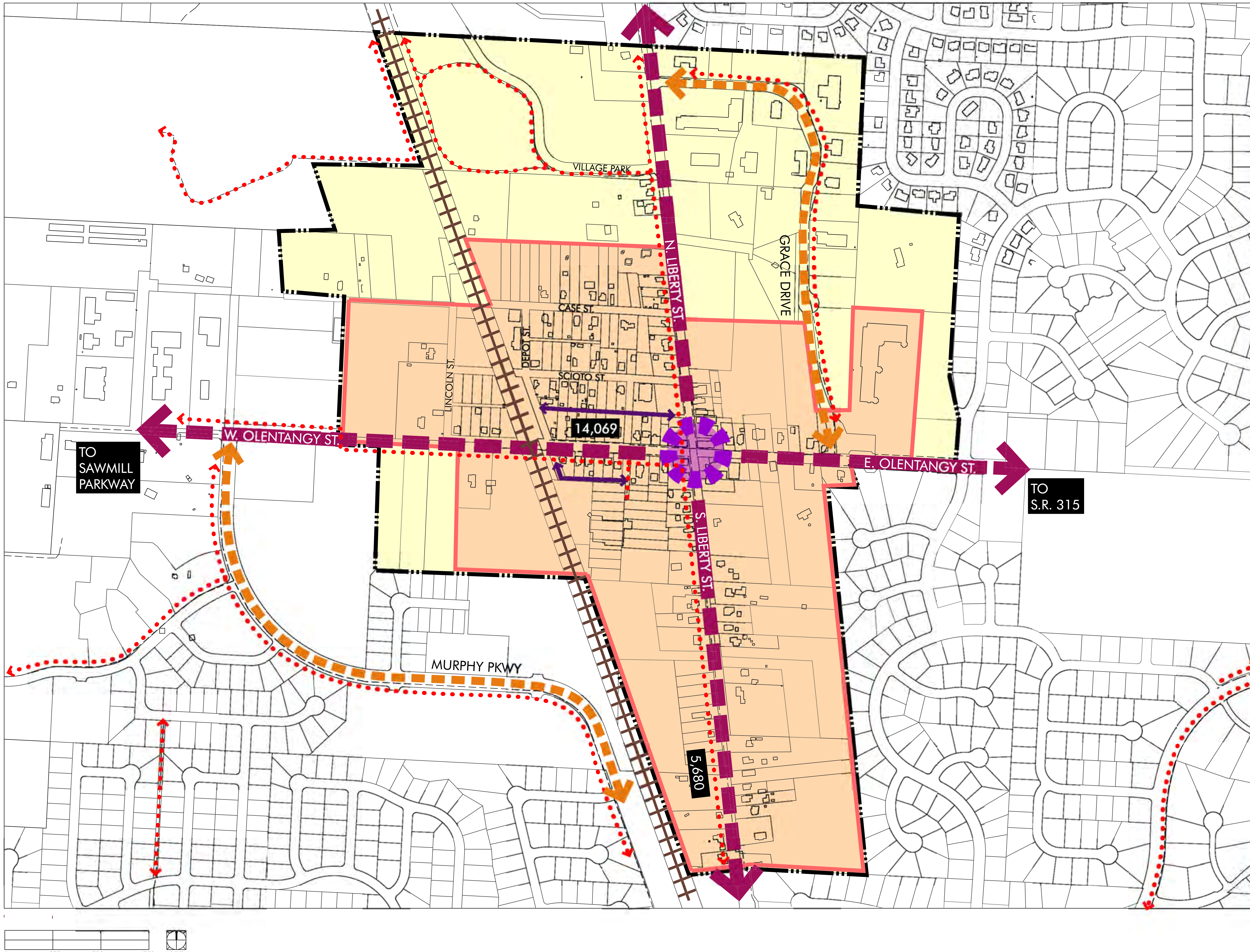


LEGEND

- Major Intersection
- Major Access Road
- Secondary Access Road
- Surface Street
- Alley
- Railroad
- Study Area Boundary
- Historic District Overlay Zone
- Existing Streetscape
- Non-friendly Pedestrian Access
- No Linkage to Downtown Core
- Contributing Residential / Non-Contributing Residential
- Office
- Civic / Institutional
- Specialty Retail
- Commercial
- Greenspace / Open Space / Vacant
- Historic Cemetery
- Off-street Parking
- Warehouse
- Church
- Educational
- Mixed-Use
- Industrial
- City of Powell Signage

Powell

TRAFFIC ANALYSIS



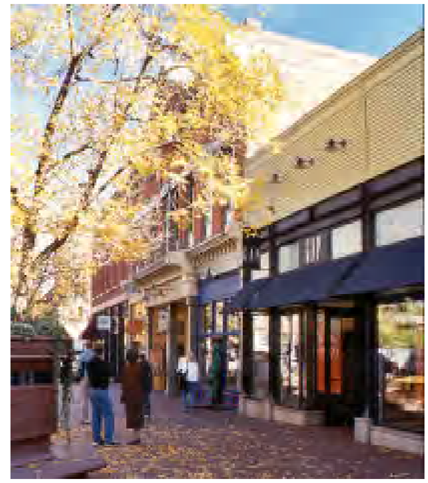
LEGEND

- Major Intersection
- Major Arterial Road
- Secondary Access Road
- Surface Street
- Alley
- Railroad
- Bikepath
- #### Traffic Count
- Study Area Boundary
- Historic District Overlay Zone

Best Practices

The photo inventory on the following pages depicts best practices in retail, residential, and civic architecture, and streetscape amenities.

Retail Architecture




P.K. O'RYAN'S RESTAURANT & PUB


CAMERA SHOP

Note: The image on this page was provided by the City of Powell.


CITY HALL


UPTOWN
Parking


PUBLIC
PARKING


Village