

APPENDIX

- A EXISTING CONDITIONS
- B SUMMARY OF ISSUES AND OPPORTUNITIES
- C MARKET ANALYSIS
- D COMMUNITY ENGAGEMENT
- E CASE STUDIES

APPENDIX A - EXISTING CONDITIONS

Overview

This report provides an analysis of existing physical conditions in the Eisenhower West Small Area Plan area. This analysis defines the physical situation “on the ground” in the study area, and identifies issues to be addressed, and opportunities to be explored. This understanding forms the basis upon which conceptual options will be developed in later phases of the process. This analysis will also become part of the Final Report which will be completed at the end of the planning process.

Site History and Archeology

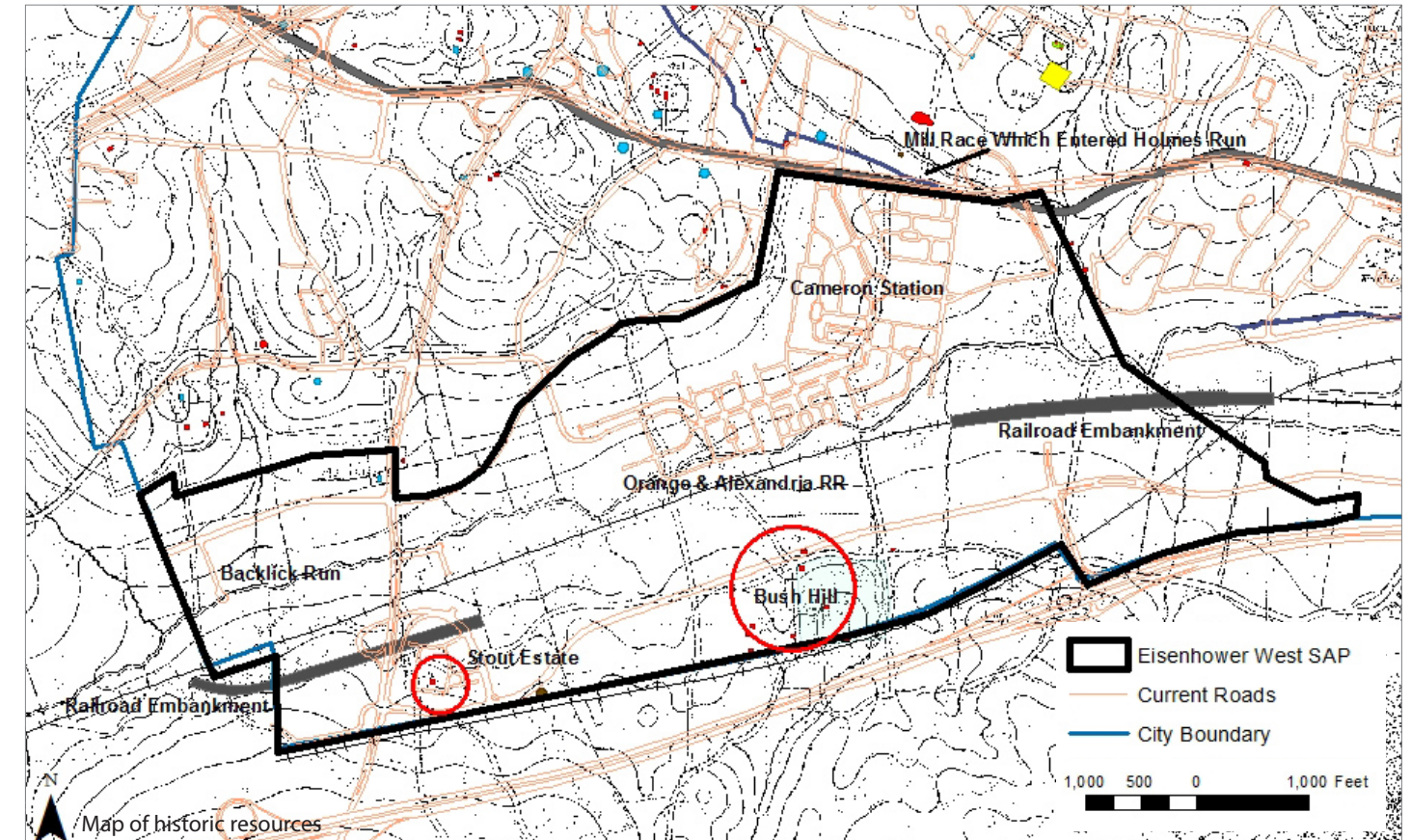
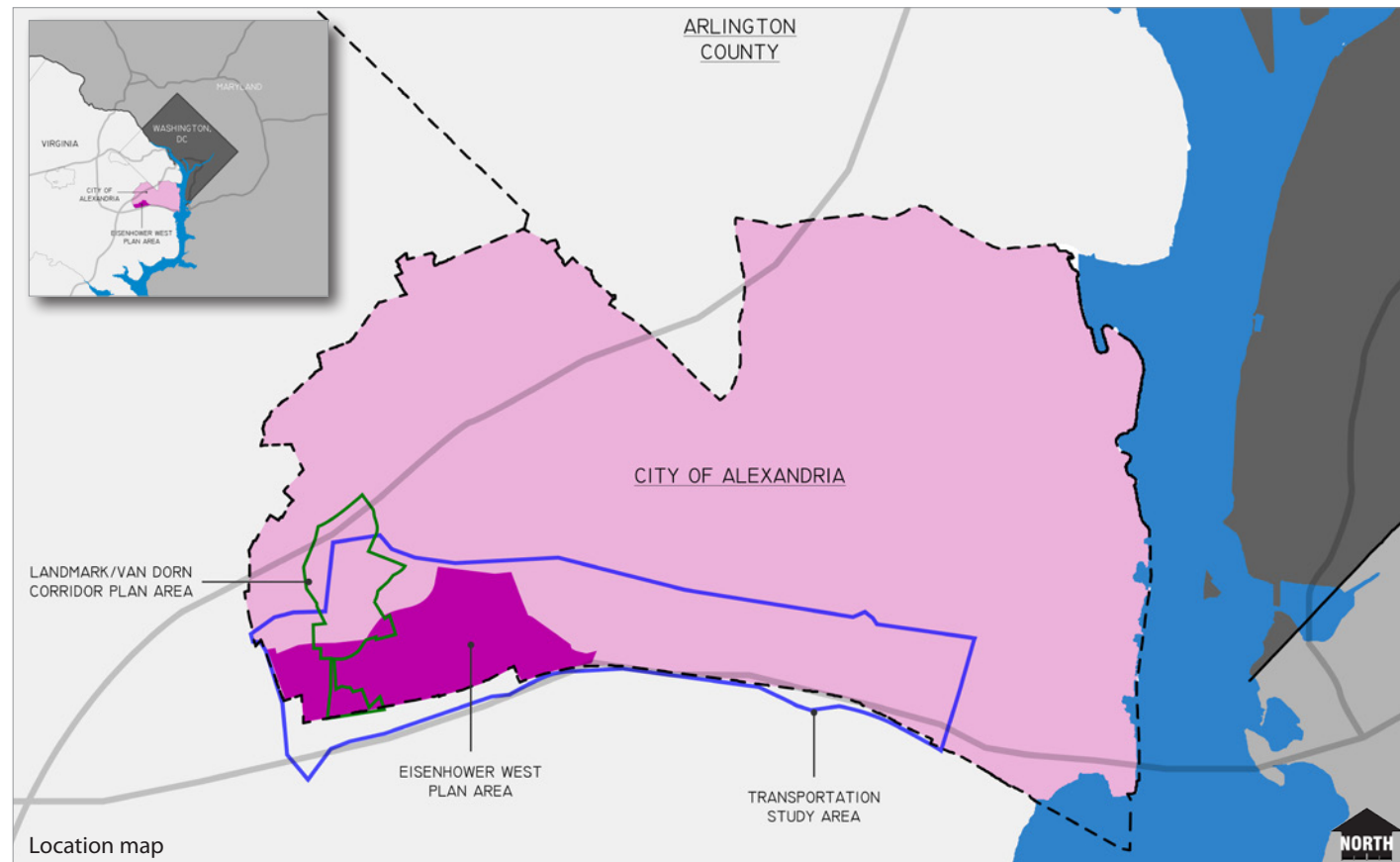
The early history of Eisenhower West planning area goes back approximately 8,500 years. The

two existing streams - Holmes Run and Backlick Run - were natural resources likely to have been used by early hunter-gathers and Native Americans living and roaming throughout the area. Use of the streams could have included the plants and animals, but also the collection of cobbles, primarily quartz and quartzite, which would have been used to manufacture stone tools. In 1649, the land was granted to supporters of King Charles II, and, by the end of the 17th century, came under the control of Lord Fairfax who issued grants for large tracts of land. During the 17th and 18th centuries, the area was divided up by the landowners, and plantations were established, on which African Americans worked as slaves. The foundations of the house at Bush Hill, a 354 acre estate, still exist

at approximately 5000 Eisenhower Avenue. Several grist mills operated in the area. Portions of Cloud’s Millrace are preserved in place along Holmes Run.

In the early 19th century, Little River Turnpike (Duke Street) was established as a toll road. The Orange and Alexandria Railroad was established in the 1850s, parallel to Duke Street. During the Civil War, a Union camp was set up near the planning area and observation balloons were launched to observe the movements of confederate troops. The area was annexed to Alexandria in 1952. In recent years, the Eisenhower West planning area developed rapidly primarily with light industrial and warehouse uses, taking advantage of proximity to the railroad, but also with office buildings, and some

residences. The Van Dorn Metrorail Station opened in 1991, on the Blue Line. In 1992, the Cameron Station neighborhood was developed, replacing the Cameron Station military installation.



Existing Area

The Eisenhower West Small Area Plan area consists of approximately 620 acres of land located in the southwestern corner of the City of Alexandria along its border with Fairfax County. The plan area is bounded by the Blue Line Metrorail and Amtrak rail tracks to the South (including the Van Dorn Metrorail Station); the Alexandria/ Fairfax County border along to the West, McConnell Avenue/ S. Pickett Street/ Duke Street to the North, and Holmes Run and Cameron Run to the East. The plan area is bisected by Backlick Run, and the CSX/ Norfolk-Southern railway lines, and contains several large parks.

Eisenhower West Demographics

- Population - 4,907 residents
- 297% overall growth in residents between 2000 and 2014
- 8,418 jobs
- Contains 32% of all wholesale trade jobs within City of Alexandria
- 69% of households have annual incomes greater than \$100,000
- 27% of households are between the ages of 25-34
- 40% are single-person households
- Number of Students enrolled in Sam Tucker in 2014: 750
- Eligible students living in the Sam Tucker attendance area: 1,050
- Eligible students not accommodated in Sam Tucker: 300

Refer to Market Analysis for additional demographics

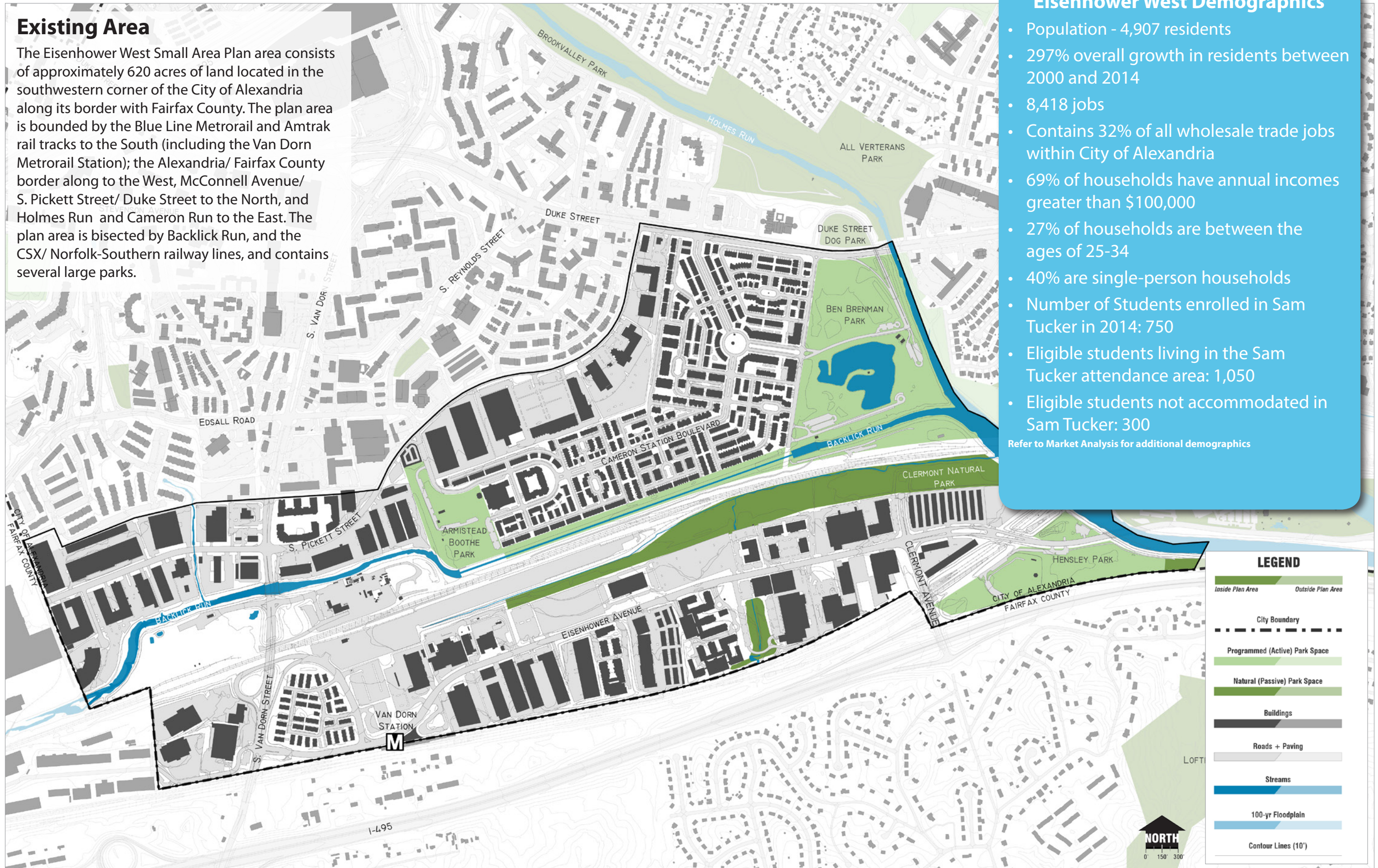


Figure - Ground

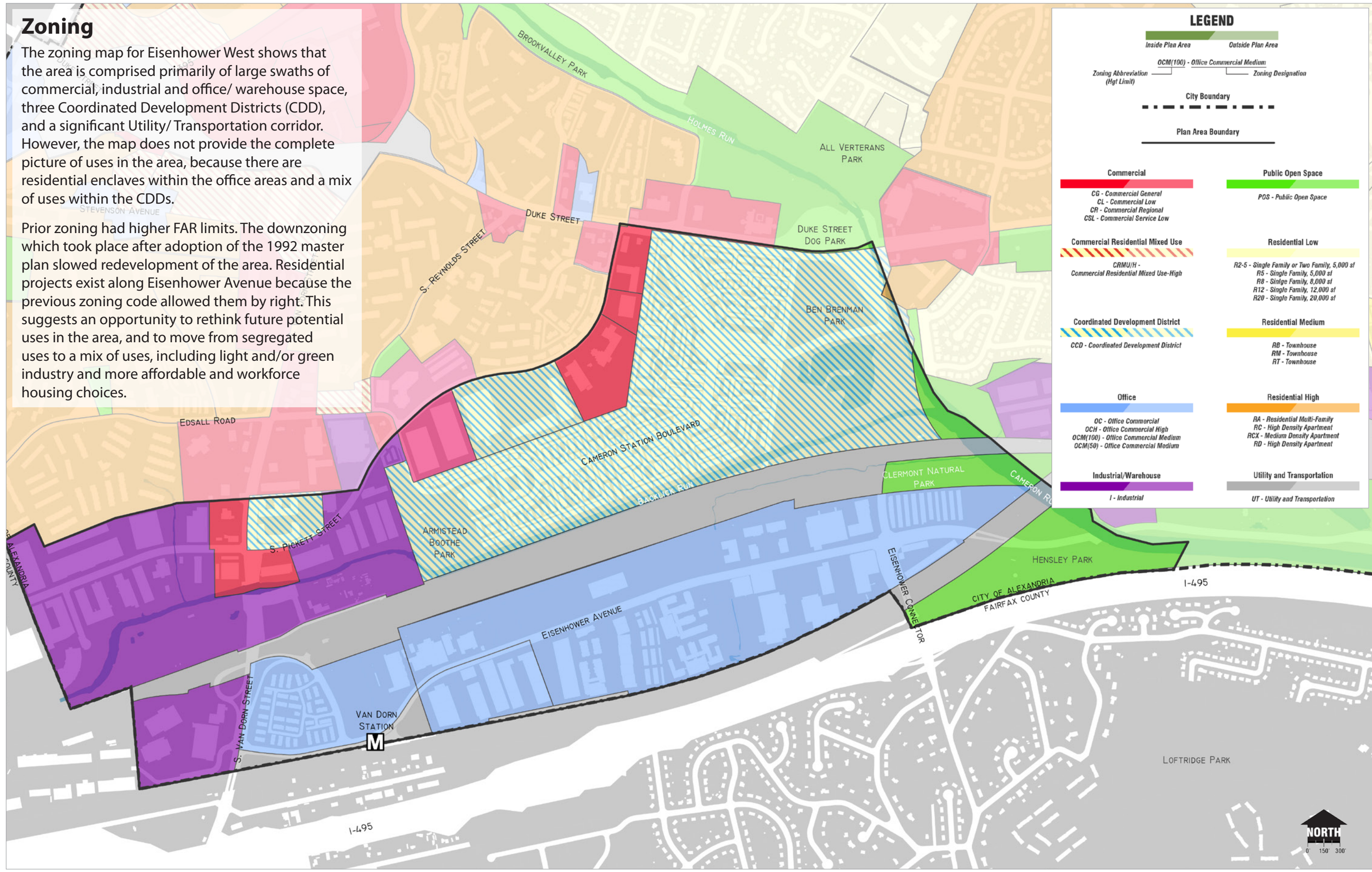
The “figure-ground” is a type of analytical urban design diagram that goes back several centuries. It is used to understand patterns of urban form by looking at the relationship of solids (built form, shown in black), to voids (everything else). In this diagram, the collection of solids reveal the generally haphazard nature of urban development in the plan area. The large void in the middle of the area represents the gap in the urban fabric created by the railway right-of-way and the natural resources and park areas that are a key characteristic of the area. The notable exception to this is the strong urban fabric of Cameron Station, where the buildings, open spaces, and street network are well-defined.



Zoning

The zoning map for Eisenhower West shows that the area is comprised primarily of large swaths of commercial, industrial and office/ warehouse space, three Coordinated Development Districts (CDD), and a significant Utility/ Transportation corridor. However, the map does not provide the complete picture of uses in the area, because there are residential enclaves within the office areas and a mix of uses within the CDDs.

Prior zoning had higher FAR limits. The downzoning which took place after adoption of the 1992 master plan slowed redevelopment of the area. Residential projects exist along Eisenhower Avenue because the previous zoning code allowed them by right. This suggests an opportunity to rethink future potential uses in the area, and to move from segregated uses to a mix of uses, including light and/or green industry and more affordable and workforce housing choices.



LEGEND

Inside Plan Area Outside Plan Area

OCM(100) - Office Commercial Medium

Zoning Abbreviation (Hgt Limit) Zoning Designation

City Boundary

Plan Area Boundary

Commercial	Public Open Space
CG - Commercial General	POS - Public Open Space
CL - Commercial Low	
CR - Commercial Regional	
CSL - Commercial Service Low	
Commercial Residential Mixed Use	Residential Low
CRMU/H - Commercial Residential Mixed Use-High	R2-5 - Single Family or Two Family, 5,000 sf
	R5 - Single Family, 5,000 sf
	R8 - Single Family, 8,000 sf
	R12 - Single Family, 12,000 sf
	R20 - Single Family, 20,000 sf
Coordinated Development District	Residential Medium
CCD - Coordinated Development District	RB - Townhouse
	RM - Townhouse
	RT - Townhouse
Office	Residential High
OC - Office Commercial	RA - Residential Multi-Family
OCH - Office Commercial High	RC - High Density Apartment
OCM(100) - Office Commercial Medium	RCX - Medium Density Apartment
OCM(50) - Office Commercial Medium	RD - High Density Apartment
Industrial/Warehouse	Utility and Transportation
I - Industrial	UT - Utility and Transportation

Building Use

This diagram shows the actual uses building-by-building, and the layouts/ arrangements of the buildings relative to one another. Most commercial and industrial/ warehouse buildings are surrounded, or fronted, by surface parking, thereby not fully leveraging the land they are on. Residential along Eisenhower Avenue is squeezed tightly into islands and fenced off or otherwise separated from surrounding uses.

Issues

- Islands of residential along Eisenhower Avenue
- Segregated uses, very little is mixed-use
- Disconnected and inwardly-focused industrial/ warehouse uses
- Warehouse uses are on long narrow parcels make individual redevelopment difficult

Opportunities

- Create one or more multi-use communities that include employment opportunities, residential capacity and destinations that take advantage of the proximity to the Metro Station and support a 24/7 environment
- Increase diversity by adding new residential, including affordable housing
- Create better connections between residential areas to each other and to surroundings
- Better connect industrial uses so they are not barriers



Building Age

Most of the the industrial/ warehouse buildings on the western portion of the plan area were built in the 1960s, while commercial and industrial/ warehouse buildings along Eisenhower date from the 1970s and 1980s. With a few exceptions, including the Trade Center along South Pickett Street, the majority of recent buildings in Eisenhower West- constructed in the 1990s and 2000s - are residential, signaling the strong market for residential development.



1950s and 60s warehouses along S. Pickett St.



Trade Center 1990s



Cameron Station residential 1990s and 2000s



Summer's Grove 1990s



1970s and 1980s warehouses along Eisenhower Ave.



Issues

- Aging existing building stock in the plan area
- Newer uses are predominantly residential and continued residential construction threatens to reduce the diversity of uses in the plan area

Opportunities

- Replace aging buildings with new, sustainably designed, higher density uses to leverage the location, amenities, infrastructure in the plan area
- Build diverse new uses including commercial and retail to support existing residential and the potential future residential market.
- Support future commercial uses including Victory Center

LEGEND

City Boundary

Plan Area Boundary
—————

Year Built

Inside Plan Area

1800 — 1950 1960 1970 1980 1990 2000

Outside Plan Area



Land Ownership

Most of the land in Eisenhower West is privately owned with the exception of WMATA-owned land around the Van Dorn Metro Station, City parks and some municipal properties along Eisenhower Avenue. Aside from the tight-knit residential developments in the plan area, land is very underutilized due to large-footprint, low-rise buildings and surface parking. Opportunities exist to densify and leverage land resources and create a more lively urban realm with new plazas, parks and public spaces.

- ### Issues
- Underutilized parcels of land
 - Lack of small locally-serving public spaces and parks
 - Barriers to cohesive redevelopment including numerous property owners in the plan area

- ### Opportunities
- Leverage land resources with higher density development where appropriate
 - Assemble properties to create large, well-designed mixed use development parcels
 - Integrate new public spaces such as parks and plazas with new trails and development
 - Create a new environment that is supportive of business needs, the residential environment, and citywide needs for green and recreational space



Connectivity

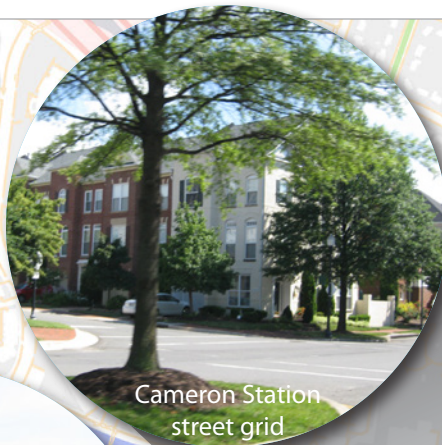
The presence of numerous east to west oriented barriers and the resulting lack of good north-south connectivity is a major defining characteristic of the Eisenhower West study area. Van Dorn Street is high-speed, high-traffic, and not designed with the pedestrian in mind, particularly in the area bridging the train tracks. Eisenhower Avenue has the potential to be a more pedestrian-friendly and pedestrian-scaled roadway. The train tracks north and south of Eisenhower Avenue remain the major barrier to creating a connected and cohesive urban realm.



Van Dorn Street bridge



Train Tracks divide north and south



Cameron Station street grid

- ### Issues
- CSX/ NS tracks are a major barrier to connectivity between northern and southern parts of the plan area
 - WMATA tracks and 495 are a major barrier to connectivity with Fairfax County
 - Few cross streets along Eisenhower Avenue create long blocks not scaled to pedestrians
 - Minimal use of bicycles along Eisenhower despite its being an official bike route

- ### Opportunities
- Create better connections between areas to one other, to other properties along the Eisenhower Avenue corridor, and to the rest of the City
 - Create improved north-south vehicular, transit, pedestrian, and bicycle connections, including the future multimodal bridge, across tracks where possible
 - Create a pedestrian-scaled street grid along Eisenhower Avenue
 - Rethink Eisenhower Avenue, Pickett Street, and Van Dorn Street to better accommodate bicyclists and pedestrians



LEGEND

- Plan Area Boundary
- Interstate Highway
- Major Roads
- Bike Lanes/Paths
- Sidewalks
- Rail Lines
- Barriers
- True 10 Min Walking Shed



Van Dorn Metro Station



Eisenhower Avenue streetscape



Transit

Eisenhower West is generally well-served by transit including the Van Dorn Metrorail Station and bus lines along Eisenhower Avenue, Van Dorn Street and South Pickett Street. This diagram shows that half of the Eisenhower West area- and part of Fairfax County to the south- is within a 1/2 mile (10 minute walk) radius, of the Van Dorn Station, yet the station continues to be one of the most underutilized stations on the Blue Line in terms of ridership. The true 10-minute walking shed from the metro highlights how insufficient connectivity and physical barriers, such as train tracks, limit the pedestrian, in contrast to the overlaid 1/2 mile radius.

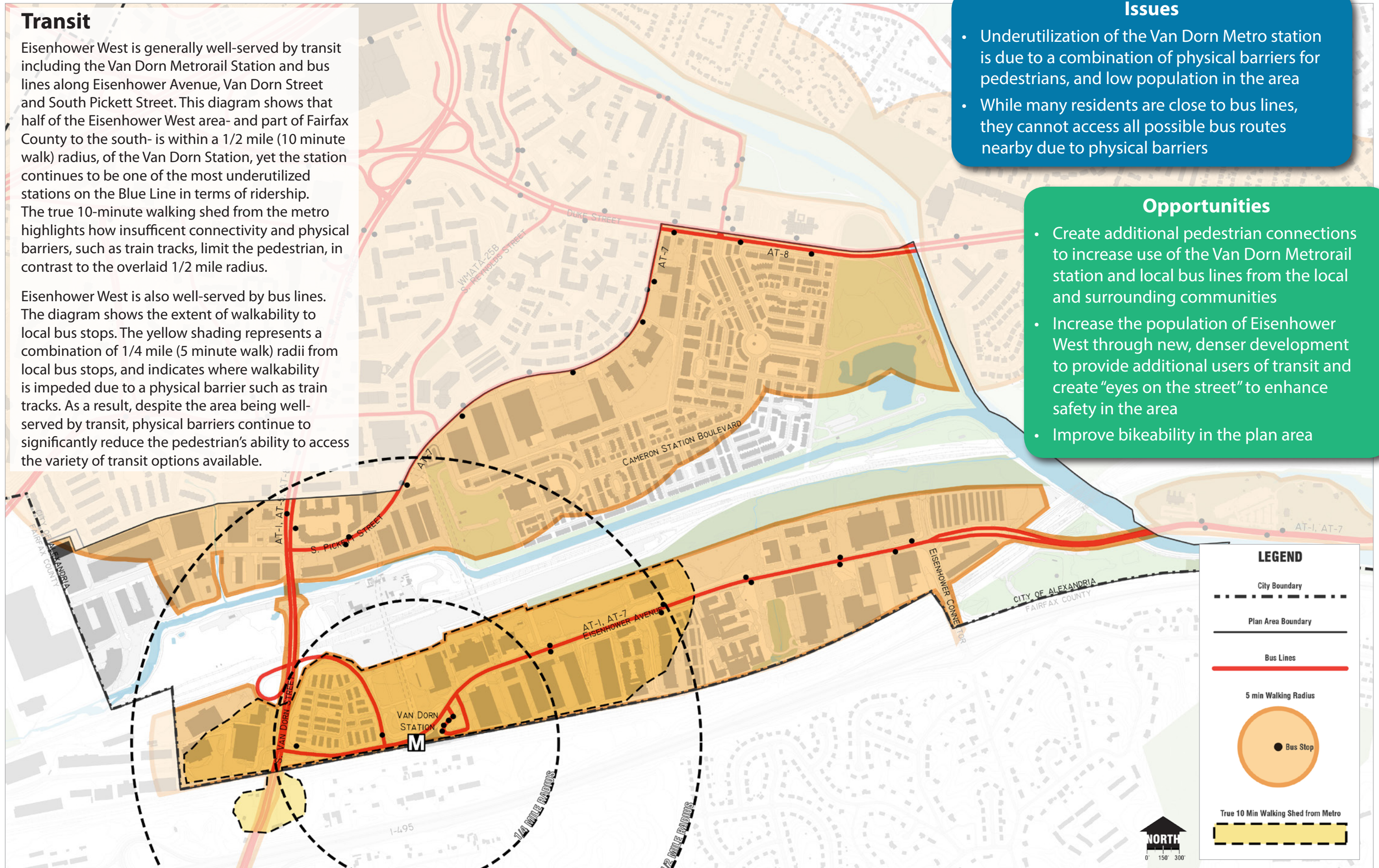
Eisenhower West is also well-served by bus lines. The diagram shows the extent of walkability to local bus stops. The yellow shading represents a combination of 1/4 mile (5 minute walk) radii from local bus stops, and indicates where walkability is impeded due to a physical barrier such as train tracks. As a result, despite the area being well-served by transit, physical barriers continue to significantly reduce the pedestrian's ability to access the variety of transit options available.

Issues

- Underutilization of the Van Dorn Metro station is due to a combination of physical barriers for pedestrians, and low population in the area
- While many residents are close to bus lines, they cannot access all possible bus routes nearby due to physical barriers

Opportunities

- Create additional pedestrian connections to increase use of the Van Dorn Metrorail station and local bus lines from the local and surrounding communities
- Increase the population of Eisenhower West through new, denser development to provide additional users of transit and create "eyes on the street" to enhance safety in the area
- Improve bikeability in the plan area



Parks and Open Space

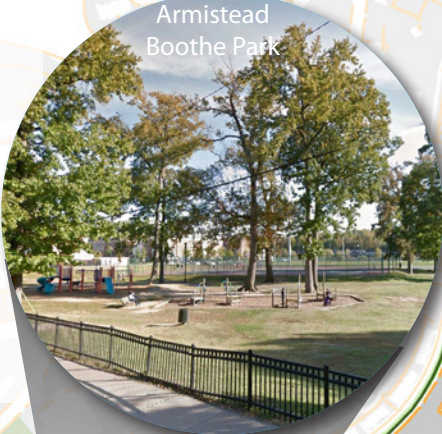
The Eisenhower West area is home to several parks which together provide approximately 105 acres of green space in the plan area:

- Ben Brenman Park has a stormwater management pond, green spaces, a dog park, and playing fields used by the local and regional community. A Community Center, which could include a Senior Center, is planned for the future.
- Armistead Boothe Park provides green space, a picnic area, sports courts, and a playground.
- Hensley Park has athletic fields and a picnic area.
- Clermont Natural Park is primarily a wooded area.
- Cameron Station Linear Park provides a trail wedged between the Cameron Station development and Backlick Run.

Ben Brenman Park, Hensley Park, and Boothe Park all have approved plans in the Citywide Park Plan.

- ### Issues
- Lack of significant, accessible green space south of the tracks
 - Lack of accessibility to parts of Backlick Run on the west end of the study area

- ### Opportunities
- Improve and repair existing parks
 - Create north-south connections between parks on either side of tracks
 - Increase access to quality park space
 - Increase variety of types of parks and public spaces
 - Celebrate and increase access to Backlick Run
 - Expand Clermont Natural Park - a priority in the Open Space Master Plan



Surface Environment

The large footprints of light industrial/ commercial/ warehouse buildings, extensive surface parking areas, roadways, residential development, and heavy industrial sites combine to create a very impervious environment in Eisenhower West. These elements contribute to the heat island effect, stormwater runoff, low water quality, and a lack of tree-cover in the built-up areas and have negative impacts on the environment. The parks and green spaces in Eisenhower West do provide some relief from these conditions but future redevelopment should prioritize reducing impervious area, improving the resource protection area adjacent to streams and increasing the tree cover to improve the overall environment.



Strip retail surface parking



Virginia Paving



Trade Center surface parking



Van Dorn Metro Station lot

- ### Issues
- High percentage of impervious surfaces
 - Heat islands
 - Stormwater runoff
 - Lack of tree cover

- ### Opportunities
- Incorporate green roofs in new buildings or collect and reuse stormwater
 - Integrate green and LID (Low Impact Development) strategies in site development
 - Increase tree cover to provide shade, cooling, and to sequester greenhouse gasses (GHGs)



LEGEND

	Inside Plan Area		Outside Plan Area
	City Boundary		
	Plan Area Boundary		
	Pervious Surface		
	Impervious Surface		
	Stream		
	100-yr Floorplain		
	10' Contour Line		

Topography

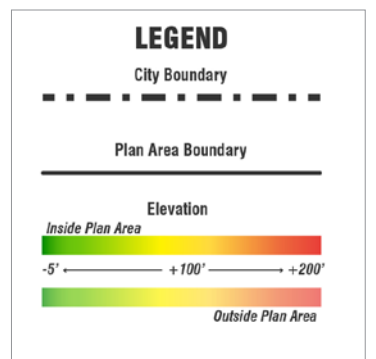
The topography of the west end of Alexandria varies considerably with elevations from approximately 30 feet up to 250 feet. Eisenhower West is in a low point in the topography of the area, the lowest points generally being along Backlick, Holmes and Cameron Runs. It will be important to understand the area's drainage patterns in order to determine a strategy for future development that reduces flooding and associated stream and property impacts and also evaluates potential locations for local and/or regional stormwater management facilities.

Issues

- Low-lying area in the region causes flooding and drainage issues
- Large scale and lack of detailed survey information of the study area requires coordination in creating an integrated stormwater management strategy

Opportunities

- Analyze drainage areas to determine potential locations for stream improvements and stormwater management facilities
- Understand existing stream drainage patterns to determine a future integrated stormwater management plan
- Incorporate analysis of existing drainage patterns and infrastructure to inform future development



Hydrology

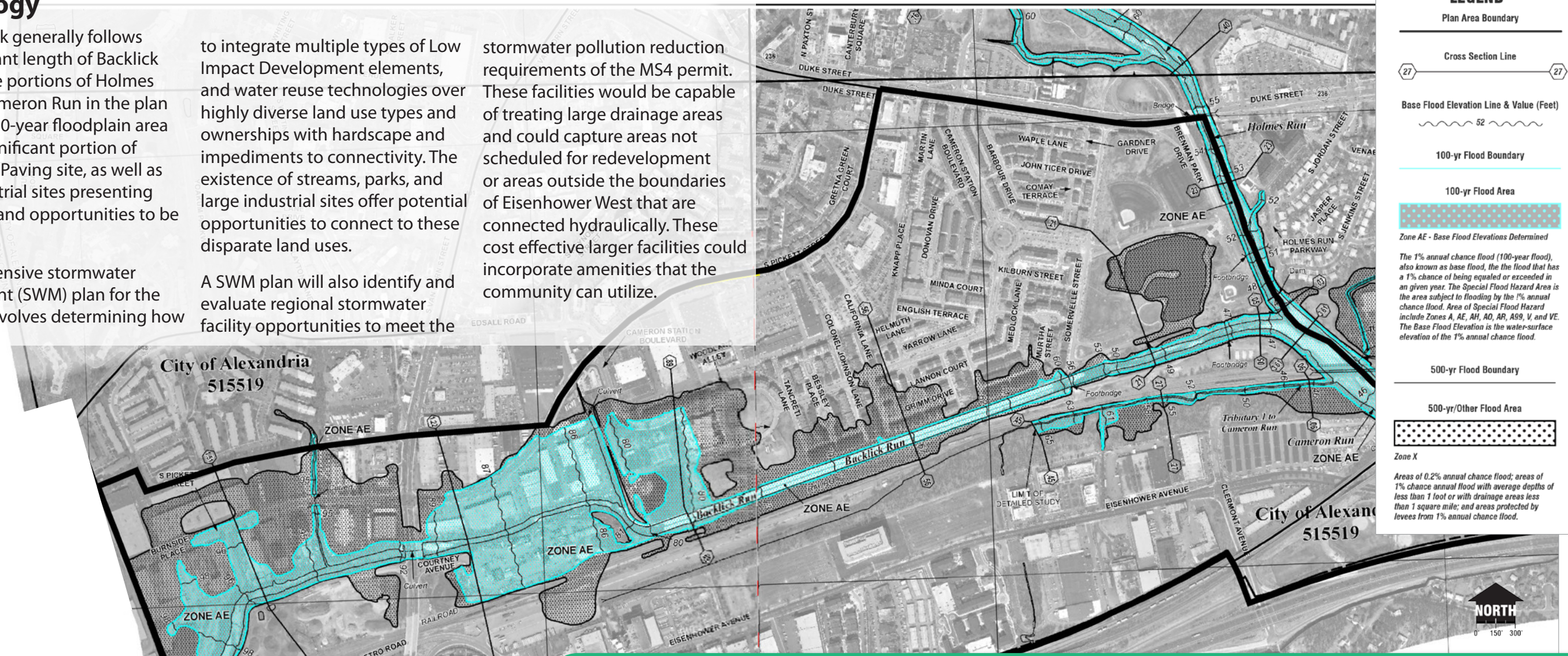
Flooding risk generally follows the significant length of Backlick Run and the portions of Holmes Run and Cameron Run in the plan area. The 100-year floodplain area covers a significant portion of the Virginia Paving site, as well as other industrial sites presenting challenges and opportunities to be considered.

A comprehensive stormwater management (SWM) plan for the plan area involves determining how

to integrate multiple types of Low Impact Development elements, and water reuse technologies over highly diverse land use types and ownerships with hardscape and impediments to connectivity. The existence of streams, parks, and large industrial sites offer potential opportunities to connect to these disparate land uses.

A SWM plan will also identify and evaluate regional stormwater facility opportunities to meet the

stormwater pollution reduction requirements of the MS4 permit. These facilities would be capable of treating large drainage areas and could capture areas not scheduled for redevelopment or areas outside the boundaries of Eisenhower West that are connected hydraulically. These cost effective larger facilities could incorporate amenities that the community can utilize.



Issues

- Large percentage of impervious area
- Periodic flooding
- Lack of sufficient existing stormwater management facilities
- Property ownership complicates access to and location of stormwater management technologies
- Creating rights-of-way within private properties
- Coordinating intra-agency involvement
- Maintenance responsibilities

Opportunities

- Develop a stormwater management (SWM) plan to reduce flooding and improve water quality, which could include restoring sections of the streams to enhance public access, providing educational opportunities, integrating green infrastructure such as water reuse and providing new passive recreational amenities
- Integrate periodic flooding into water reuse strategy
- Integrate green infrastructure strategies and technologies into industrial sites
- Integrate green infrastructure strategies at Backlick Run and Holmes Run connection points
- Integrate flood mitigation strategies in future redevelopment plans
- Coordinate overall SWM strategies with Alexandria's MS4 permit requirements
- Plan and share local and regional SWM facilities among new developments
- Restore Resource Protection Area (RPA)
- Create more open space, parks, and trails that can be used within the floodplain

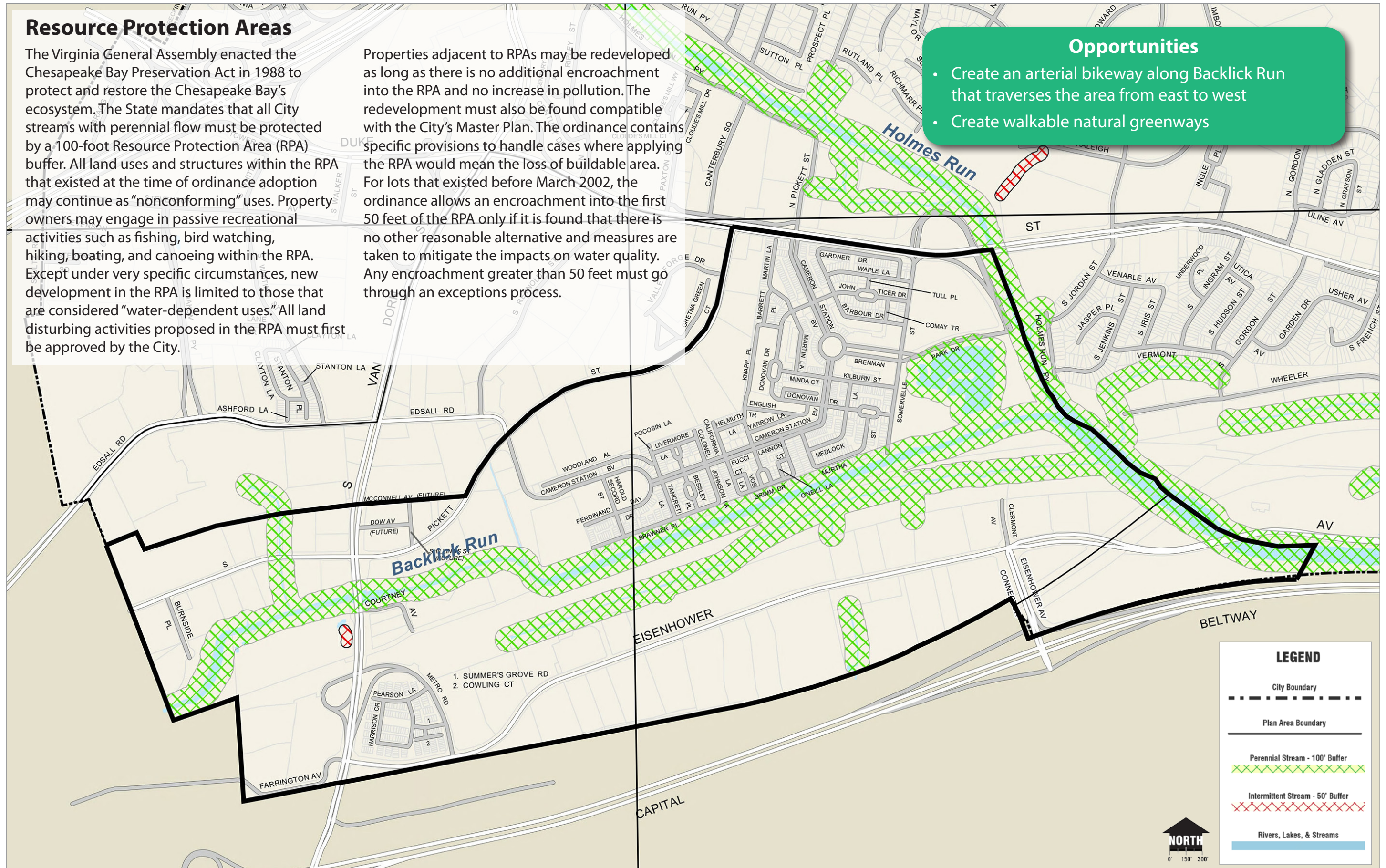
Resource Protection Areas

The Virginia General Assembly enacted the Chesapeake Bay Preservation Act in 1988 to protect and restore the Chesapeake Bay's ecosystem. The State mandates that all City streams with perennial flow must be protected by a 100-foot Resource Protection Area (RPA) buffer. All land uses and structures within the RPA that existed at the time of ordinance adoption may continue as "nonconforming" uses. Property owners may engage in passive recreational activities such as fishing, bird watching, hiking, boating, and canoeing within the RPA. Except under very specific circumstances, new development in the RPA is limited to those that are considered "water-dependent uses." All land disturbing activities proposed in the RPA must first be approved by the City.

Properties adjacent to RPAs may be redeveloped as long as there is no additional encroachment into the RPA and no increase in pollution. The redevelopment must also be found compatible with the City's Master Plan. The ordinance contains specific provisions to handle cases where applying the RPA would mean the loss of buildable area. For lots that existed before March 2002, the ordinance allows an encroachment into the first 50 feet of the RPA only if it is found that there is no other reasonable alternative and measures are taken to mitigate the impacts on water quality. Any encroachment greater than 50 feet must go through an exceptions process.

Opportunities

- Create an arterial bikeway along Backlick Run that traverses the area from east to west
- Create walkable natural greenways



Sanitary Sewer

The Eisenhower West Small Area Plan (SAP) will likely result in significantly more wastewater than what is currently generated. There are a total of approximately 80,000 feet of sanitary sewer within the plan area. The majority of these sewers are small diameter (10-12 inches) collector sewers, which are owned by the City of Alexandria (City). The small diameter collector sewers convey the wastewater to larger interceptor sanitary sewers owned and operated by Fairfax County, which ultimately discharges into the Holmes Run Trunk Sewer (across Cameron Run) and conveyed to the wastewater treatment facility, both owned and operated by Alexandria Renew Enterprises (AlexRenew).

The City maintains a hydraulic model of its collection system, which identifies where sanitary sewer infrastructure upgrades are required in order to accommodate growth. For instance, where sanitary sewer hydraulic capacity is exceeded due to growth, the developer is required to provide for these infrastructure improvements. These improvements can typically be accomplished by replacing the existing sanitary sewer with a

larger pipe. For the Eisenhower West SAP, several infrastructure upgrades to the existing City-owned collector sewers are anticipated to serve proposed development/redevelopment. Based on previous planning forecasts and current modeled results, a total of 5,000-7,000 feet of sanitary sewer pipe will need to be upsized in the future.

Fairfax County maintains a hydraulic model of its own collection system. When development/

redevelopment occurs in portions of the City impacting the sewer system, it is required of the developer to contact Fairfax County early in the development process to ensure sufficient sanitary sewer capacity is available.

The Holmes Run Trunk Sewer, owned by AlexRenew, serves both the City and Fairfax County. Currently, all three parties are involved in a joint study to develop and implement a plan to provide

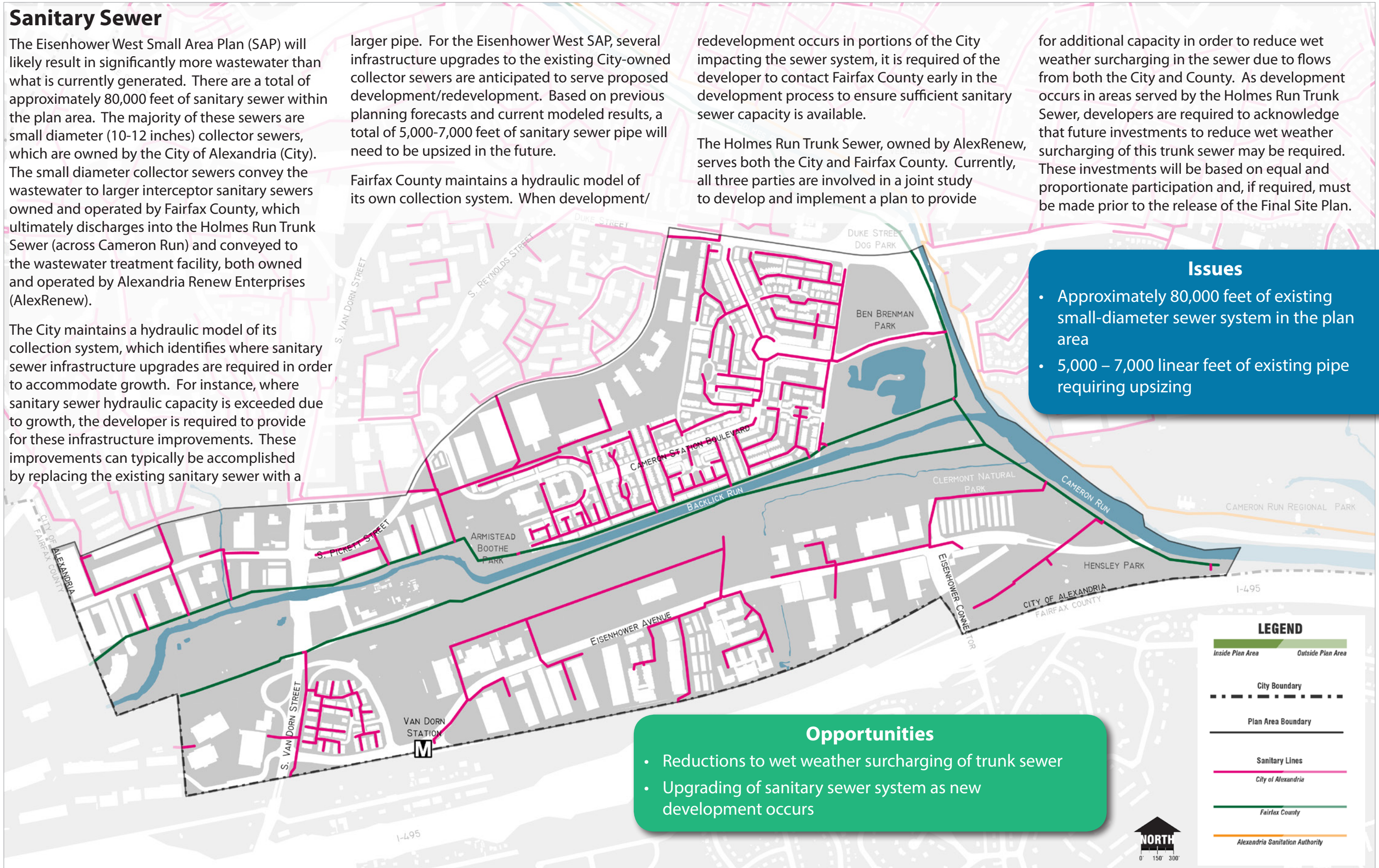
for additional capacity in order to reduce wet weather surcharging in the sewer due to flows from both the City and County. As development occurs in areas served by the Holmes Run Trunk Sewer, developers are required to acknowledge that future investments to reduce wet weather surcharging of this trunk sewer may be required. These investments will be based on equal and proportionate participation and, if required, must be made prior to the release of the Final Site Plan.

Issues

- Approximately 80,000 feet of existing small-diameter sewer system in the plan area
- 5,000 – 7,000 linear feet of existing pipe requiring upsizing

Opportunities

- Reductions to wet weather surcharging of trunk sewer
- Upgrading of sanitary sewer system as new development occurs



LEGEND

Inside Plan Area Outside Plan Area

City Boundary

Plan Area Boundary

Sanitary Lines

City of Alexandria

Fairfax County

Alexandria Sanitation Authority

Covanta Waste-to-Energy Plant

The Alexandria/Arlington Resource Recovery Facility operated by Covanta began commercial operation in 1988 and serves residents of Arlington County and the City of Alexandria, which jointly own the site. The facility has 45 full time employees. Three, 325 ton-per-day furnaces process nearly 1000 tons of solid waste per day, generating up to 23 megawatts of renewable energy that is sold to Dominion Virginia Power Company. It receives and processes 350,000 tons of Municipal Solid Waste annually. This powers up to 20,000 homes continuously. The plant runs on approximately 50,000 to 70,000 tons of waste annually, 30% of that contributed from Alexandria. The facility is currently being operated under a User's Agreement between Covanta and the City of Alexandria through 2038.

- **Site:** 4 acres
- **Energy-from-Waste System:** Three 325, ton-per-day waterwall furnaces with Martin® reverse-reciprocating grates and ash handling system
- **Boiler Design:** 600 pounds per square inch gauge/700°F superheater outlet conditions
- **Air Pollution Control Equipment:** Semi-dry flue gas scrubbers injecting lime, fabric filter baghouses, nitrogen oxide control system, mercury control system, and continuous emissions monitoring (CEM) system
- **Rated Refuse Capacity:** 975 tons per day
- **Energy Generation @ Rated Capacity:** up to 23 megawatts from two condensing steam turbine generators



DRAFT October 21, 2015

- **Traffic Impact:** The facility currently sees approximately 200 trucks per day delivering waste to the facility and operates with hours for Alexandria residents. There is also outgoing traffic for trucks delivering the ash from the process to Fairfax for disposal and delivering ferrous and scrap material that cannot be burned to recyclers.

Sustainability Opportunities for Consideration:

1. Convert Facility to Combined Heat & Power (CHP) plant. This would require having Covanta design and install additional heat exchangers that would convert the waste heat currently being discharged to the facilities cooling towers to heating hot water or steam. This waste heat could then be utilized by industrial or commercial users in the Eisenhower West Development. This will require an assessment during the planning process of potential users in the future development for this waste heat, and a strategy for how to get the piping to the future uses.

2. Extend Non-Potable Water from Alexandria Renew for Cooling Tower Make-Up. Under a potential agreement between the City of Alexandria and Alexandria Renew Enterprises (AlexRenew), the city's wastewater treatment facility, AlexRenew would provide a non-potable water source and piping system from the Alexandria treatment facility to the Covanta site for use by Covanta as make-up water for its cooling towers. Since Covanta is the largest potable water user in the City, this would significantly reduce the potable water usage for the development. This will require an assessment during the planning process of other potential users, in addition to Covanta, for the non-potable water in the future Eisenhower West development. The more users that can be found the more economically viable the proposal will be for AlexRenew.

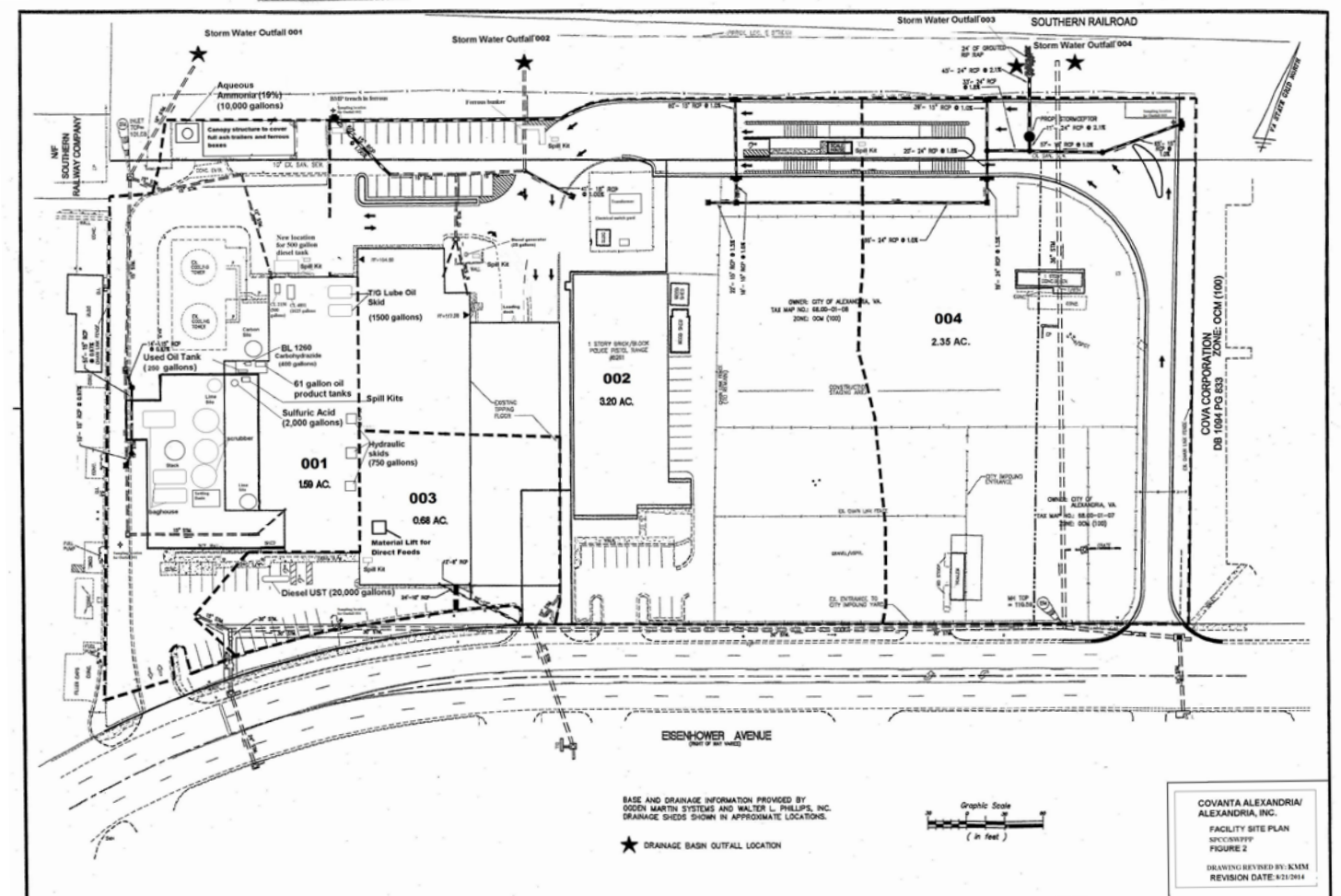
3. Extend Non-Potable Water from Alexandria Renew for Heat Rejection. Under a similar agreement between the City of Alexandria and AlexRenew as indicated above, piping would be provided to and from the Covanta site for use as a heat rejection system in-lieu-of utilizing the cooling towers on-site.

Issues

- Location of Covanta near the Van Dorn Metrorail Station
- Issues of odor with its proximity of this heavy industrial use to future new development including residential uses
- Approximately 350 feet of frontage on Eisenhower Avenue

Opportunities

- Convert facility to Combined Heat & Power (CHP) plant
- Extend non-potable water from AlexRenew for cooling tower make-up
- Extend non-potable water from AlexRenew for heat rejection
- Potential for a more active frontage along Eisenhower Avenue



APPENDIX B - SUMMARY OF ISSUES AND OPPORTUNITIES

ISSUES

LAND USE

- Disconnected and car-oriented urban form
- Lack of cohesive or defining architectural character (Cameron Station and Summers Grove excepted)
- Incompatibility of islands of residential uses surrounded by roadways and heavy industrial uses
- Segregated uses, with little mixed-use (see Fig. B.1)
- Disconnected and inwardly-focused industrial/warehouse uses
- Location of Covanta near the Van Dorn Metrorail Station with approximately 350 feet of frontage on Eisenhower Avenue
- Lack of affordable housing options

TRANSPORTATION AND CONNECTIVITY

- General lack of north-south connectivity. CSX/NS tracks are a major barrier to north-south connectivity. WMATA tracks and 495 are a major barrier to connectivity with Fairfax County (see Fig. B.2)
- Few cross streets along Eisenhower Avenue create long blocks not scaled to pedestrians
- Minimal use of bicycles along Eisenhower Avenue despite its being an official bike route
- Underutilization of the Van Dorn Metro station due to a combination of physical barriers for pedestrians, and low population in the area
- Underutilization of transit due to lack of walkability despite its proximity

PARKS AND OPEN SPACE

- Lack of significant, accessible green space south of the CSX/NS tracks (see Fig. B.3)
- Lack of accessibility to parts of Backlick Run on the west end of the study area
- Lack of small locally-serving public spaces and parks

BUILDINGS AND ARCHITECTURE

- Aging existing building stock in the plan area
- Lack of character-defining or historic buildings
- Newer uses are predominantly residential. Continued residential construction threatens to reduce the diversity of uses in the plan area
- Underutilized parcels of land
- Long narrow parcels that make individual redevelopment of many of the warehouse uses difficult
- Barriers to cohesive redevelopment including numerous property owners in the plan area

INFRASTRUCTURE AND ENVIRONMENT

- High amount of impervious surfaces creating stormwater runoff and heat islands (see Fig. B.4)
- Lack of tree cover
- Low-lying area in the region causes flooding and drainage issues
- Lack of sufficient existing stormwater management facilities
- Existing small-diameter sewer system pipes in the plan area require upsizing
- Existing encroachments in the Resource Protection Area (RPA)
- Riparian buffer is degraded

OPPORTUNITIES

LAND USE

- Create one or more multi-use communities that include employment opportunities, residential capacity and destinations that take advantage of the proximity to the Metro Station and support a 24/7 environment
- Increase housing diversity by encouraging a range of high-quality options affordable and accessible to households of different income levels, ages, abilities, and sizes

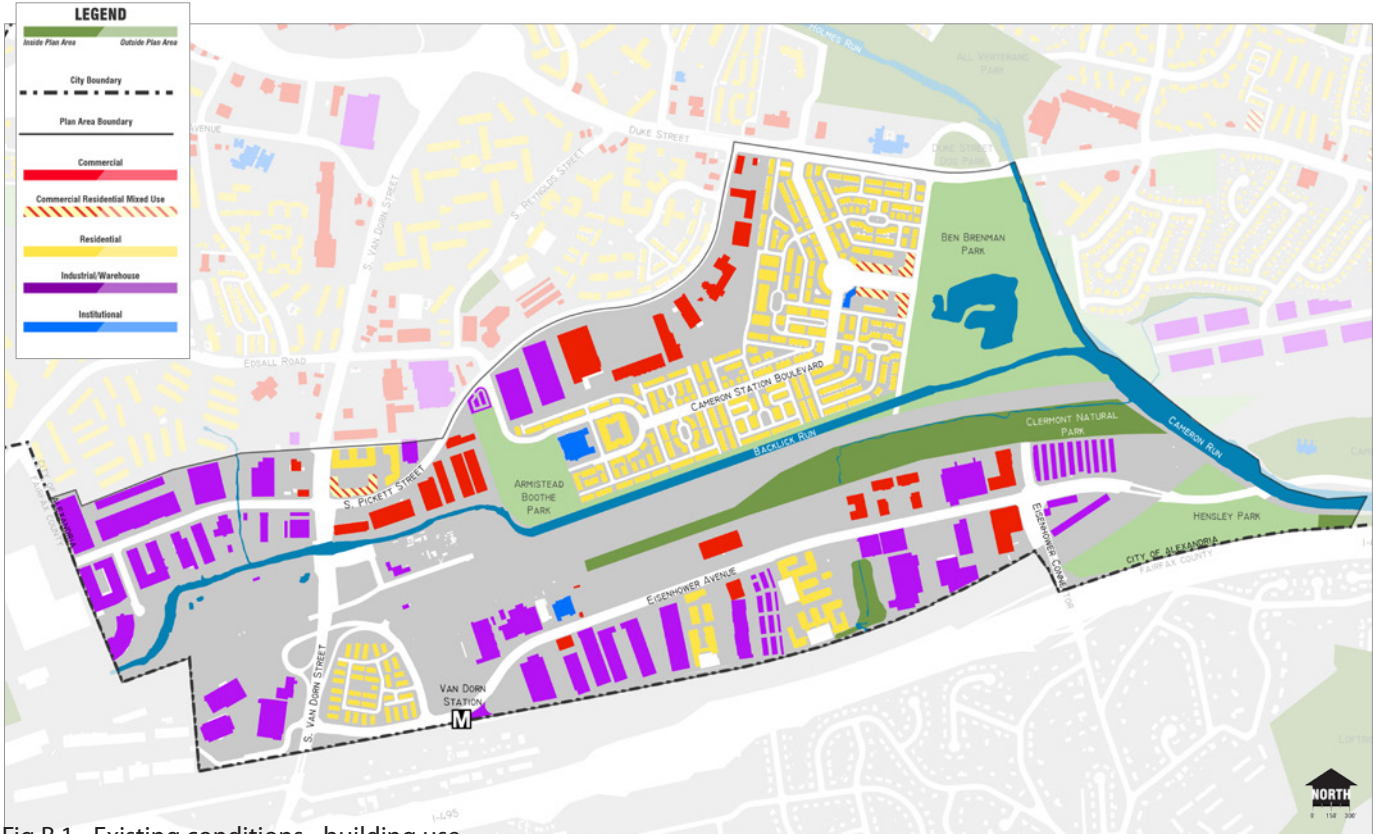


Fig B.1 - Existing conditions - building use

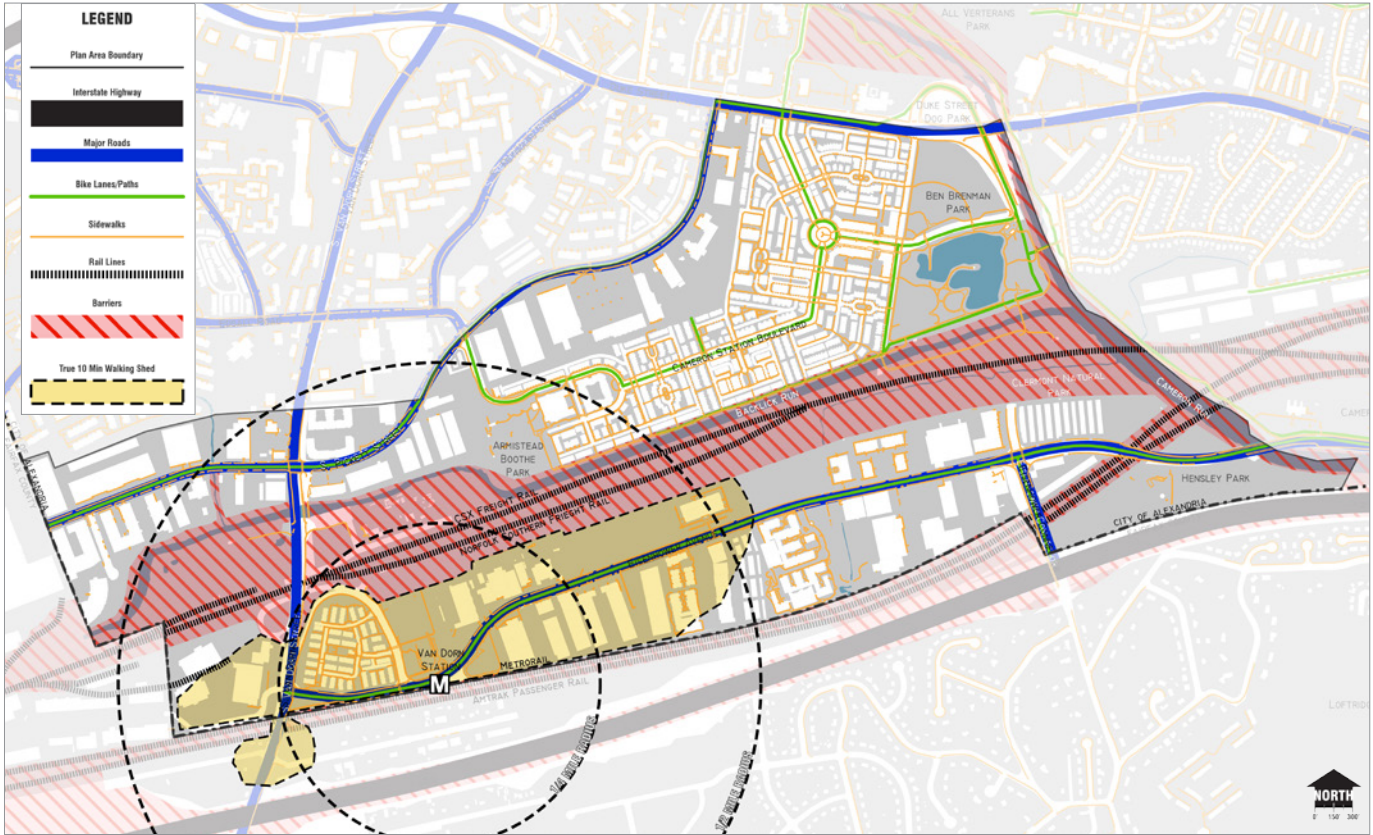


Fig. B.2- Existing conditions - transportation and connectivity

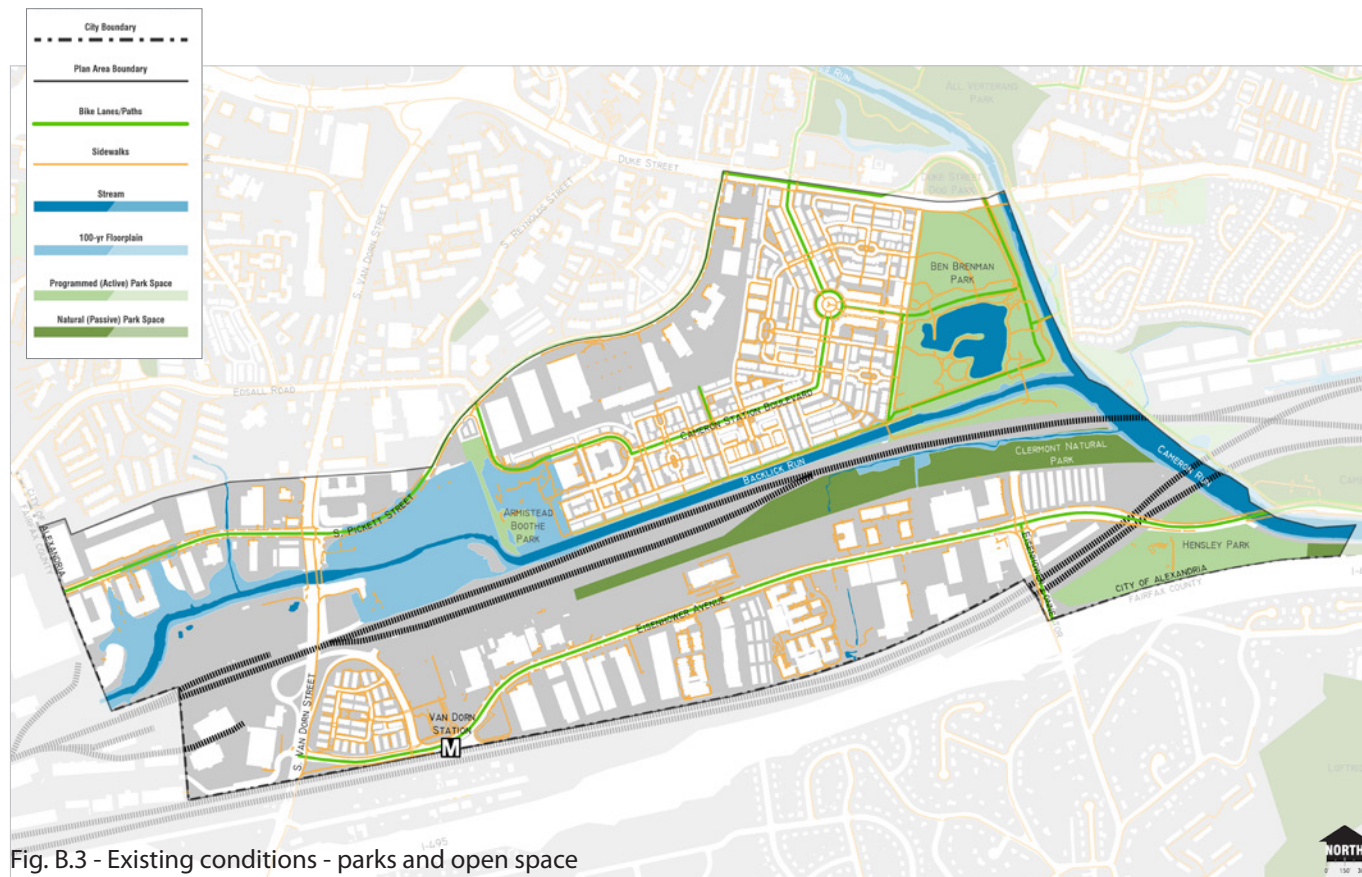


Fig. B.3 - Existing conditions - parks and open space

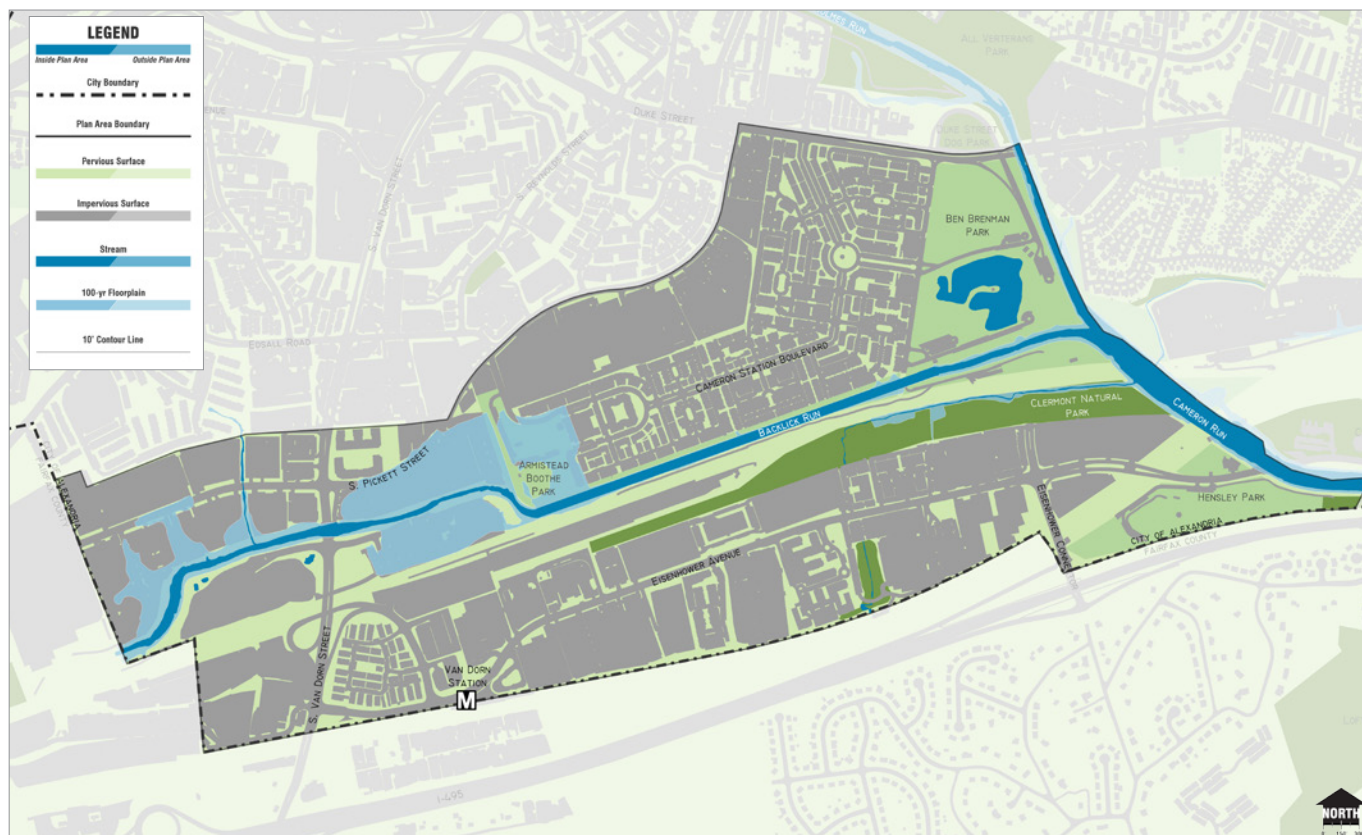


Fig. B.4 - Existing conditions - surface environment

- Explore opportunities to collocate affordable housing units with future civic or municipal uses
- Increase the population of Eisenhower West through new, denser development to provide additional users of transit and create “eyes on the street” to enhance safety in the area
- Potentially assemble properties under the right conditions
- Support future commercial uses
- Celebrate and link area historic resources such as Bush Hill
- Build on natural assets such as parks, streams - to help define the character of Eisenhower West
- Define areas for celebration of local ethnic and cultural groups

TRANSPORTATION AND CONNECTIVITY

- Transform the disconnected and car-oriented area into a model of a connected and walkable-bikeable area
- Create better connectivity with the future multi-modal bridge
- Create a pedestrian-scaled street grid along Eisenhower Avenue
- Create better connections between all areas to each other, to other properties along the Eisenhower Avenue corridor, and to the rest of the City
- Create improved north-south transit, pedestrian, and bicycle connections across tracks when vehicular connections are not possible
- Rethink Eisenhower Avenue, Pickett Street, and Van Dorn Street to better accommodate bicyclists and pedestrians
- Create additional pedestrian connections to increase use of the Van Dorn Metrorail station and local bus lines from the local and surrounding communities
- Improve bikeability in the plan area

PARKS AND OPEN SPACE

- Build on natural assets - parks, streams – to enhance the natural character of Eisenhower West

- Improve and repair existing parks
- Create north-south connections between parks on either side of railroad tracks
- Increase access to quality park space
- Increase variety of types of parks and public spaces
- Celebrate and increase access to Backlick Run
- Expand Clermont Natural Park - a priority in the Open Space Master Plan

BUILDINGS AND ARCHITECTURE

- Replace aging buildings with new, sustainably designed, higher density uses to leverage the location, amenities, infrastructure in the plan area
- Build diverse new uses including commercial and retail to support existing residential and the potential future residential market.
- Leverage land resources with higher density development where appropriate
- Integrate new public spaces such as parks and plazas with new trails and development

INFRASTRUCTURE AND ENVIRONMENT

- Incorporate green roofs in new buildings or collect and reuse stormwater
- Integrate green and LID (Low Impact Development) strategies in site development
- Increase tree cover to provide shade, cooling, and to sequester greenhouse gasses (GHGs)
- Analyze drainage areas to determine potential locations for stream improvements and stormwater management facilities
- Integrate green infrastructure strategies and technologies into industrial sites
- Integrate green infrastructure strategies at Backlick Run and Holmes Run connection points
- Plan and share local and regional SWM facilities among new developments
- Restore Resource Protection Areas
- Create more open space, parks, and trails that can be used within the floodplain
- Upgrade sanitary sewer system as new development occurs

APPENDIX C - MARKET ANALYSIS

Executive Summary

HR&A, under contract to SmithGroupJJR, completed a real estate market analysis to inform the development of a Small Area Plan (“SAP”) for the Eisenhower West area of Alexandria, Virginia. The following is an overview of HR&A’s key findings and recommendations.

Market Analysis Objectives

HR&A’s analysis provides a baseline assessment of current and projected market conditions. The goal of this work is to inform the development of the Small Area Plan, which will consider:

- What land uses are market supportable in the short and long terms?
- What is an appropriate balance of land uses in the area?
- How can the City encourage population growth while also encouraging job growth?
- How can the City facilitate transit-oriented development in Eisenhower West?

Demographic and Economic Trends

- Eisenhower West was primarily a commercial and industrial area until the introduction of residential development in the late 1990s. As a result, the residential population grew by almost 300% to nearly 5,000 people between 2000 and 2014. New households in Eisenhower West tend to have higher household incomes, be younger, and have fewer children than in the City overall.
- Eisenhower West is not a particularly employment dense area. The 8,418 jobs represent 8.1% of the City’s total jobs and are largely in wholesale trade and administrative & support services (back office). Employment in these sectors represents 32% of wholesale trade jobs and 25% of back office.
- Businesses in Eisenhower West benefit from its location inside the Beltway and proximity to Washington, DC business and consumer markets.



Residential

- Eisenhower West contains 3,058 residential units, all of which have been developed since 1999. There are roughly equal numbers of owned and rented units across a mix of townhouse and multifamily developments.
- Low vacancy and increasing rents in Northern Virginia, along with the presence of an older multifamily apartment stock in West Alexandria, suggest demand for new multifamily rental development. Eisenhower West’s Metro-accessible location inside the Beltway make it attractive to this type of development.
- Regionally, the for-sale housing market is also strong with increasing inventory and declining averages of the number of days units are on the market before being sold.

Executive Summary (cont'd.)

Retail

- Retail in Eisenhower West and the surrounding area is primarily characterized by dated shopping malls and car dealerships. With the exception of the proposed redevelopment of Landmark Mall, there has been little new retail built in the past 20 years.
- Area residents, rather than workers, are the primary drivers of retail sales in the trade areas, and the introduction of new residential development in the area will continue to drive up demand.
- There is additional unmet demand for new grocery stores, general merchandise stores, and restaurants in Eisenhower West.
- While redevelopment plans for Landmark Mall and potential redevelopment within the Van Dorn corridor may absorb some of this demand, the gaps appear substantial enough to support new neighborhood-oriented retail development in Eisenhower West.

Industrial

- The industrial stock in Eisenhower West is old and out of date. Excluding Restaurant Depot, no new industrial property has been developed since 1985.
- Vacancy in Eisenhower West has increased for both warehouse and flex buildings, a result of tenants either moving to more modern buildings elsewhere, or going out of businesses (as reflected by the decline in employment in key sectors, including wholesale trade and transportation and warehousing).
- Industrial rents in Eisenhower West have been consistently higher compared to the MSA, suggesting a premium due to its location inside the Beltway, despite the older industrial stock. However, new industrial development in this area would be challenging given the comparatively high cost of land.

Office

- With only 4 office buildings, Eisenhower West is not a major office market in the City of Alexandria. Over 80% of the space is in the 607,000 SF Victory Center, which has been vacant since it was renovated in 2009 due to a building configuration that does not meet current GSA requirements.
- **Location of the Transportation, Security Administration (TSA) headquarters to Victory Center will stimulate interest in Eisenhower West for office space.**
- Demand for office space in all markets is stagnant or declining: regional office rents remain flat, and citywide office rents have declined since the recession. In addition, vacancy rates in the City have surpassed those in the region.
- In order to receive financing, the majority of regional office construction is either build-to-suit or significantly pre-leased. In the near term, new office development in Eisenhower West is likely challenging, with the exception of small-scale, locally serving office uses. In the longer term, however, the area does benefit from its proximity to Metro and the Capital Beltway.

Hotel

- The regional hotel market is highly competitive. As a result, while occupancy has remained stable, hotel revenue has declined significantly. Therefore, the relative stability in occupancy has been achieved at the expense of hotel revenues, which will impact the potential for new development in both the short- and medium-term.
- Hotels in secondary submarkets with brands most likely comparable to what could be supported in Eisenhower West are generally older, particularly in submarkets in western portions of the City and adjacent to the Beltway. There may be an opportunity in Eisenhower West for development of a new, mid-priced hotel that would compete with the older products in other highway adjacent locations.

Executive Summary (cont'd.)

Summary of Opportunities and Challenges

HR&A recommends that the area wide development plan consider strategic opportunities around key nodes and be flexible to current and future market conditions.

Short Term (0-7 years)

- In the short term, the supply of new residential development is anticipated to meet housing demand generated by the plan area's middle and upper income households. The area has already seen some infill residential development and this pattern could continue on key sites.
- New residents will add to demand for retail and other amenities, and support new retail development in Eisenhower West even with significant renovations at the Landmark Mall and in the Van Dorn area.
- In addition, industrial uses in existing buildings will remain viable, as there is still demand from tenants seeking locations inside the Beltway close to consumer and business markets.
- Regionally, near term demand for office development is low. The recent announcement of the location of the TSA Headquarters to the Victory Center will stimulate interest in the area as an office location.

Medium Term (7-15 years)

- In the medium term, Eisenhower West will be in the midst of a transforming area with implementation of the Landmark/Van Dorn Corridor Plan.
- Industrial uses, particularly in rented facilities, may face redevelopment pressure as a result of increasing residential and retail demand, need for new spaces, and cheaper land elsewhere.
- Office users will likely still prefer walkable, transit accessible, mixed-use communities, which could be accommodated in Eisenhower West. Assuming a recovered regional market, absorption in transit-accessible areas closer to the region's core, and interested tenants, Eisenhower West would become a more desirable office location.
- The area could also potentially support the development of mid-scale hotels, as either new flags in the market competing with older products nearby or if regional occupancy rates remain stable and revenue trends improve.
- Strategic redevelopment and potential colocation of public uses can create opportunities to provide housing options affordable to a range of incomes and welcoming to different household types—including young professionals, families, seniors, and workers critical to the economic competitiveness and sustainability of the area. The Plan area hosts (and will continue to attract) a wide variety of employers. The success of these businesses will, in part, rely on the availability of a diverse workforce. Providing affordable and life stage-appropriate housing in close proximity to jobs and transit will help improve workers' and residents' quality of life, reduce congestion, lessen economic leakage, and strengthen the City's tax base.

Long Term (15-30 years)

- Eisenhower West is well situated to support a balance of residential and commercial development. The Van Dorn Metrorail Station and proximity to the Beltway will continue to be assets.
- The Small Area Plan should be flexible to be responsive to changing economic conditions. Industrial uses will relocate for cheaper space outside the Beltway.
- Unless owners are incentivized to invest in new industrial facilities or industrial users own their sites, these uses are likely to convert to residential or other commercial uses if zoning allows.
- There may also be opportunities for new office development as vacant space around stations closer to the region's core is absorbed.
- This will in turn generate more local demand for hotel development, attracting visitors who are conducting business in Eisenhower West and seeking more affordable accommodations with good highway access.
- As hotels and multifamily buildings have similar building envelopes, long-term planning should allow for strategic multifamily sites to accommodate potential future hotel development.

Introduction

Plan Overview

The Eisenhower West Small Area Plan plan area (“Plan Area”) consists of roughly one square mile located on the southwestern corner of the City bordering Fairfax County. It is bounded by the Yellow Line Metro in the South, the Alexandria/Fairfax County border to the West, McConnell Avenue to S. Pickett Street in the North, and Holmes Run Trail to the East.

Project Purpose

Eisenhower West has undergone a significant transition in uses, and the last Small Area Plan was completed in 1992. Formerly consisting solely of commercial uses, including light and heavy industrial activities, the area has seen new residential and mixed-use developments which have introduced nearly 5,000 new residents to the area since the first developments were delivered in 1999.

In light of this rapidly changing environment, the City of Alexandria identified the Eisenhower West area as a candidate for a Small Area Plan. The City retained SmithGroupJJR to assist with the plan, who in turn solicited HR&A Advisors, Inc. (“HR&A”) to perform a market scan of residential, retail, office, and industrial real estate to determine the future possibilities for Eisenhower West.

HR&A’s analysis seeks to inform components of the Small Area Plan, including:

1. What land uses which are market supportable both in the near term and in the foreseeable future?
2. What might the mix or balance of land uses look like in the Plan Area?
3. How can the City seek to encourage population growth while also encouraging job growth?
4. How can the City facilitate transit-oriented development in Eisenhower West?

HR&A’s analysis, contains a summary of the real estate inventory in Eisenhower West, how this inventory has changed over time, and how regional demographic, economic, and real estate market dynamics may affect real estate development in the future.

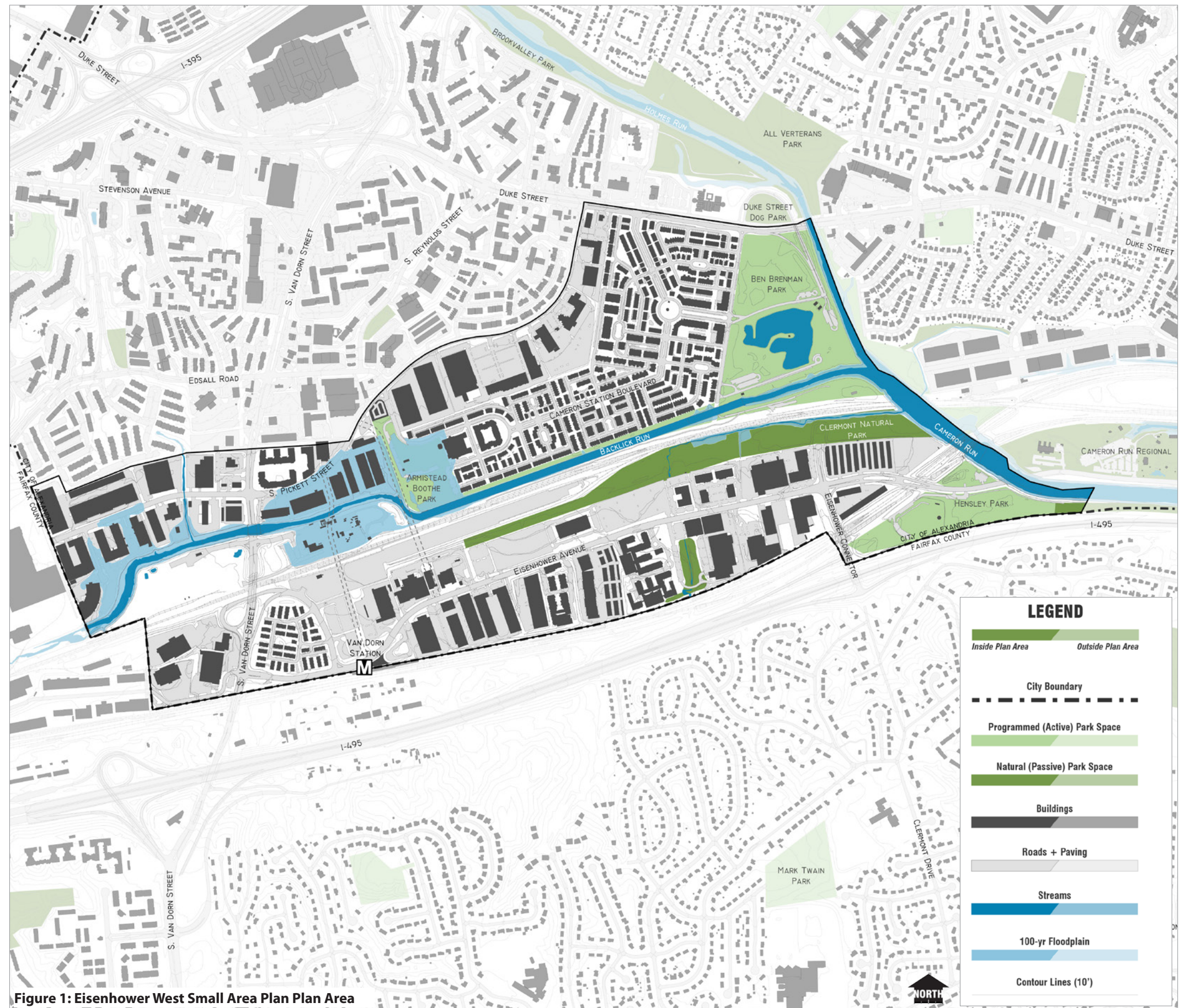


Figure 1: Eisenhower West Small Area Plan Plan Area

Demographic and Economic Analysis

Demographics

The Plan Area's population has grown significantly since 2000 due to extensive new residential development.

- The completion of Cameron Station, The Exchange at Van Dorn, and The Reserve at Eisenhower has added 3,600 residents to Eisenhower West through 2014. As there were only two residential clusters in Eisenhower West prior to 2000 (Summers Grove and portions of Cameron Station), these developments almost tripled the resident population, bringing the total number of residents to nearly 5,000.
- While Eisenhower West only represents 3% of the City's total population, the addition of 3,600 residents from 2000 to 2014 represented 22% of the City's overall growth in this period.

Year	Eisenhower West	Alexandria	Washington MSA
2000	1,235	128,283	4,837,430
2010	4,832	139,966	5,636,232
2014*	4,907	144,869	5,874,437

Figure 2: Total Population

*2014 population estimated by Esri. Does not include new residents in the recently completed Modera Tempo (formerly "Landmark Gateway"), which began leasing these units in July, 2014, and opening them for occupancy in October, 2014.

Source: City of Alexandria; Esri Business Analyst

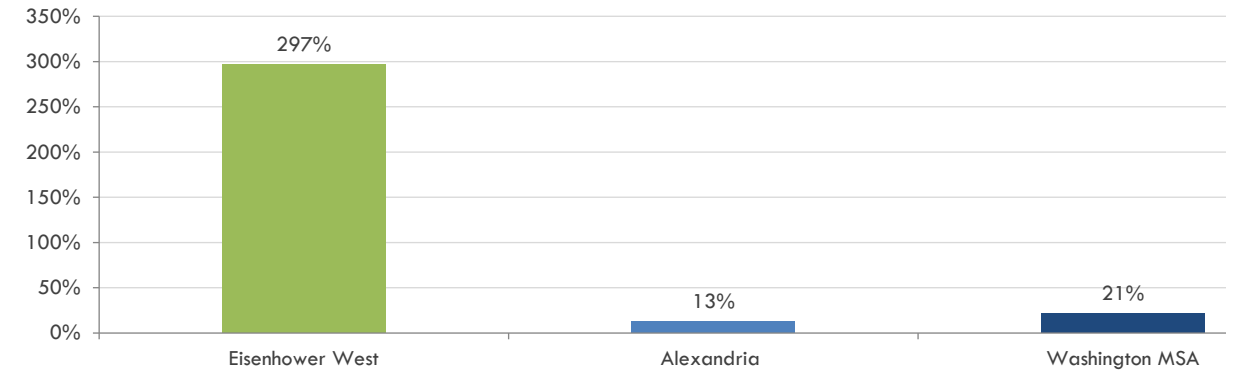


Figure 3: Percentage Change, Population, 2000-2014

Source: City of Alexandria; Esri Business Analyst

Households in Eisenhower West earn higher incomes than households in the City and the Washington MSA overall.

- Median household income in Eisenhower West is 52% higher than the City as a whole, and 39% higher than the Washington MSA (the Region).
- Sixty-nine percent of households in Eisenhower West have annual incomes greater than \$100,000, compared to 42% of households in the City and 46% of all households in the Washington MSA.

	Eisenhower West	Alexandria	Washington MSA
Median Household Income	\$125,984	\$83,054	\$90,415

Figure 4: Median Household Income

Source: Esri Business Analyst

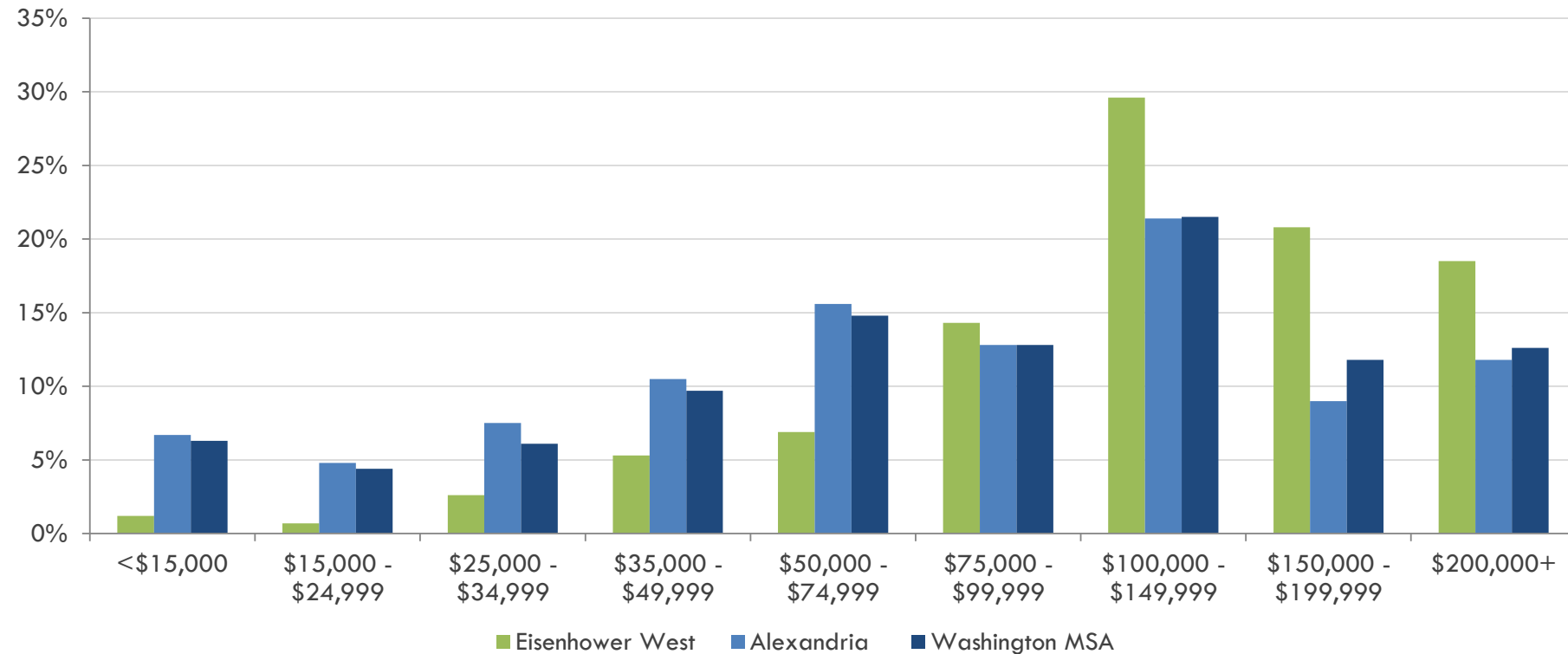


Figure 5: Distribution of Household Income, 2014

Source: Esri Business Analyst

Demographic and Economic Analysis (cont'd.)

Demographics

Households in Eisenhower West tend to be younger and without children.

- Householders below the age of 45 comprise 55% of all households in Eisenhower West, and 50% in the City of Alexandria. By comparison, these households comprise 40% of all households in the Washington MSA.
- Households in Eisenhower West consists of 40% single-person households, lower compared to the City (43%) and significantly higher compared to the MSA (27%).
- Households in Eisenhower West consists of 28% married couples without children, a higher concentration than both the City (20%) and the MSA (24%).
- As the area matures, households may increase the number of children.

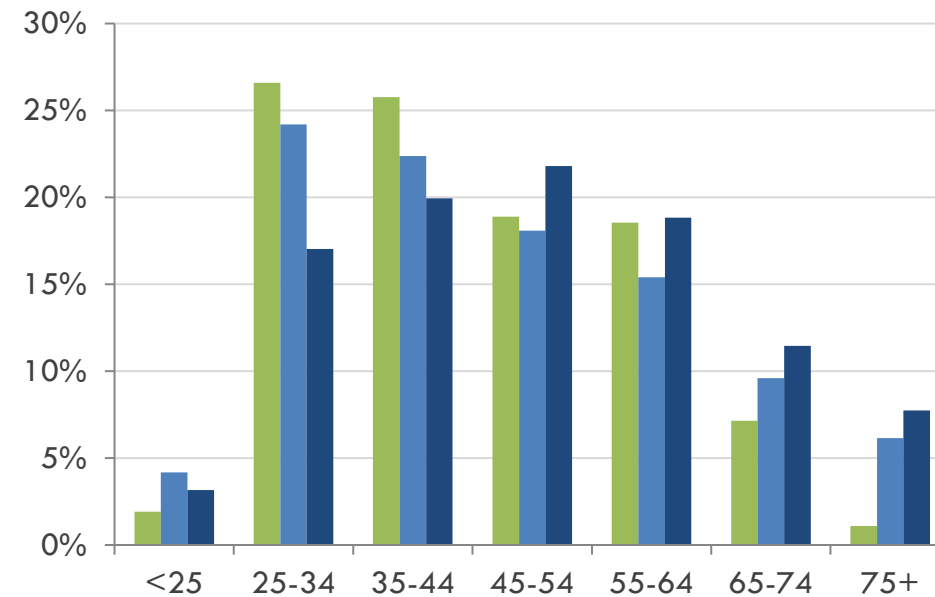


Figure 6: Percentage of Households by Age of Householder, 2014

Source: City of Alexandria, Esri Business Analyst

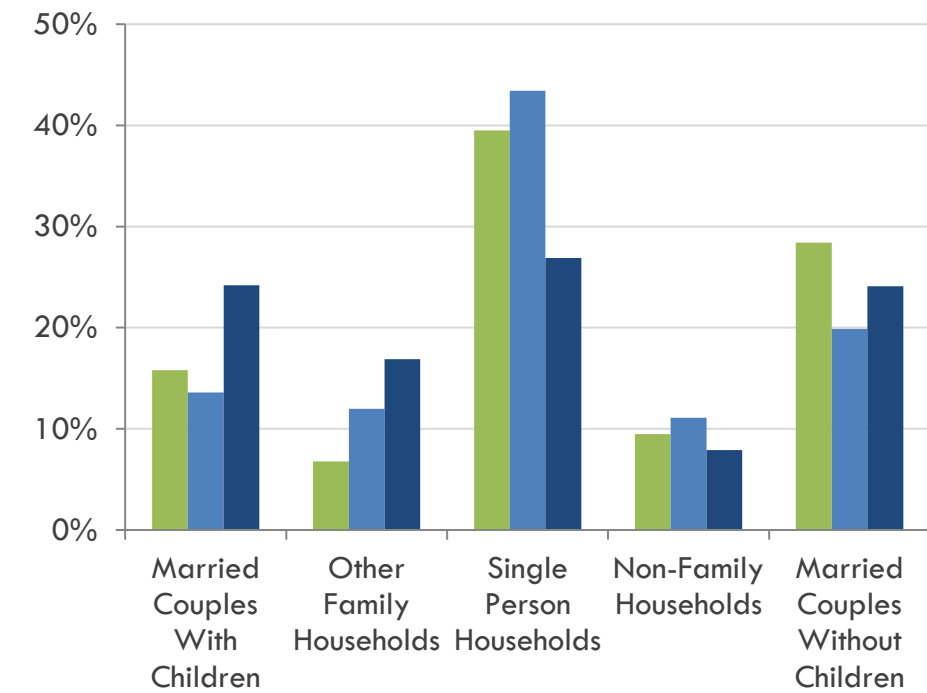


Figure 7: Percentage of Households by Composition, 2014

Source: City of Alexandria, Esri Business Analyst

Economics

Regional and citywide unemployment rates have remained lower than national unemployment rates prior to and during the recent recession.

- Historically, the annual unemployment rate in the Region and the City of Alexandria have trended together and have been much lower than the national unemployment rate, indicating a strong and stable employment base in the region. On average, from 2000-2013 the City of Alexandria's unemployment rate has been 3 percentage points lower than the national unemployment rate.
- Between 2011 and 2013, local unemployment rates in Alexandria and the Washington MSA did not decline as rapidly as the national rate, possibly as a result of contraction in the federal government.

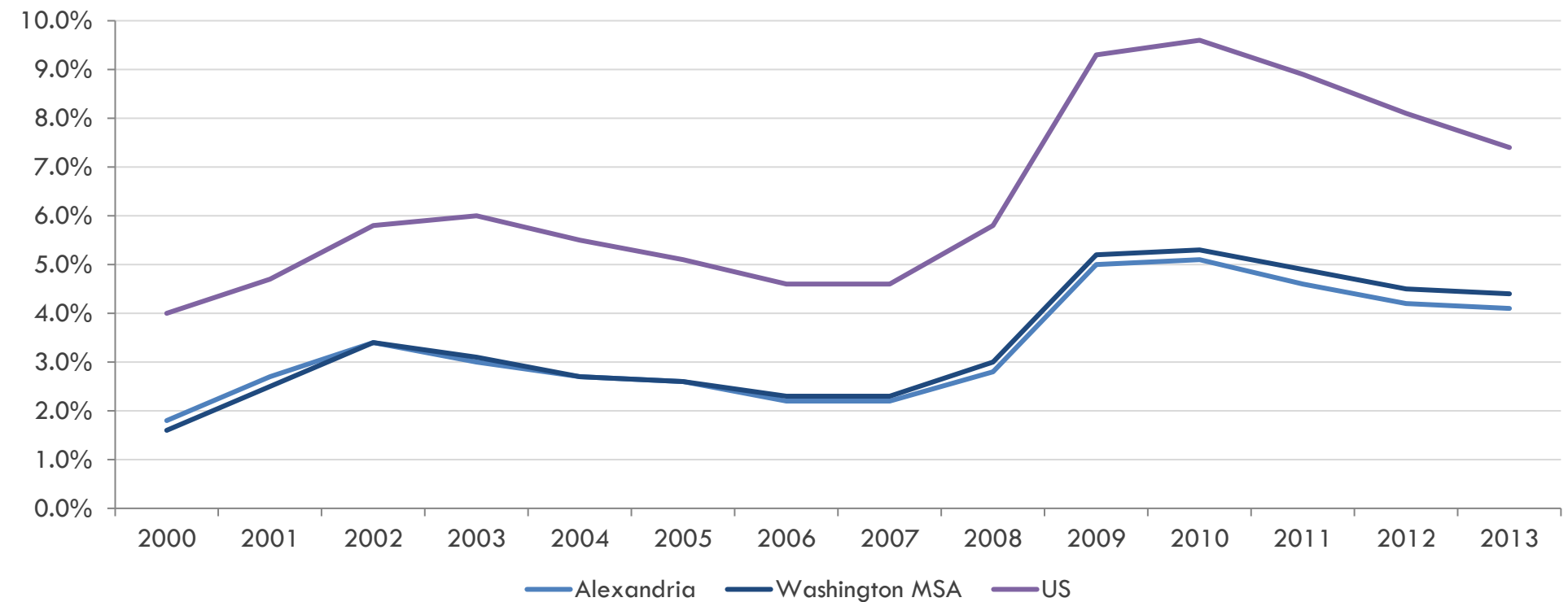


Figure 8: Annual Unemployment Rate, 2000-2013

Source: Bureau of Labor Statistics

Demographic and Economic Analysis (cont'd.)

Economics

Despite its heavily commercial character, Eisenhower West represents only a small portion of the City's total employment.

- The 8,418 jobs in Eisenhower West comprise 8.1% of the City's total jobs (103,724).
- Eisenhower West accounts for 32% of all wholesale trade jobs within the City of Alexandria. This industry comprises those business which sell merchandise to other businesses rather than directly to the public, such as Restaurant Depot.
- In addition, administrative, support, and waste management jobs comprise over 25% of all such jobs within the City. These industries include "back office" support industries such as office administration, human resources, clerical services, security and surveillance services, cleaning, waste disposal, and others.
- The area contains only a small number of jobs in traditional office-using industries.

Administrative, support, and waste management industries make up the majority of all jobs in Eisenhower West.

- Just over 3,500, or 42%, of the Plan Area's labor force works in administrative, support, and waste management sectors.
- Nearly 3,800, or 45%, of all jobs in Eisenhower West are distributed evenly across retail, professional, scientific, and technical service, wholesale trade, construction, manufacturing, transportation, and other sectors.

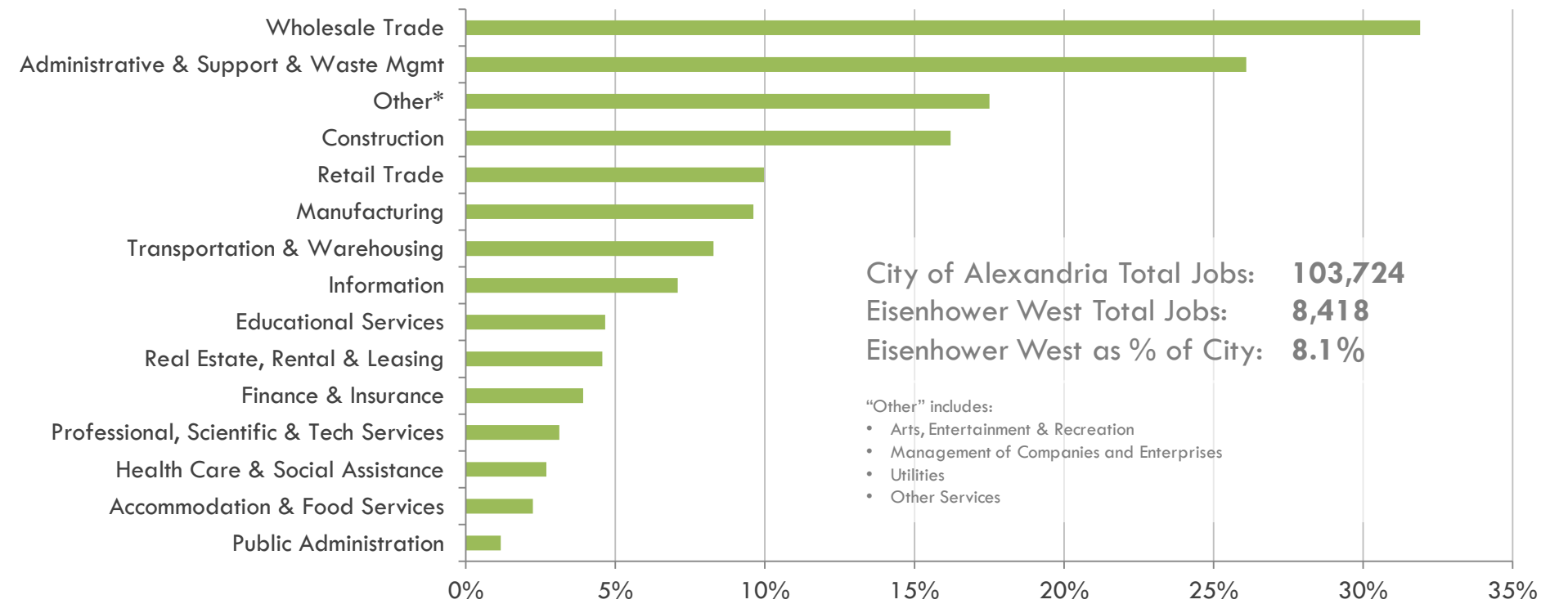


Figure 9: Percentage of Alexandria Employment within Eisenhower West

Source: Esri Business Analyst

87% of all jobs in Eisenhower West are in these industries

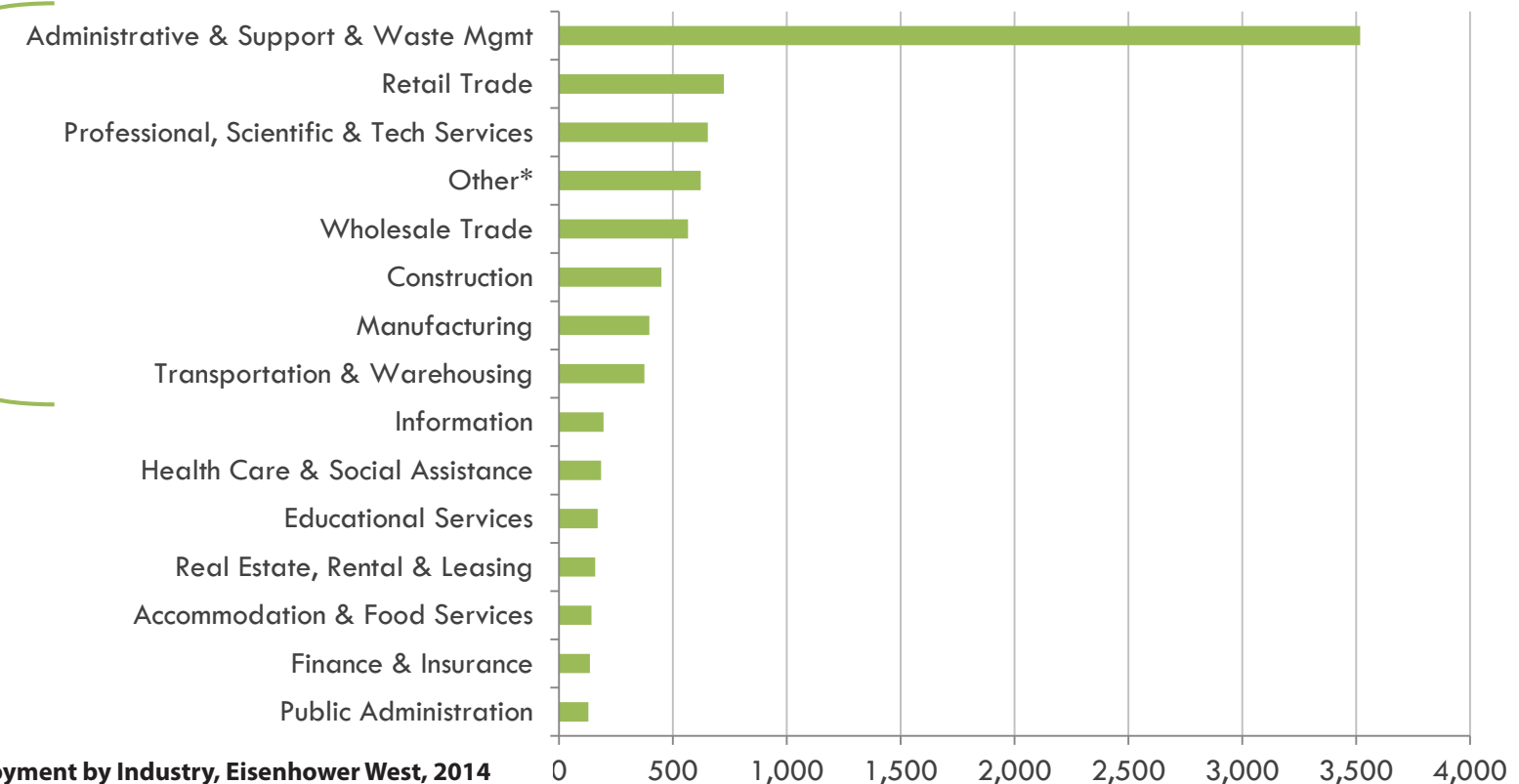


Figure 10: Total Employment by Industry, Eisenhower West, 2014

Source: Esri Business Analyst

Demographic and Economic Analysis (cont'd.)

Economics (cont'd.)

Citywide, many of the industry sectors which make up the majority of Eisenhower West's employment base have declined since 2002.

- Many of the industry sectors which make up the majority of jobs in Eisenhower West, underlined in green in the graph below, experienced citywide losses between 2002 and 2011, including retail trade, wholesale trade, construction, and transportation and warehousing. In contrast, these industries have grown regionally, with the exception of construction.
- Administrative, support, and waste management remained relatively static Citywide, but has grown throughout the MSA.
- Jobs related to professional/scientific/technical services and manufacturing grew in Alexandria. However, the City did not capture a similar share of professional, scientific, and technical services jobs as the MSA.

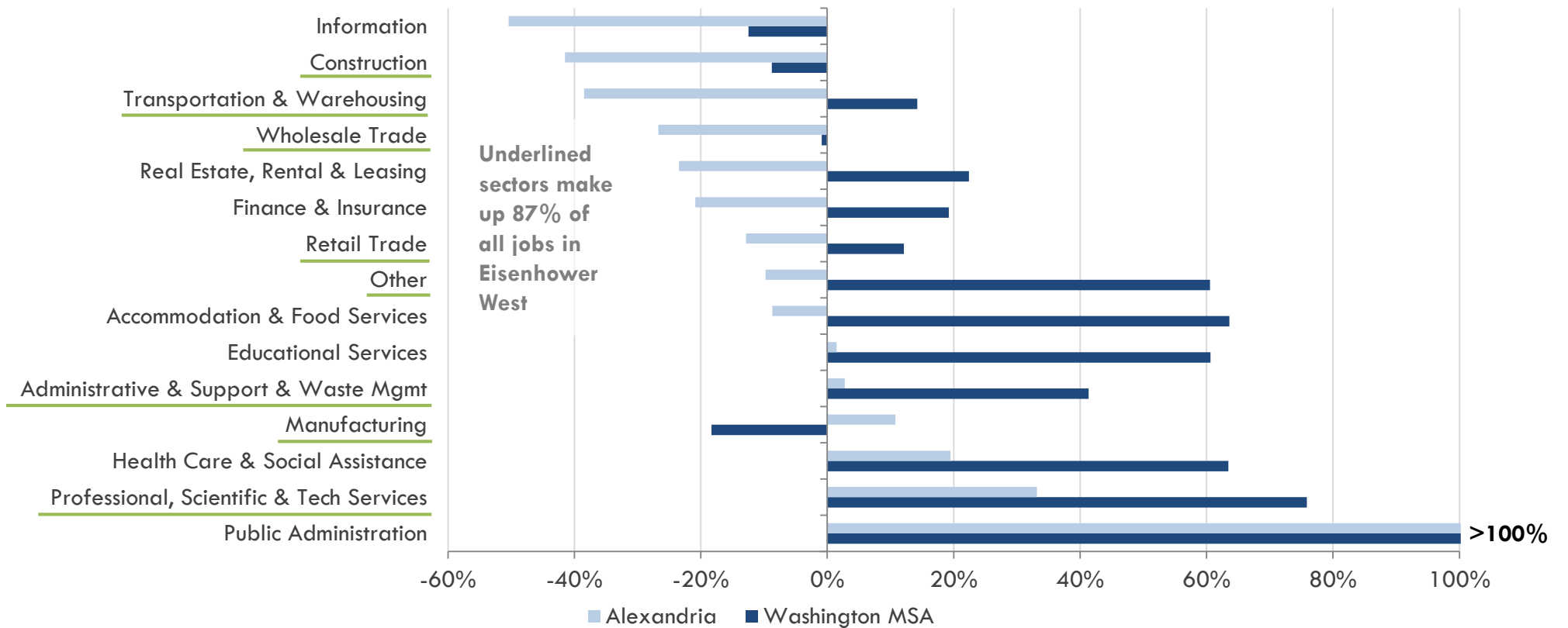


Figure 11: Percentage Change in Employment by Industry, 2002-2011

Source: US Census Bureau; Center for Economic Studies, LEHD

Conclusions and Implications

In the context of a region experiencing overall population growth, the population in Eisenhower West has grown substantially as the result of new housing development, mainly Cameron Station.



With projected continued regional growth, demand for housing and related amenities is likely to increase. New housing development will also drive demand for retail and other amenities in Eisenhower West.

Jobs in Eisenhower West are mainly concentrated in industries, such as warehousing and wholesale trade, that have declined regionally.



While it may be challenging for Eisenhower West to continue to retain these jobs given regional market conditions, it provides an opportunity for the area to attract new job-generating sectors.

Administrative, Support, and Waste Management industries comprise most of the Plan Area's jobs, and remained stable between 2002 and 2011.



These sectors benefit from Eisenhower West's location and affordability. In the near term, they are likely to remain stable.

Real Estate Market Assessment

Real Estate

HR&A assessed the market for the already eclectic mix of residential, retail, office, and industrial properties located within Eisenhower West.

- The Eisenhower West plan area is primarily commercial with newer pockets of residential development.
- Industrial properties, including warehouses and flex space, dominates the Plan Area, comprising 70% of all non-residential land uses on a square foot basis.
- Many of the commercial buildings are older, with a median age of 34-39 years. Residential development is much newer, with a median age of 13 years.
- Amongst residential properties, there is a mix of multifamily and single-family/townhouse developments. Most of these projects consist of for-sale units in Summers Grove, Cameron Station, and The Reserve at Eisenhower; though there are rental units located within two multifamily developments, The Exchange at Van Dorn and the recently completed units at Modera Tempo (formerly "Landmark Gateway").
- There are rental units located within two multifamily developments, The Exchange at Van Dorn and the recently delivered Modera Tempo (formerly, "Landmark Gateway").
- Excluding the operations at Virginia Paving and Vulcan Materials, the industrial stock is made up of small, single-story warehouses and flex space home to a variety of tenants.
- For the most part, retail uses in Eisenhower West consist of auto dealerships, with some big box uses such as Home Depot, and some neighborhood serving retail located in strip/neighborhood centers.
- Most of the office space within the Plan Area is located in the 607,000 SF Victory Center. Despite being renovated in 2009, it is 100% vacant as of this report. The area's remaining office space is located in older, single-story buildings.

Land Use	Gross Square Feet/Units	Median Year Built
Office	735,515 SF	1979
Industrial*	3,430,134 SF	1975
Retail	739,194 SF	1977
Total Commercial	4,904,843 SF	
Residential**	2,727 Units	2001

Figure 12: Land Use by Gross Square Feet/ Units

Source: CoStar; City of Alexandria

*Includes all warehouse and flex; excludes Virginia Paving and Vulcan Materials

**Includes all rental and for-sale multifamily and single family dwelling units in the Plan Area

In addition to comparing Eisenhower West to the region, HR&A analyzed the local market for each product type, the boundaries of which differ slightly depending on industry-accepted definitions of local submarkets.

Product Type	Market Analysis Area	Notes
Multifamily Rental	"West Alexandria": N Quaker Lane to the east City limits to the north, south, and west	West Alexandria is the industry-defined market for multifamily rental product comparable to projects in Eisenhower West
Multifamily For-Sale (Condo)	City of Alexandria	The City of Alexandria as a whole is the industry-defined submarket for comparable condos, single-family houses, and townhouses
Single-family/Townhouse		
Retail	One- and three-mile radii from the center of the plan area	Retail areas account for the "draw" of potential consumers based on product type and distance
Office	City of Alexandria	The City of Alexandria as a whole is the industry-defined submarket commercial real estate uses
Industrial		

Figure 13: Market Analysis Product Types

Residential Real Estate Market Assessment (cont'd.)

Residential Overview

Residential development in Eisenhower West is relatively new, and several developments are scattered amongst commercial uses.

- Residential units within Eisenhower West are located across five developments: Summers Grove, Cameron Station, The Reserve at Eisenhower, The Exchange at Van Dorn, and Modera Tempo (Formerly "Landmark Gateway". Cameron Station is a former army base, while the other developments are redevelopments of former commercial sites.
- All of the residential development has been built within the past 15 years.

Residential product within Eisenhower West consists of a split between single-family¹ and multifamily developments.

- These developments consist of slightly more single-family homes (54%), including detached homes and attached townhouses, than multifamily units (46%). Though somewhat evenly distributed, there are a greater concentration of single-family homes and townhouses in Eisenhower West compared to the City, and fewer than compared to the MSA.



**Total Units:
2,727**

Figure 14: Residential Developments in Eisenhower West

Source: Zillow; HR&A Advisors, Inc.

*This property will eventually consist of 492 units. 161 units have been completed and are available for lease as of this report. Mill Creek will deliver an additional 199 apartments as a part of its first phase, and an additional 132 units in its second phase; both phases are scheduled for completion in July/August of 2015.

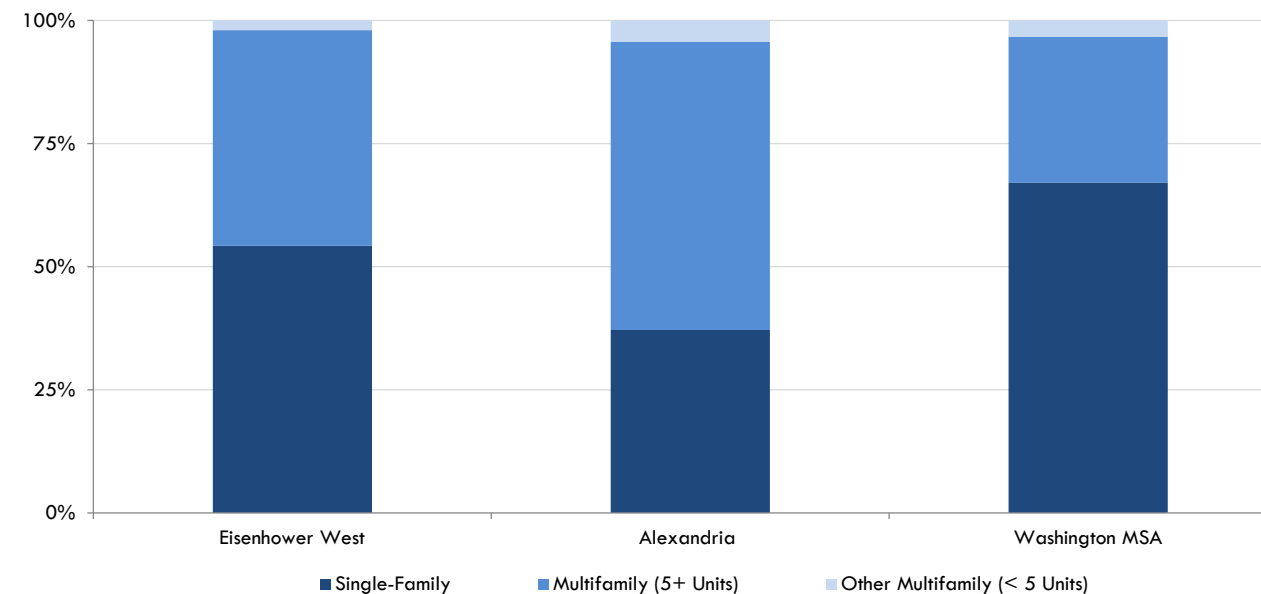


Figure 15: Distribution of Units by Units in Structure, 2014

Source: Esri Business Analyst

Residential Real Estate Market Assessment (cont'd.)

Residential Overview (cont'd.)

Residential product within Eisenhower West is largely owner-occupied.

- The Plan area maintains higher rates of homeownership compared to the City and the MSA. These homeownership rates reflect the large number of single-family homes and condominiums that comprise the four housing developments in Eisenhower West; however, these data do not yet reflect the recent delivery of 161 rental units at Modera Tempo (formerly "Landmark Gateway").

Residential: Multifamily Rental

In contrast to Eisenhower West, rental buildings within the West Alexandria submarket are much older, with few deliveries in recent years.

- Over half (53%) of all existing multifamily rental units in the "West Alexandria" submarket were built during the 1960s.
- Out of the 21,547 units within the West Alexandria submarket, 694 units (3%) are located in Eisenhower West within two developments that were completed in the past decade: The Reserve at Eisenhower in 2007 and the Modera Tempo (formerly "Landmark Gateway") in 2014.
- Developers delivered new apartment units at a rate of approximately 200 units per year through 2003. From 2004-2006, however, over 2,000 units were converted to condos, thus reducing the number of rental units in the area by 9%. The number of total rental units in the area recovered, but remained static until the delivery of Modera Tempo (formerly "Landmark Gateway") in 2014.

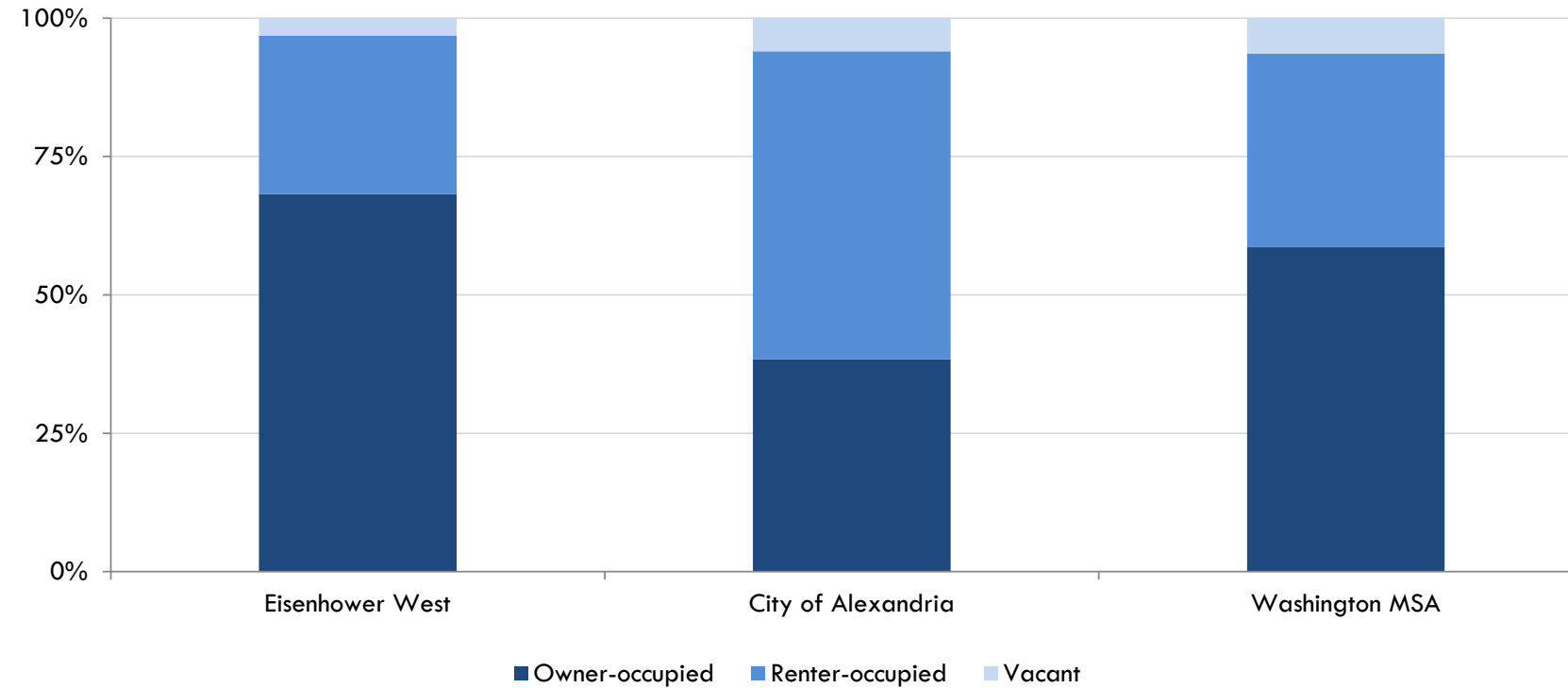


Figure 16: Housing Tenure, All Housing Units, 2014
Source: Esri Business Analyst

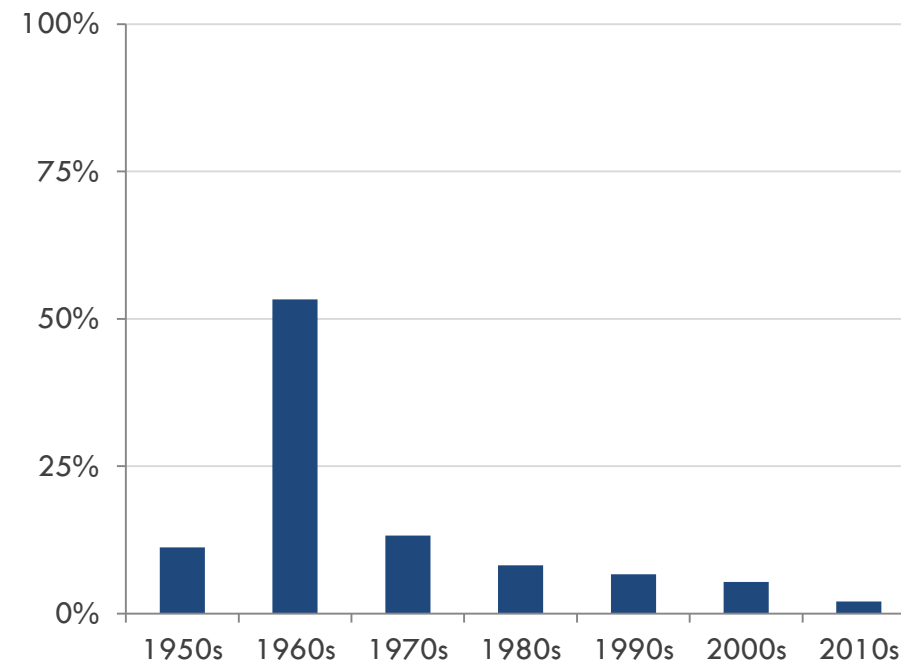


Figure 17: Percentage of Multifamily Units by Decade of Construction, West Alexandria
Source: CoStar

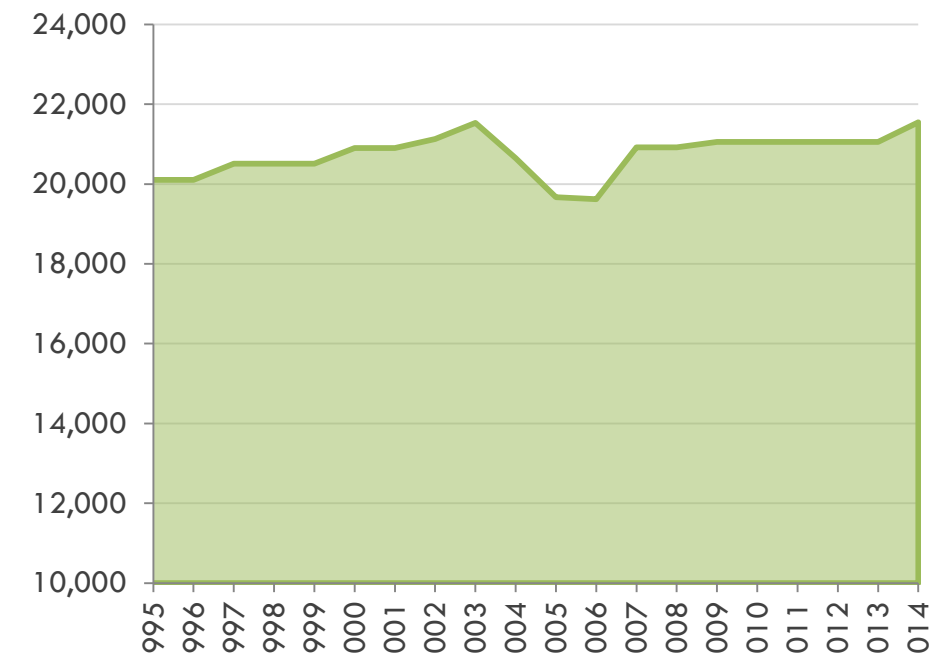


Figure 18: Total Multifamily Rental Inventory (units), West Alexandria, 1995-2014*
*2014 year-to-date, or 2nd quarter as of this report
Source: CoStar

Landmark Gateway (now Modera Tempo)

Developer: Mill Creek Residential

Residential	492 Rental Units
Unit Size	Range from studios (530 SF) to 2-bedroom, 2-bathroom with dens (1,384 SF)
Average Monthly Asking Rent	\$1,977/unit \$2.72/SF
Retail	15,000 SF



Residential: Multifamily Rental

With 161 units leasing and another 331 scheduled for completion in July/August 2015, Modera Tempo, (formerly "Landmark Gateway") is the first residential development in Eisenhower West since 2007.

Source: Mill Creek Residential Trust

Residential Real Estate Market Assessment (cont'd.)

Residential: Multifamily Rental

The multifamily rental market appears to be recovering post-recession.

- Due to the conversion of many rentals to condos between 2004 and 2006, and removing them from the available supply of rental units, rental vacancy rates decreased and rents continued to increase.
- Given positive economic conditions and inexpensive financing, nearly 1,300 units came online in 2007. These units took several years to be fully absorbed and contributed to a sharp decline in rents in addition to the impacts of the recession.
- Since this initial decrease in rent, West Alexandria has remained less expensive than the rest of the Northern Virginia market, and the gap continues to widen. However, this relative affordability continues to attract tenants, and vacancy has declined from 5% in 2009 to 2% in 2014 (to date).

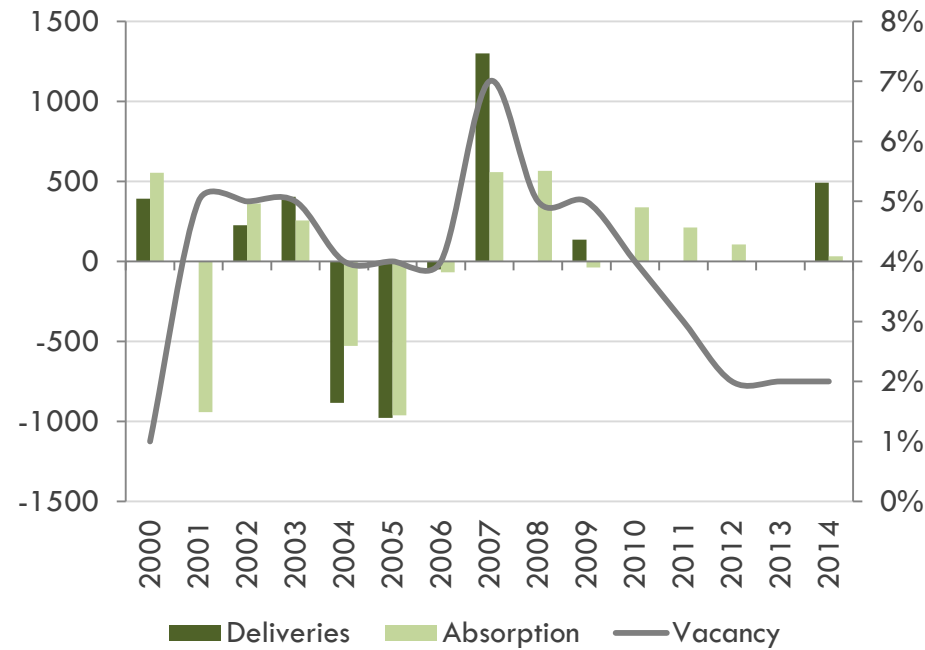


Figure 19: Deliveries, Absorption, and Vacancy, West Alexandria, 2000-2014*
 * 2014 year-to-date, or 2nd quarter as of this report
 Source: Reis

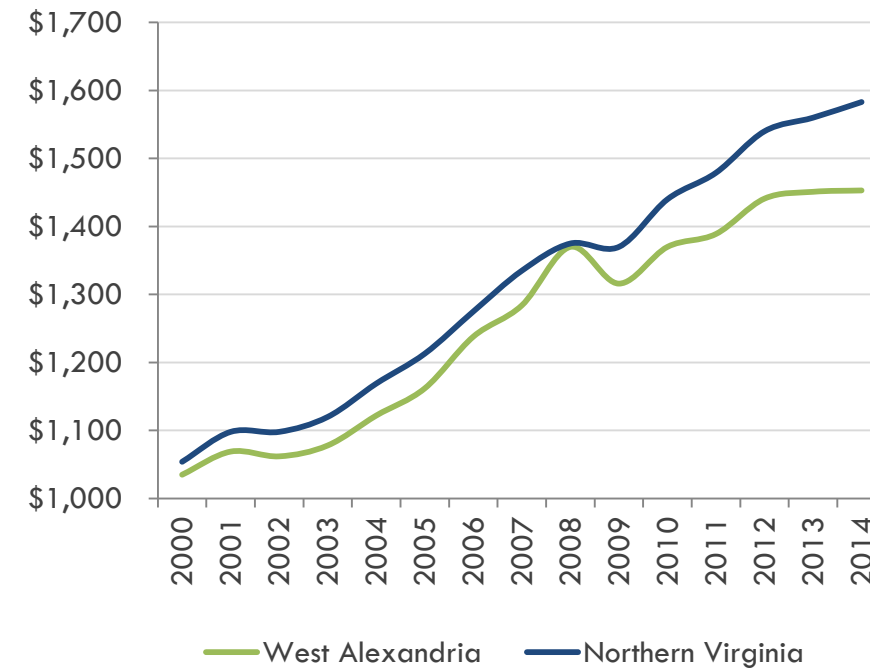


Figure 20: Effective Rent per Unit, 2000-2014*
 * 2014 year-to-date, or 2nd quarter as of this report
 Source: Reis

Residential: For-Sale Housing

The local and regional for-sale housing market is improving.

- The average number of days on market in Alexandria declined from 100 to 65 (-35%) between 2010 and 2014. On average, units in Alexandria are on the market 17 fewer days than in the Washington MSA.
- Increased demand reduced the total inventory of houses available for sale throughout the City between late 2010 and mid-2013. The recent increase in homes for sale may indicate a desire on behalf of homeowners to take advantage of these improving market conditions.
- Strong regional demand for for-sale housing is expected to continue, assuming interest rates remain low.

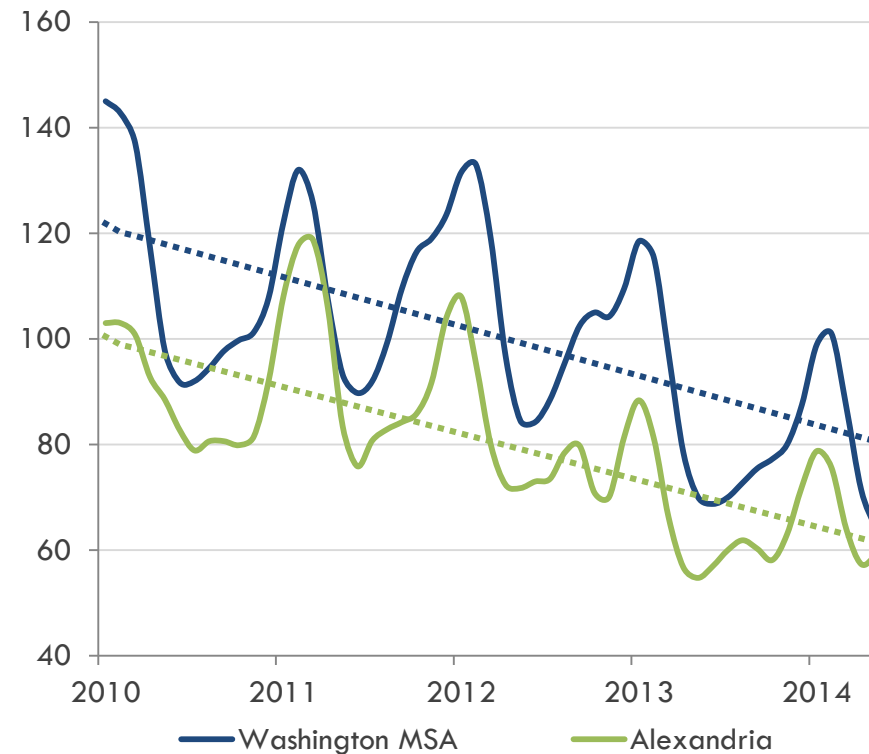


Figure 21: Average Number of Days on Market, 2000-2014*
 * 2014 year-to-date, or 2nd quarter as of this report
 Source: Zillow.com

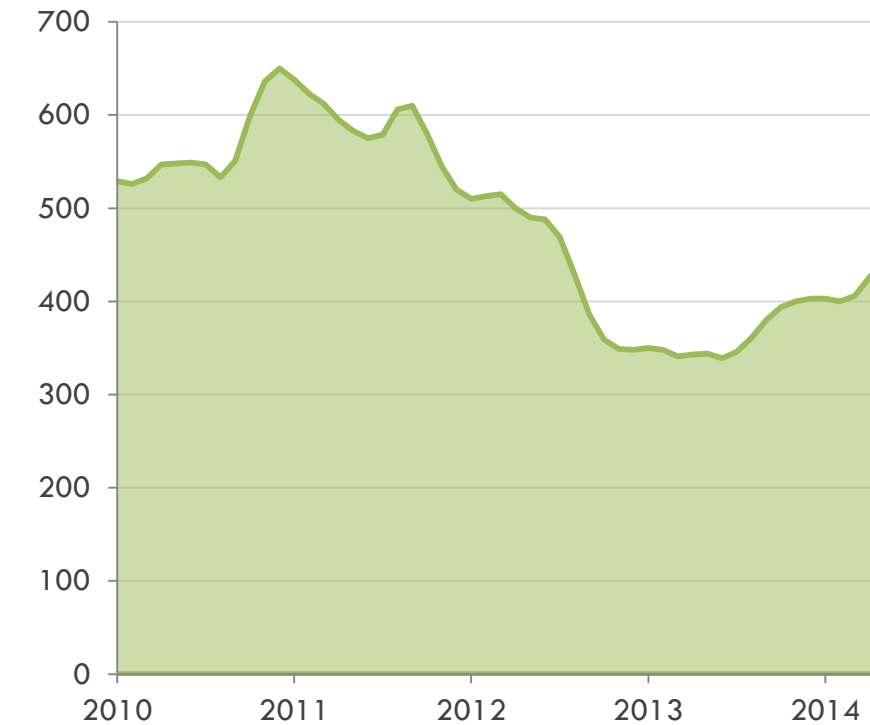


Figure 22: For-Sale Inventory, All Units, Alexandria, 2010-2014*
 * 2014 year-to-date, or 2nd quarter as of this report
 Source: Zillow.com

Residential Real Estate Market Assessment (cont'd.)

Residential: For-Sale Housing

Median home values for all housing types in Alexandria have trailed those in Arlington and Fairfax, but Alexandria remains fairly competitive.

- While lower than Arlington, median single-family home values in Alexandria are higher than in Fairfax County and the Region overall.
- In Alexandria, median values for single-family homes have increased by 23% since the 2009 recession low, and median values for condos have increased by 8% since the 2009 recession low.
- The narrow gap between condominium values throughout the MSA and in Alexandria, Arlington, and Fairfax may indicate that condos in Alexandria are competitive on price. There may be demand for additional condos in Eisenhower West, but prices have grown only 7% (compared to 8% in Arlington and 20% in Fairfax) since their lowest point in 2009.
- Additional new housing development in the plan area could likely be competitive at the right price point.

Residential: Pipeline

A dramatic increase in new building permits demonstrates positive developer response to strong demand for residential rental and for-sale development.

- Multifamily building permits in the City spiked in 2013 as developers have sought to meet the demand for new rental and condominium buildings.
- Pipeline includes a mix of condo and rental projects, the majority of which are part of larger mixed-use developments.
- This activity may signify additional opportunity for residential development in Eisenhower West, depending on the market timing of existing development in the pipeline.

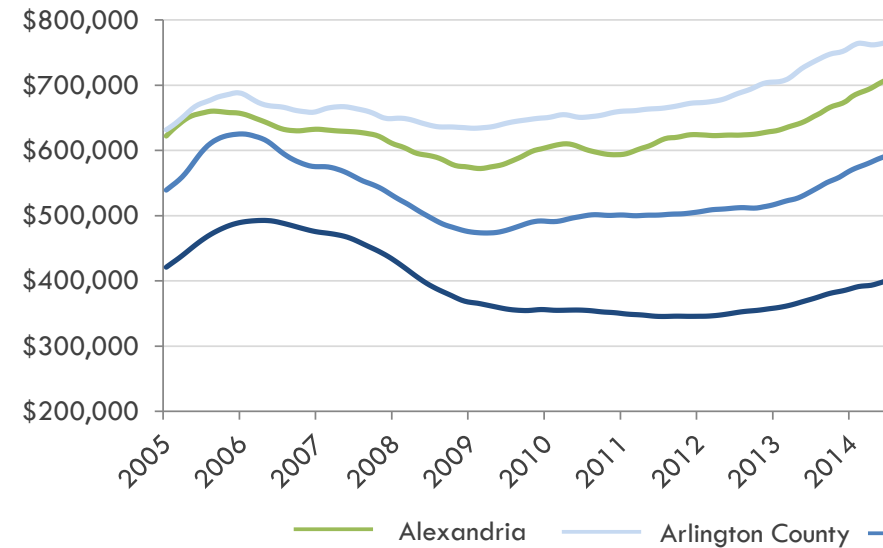


Figure 23: Median Home Value, Single-Family*, 2005-2014**

* Includes all residential structures designed as one dwelling, including townhouses
 ** 2014 year-to-date, or 2nd quarter as of this report. Source: Zillow.com

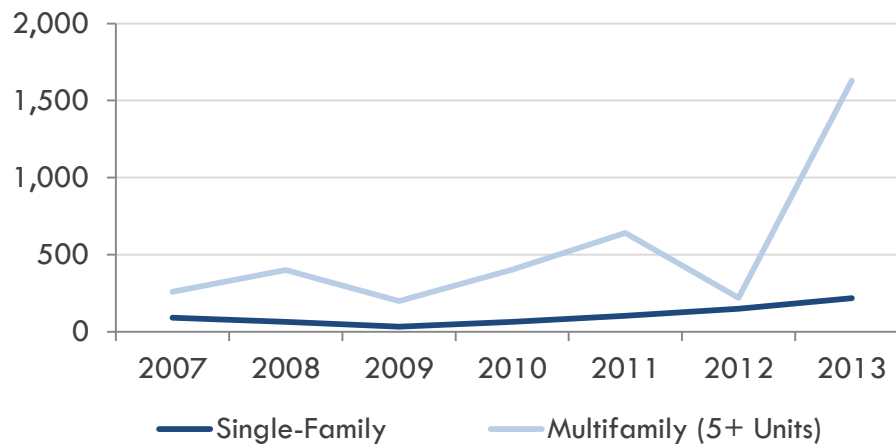


Figure 25: Building Permits Issued, City of Alexandria, 2007-2013

	Residential	Type	Other Uses
Landmark Mall	370-400	Multifamily Rental	250,000 – 320,000 SF Retail
Stevenson Ave Condos	121 Units	Multifamily Condo	80,000 SF Office
Washington Suites	219 Units	Multifamily Rental	
Choi Site	300,000 SF	Unknown	500,000 SF Office, 10,000 SF Retail
Van Dorn Plaza	550,000 SF	Unknown	100,000 SF Retail
Millennium/Saul Centers	445,000 SF	Unknown	700,000 SF Office, 125,000 SF Retail

Figure 27: Nearby Residential Pipeline

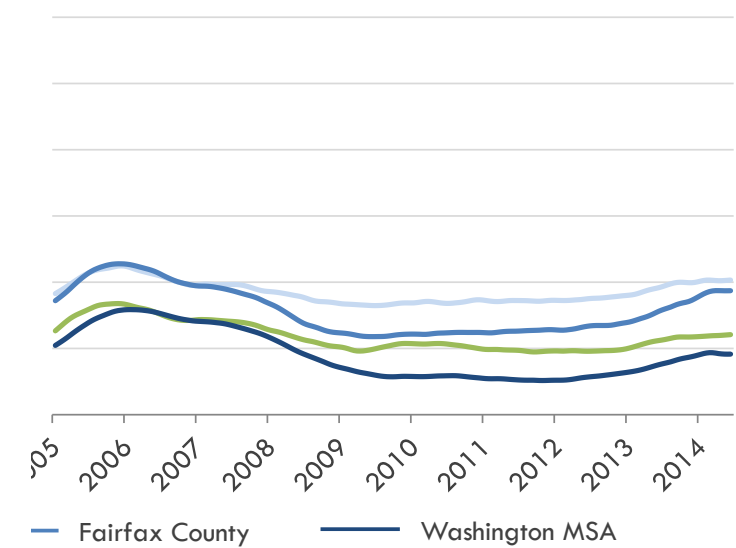


Figure 24: Median Home Value, Condo, 2005-2014**

** 2014 year-to-date, or 2nd quarter as of this report
 Source: Zillow.com

	Residential	Type	Other Uses
Cameron Park	457 Units	Multifamily Condo/Rental, Townhouse	36,000 SF Retail
Landmark Gateway	331 Units	Multifamily (Remaining Phases 1, and Phase 2)	
Pickett's Place	48 Units	Townhouse /Stacked Townhouse	
Eisenhower West Total	505 Units		

Figure 26: Eisenhower West Residential Pipeline

Source: HUD SOCDs Building Permit Database; CoStar; City of Alexandria; HR&A Advisors

Residential Real Estate Market Assessment (cont'd.)

Residential: Conclusions and Implications

The current supply of housing in Eisenhower West was built since 1999.



Eisenhower West has a new and evolving identify as a residential area.

Several indicators suggest a recovered market for multifamily rental housing, including decreased vacancy, positive net absorption, and a spike in building permits.



Sites in Eisenhower West could be well situated for transit-oriented multifamily developments to capture additional demand due to their location near the Metro and Beltway.

Modera Tempo (formerly "Landmark Gateway") is comparable to the type of multifamily housing in demand throughout the region.



Eisenhower West could support additional, highly amenitized multifamily rental product which appeals to a younger demographic seeking locations inside the Beltway, priced competitively with newer projects elsewhere.

Retail Real Estate Market Assessment (cont'd.)

Retail Overview

HR&A analyzed the sales volume and demand for retail goods within a one-mile and three-mile radius of Eisenhower West.

- The one-mile trade area includes consumers that are within walking, biking, or driving distance from the center of the Eisenhower West Small Area Plan plan area. Consumers typically make frequent trips for day-to-day consumption of “convenience goods” (such as groceries and personal care products) within this radius.
- The three-mile trade area includes consumers within a short drive from the center of the Eisenhower West Small Area Plan plan area. Consumers typically make these longer trips to purchase “comparison goods,” including clothing, furniture, electronics, and automobiles. Consumers also travel within this trade area to patronize dining establishments.
- Consumers within both trade areas may not necessary travel throughout the trade areas, as barriers to travel such as the Beltway and I-95 limit the distance to which consumers may be willing to travel.

Retail Supply

Retail clusters in the vicinity of Eisenhower West consist of a diverse mix of locally-serving and regionally-serving shopping centers and other businesses.

- Much of the retail within and surrounding the Eisenhower West plan area consists of malls, shopping centers, and car dealerships, which serve a regional consumer base.
- There is some level of neighborhood-serving retail in the form of strip centers (such as Van Dorn Station), and ground-floor retail in mixed-use buildings in Cameron Station and Modera Tempo (formerly “Landmark Gateway”).
- With the exception of Landmark Mall, much of the retail in and around Eisenhower West did not exist until the 1990s.

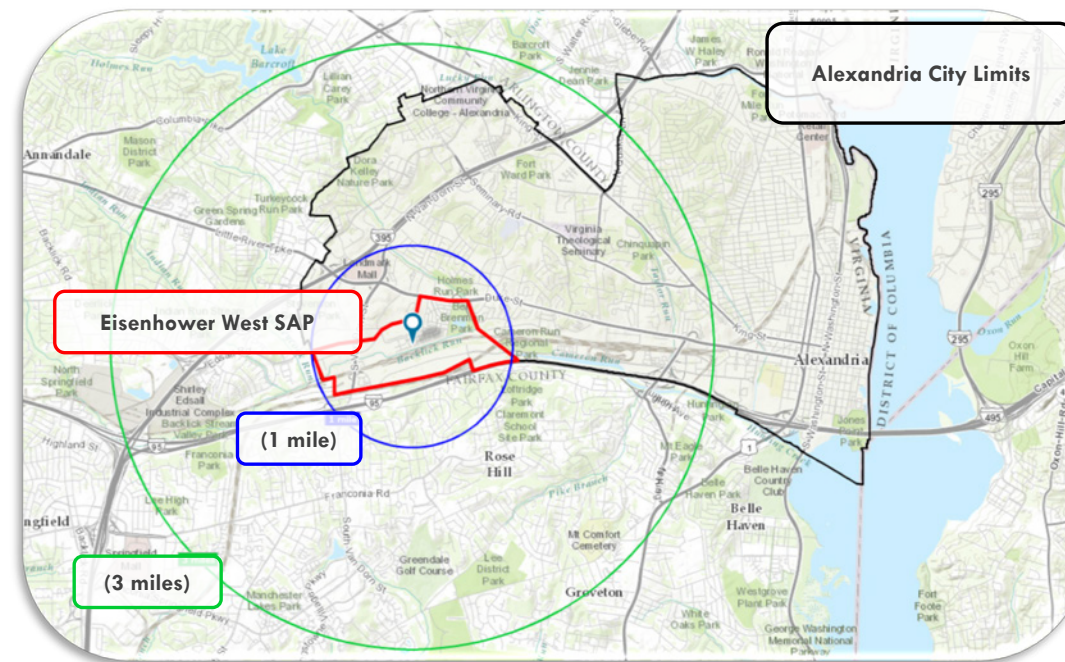


Figure 28: Retail Analysis Trade Areas
Source: HR&A Advisors, Inc.

Comparison Goods

1 mile (Convenience Goods)

Grocery

Personal Care

Miscellaneous

3 miles (Comparison Goods)

Home Furnishing

Electronics

Apparel

Hobby, Books, Music, Sports

General Merchandise

Building Materials

Dining

Figure 29: Convenience and Comparison Goods

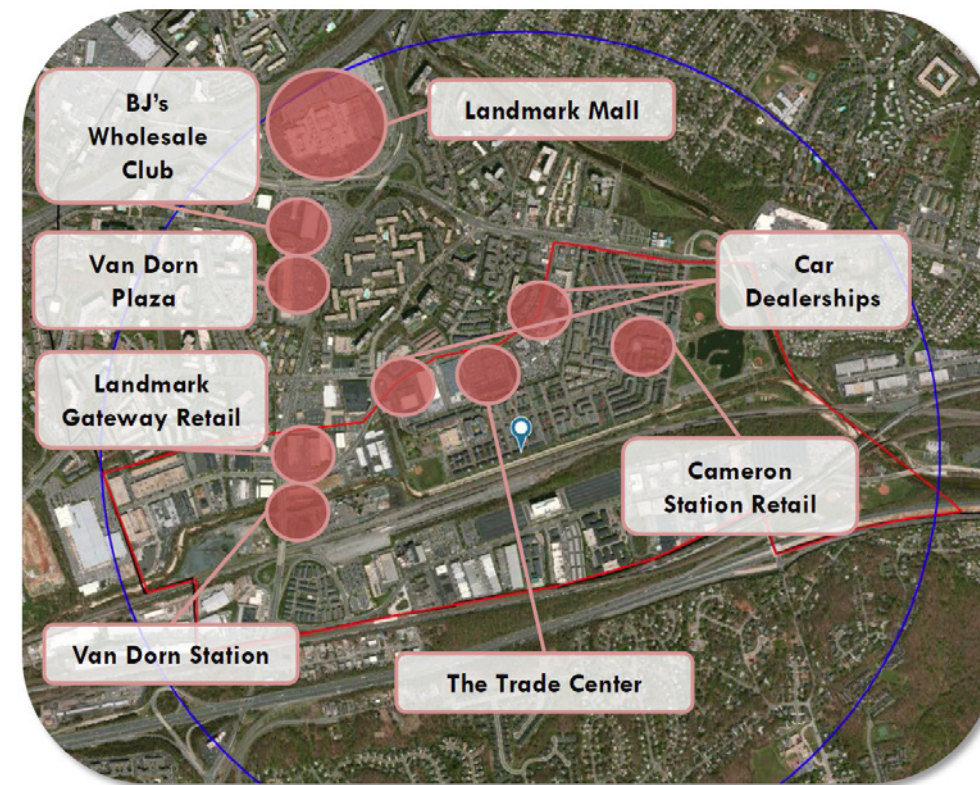


Figure 30: Local Retail Clusters
Source: Esri Business Analyst, CoStar

Plan Area Primary Retail Clusters

- Landmark Mall (1965). A 969,000 SF super-regional shopping center anchored by a Macy’s and a Sears. Has struggled in recent years to retain retailers, and is now the subject of plans for major redevelopment.
- Van Dorn Plaza (1979). A 119,908 SF shopping center anchored by a Safeway.
- Van Dorn Station (1990). A small, 27,000 SF cluster of neighborhood-serving retail.
- BJ’s Wholesale Club (1992). A 116,869 SF building constructed for and inhabited by BJ’s Wholesale Club.
- The Trade Center (1993). The largest retail cluster in the Plan Area. This shopping center contains about 20 stores and is anchored by a Home Depot.
- Cameron Station (1999-2002). Retail within Cameron Station is located on the ground-floor of mixed-used buildings, totaling 30,000 SF. Tenants includes a coffee shop, salon, cleaners and other small stores which provide convenience goods and amenities to residents.
- Modera Tempo (2014) (formerly “Landmark Gateway”). This recently opened apartment building started leasing in July 2014, and began occupying apartments in October 2014. The ground floor retail space is still undergoing initial lease-up.

Retail Real Estate Market Assessment (cont'd.)

Retail Supply

Regionally-serving retail within Eisenhower West competes with a number of major shopping centers within the three-mile trade area.

- Within three miles of the plan area, there are eight major shopping centers totaling 2.8 million SF of retail space.
- These shopping centers offers a range in size from community centers consisting one or two anchors and 15-40 individual stores, to the Landmark Mall, a super-regional mall located within one-mile of Eisenhower West, currently consisting of two anchors (Macy's and Sears) and approximately 30 open stores¹

The Plan Area has a only a few entertainment, sports, and other recreational venues.

- Two establishments focus on providing sports entertainment—US Bowl and Strike Zone Baseball, each located in older warehouses— while remaining uses are a combination of gyms, yoga studios, and a rock climbing gym in various flex and warehouse buildings throughout the one-mile trade area.
- Redevelopment plans for the Landmark Mall include a movie theater.
- US Bowl is the subject of a proposed redevelopment to construct 48 townhouses², which would transform the site from its current use into a residential development. This plan is currently under review by the City.

Shopping Center	Type*	GLA**
1. Landmark Mall	Super-Regional Mall	969,000
2. Plaza at Landmark	Regional Mall	443,000
3. Beacon Center	Community Center	365,115
4. Crossroads Place	Community Center	336,248
5. Village at Shirlington	Community Center	261,000
6. Kingstowne Towne Center***	Community Center	227,359
7. The Trade Center	Community Center	205,837
8. Kings Crossing	Community Center	135,000
Total		2,807,559

Figure 31: Area Shopping Centers

* International Council of Shopping Centers archetypes by total GLA

** Gross Leasable Area

*** Refers only to the shopping and retail center

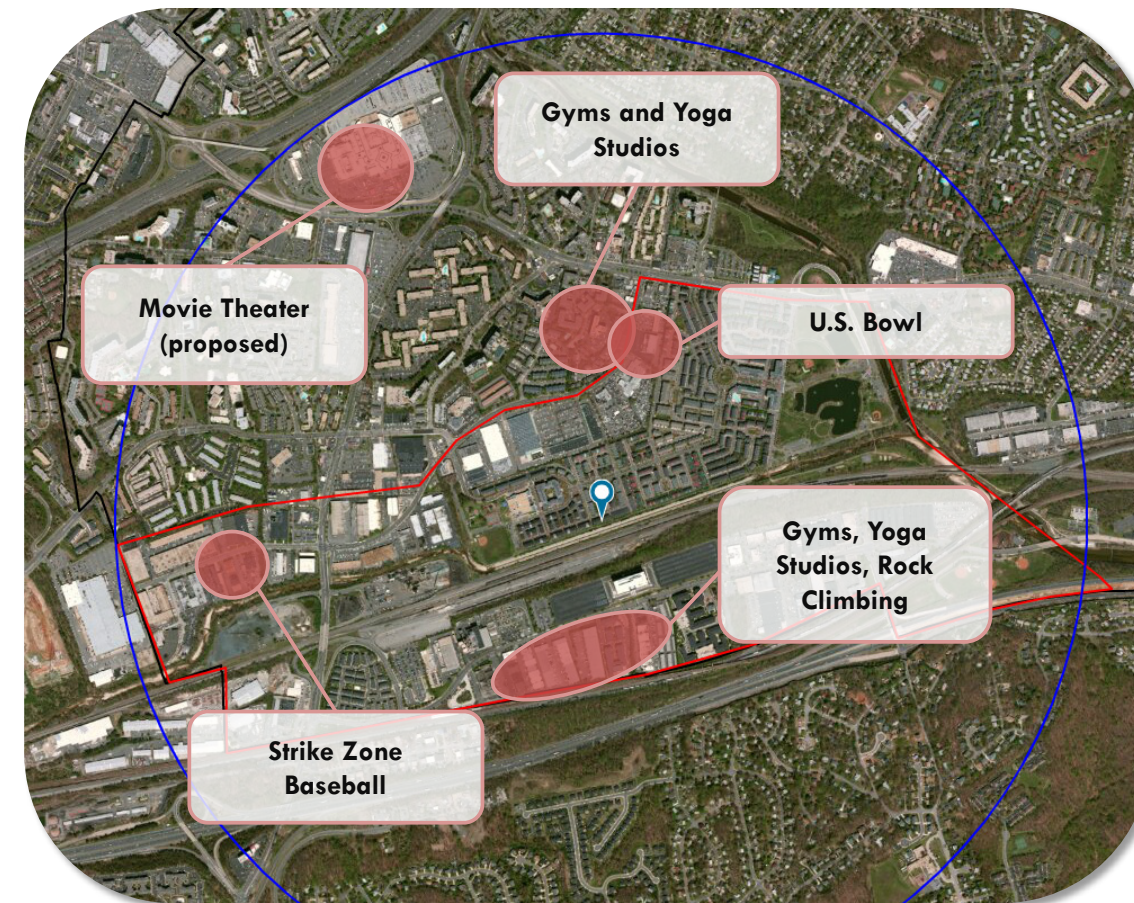
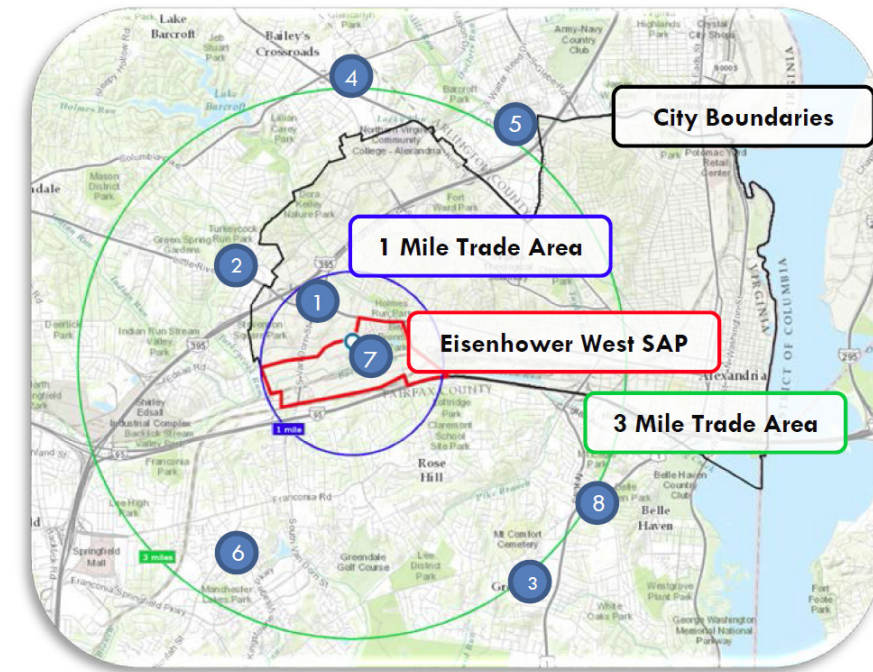


Figure 32: Local Entertainment Establishments

Source: Esri Business Analyst, HR&A Advisors, Inc.

Source:

¹ Landmark Mall

² City of Alexandria

Retail Real Estate Market Assessment (cont'd.)

Retail Pipeline

The 2009 Landmark/Van Dorn Corridor Plan (“LVDCP”) estimates that parcels near Eisenhower West can support a total of 1.4 million square feet of retail in town centers and mixed-use development.

- Currently, the Landmark/Van Dorn Corridor contains approximately 1.5 million square feet of retail space, located primarily in the Landmark Mall and other various neighborhood centers and freestanding retail buildings.¹ The City envisions that much of this retail space will be replaced with denser, more urban retail in town center-style and mixed-use developments.
- The City envisions properties within the “West End Town Center” as encouraging “regional scale development at this prominent entry into Alexandria,” proposing that these properties in total be redeveloped with, at minimum, 1 million SF of retail mainly within town-center style developments. These future developments will absorb much of the demand for regional retail destinations in the area, likely precluding the potential for regional retail destinations in Eisenhower West.
- The City envisions properties within “Pickett Place” as encouraging “a strong community retail center and convenience centers for adjacent residential areas,” proposing a minimum of 359,000 SF of retail be developed on these properties in total. These areas, which the LVDCP proposes should contain more neighborhood-oriented retail uses, are located closer to and in some cases within Eisenhower West.

Near-term development activity may absorb much of this demand, though there still may be some opportunities for a variety of types of retail in Eisenhower West.

- Approved redevelopment plans for the Landmark Mall will replace 640,000 SF of existing retail space with 250,000 to 320,000 SF of retail in a town center-style development. The Macy’s and Sears will remain, and as a result, the new Landmark Mall will contain 510,000 to 580,000 SF of retail—though this will be less than the 800,000 SF suggested by the LVDCP.
- Two developments—one completed (Modera Tempo - (formerly “Landmark Gateway”), and one approved (Cameron Park)—are located within the Eisenhower West plan area. Though Cameron Park will offer more retail than the minimum proposed, the Modera Tempo is only delivering 15,000 SF of retail—though less than the 250,000 SF of retail suggested by the LVDCP.
- The capacity for Eisenhower West depends on the timing of future developments in the Landmark/Van Dorn Corridor and other submarkets which compete with Eisenhower West for retail spending.

¹ Source: CoStar

Development Block	Land Use	Minimum Retail SF Proposed
West End Town Center		
1. Landmark Mall	Regional Town Center	800,000
2. Choi	Regional Town Center	10,000
3. Millennium/Sal Centers	Regional Town Center	125,000
4. Van Dorn Plaza	Residential/Office Mixed-Use	100,000
Subtotal		1,035,000
Pickett Place		
5. Edsall/Van Dorn North (part)	Residential Mixed-Use	25,000
6. Koons Collision	Residential Mixed-Use	60,000
7. Edsall/Pickett/Van Dorn	Mixed-Use Community Retail Center	250,000
8. Auto Dealer	Residential Mixed-Use	12,000
9. Gateway II Pickett	Residential Mixed-Use	12,000
Subtotal		359,000
Total		1,394,000

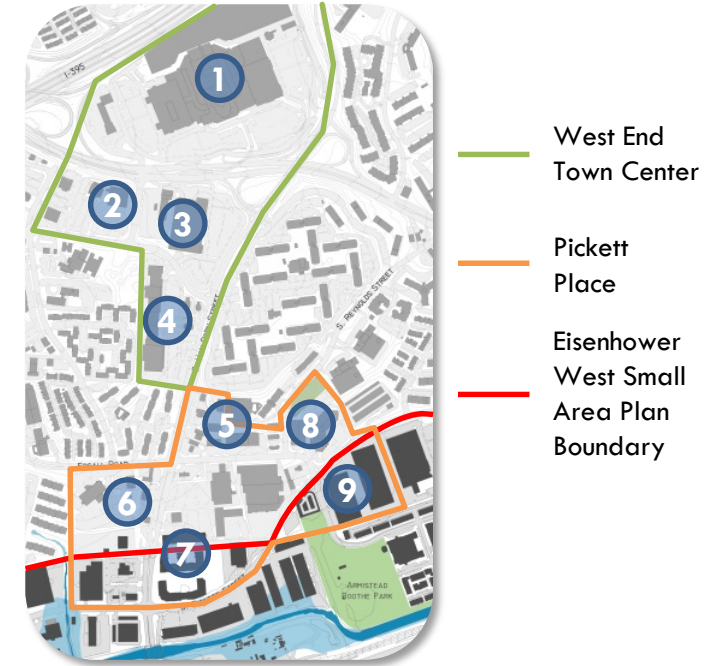


Figure 33: LVDCP Development Blocks

Source: City of Alexandria

Development Block (LVDCP)	Land Use (LVDCP)	Project Name (Actual)	Minimum Retail SF Proposed (LVDCP)	Retail SF Developed or Approved (Actual)
Landmark Mall	Regional Town Center	Landmark Mall	800,000	510,000-580,000
Edsall/Pickett/Van Dorn	Mixed-Use Community Retail Center	Modera Tempo	250,000	15,000
Gateway II Pickett	Residential Mixed-Use	Cameron Park	12,000	36,000
Total			1,062,000	561,000-361,000

Figure 34: Recent and Pending Development Activity on LVDCP Development Blocks

Source: City of Alexandria

Retail Real Estate Market Assessment (cont'd.)

Retail Supply

Most retail goods sold within the one-mile trade area of Eisenhower West reflect the Plan Area's many car dealerships and auto parts stores.

- As a result of the numerous car dealerships and auto parts stores in Eisenhower West, Motor Vehicles and Parts Dealers comprise 42% (or \$270.2 million) of all retail sales within the one-mile trade area.
- General Merchandise, which includes goods sold in department stores and warehouse clubs, also contributes heavily to local retail sales volume, with goods sold in stores such as Macy's, Sears, and BJ's Wholesale Club responsible for 28% (\$104 million) of all retail sales within the one-mile trade area.
- Twenty-six percent (or \$170.5 million) of retail sales within one mile of Eisenhower West consists of convenience goods, including Personal Care (25%), Grocery (19%), and Miscellaneous Goods (1%).

Within the three-mile trade area, sales of comparison goods exceed other categories, including motor vehicles and parts.

- Within the three-mile trade area, 30% (or \$603.9 million) of retail sales within three miles of Eisenhower West consist of comparison goods, including General Merchandise (20%), Apparel (6%), Electronics (4%), Hobbies etc. (4%), Building Materials (4%), and Home Furnishing (3%).
- These sales exceed sales of goods in Motor Vehicles and Parts Dealers, which comprise 28% (or \$570.5 million) of all retail sales.
- Grocery Store goods are responsible for 21% (\$412.6 million) of all retail sales within the three-mile trade area.

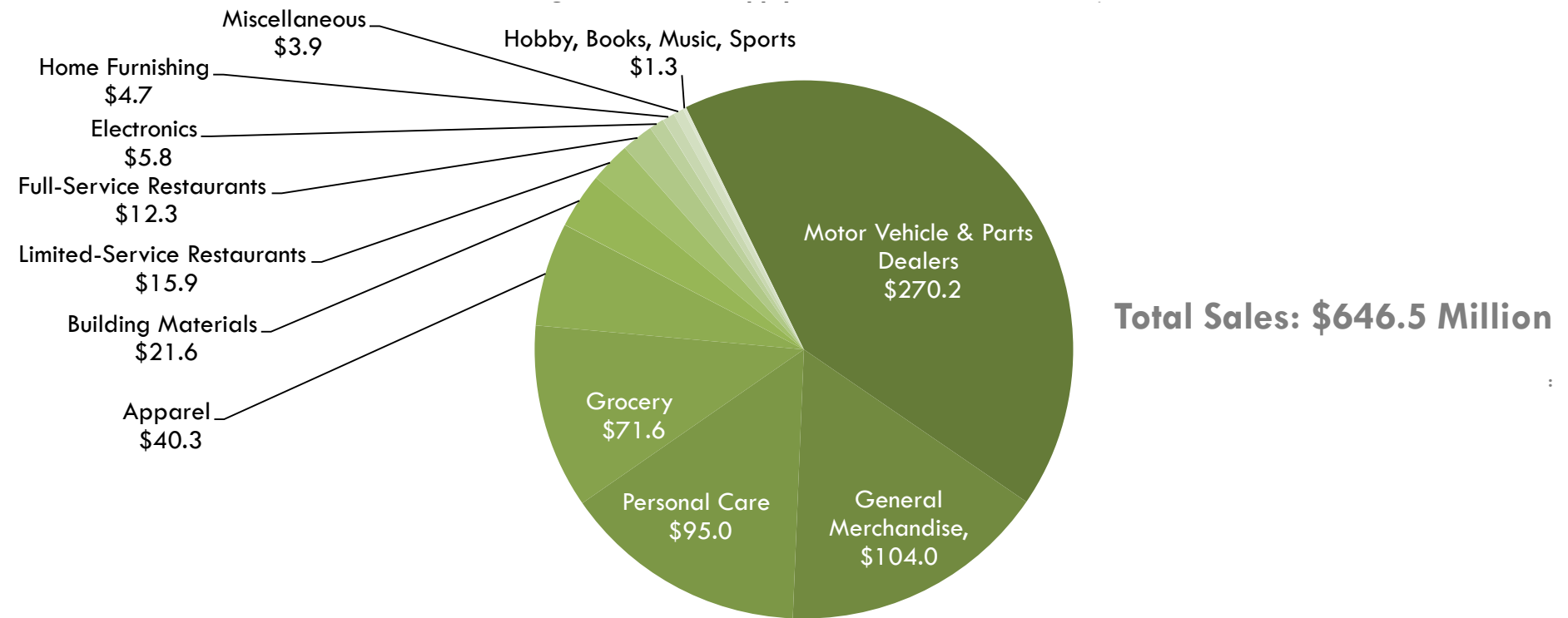


Figure 35: Retail Supply, 1 Mile Trade Area, 2013 (\$ millions)

Source: Esri Business Analyst

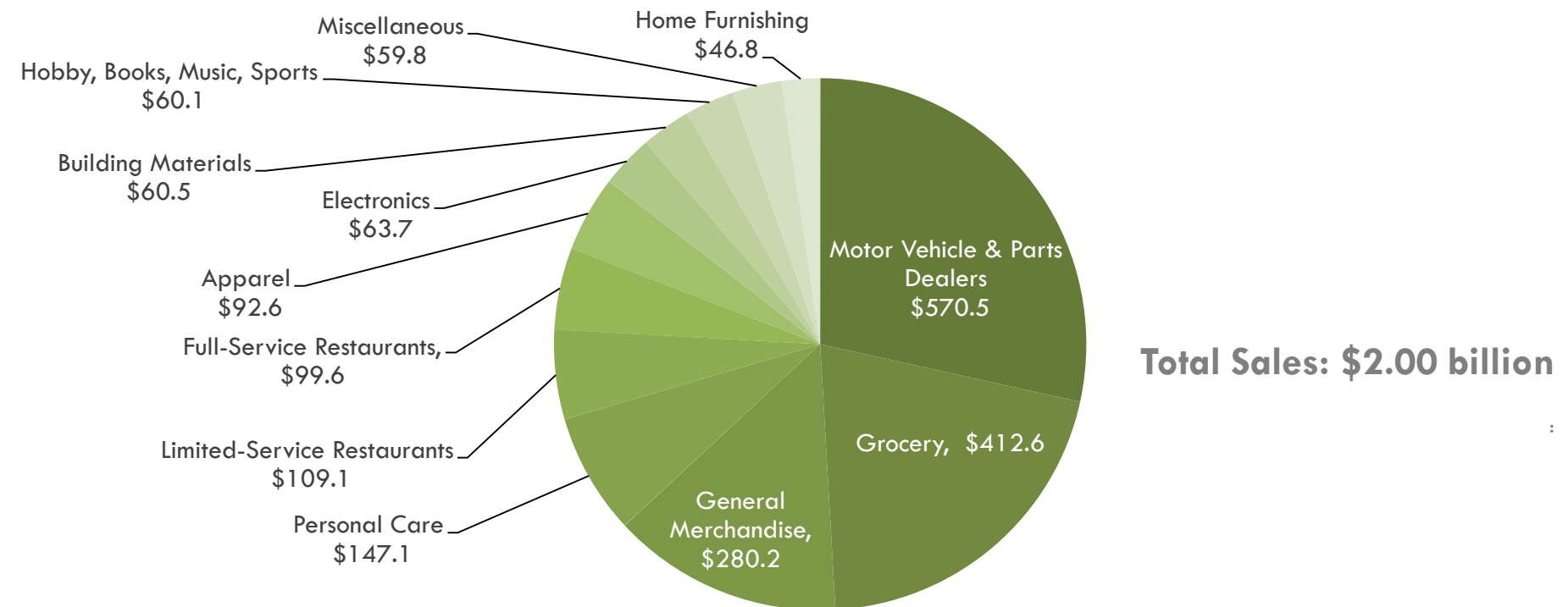


Figure 36: Retail Supply, 3 Mile Trade Area, 2013 (\$ millions)

Source: Esri Business Analyst

Retail Real Estate Market Assessment (cont'd.)

Retail Demand

As residential development continues to increase in Eisenhower West, there will be a greater demand for retail goods across all categories.

- Due in part to the larger number of residents than workers at both geographies, residents spend more in retail goods than workers and drive a significant share of retail demand.
- Residents and workers within a one-mile trade area surrounding Eisenhower West purchased \$428.6 million in retail goods across all categories. Residents were responsible for purchasing 80% (\$345 million) of these goods.
- Residents and workers within a three-mile trade area surrounding Eisenhower West purchased \$2.5 billion in retail goods across all categories. Residents were responsible for purchasing 82% (\$2.3 billion) of these goods.

Residents and households within a three-mile trade area spend over \$83 million on entertainment and recreation, including frequent attendance at movies and live theater.

- Out of total spending on entertainment/recreation fees and admission, residents spend 26% of all expenditures (\$21.8 million) on movies, theater, opera, and ballet performances.
- A majority of households in a three-mile trade area (83%) have patronized a movie or live theater performance in the last 12 months.

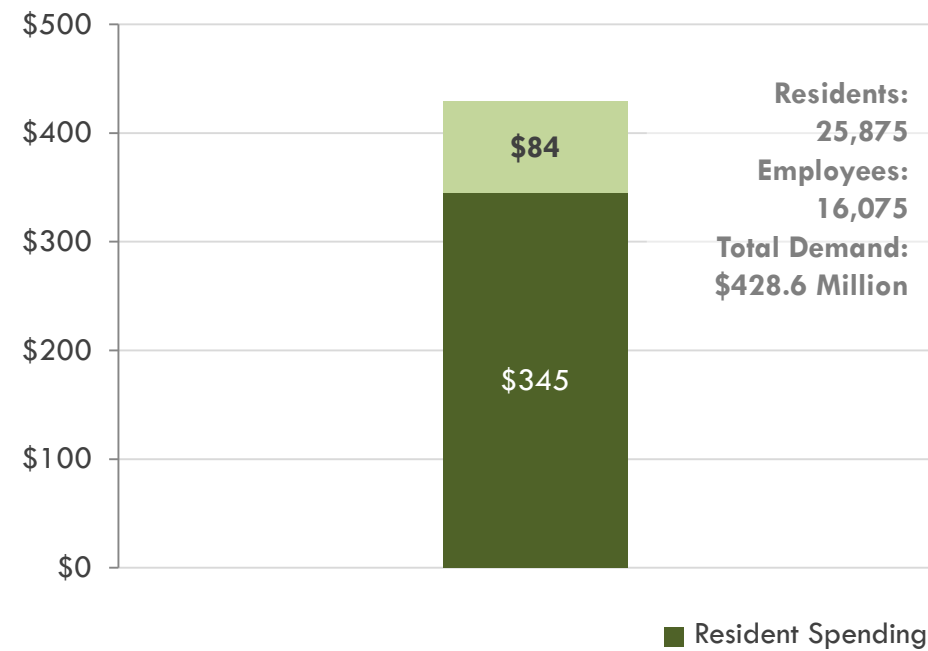


Figure 37: Total Retail Demand, 1-Mile Trade Area, 2013 (\$ millions)

* Based on a national average of worker spending per retail category
Source: Esri Business Analyst, International Council of Shopping Centers

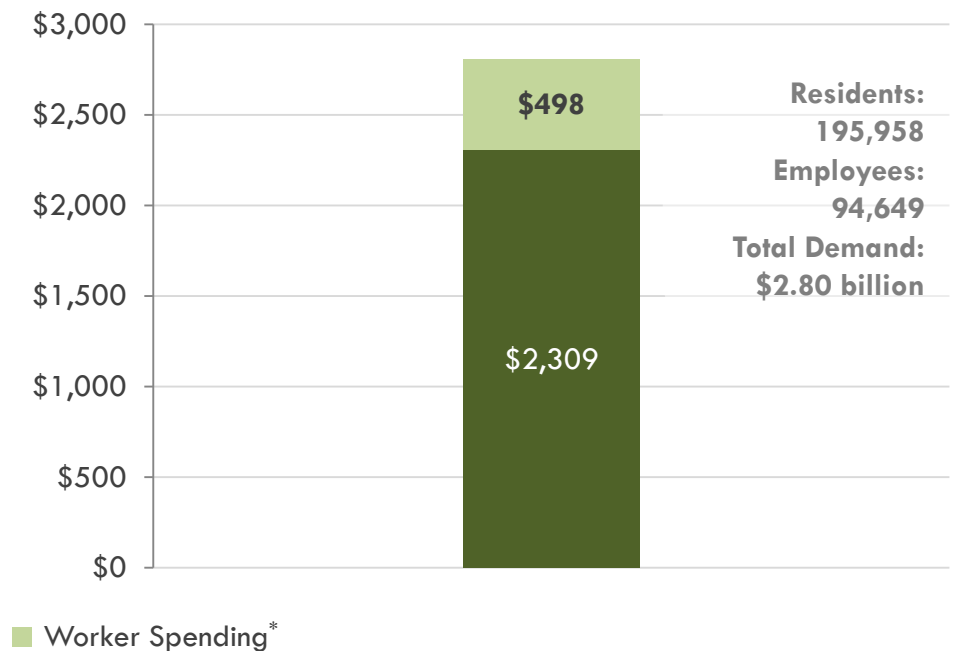


Figure 38: Total Retail Demand, 3-Mile Trade Area, 2013 (\$ millions)

* Based on a national average of worker spending per retail category
Source: Esri Business Analyst, International Council of Shopping Centers

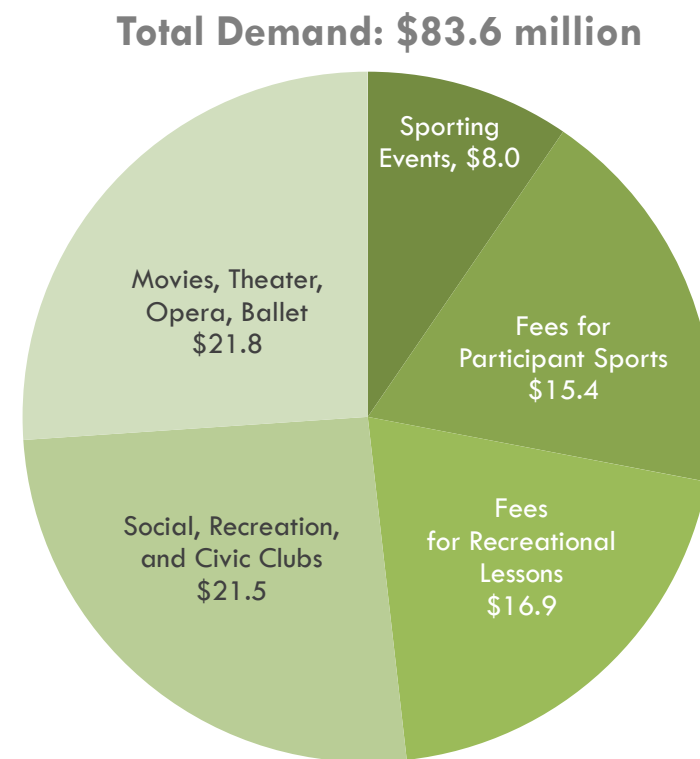


Figure 39: Entertainment Demand, 3 Mile Trade Area, Residents, 2013 (\$ millions)

Source: Esri Business Analyst

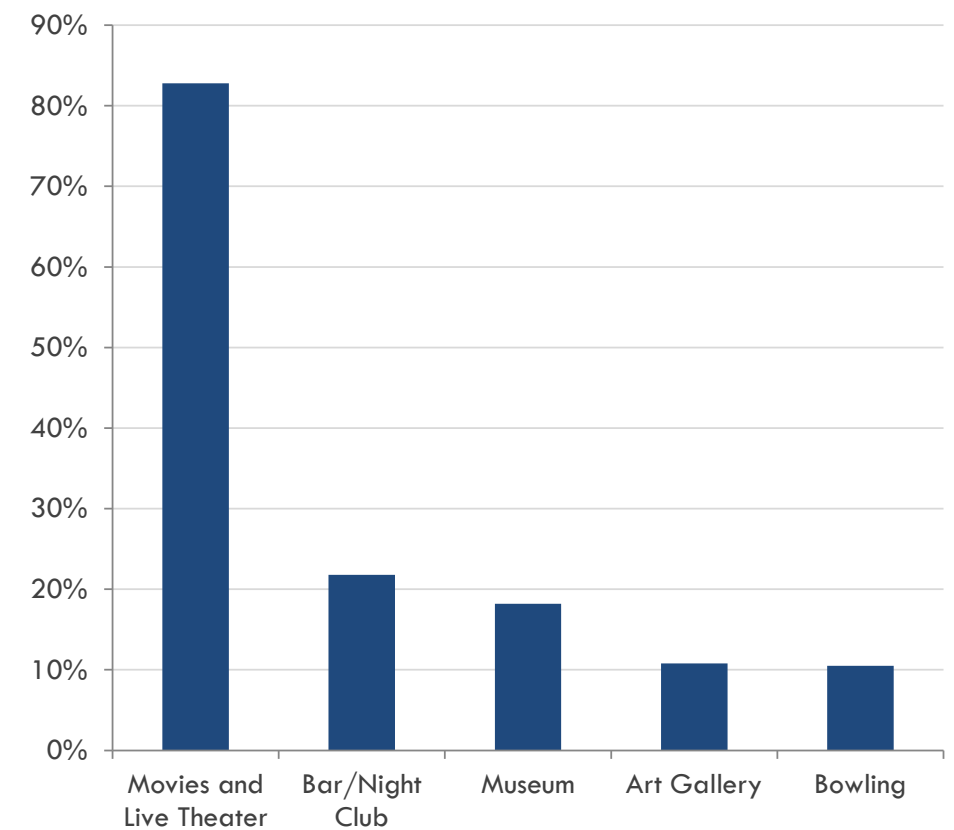


Figure 40: Percentage of all Households Participating in an Activity in the Last 12 months, 3 Mile Trade Area, 2013

Source: Esri Business Analyst

Retail Real Estate Market Assessment (cont'd.)

Retail Demand (cont'd.)

HR&A estimated the potential for retail development in Eisenhower West to meet unmet demand for retail goods.

- This analysis compares the total dollars spent on retail goods by residents and workers to the dollar value amount of existing sales of retail goods within defined trade areas.
- A trade area demonstrates unmet demand for a retail good when the amount of goods purchased by people who live and work in the area exceeds the amount of existing sales – that is, people who live and work in the area are spending their money elsewhere either due to a lack of supply or the presence of more appealing retail offerings outside of the trade area.
- In this case, HR&A used the ESRI Business Analyst retail sales and expenditure database to compare estimates of spending potential for both one- and three-mile trade areas to estimates of existing sales volumes. These numbers reflect the market conditions in 2013.

Eisenhower West may be able to support additional grocery stores and miscellaneous convenience goods.

- Within the one-mile trade area spending potential for grocery stores (\$94M) exceeds existing sales (\$72M), indicating support for additional grocery stores within Eisenhower West.
- The same is true for miscellaneous goods, where spending potential (\$20M) exceeds existing sales (\$4M). Goods in this category include flowers, office supplies, and used merchandise.
- Spending potential for personal care stores (\$44M) is lower than existing sales (\$95M) within the one-mile trade area, indicating there may not be support for more establishments selling these types of goods in Eisenhower West.

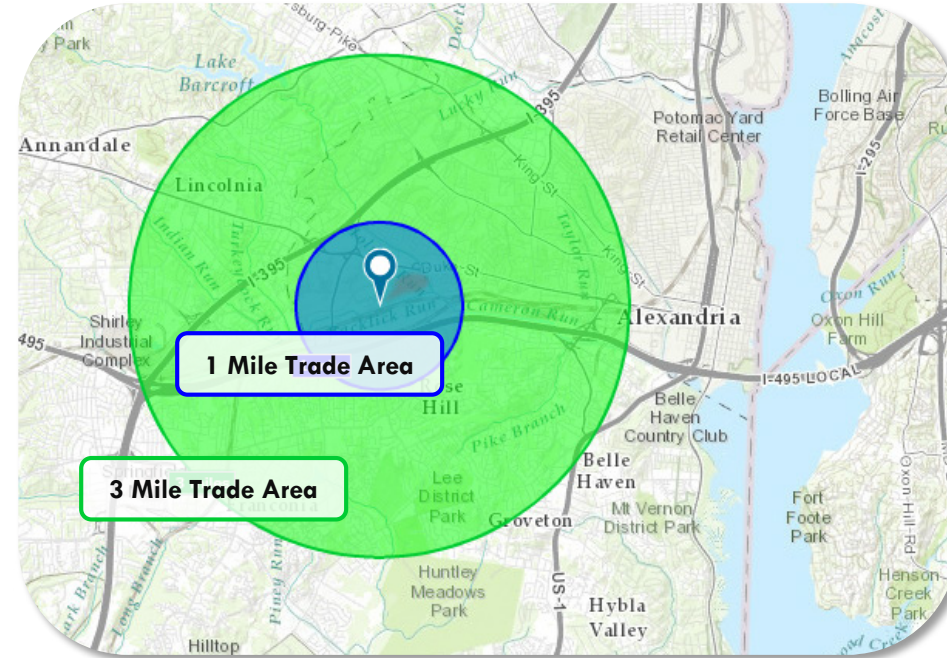


Figure 41: Retail Gap Analysis Trade Areas

Unmet Demand =
Resident and Worker Spending > Existing Sales

	Resident + Worker Spending	Existing Sales	Unmet Spending Potential	Supportable Square Footage
Grocery	\$94M	\$72M	\$22M	150,000 SF
Miscellaneous	\$20M	\$4M	\$16M	70,000 SF
Personal Care	\$44M	\$95M	(\$0)	N/A
TOTAL	\$158M	\$171M	\$38M	220,000 SF

Figure 42: Unmet Spending Potential, Convenience Goods Within a 1-mile Trade Area, 2013

Source: Esri Business Analyst, 2013; Maxim Retail Sales

Retail Real Estate Market Assessment (cont'd.)

Retail Demand (cont'd.)

Eisenhower West may be able to support additional establishments in comparison goods across all categories.

- Within the three-mile trade area, total spending potential for comparison goods (\$1.33 billion) exceeds total existing sales (\$605) across all categories, indicating strong support for new establishments selling a range of goods

Eisenhower West may be able to support additional restaurants, including both full- and limited-service.

- Total spending potential for both full-service and limited-service restaurants (\$444M) in the three-mile trade area exceeds total existing sales (\$209M), indicating support for additional restaurants in Eisenhower West.
- As the number of residents in the trade area increases as new residential developments come, spending potential for dining establishments will continue to increase.

	Resident + Worker Spending	Existing Sales	Unmet Spending Potential	Supportable Square Footage
General Merchandise	\$732M	\$280M	\$452M	1,140,000 SF
Apparel	\$231M	\$93M	\$138M	340,000 SF
Electronics	\$106M	\$64M	\$42M	62,000 SF
Building Materials	\$101M	\$61M	\$40M	150,000 SF
Hobby, Books, Music, Sports	\$88M	\$60M	\$28M	90,000 SF
Home Furnishings	\$75M	\$47M	\$28M	140,000 SF
TOTAL	\$1.33B	\$605M	\$728M	1,922,000 SF

Figure 43: Unmet Spending Potential, Comparison Goods Within a 3-mile Trade Area, 2013

Source: Esri Business Analyst, 2013; Maxim Retail Sales

	Resident + Worker Spending	Existing Sales	Unmet Spending Potential	Supportable Square Footage
Full Service Restaurants	\$213M	\$100M	\$113M	264,000 SF
Limited-Service Restaurants	\$231M	\$109M	\$122M	282,000 SF
TOTAL	\$444M	\$209M	\$235M	546,000 SF

Figure 44: Unmet Spending Potential, Dining Establishments Within a 3-mile Trade Area, 2013

Source: Esri Business Analyst, 2013; Maxim Retail Sales

Retail Real Estate Market Assessment (cont'd.)

Retail Demand (cont'd.)

Eisenhower West can therefore support additional retail, though it is likely that retail clusters elsewhere are capturing much of this unmet spending potential already.

- Although the analysis demonstrates unmet potential for nearly 3 million square feet of additional retail space, much of this activity is already being absorbed by retail clusters beyond the three-mile trade area radius, ranging from numerous grocery anchored shopping centers to other major malls such as The Fashion Centre at Pentagon City in Arlington, Mosaic District in Fairfax, and Springfield Town Center in Springfield.
- In addition, the Landmark/Van Dorn Corridor plan estimates that the corridor could support approximately 1.4 million SF of total retail, including retail establishments which currently exist and may be redeveloped in the future. If built out in the near term, this development could capture some of the retail demand projected for Eisenhower West.

Retail

Conclusions and Implications

With the exception of the redevelopment of the Landmark Mall and some mixed use development, there has been little new retail built in the areas near Eisenhower West in the past 20 years.

The City has estimated that the Landmark/Van Dorn corridor can support 1.4 million square feet of retail in new projects, though only three developments are imminent.

There is unmet demand for comparison goods within a three-mile trade area, particularly for both general merchandise and dining.

There is unmet demand for grocery stores and miscellaneous convenience goods within a one-mile trade area.



Figure 45: Total Supportable Retail Square Footage, 2013

Source: Esri Business Analyst, 2013; Maxim Retail Sales

There is likely demand for retail stores and restaurants in newer facilities.

New retail development may absorb much of the trade areas' existing demand in the near-term depending on the pace, but the addition of new residential units will introduce additional consumers, who may support additional neighborhood-serving retail in Eisenhower West in the future.

Excess demand may justify more general merchandise stores in a variety of formats near-term, and more dining establishments in Eisenhower West; both can be further supported as new residential development is added in the future.

A small grocery store could be supported in the near-term, preferably as part of a mixed use development project, and future residential development can support additional grocery in the long-term.

Office Real Estate Market Assessment (cont'd.)

Office Overview

Eisenhower West lacks a robust office market.

- Eisenhower West contains minimal office space with only 735,515 SF, of which 606,921 SF (83%) is in the vacant Victory Center that was built in 1973, but redeveloped in 2009.
- The City's major office clusters are located in Old Town Alexandria, Carlyle, and along the I-395 Corridor.

Office Class A

Developers continue to deliver new office space throughout the region, though these buildings are likely build-to-suit or preleased; little has been built in Alexandria.

- The regional market contains 255 million SF of Class A office space, of which 2.2 million square feet was delivered in 2013.
- Build-to-suit or pre-leased space appears to be driving new office development throughout the MSA, as indicated by consistent levels of positive net absorption. Secondary market reports note that the current office pipeline is 58% preleased, which is slightly above the 10-year average pre-lease rate of 47% and indicates that underwriters are requiring developers attract tenants prior to construction.¹
- By contrast, the City of Alexandria has experienced negative or very low positive net absorption and steadily increasing vacancy since 2009. This is at least partly, if not wholly, due to federal tenants vacating office space in accordance with 2005 Base Realignment and Closure (BRAC).

¹ Northern Virginia Office Market, Q2 2014, Transwestern

Property	Year Built/Renovated	SF
5150 Duke St	1960	9,594
Eisenhower Executive Office Building (4875 Eisenhower Avenue)	1985	49,000
Pickett Center (50 S Pickett Street)	1988	70,000
Victory Center (5001 Eisenhower Avenue)	1973/2009	606,921
Total		735,515
Total Citywide Office Square Feet*		22,192,871
Eisenhower West as % of City Office Square Feet		3.3%

Figure 46: Eisenhower West Office Inventory

*The total inventory noted here includes federally owned office buildings and other owner-occupied office buildings in the City of Alexandria. These buildings are not a part of the market analysis explored herein, which focuses on investor-owned, renter-occupied properties. In addition, many industrial properties in Alexandria contain a small quantity of office space, which does not impact the broader office market and is also not included here. However, industrial properties which contain a significant quantity of office space (typically 50% of total SF or greater) are categorized as "flex" space, and are explored in the Industrial Market Assessment.

Source: CoStar; City of Alexandria

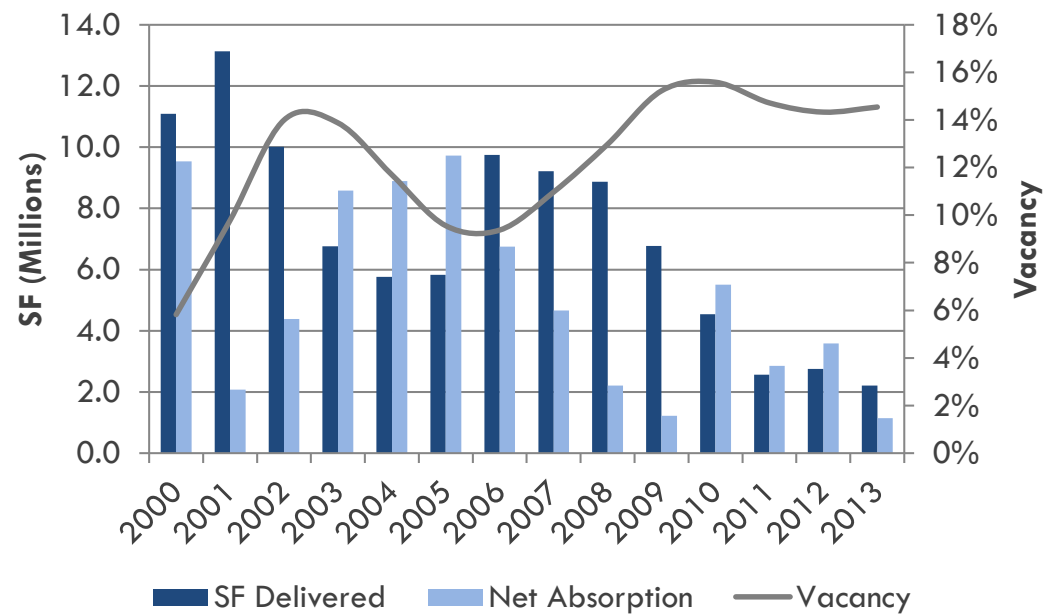


Figure 47: Deliveries, Absorption, & Vacancy, Class A Office, Washington MSA, 2000-2013

Source: CoStar

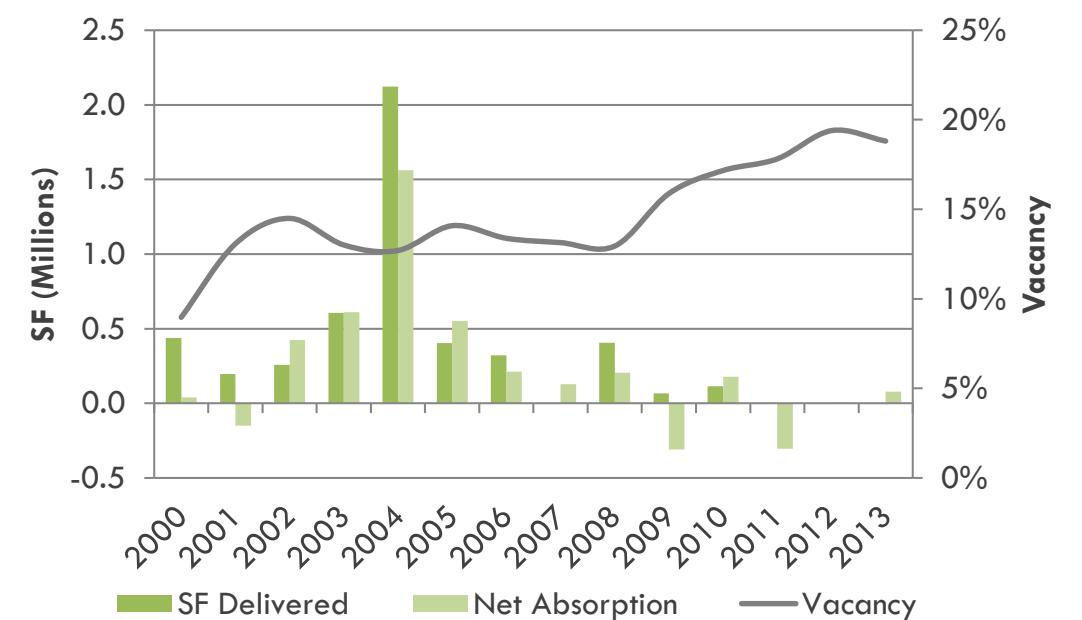


Figure 48: Deliveries, Absorption, & Vacancy, Class A Office, Alexandria, 2000-2013

Source: CoStar

Office Real Estate Market Assessment (cont'd.)

Office Class A (cont'd.)

While low rates of Citywide employment growth may not support new office construction, competitively priced, existing Class A space can attract tenants to the area.

- Since 2009, vacancy rates for Class A office in the City of Alexandria risen more sharply those of the Washington MSA, resulting in declining rates.
- Class A rents in the City of Alexandria declined 10% between 2010 and 2013. However, since 2012, vacancy has started to decrease, which suggests a possible “flight to quality” by tenants attracted to the high quality space at a lower price point.
- In contrast, Class A rents in the Washington MSA have remained largely stable since 2010, and though vacancy rates declined between 2010 and 2012, they began to increase in 2013.

Office Class B

Both regionally and citywide, Class B rents have remained largely stable since 2007, though citywide vacancy has increased rapidly since 2010.

- Rental rates for Class B office space has remained largely stable. However, regional vacancy rates have steadily increased from 9% in 2006 to 14% in 2010 (a 50% increase).
- Similarly, the City experienced a rapid increase in vacancy from 8% in 2010 to 18% in 2013—a 125% increase in almost half the timeframe when compared to the MSA.

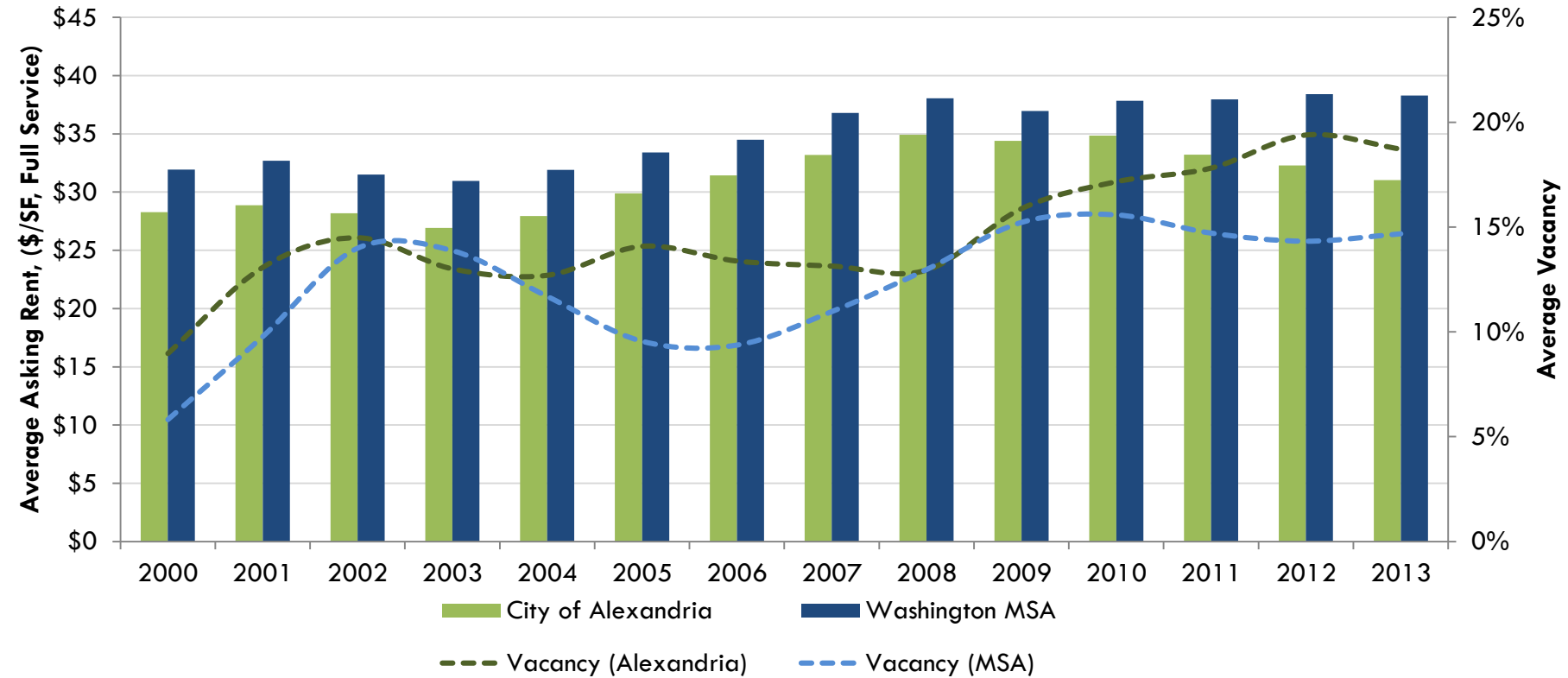


Figure 49: Average Asking Rent and Vacancy, Class A Office, 2000-2013

Source: CoStar

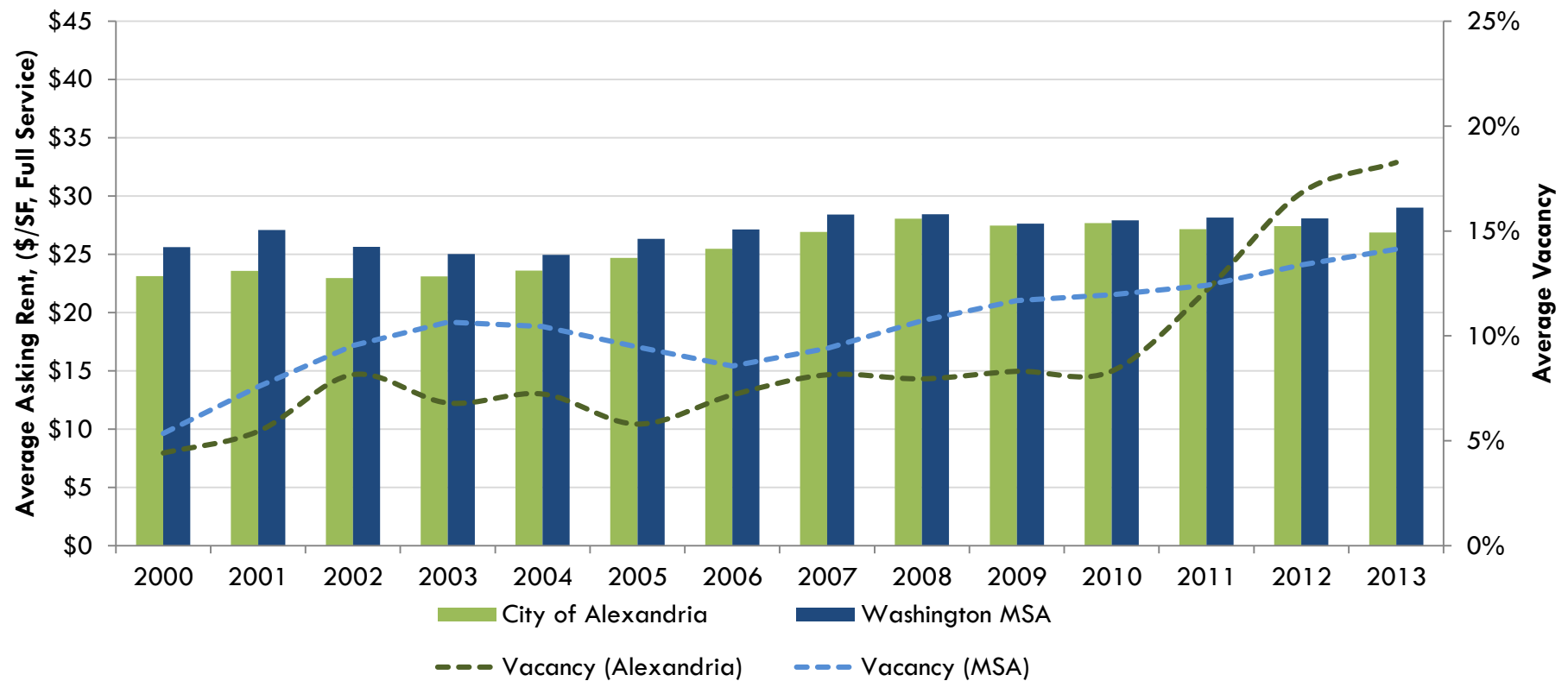


Figure 50: Average Asking Rent and Vacancy, Class B Office, 2000-2013

Source: CoStar

Office Real Estate Market Assessment (cont'd.)

Office: Government Activity

The 2005 round of Base Realignment and Closure (BRAC) has resulted in numerous vacant office properties in the City of Alexandria.

- The latest BRAC round resulted in over 265,000 SF of unoccupied office space throughout the City, as of 2014.
- Through 2017, leases for another 200,000 SF of office space are set to expire as a result of BRAC.

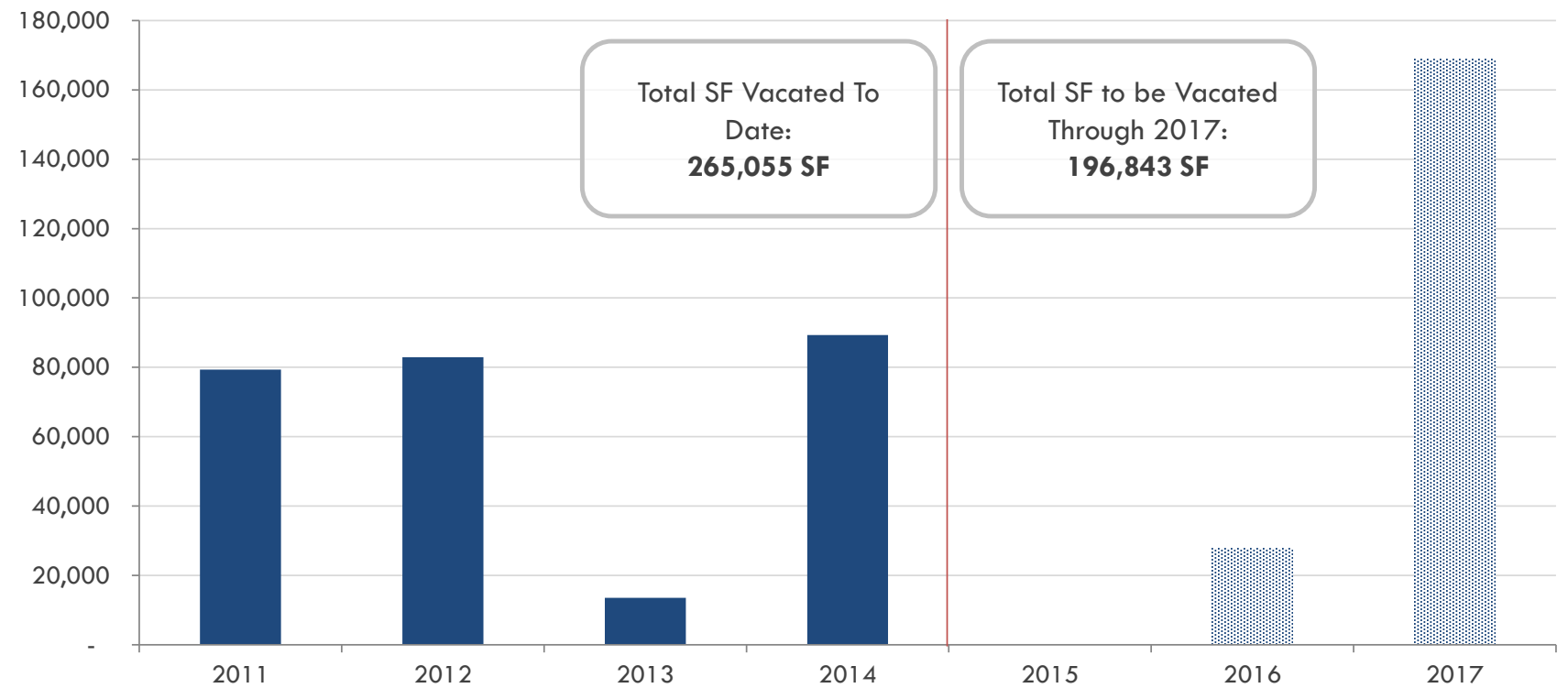


Figure 51: Total Square Feet of Office Space Vacated Due to BRAC,* City of Alexandria, 2011-2017

* Excludes buildings which were demolished or re-leased
Source: City of Alexandria

Office

Conclusions and Implications

Eisenhower West only has four office buildings which account for just over 3% of the total office stock in the City of Alexandria.



Eisenhower West is currently not the focus of office activity in the City.

Regional and citywide office rents have remained flat or declined since the recession, and vacancy rates in the City have surpassed those in the region.



In the near-term, the regional and local office market will continue to soften, indicating declining demand for office space in all markets.

Pre-leasing appears to be the most important factor for new office construction across the region.



There may be opportunities for Eisenhower West to accommodate new office development in the near-term, but likely only if a potential tenant is identified beforehand.

Regionally, Class A buildings have higher vacancy rates than Class B buildings, though decreasing Class A rents may begin to attract tenants.



The Victory Center may find a tenant if these trends continue, though will still struggle to compete with more modern Class A buildings elsewhere.

Industrial Real Estate Market Assessment

Industrial Overview

The Eisenhower West industrial market makes up the majority of industrial product in the City, and is characterized by older buildings and limited new development.

- Industrial properties within the plan area consist of warehouse and flex buildings. These properties account for 78% of all industrial space in the City and drive much of the City's industrial market activity. In interviews with HR&A, brokers note two distinct advantages of Eisenhower West's industrial market: 1) proximity to and location inside the Beltway, and 2) proximity to consumers.¹
- Brokers also noted, however, that these buildings are older than competitive stock elsewhere, limiting their competitiveness due to higher capital maintenance requirements and obsolete design elements (such as low ceiling heights and narrow column spacing).
- The high concentration of industrial uses also results in a lower job density, which makes it challenging to support retail amenities geared towards workers.

Industrial Warehouse and Flex

Industrial buildings in Eisenhower West are home to a diversity of tenants in warehouse and flex buildings.

Warehouse

- Warehouses are used for the warehousing and distribution of inventory. Conventionally, warehouses range from 12,500 SF to 125,000 SF in size and maintain 5% to 20% of the building as office space.²
- Warehouses in Eisenhower West account for 88% of all warehouse space in the City of Alexandria. Tenants include food vendors and caterers, home services providers (such as plumbers, HVAC technicians, and flooring specialists),

Warehouse	Total Buildings	Total Square Feet	Median Year Built
Eisenhower West	44	2,852,132	1967
City of Alexandria	115	3,231,257	1965
Eisenhower West as % of City	38%	88%	

Flex	Total Buildings	Total Square Feet	Median Year Built
Eisenhower West	15	578,002	1982
City of Alexandria	62	1,161,167	1966
Eisenhower West as % of City	24%	50%	

Figure 52: Eisenhower West Industrial Inventory

electrical contractors, retail distribution centers, as well as UPS and FedEx truck terminals located on Eisenhower Avenue. There is one large distribution center in the area, the 500,000 SF Plaza 500 building in adjacent Fairfax County, which houses Smoot Lumber and other tenants.

Flex

- Flex buildings are designed to be versatile, and can include a number of simultaneous activities ranging from office, research and development, sale of retail goods in a non-store setting, industrial, warehousing, and distribution. Flex space is typically at least 50% office space.
- Flex buildings in Eisenhower West account for 50% of all flex space in the City of Alexandria. Tenants are diverse, and include home goods manufacturing with retail frontages (such as paint suppliers and granite/stoneworkers), printers, law firms, art dealers, auto parts distributors, yoga studios, gyms, a rock climbing gym, and many others.

¹ For example, area residents purchasing goods and service from contractors and home service providers (such as plumbers, HVAC technicians, flooring specialists, etc.), and area hotels purchasing food and catering services from vendors and caterers

² Source: CoStar



Figure 53: Plaza 500, 6259 Edsall Road
Source: CoStar



Figure 54: PS Business Park, 4601 Eisenhower Avenue
Source: PS Business Parks

Industrial Real Estate Market Assessment (cont'd.)

Industrial: Warehouse

Though vacancy has continued to climb, there have been only a slight decline in rents both in Eisenhower West and the MSA.

- Though warehouse vacancy in Eisenhower West has increased from 3% to 15% (a 400% increase) between 2008 and 2013 (surpassing the MSA's vacancy rate of 9%), rents have remained largely stable, decreasing from \$9.87/sf NNN¹ to \$8.58/sf NNN in the same period (a 13% decrease).
- These numbers indicate that, while some tenants are leaving Eisenhower West, the area still can command competitive rents which are higher than those in the MSA.

The area has delivered few new industrial properties in recent years and has largely experienced negative absorption since 2009.

- With the exception of a build-to-suit for Restaurant Depot in 2012, there have been no new warehouses built in Eisenhower West since 1983.
- Negative absorption since 2009—with the exception of a slight positive absorption in 2012—has resulted in increased vacancy throughout all warehouse properties in Eisenhower West.

¹ A "triple-net," or "NNN," lease is an agreement where the tenant/lessee is solely responsible for all real estate taxes, building insurance, and maintenance on the property. Rental rates noted as "NNN" therefore include these costs, which is common for industrial and retail property (and occasionally office).

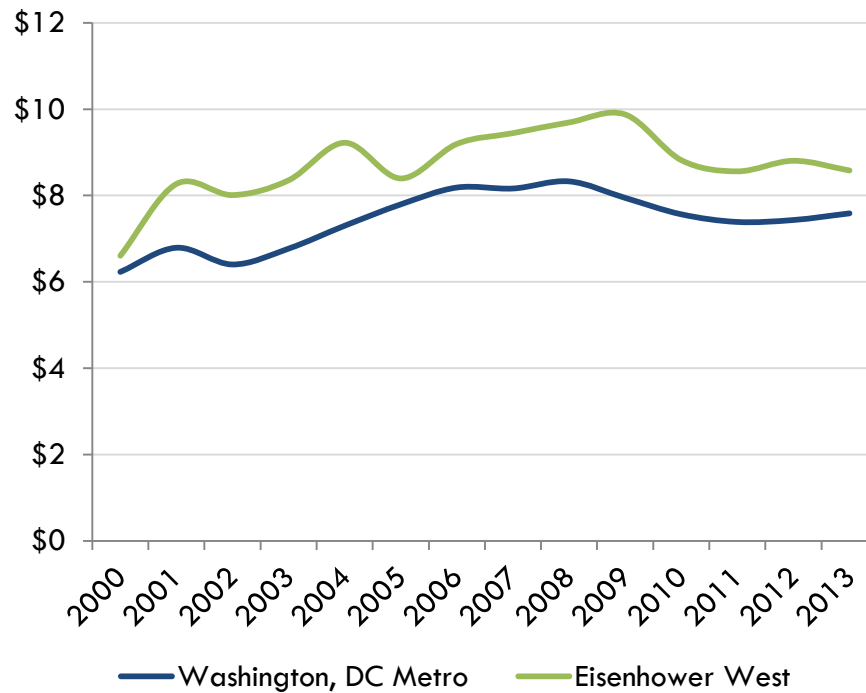


Figure 55: Average Asking Rent, NNN, Warehouse, 2000-2013

Source: CoStar

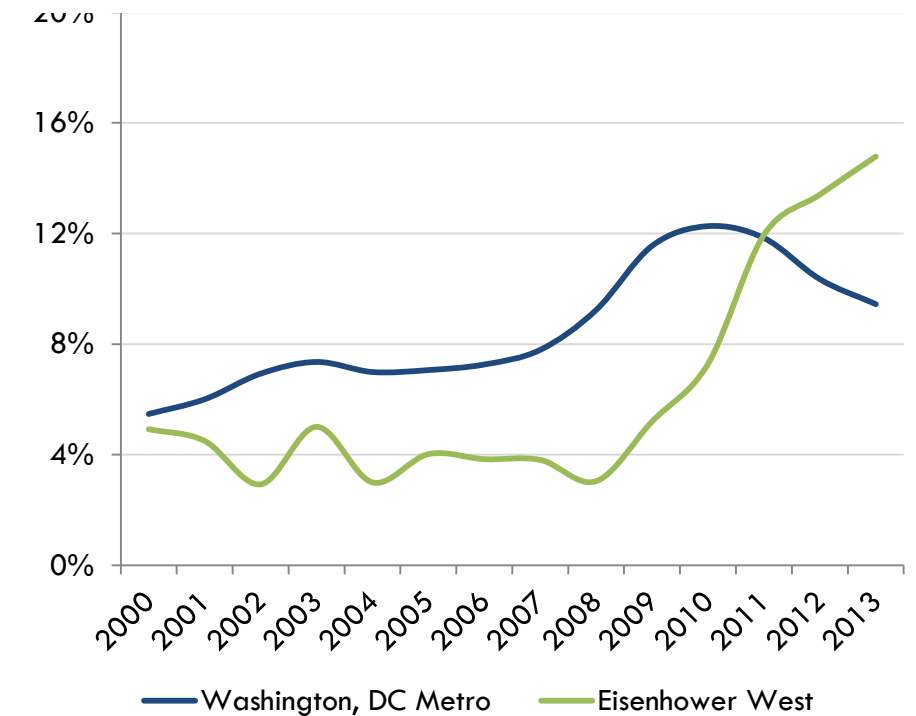


Figure 56: Average Vacancy, Warehouse, 2000-2013

Source: CoStar

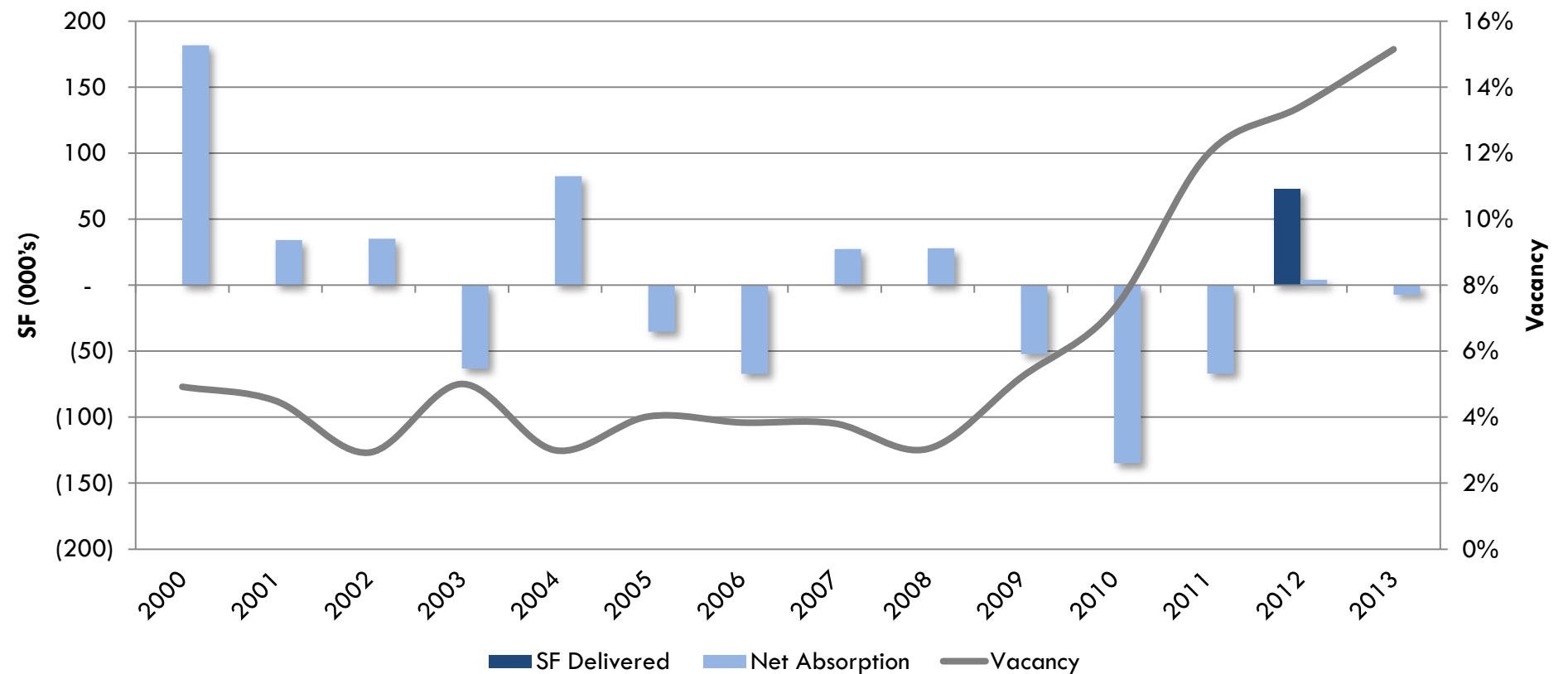


Figure 57: Deliveries, Absorption, & Vacancy, Warehouse, Eisenhower West, 2000-2013

Source: CoStar

Industrial Real Estate Market Assessment (cont'd.)

Industrial: Flex

While Flex in Eisenhower West has typically experienced lower vacancy than the City due to lower rents, in recent years vacancy has surpassed that of the City and the MSA.

- Rents for Flex space in Eisenhower West has consistently been higher than rents in the MSA but much lower than rents in the City overall.
- This gap has widened over time. In 2004, rents in Eisenhower West were only \$1.15/sf NNN less than rents in the City overall; however, in 2013, rents in Eisenhower West were \$6.02/sf NNN less than in the City overall.
- Typically, this has translated to lower or equal vacancy rates. However, since their lower point at 3% in 2008, vacancy rates in Eisenhower West have increased to 15% in 2013, and have surpassed those of the City (14%) and the MSA (9%), the latter of which has been declining since 2009.

The area has delivered no new Flex properties in recent years and has largely experienced negative absorption since 2008.

- There have been no new deliveries of warehouse product in Eisenhower West since 1985.
- With the exception of 5,000 square feet in 2010 and 18,000 square feet in 2011, Eisenhower West has experienced negative absorption ranging from -56,000 square feet to -38,000 square per year since 2008.

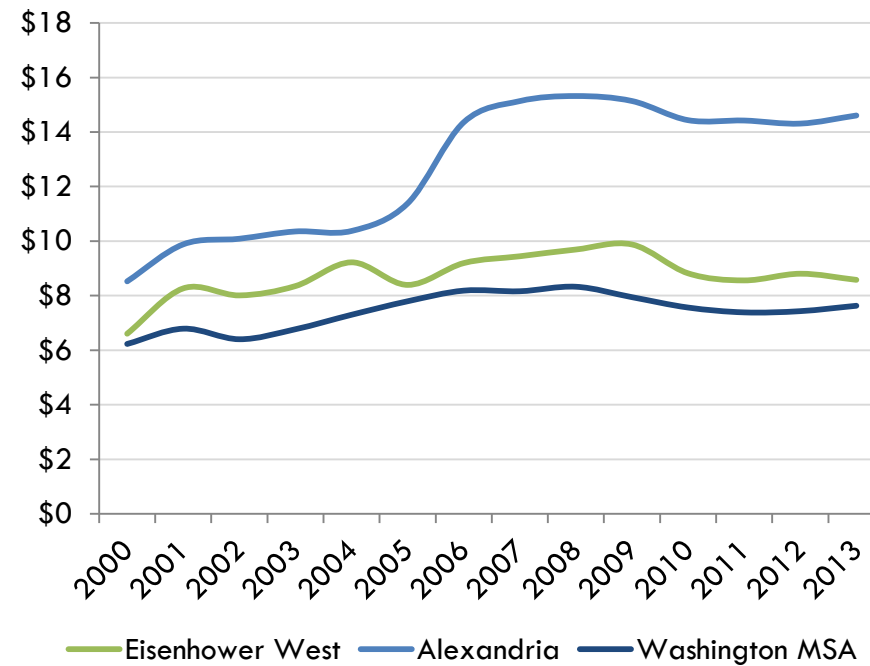


Figure 58: Average Asking Rent, NNN, Flex, 2000-2013

Source: CoStar

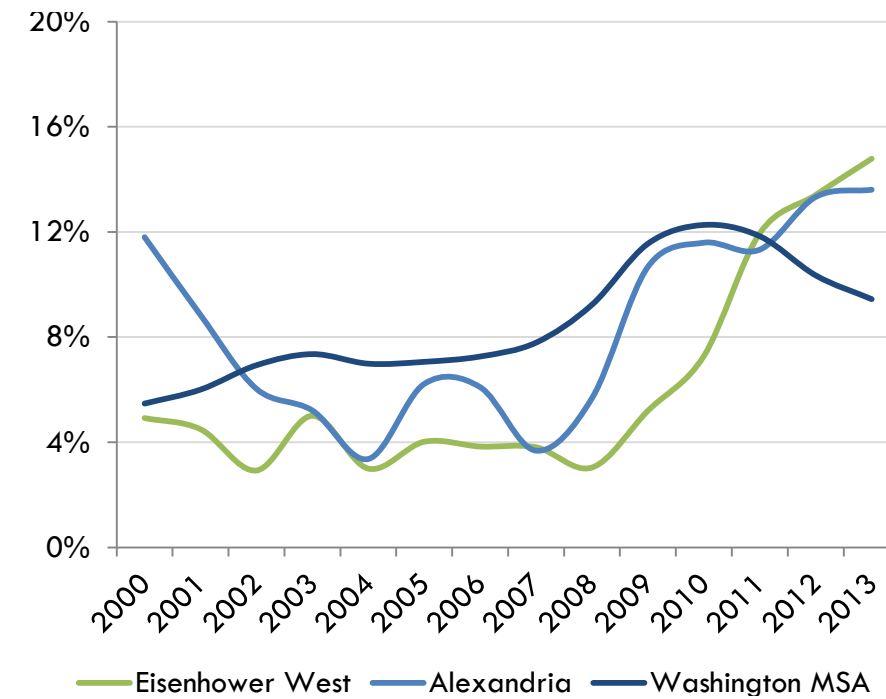


Figure 59: Average Vacancy, Flex, 2000-2013

Source: CoStar

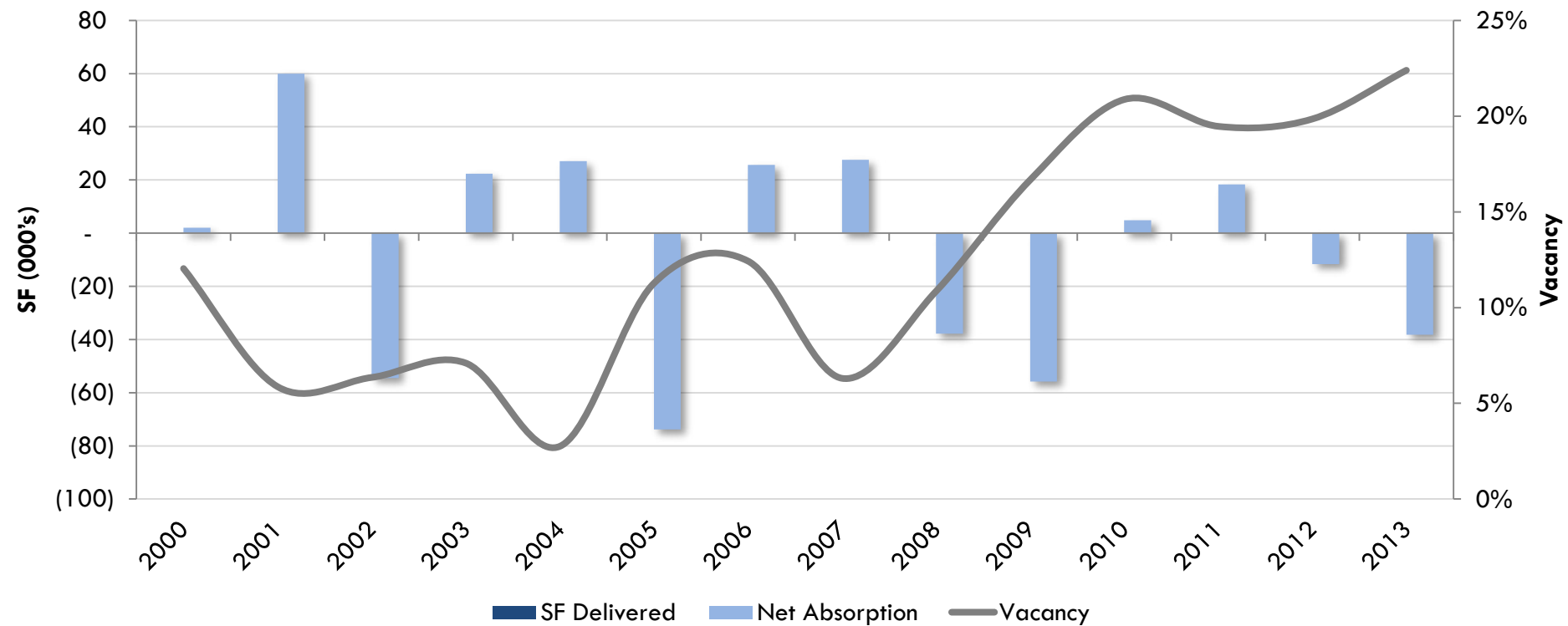


Figure 60: Deliveries, Absorption, & Vacancy, Flex, Eisenhower West, 2000-2013

Source: CoStar

Industrial Real Estate Market Assessment (cont'd.)

Industrial

Conclusions and Implications

Excluding Restaurant Depot, no new industrial space has been developed since 1985, resulting in a very old and out of date industrial stock.



The age of many of the buildings may be impacting their competitive advantage over properties elsewhere in the region with more modern layouts, which may negatively impact the long-term competitiveness of the area's industrial building stock.

Eisenhower West drives the City's warehouse and flex market, and rents have been consistently higher compared to the MSA.



Eisenhower West will continue to be competitive in the near-term due to its location inside the Beltway and proximity to customers, and this demand may also drive some level of long-term investment in industrial property.

Vacancy in Eisenhower West has increased for both warehouses and flex buildings, reflecting the age of the buildings and decline in key industry sectors.



The future of industrial uses in Eisenhower West will depend in the area's ability to continue to attract from growing industries and compete regionally.

Hotel Real Estate Market Assessment

Hotel Overview

Eisenhower West currently lacks a robust hotel market.

- HR&A analyzed clusters of hotels in and adjacent to Alexandria and grouped them into “primary” and “secondary” markets of at least three hotels. HR&A also identified a single hotel – the Comfort Inn & Suites Alexandria – located near the study area.
- Primary markets consist of hotels in areas that are key office clusters and/or heavily visited by tourists. Secondary markets consist of hotels in areas that do not have office clusters, but are adjacent to primary market areas or are accessible to major highways.
- There are no hotels within Eisenhower West, and the Comfort Inn & Suites Alexandria is the only hotel nearby, located just outside of the plan area boundary.

Hotel Supply

Hotels in Eisenhower West are characteristic of those in secondary market areas that offer less expensive accommodations with Beltway access.

- Hotels in primary markets primarily consist of the more expensive upper upscale, upscale, and upper midscale chains.¹
- Hotels in secondary markets primarily consist of economy and upper midscale chains for customers looking for less expensive options without sacrificing accessibility. The Comfort Inn & Suites Alexandria near Eisenhower West is representative of this group.

¹Chain scales are grouped based on average room rates. In order of least expensive to most expensive, these groups are: economy, midscale, upper midscale, upscale, upper upscale, and luxury.

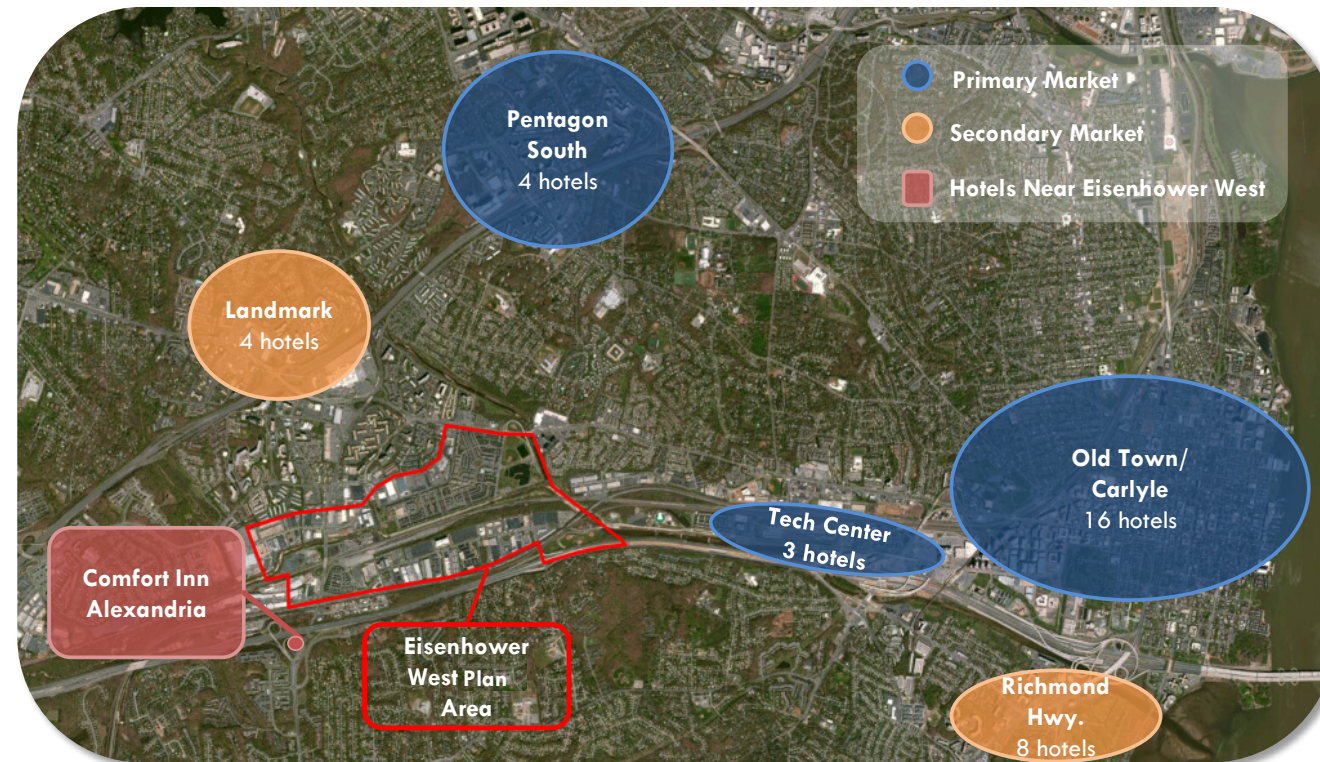


Figure 61: Regional Hotel Supply
Source: Smith Travel Group, HR&A Advisors

Market	Hotels	Total Rooms	Primary Classes	Flags	Customer Base
PRIMARY					
Old Town/Carlyle	16	2,657	Upscale, Upper Upscale	Westin, Kimpton, Hilton, et al	Tourists and business visitors
Pentagon South	4	934	Upper Midscale, Upscale	Hampton Inn, Hilton, et al	Business visitors (Mark Center, Bailey’s Crossroads)
Tech Center	3	465	Economy, Upper Midscale	Courtyard by Marriot, Extended Stay, Springhill Suites	Tech Center visitors; customers looking for less expensive options near Old Town/Carlyle
<i>Subtotal</i>	<u>23</u>	<u>4,056</u>			
SECONDARY					
Landmark	4	552	Economy, Upper Midscale	Days Inn, Comfort Inn, et al	Customers looking for less expensive options on the Beltway
Richmond Highway	8	707	Economy, Upper Midscale	Days Inn, Red Roof Inn, Holiday Inn, Springhill Suites, etc.	Customers looking for less expensive options near Old Town/Carlyle
Hotels Near Eisenhower West	1	143	Upper Midscale	Comfort Inn & Suites	Customers looking for less expensive options on the Beltway
<i>Subtotal</i>	<u>13</u>	<u>1,402</u>			
Total	36	5,458			

Figure 62: Alexandria Hotel Markets
Source: Smith Travel Group

Hotel Real Estate Market Assessment (cont'd.)

Hotel Supply (cont'd.)

Hotel markets in western portions of Alexandria have delivered no new hotels since the late 1990s, and those near Eisenhower West were delivered even earlier.

- Recent hotel development activity has been concentrated in primary and secondary markets in and around Old Town and Carlyle, where recent construction has delivered nine new hotels since 2000. New construction hotels have included upper midscale chains in secondary markets, such as the Courtyard Alexandria in Tech Center in 2010, upper upscale chains in primary markets, such as the Hilton Garden Inn Old Town in 2014.
- By contrast, hotels in primary and secondary markets in areas to the west have seen no new construction since the late 1990s. The latest new delivery was of the Extended Stay America in Landmark in 1999.
- Near Eisenhower West specifically, new hotel development is even older: the most recent delivery of a hotel currently in operation was the Comfort Inn & Suites Alexandria in 1965¹.

Hotel Demand

The hotel market in Northern Virginia has grown, with steadily increasing demand and a similarly increasing supply resulting in a stable occupancy rates since 2008.

- Demand equals the total number of room nights sold in a year. The demand for hotel rooms in Northern Virginia – which includes Alexandria, Arlington County, and Fairfax County – increased by 12.2% between 2008 and 2013. Hotel supply, which is the number of room nights available in a year, has increased at a similar rate (13.5%) in the same time period.
- As a result of the similar rates of increase

for both demand and supply, occupancy rates for hotels in Northern Virginia have remained relatively stable, averaging 69.9%. These dynamics are due in part to the stable employment rates in the city and in the region, combined with tourism to Alexandria.

- However, RevPAR—a measure of hotel financial performance—has decreased over this same time period. This indicates that hotels in Northern Virginia have had to lower average daily room rates in order to attract customers in the competitive market.

¹ Washington Suites, another hotel located near Eisenhower West, was converted from multifamily apartments to a hotel in 1984. However, the building is currently being converted back to multifamily apartments and is no longer a factor in the local hotel market.

Market	Market Type	Primary Classes	Years Built
Old Town/Carlyle			
Old Town/Carlyle	Primary	Upscale, Upper Upscale	1960-2014
Tech Center	Primary	Economy, Upper Midscale	1991-2011
Richmond Highway	Secondary	Economy, Upper Midscale	1954-2010
Western Portions of Alexandria			
Pentagon South	Primary	Upper Midscale, Upscale	1975-1996
Landmark	Secondary	Economy, Upper Midscale	1972-1999
Hotels Near Eisenhower West			
Comfort Inn and Suites	Secondary	Upper Midscale	1965

Figure 63: Alexandria Hotel Markets, Years of Construction Activity

Source: Smith Travel Group

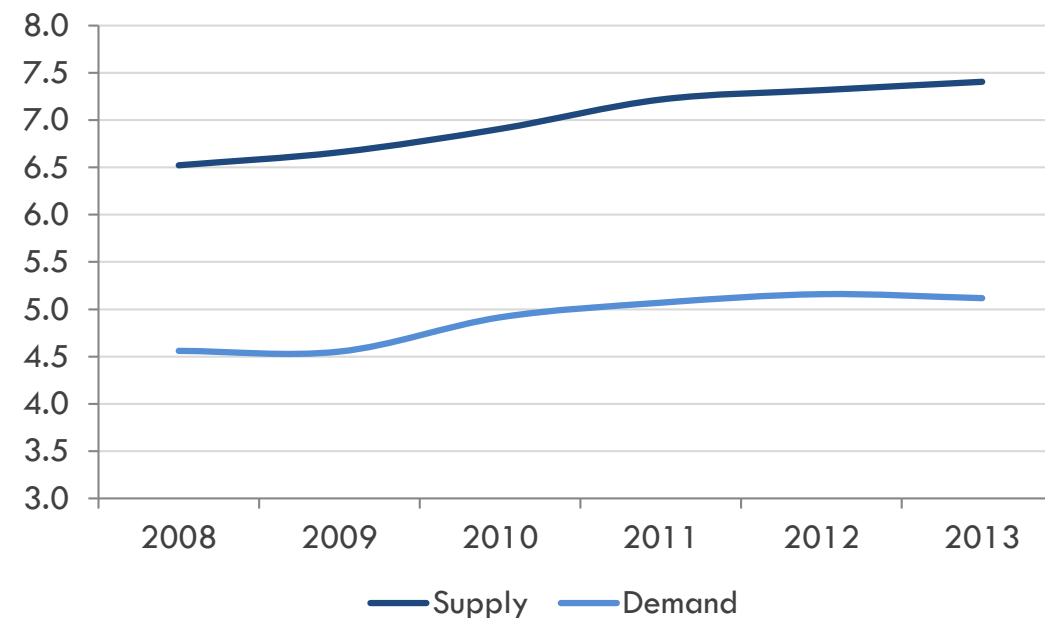


Figure 64: Annual Supply and Demand, Northern Virginia, 2008-2013 (millions of rooms)

Source: Smith Travel Group

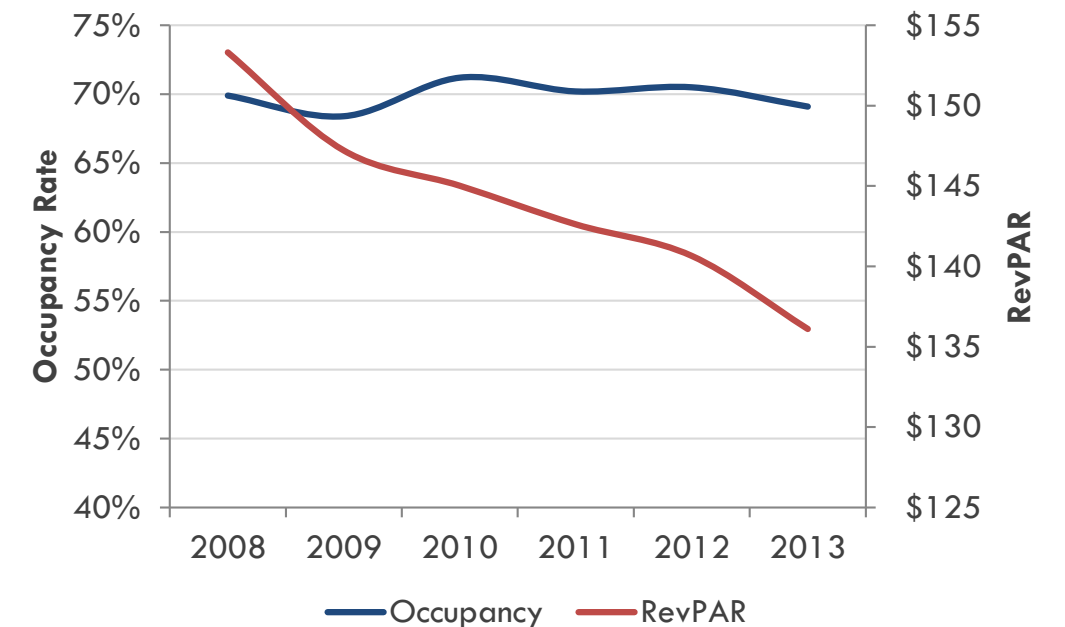


Figure 65: Occupancy Rate and RevPAR*, Northern Virginia, 2008-2013

Source: Smith Travel Group

*"RevPAR" refers to "Revenue Per Available Room." This metric is calculated by multiplying the average daily room rate by the percentage occupancy, and represents the financial performance of a sample of hotels. RevPAR does not take into account revenue from other hotel services, such as restaurants.

Hotel Real Estate Market Assessment (cont'd.)

Hotel

Conclusions and Implications

While occupancy rates have remained stable in the context of increasing supply and demand, RevPAR has declined significantly.



The regional hotel market is highly competitive. The relative stability in occupancy rates has been achieved at the expense of hotel revenues, which will impact the potential for new development in both the short- and medium-term.

Hotels in secondary submarkets with flags most likely comparable to what could be supported in Eisenhower West are generally older, particularly in submarkets in western portions of the City and adjacent to the Beltway.



There may be an opportunity in Eisenhower West for development of a new, mid-priced hotel that would compete with the older products in other highway adjacent locations.

Conclusions: Opportunities and Challenges

Short Term (0-7 years)

- Eisenhower West will experience demand for new residential development. The area has already seen some infill residential development and this pattern could continue on key sites.
- There is currently demand for additional retail in Eisenhower West. However, near-term plans for the redevelopment of Landmark Mall and the Van Dorn Corridor, as well as retail activity elsewhere in the region, may absorb much of the region's demand for comparison goods shopping in the near-term, limiting retail development to neighborhood-oriented retail establishments serving primarily convenience goods, and dining.
- Stable industrial rents indicate there is currently still demand from tenants seeking locations inside the Beltway close to consumer and business markets.
- Any new office development in the near-term will face weak regional and citywide office market dynamics, and new office development in Eisenhower West will be limited to those opportunities when a potential tenant is lined up ahead of time. However, there may be support for new office in mixed-use developments catering to small professional services or medical office spaces developed as part of larger mixed-use projects.
- Near-term prospects for hotel development are challenging, as the recent decline in RevPAR indicates growing competition among all hotels. Due to Eisenhower West's access to major highways, there may be opportunities to develop hotels with flags similar to those found in competitive secondary markets, but market fundamentals may first need to improve.

Medium Term (7-15 years)

- Residential demand will likely remain strong as millennials (a generation larger than the baby boomers) reach peak household formation years.
- As new residential development is introduced both in Eisenhower West and in nearby neighborhoods, the demand for all types of retail will increase, (particularly for convenience goods), and Eisenhower West can capture some of this demand.
- New or replacement industrial development to replace aging buildings will start to be necessary, but may be challenging given the comparatively high cost of land versus achievable industrial rents. This will increase pressure for conversion of buildings with previously stable industrial tenants.
- The area may also be attractive to institutional users (colleges, medical facilities, cultural uses, etc.) that will value the area's transportation network and access to strong residential neighborhoods.
- Traditional office development will likely remain challenging, unless tenants are identified in advance of new building construction.
- Should RevPAR increase, new hotel development in the medium-term will most likely replace existing rooms, and may not add net new rooms to the market. This may result in few opportunities to develop a new hotel in Eisenhower West, but as in the short term, the area's accessibility to major highways may still justify the development of a lower-cost flag similar to those in comparable secondary markets.

Long Term (15-30 years)

- Eisenhower West is well positioned for balanced residential and commercial development. A strategic development plan should consider continued residential and commercial development at key nodes.
- In the long term, new industrial development in this area will likely be very challenging as land prices increase and new industrial development seeks cheaper opportunities further away. The expiring of long-term leases will present opportunities to attract new types of development to the area and standardize its commercial and residential character.
- In the future, opportunities for office development may arise as vacant space around Metro stations closer to the region's center is absorbed. The area may also be attractive to institutional users (colleges, medical facilities, cultural uses, etc.) that will value the area's transportation network and access to strong residential neighborhoods.
- Should demand from these users increase, and Eisenhower West begins to more resemble some of the city's other primary office markets, so will demand for a wide range of hotel chains in the area. In addition, as market fundamentals improve over the long-term, new hotel development may be feasible in Eisenhower West. As hotels have similar building envelopes to multifamily buildings, long-term planning efforts should endeavor to identify areas which can remain flexible and accommodate both uses.

APPENDIX D - COMMUNITY ENGAGEMENT

The Department of Planning and Zoning conducted extensive up-front work to gather information, and frame the planning process. A Steering Committee comprised of landowners and their representatives, local residents, and stakeholders was convened to guide the planning process. A multi-disciplinary consultant team was engaged to provide technical assistance including SmithGroupJJR for urban design, planning, architecture, and energy

expertise; HR&A Advisors for expertise with market economics and plan implementation; and Greening Urban for analysis and expertise on the sanitary sewer and sustainable stormwater management elements of the plan. Components of the planning process included:

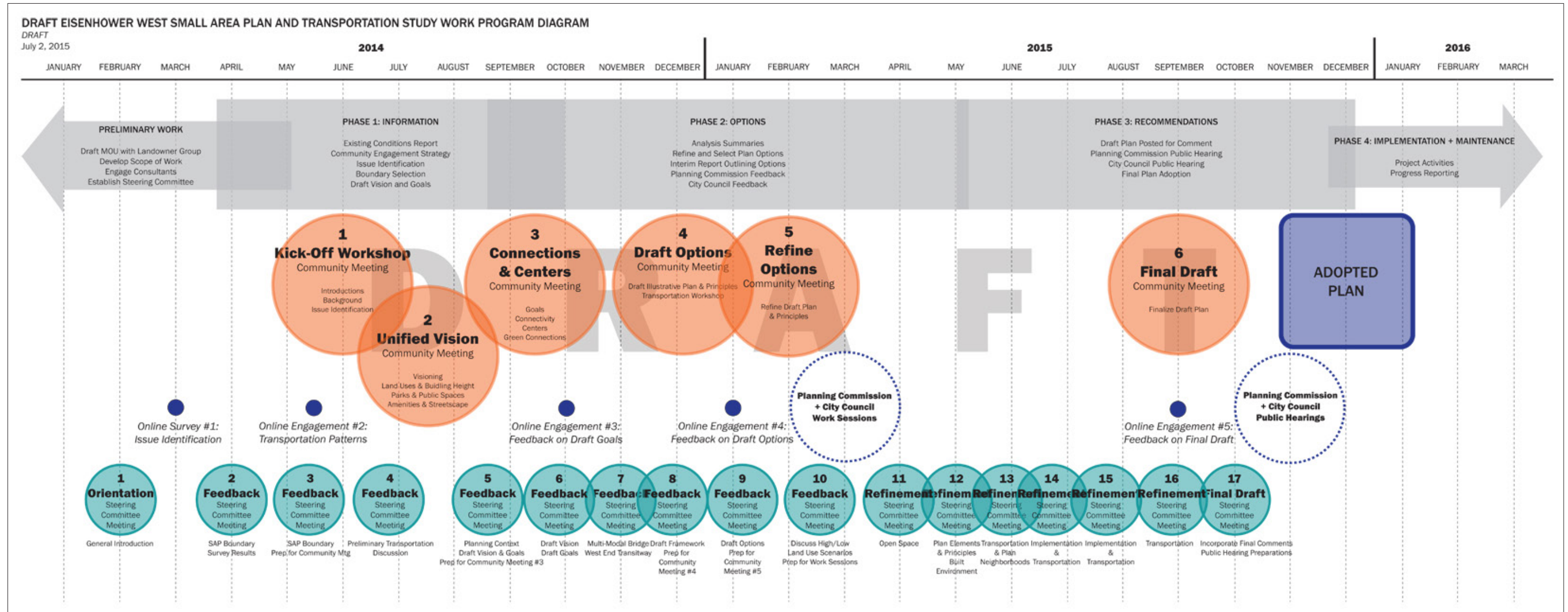
- Community Engagement
- Issue Identification

- Visioning and Goal Setting
- Existing Conditions Analysis
- Existing Market Analysis
- Development of Alternative Concepts
- Draft Plan Development
- Energy and Environmental Analysis
- Economic Analysis

- Infrastructure Cost and Developer Contribution Analysis
- Implementation Plan
- Plan Documentation

Interdepartmental Coordination

Throughout the planning process, P&Z staff and the consultant team coordinated with representatives of other City departments including:



- Transportation and Environmental Services
- Recreation, Parks, and Cultural Activities
- Alexandria Economic Development Partnership
- Office of Housing

Coordination with Transportation Study

The City conducted a concurrent transportation study for an area encompassing, but larger than, the Eisenhower West study area. The Transportation Study describes and addresses the transportation implications of future development in the area and the potential location, alignment, and impact of a new multi-modal bridge. The bridge would provide additional connectivity between Eisenhower Avenue and the Van Dorn Metrorail station to the south and roadways to the north. The Small Area Plan and the Transportation Study coordinated their efforts throughout the planning process.

Coordination with Utilities

In order to coordinate efforts on critical infrastructure elements that support the Small Area Plan, the project team also met with representatives of the following companies:

- Covanta
- AlexRenew
- Washington Gas
- Dominion Virginia Power

Coordination with Fairfax County

P&Z staff also coordinated with representatives of Fairfax County's Department of Planning and Zoning who also attended Steering Committee and Community Meetings.

Conclusion

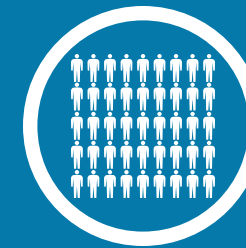
The Eisenhower West Small Area Plan was approved by the City Council on **DATE TBD**.

COMMUNITY ENGAGEMENT

The Eisenhower West Small Area Plan was developed through a multi-faceted and interactive community engagement process guided by the City-adopted Civic Engagement Principles and supporting practices established in the *What's Next Alexandria Handbook for Civic Engagement*. This outreach approach was designed to maximize participation, gather ideas from residents and stakeholders, and ensure a successful and inclusive planning process to achieve the vision and goals for



Photos from Community Meeting #1



EISENHOWER WEST SMALL AREA PLAN MEETINGS

Community Meetings

#1 June 16, 2014	Issues and Opportunities
#2 July 28, 2014	Vision and Goals
#3 September 29, 2014	Nodes, Connections Green Connections
#4 December 8, 2014	Framework Plan Conceptual Land Use Options
#5 February 9, 2015	Concept Plan
#6 September 19, 2015	Draft Plan

Steering Committee Meetings

February 19, 2014	February 23, 2015
April 29, 2014	April 27, 2015,
June 12, 2014	May 13, 2015
June 30th, 2014	May 19, 2015
September 8th, 2014	June 22, 2015
September 25th, 2014	July 27, 2015
November 10, 2014	September 9, 2015
November 24, 2014	October 14, 2015
January 26, 2015	

Eisenhower West.

Steering Committee

In early 2014, the Alexandria City Council appointed a 12-member Steering Committee comprised of various commission representatives, community residents, stakeholders, and landowners' representatives to provide guidance on process related issues, including reviewing and giving feedback on the proposed community engagement, the small area plan boundary, tools and strategies for engagement, agenda setting, community outreach and communications, among other tasks. They also weighed in on technical content elements, such as the project scope and

development scenarios for consideration in the transportation study. All 17 Steering Committee meetings were open to members of the public.

Details and materials from all Steering Committee Meetings can be found at <http://www.alexandriava.gov/planning/info/default.aspx?id=82036>

Community Meetings

Six community meetings were held during the course of the planning period and provided key guidance in shaping the vision of the plan. Each meeting consisted of a presentation by P&Z staff and the consultant team followed by interactive exercises designed to solicit ideas, opinions and feedback on the concepts, options and materials

presented. The meetings were designed to be iterative; each successive meeting recapped the previous and built on its results. Doing so illustrated to participants the logical progression and layering of ideas that resulted in the major elements that make up the Eisenhower West Small Area Plan.

Materials from all meetings can be found at <http://www.alexandriava.gov/82036>

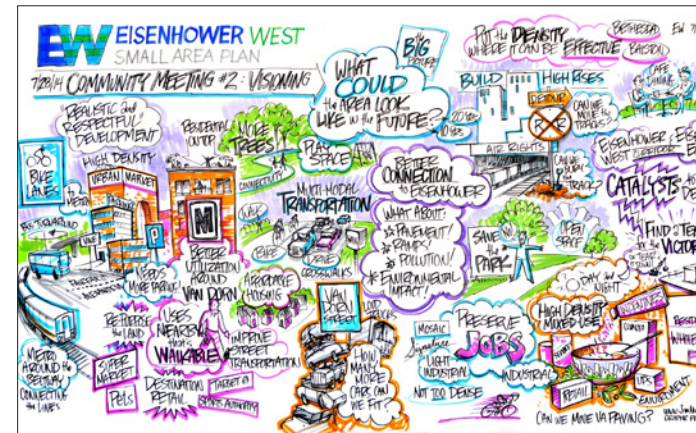
Community Meeting #1: Issues And Opportunities

Planning and Zoning staff introduced the Eisenhower West Small Area Plan project and described the project boundaries, scope, schedule and planning process, and the role of the Steering

Committee. They also described the scope of the Transportation Study and the coordination that would take place with the Small Area Plan. Participants engaged in a discussion of key issues and opportunities related to the major elements of the Small Area Plan.

Community Meeting #2: Vision And Goals

An interactive exercise was conducted to help community members envision the future of Eisenhower West. Participants were asked to describe what they liked about Eisenhower West and what they would like to see improved. An artist recorded the results of the discussion, producing



Photos from Community Meeting #2

Photos from Community Meeting #3

the graphic image shown below.

Attendees also participated in a dot exercise indicating preferences regarding Land Uses and Building Heights, Parks and Public Spaces, and Amenities and Streetscape Elements for four sub-areas within Eisenhower West.

A third visioning exercise asked participants to think about the places that they were familiar with in Eisenhower West area, and place dots on a map showing locations they thought should be preserved, enhanced, or transformed.

Community Meeting #3: Centers, Connections, Green Connections

The draft goals for the Small Area Plan were

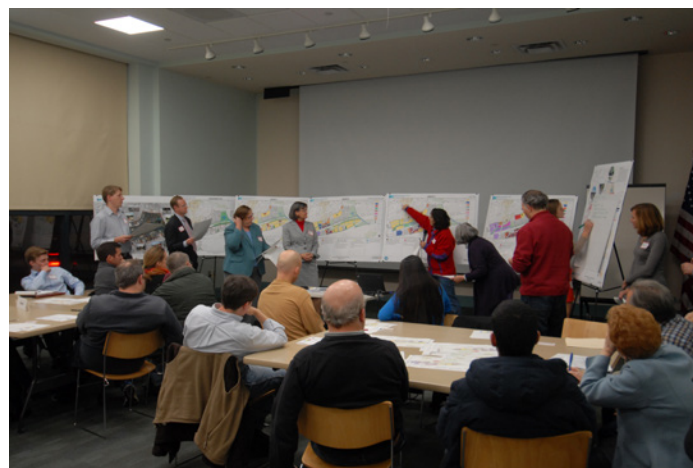
described and participants were given the opportunity to comment on the wording. A small group drawing exercise followed in which participants identified the locations of key existing and future nodes, or centers of mixed-use activity. They also determined the appropriate scale for a network of blocks and street connections and where important new green connections and spaces should be placed as well as which existing spaces should be enhanced. Each group then presented their ideas for these framework elements for the plan to the larger group. The discussion revealed commonalities and presented new ideas for the group to weigh in on.

Community Meeting #4: Framework Plan, Conceptual Land Use Options

A presentation of two versions of a draft Framework Plan were presented, resulting from the small group exercises that were conducted at Community Meeting #3. The Framework Plan illustrated the general consensus that was developed during the previous meeting on the locations of future mixed-use nodes, a potential future grid of streets and blocks, and green connections and open spaces throughout Eisenhower West.

A discussion of land use types and a presentation of four conceptual land use options for the future of

Eisenhower West followed. The options illustrated through diagrams and images different approaches for distributing land uses in order to achieve the community's vision for the plan area, while integrating the elements of the Framework Plan. A small group exercise was conducted after the presentation during which participants discussed the strengths and weaknesses of the overall concepts and of specific elements of each concept. Each small group then presented their findings to the attendees for additional discussion and feedback.



Photos from Community Meeting #4

Photos from Community Meeting #5

**Community Meeting #5:
Concept Plan**

The concept plan developed throughout the community engagement process was presented including its component elements, such as the characteristics of a “Great Street” and land uses (retail, office, civic, institutional, mixed use, residential, flex space).

The presentation further described the idea of “green fingers”, options for the multimodal bridge, and how the refined land use concept plan was derived by layering the plan elements of nodes, existing streets, future streets and connections, parks and green fingers, blocks, land uses, and

heights.

**Community Meeting #6:
Draft Small Area Plan**

The Draft Small Area Plan was presented during the 6th and final community meeting and began with an introductory presentation by Planning Director Karl Moritz describing the background and goals of the plan for Eisenhower West. This was followed by a recap of the results of the planning process and previous community meetings. The major elements of the plan were presented including the overall concept for the plan; the land use, transportation and connectivity, parks and open space, and sustainability elements of the plan



Photos from Community Meeting #6

Image from AlexEngage web page for Eisenhower West

including energy, sanitary sewer and stormwater. An illustrative drawing and perspective renderings of the plan provided more detailed information on the plan and on proposed improvements to each of the 6 neighborhoods within the plan area. Participants then circulated to stations where they could discuss specific elements of the plan, ask questions and provide feedback to the planning team. The Draft report was posted on AlexEngage to solicit additional comments online.

Online Engagement

An essential part of the engagement strategy was an interactive online component that supplemented the Steering Committee and Community Meetings. After key Community Meetings, P&Z posted information from the meeting using the City's AlexEngage website (<http://engage.alexandriava.gov>) providing a platform for polling, comments, and feedback on specific questions. Both participants who attended the Community Meetings, as well as those who could not attend, had a platform for giving additional feedback. Online engagement played an integral role in updating the public on the progression of the planning process, and the concepts and ideas being developed.

PLANNING CONTEXT

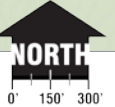
The Eisenhower West Small Area Plan builds on and is informed by several previous plans and studies including:

- Alexandria Industrial Use Study (2009)
http://alexandriava.gov/uploadedFiles/planning/info/IndustrialUseStudy_Forweb.pdf
- Eisenhower East Small Area Plan (2003)
<http://alexandriava.gov/uploadedFiles/planning/info/eisenhowereast-carlyle/EESAP.pdf>
- Landmark/ Van Dorn Corridor Plan (2009)
<https://www.alexandriava.gov/uploadedFiles/planning/info/landmark-vandorn/LVDPlanAllweb.pdf>
- Landmark/ Van Dorn Small Area Plan (1992)
<http://alexandriava.gov/planning/info/default.aspx?id=44614#LVD>
- Alexandria Open Space Master Plan (2002)
<https://www.alexandriava.gov/uploadedfiles/recreation/info/OpenSpacePlan.pdf>
- Citywide Parks Improvement Plan (2014)
<http://alexandriava.gov/recreation/info/default.aspx?id=65170>
- Complete Streets Design Guidelines Policy (2011)
<http://alexandriava.gov/localmotion/info/default.aspx?id=49868>
- Eco City Charter (2008)
<https://alexandriava.gov/uploadedFiles/tes/oeq/EcoCityCharter2008.pdf>
- 2030 Environmental Action Plan (2009)
http://alexandriava.gov/uploadedFiles/tes/eco-city/EAP_FINAL_06_18_09.pdf
- Green Building Policy (2009)
<https://www.alexandriava.gov/uploadedFiles/planning/info/GreenBuildingPolicyhandout.pdf>
- Long Range Educational Facilities Plan (2015)
<https://www.alexandriava.gov/uploadedFiles/planning/info/FINALLongRangeEducationalFacilitiesPlanJune232015v3reduced.pdf>
- Housing Master Plan (2013)
<https://alexandriava.gov/uploadedFiles/housing/info/Housing%20Master%20Plan%20Final.pdf>
- Parks and Recreation Needs Assessment (2013)
https://alexandriava.gov/uploadedFiles/recreation/info/2013_Alexandria%20Final%20Report.pdf
- Pedestrian and Bicycle Mobility Plan (2008)
http://alexandriava.gov/uploadedFiles/tes/info/FINAL_FULLPLAN_060108.pdf
- Transitway Corridor Feasibility Study (2012)
<http://alexandriava.gov/HighCapacityTransit>
- Transportation Master Plan (2008)
https://alexandriava.gov/uploadedfiles/tes/info/tes_tmp_complete.pdf

APPENDIX E - CASES STUDIES



Eisenhower West Plan Area

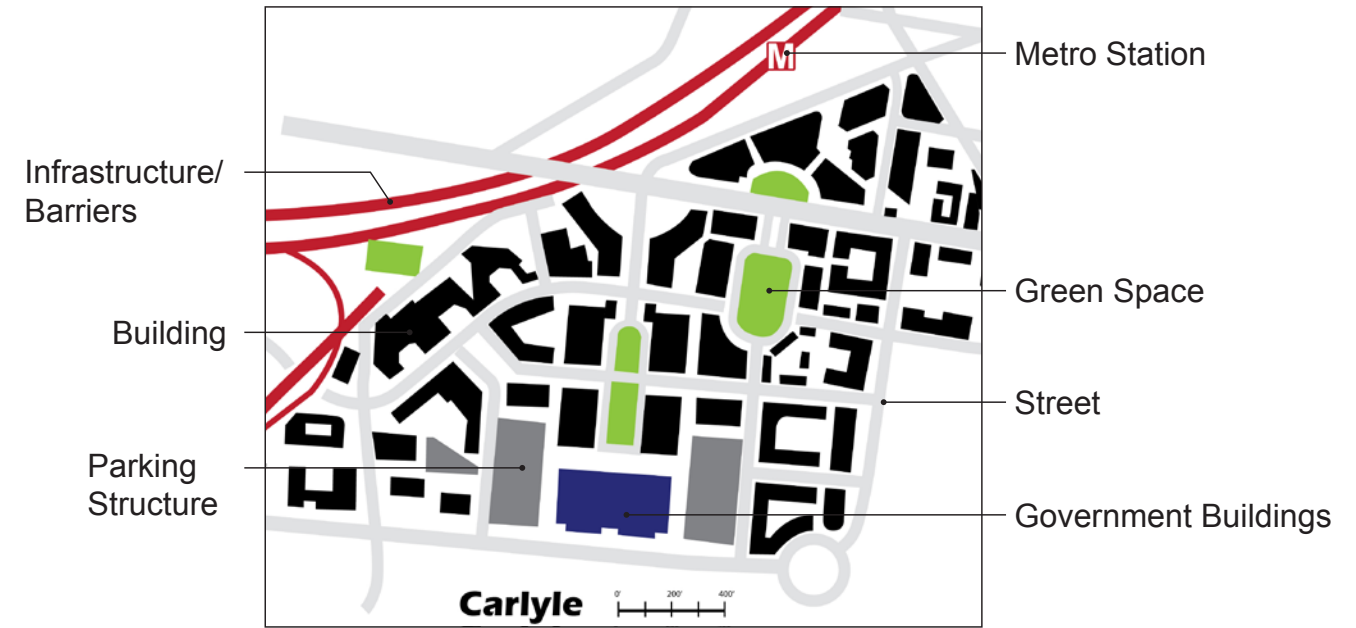


Scale Comparisons

The urban areas illustrated here are shown at the same scale as the Eisenhower West plan on the previous page.

Similarities to Eisenhower West

- Urban edge communities developing/densifying
- Transit-oriented, walkable
- Above-ground presence of infrastructure acting as a barrier/boundary on the site
- Government offices used to spur development
- Former warehouse/light industrial uses on the site



Reston Town Center

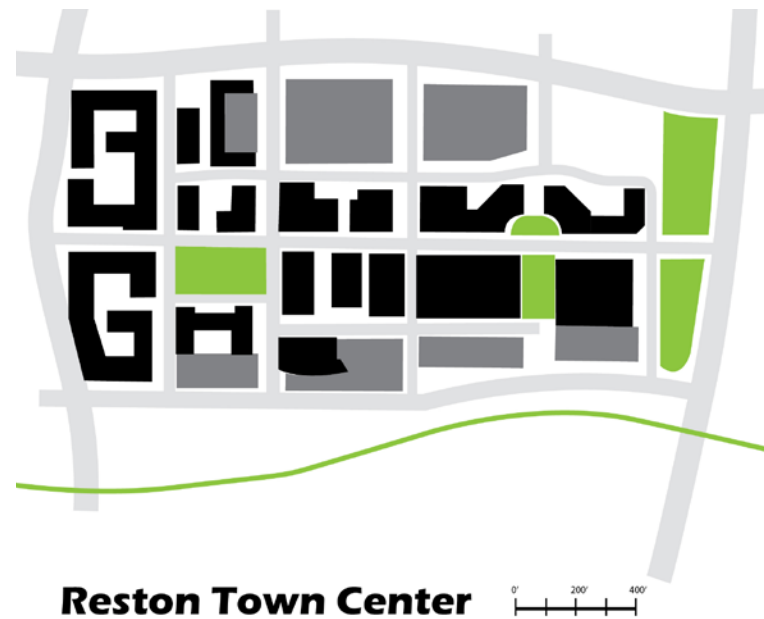
TOWN CENTERS

	Phase 1 (1990)	Phases 1+2 (2009)
Retail*	240,000 sf	360,000 sf
Office	530,000 sf	2.1 million sf
Residential		360 units
Theater	13 screens	13 screens
Hotel	514 rooms	514 rooms
Parking		7,000 spaces (6 garages + 1 surface lot)
Open Space	Fountain Plaza	Fountain Plaza
Site	20.6 acres	85 acres

*Retail area includes theater

Key Elements

- Developers determined “critical mass” needed to Phase 1 to be successful on it’s own for 10 years



Mosaic District

TOWN CENTERS

	Phase 1 (2012)	Phase 1+2
Target	170,000 sf	170,000 sf
Other Retail	170,000 sf	350,000 sf
Office	75,000 sf	170,000 sf
Residential		782 apartments, 138 townhomes
Theater	8 screens	8 screens
Hotel	148 rooms	148 rooms
Parking	2,000 spaces	4,000 spaces, 2 garages
Open Space	1 acre park	2 acres of park
Site	31 acres	31 acres

Key Elements

- Fairfax County and developer Edens formed community development authority (CDA) public/private partnership
- Used CDA bonds and TIF to finance
- Big box Target sits on top of 3 levels of parking and ground floor retail
- Located 0.5 mi from Dunn Loring Metro
- LEED-ND Silver



Mosaic District 0' 200' 400'



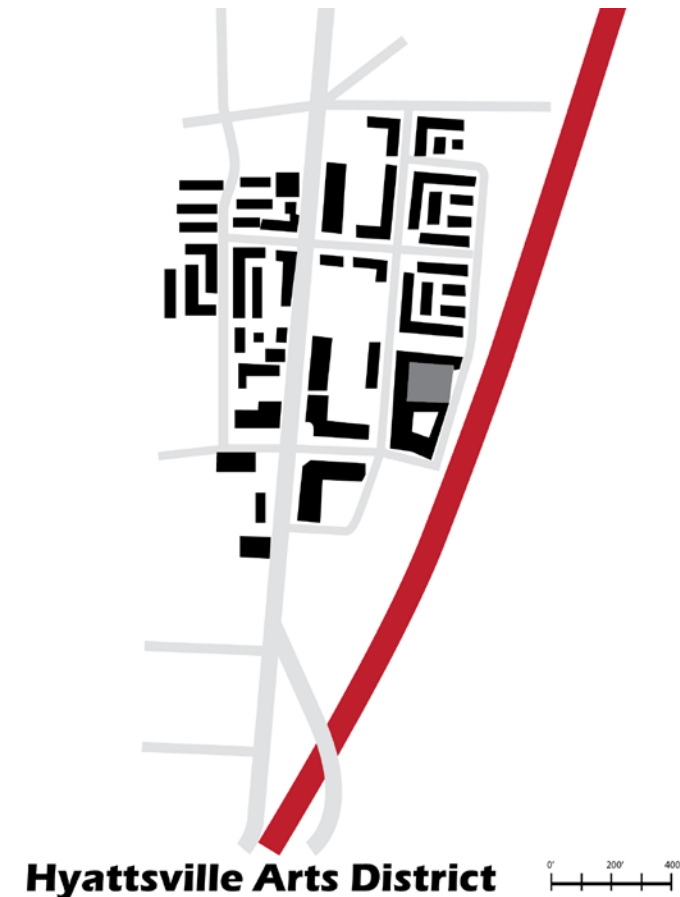
Hyattsville Arts District

TOWN CENTERS

Retail	40,000 sf
Residential	500 units
Site	25 acres

Key Elements

- Hyattsville Community Development Corporation pursues small business to maintain the character and local, sustainable focus of the community
- Route 1 Corridor plan spans 2 miles through Hyattsville, Brentwood, Mt Ranier
- Current site is an excess of parking and unimproved lots
- Revitalization tools include: arts & entertainment district tax incentives, reviatlization tax credits, high technology growth and development incentives, shared parking facilities
- Located 1.5 mi from 2 Metro stations



Rockville Town Center

	2007
Office, Retail, Restaurants	180,000 sf
Residential	644 units
Library	102,000 sf
Parking	1,900 spaces
Site	12.5 acres town center 60 acres total

Key Elements

- Located 15 miles north of Washington, DC
- Direct access to Rockville Metro Plaza (separate project) and Metrorail, plus nearby access to Amtrak/Maryland Area Regional Commuter Train
- Six-blocks of urban infill
- 102,000-square-foot county library and five-story VisArts arts and business innovation center
- 28,000-square-foot public plaza with pavilion and water feature
- Three public/private parking garages



TOWN CENTERS



Ft Totten Square

BIG BOX RETAIL

	2015
Walmart	125,000 sf
Other Retail	10,000 sf
Residential	345 units
Parking	775 spaces, below grade and structured
Site	4.6 acres

Key Elements

- Ground-floor Wal-Mart and small retail
- 4 levels residential above
- 1 level parking (400 spaces) below grade for retail; separate garage for residents (375 spaces)
- Located 0.5 mi from Fort Totten Metro



DC-USA

BIG BOX RETAIL

	2008
Target	180,000 sf
Other Retail	695,000 sf
Local Retail	15,000 sf
Parking	1,000 spaces, below grade
Site	5 acres

Key Elements

- Development Corporation of Columbia Heights (DCCH), non-profit community development organization, coordinated neighborhood revitalization
- 2 floors of big boxes above ground floor retail
- Local retail spaces leased at 33% below market rate for small and minority businesses
- Largest retail in DC, includes Staples, Best Buy, Bed Bath & Beyond, Washington Sports Club, Petco, DSW
- Controversial below-grade parking garage- parking requirements were not adjusted to reflect urban requirements; at max capacity 50% of garage is full
- Located at the Columbia Heights Metro



Grocery Stores

Tivoli Giant	2005
Giant	55,000 sf
Parking	2 levels above

Petworth Safeway	2014
Safeway	62,500 sf
Residential	218 units
Parking	215 spaces, below grade

Key Elements

- Both located 0.1 mi from a Metro station
- Safeway has 5 levels of residential above the store
- Giant is connected to historically restored Tivoli Theatre; 2 levels of parking above concealed by facade complimenting historic building

BIG BOX RETAIL



Articles/Studies

Economic Opportunity & Small-Scale Manufacturing

Posted on June 23, 2014 by Jana Preuss

There is a new opportunity in our changing cities to connect more residents with economic opportunity. We can do so by integrating small-scale industrial uses into our city development. Let's call this mixed-use industrial real estate.



Greenpoint Manufacturing and Design Center

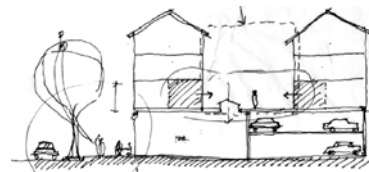
We are seeing a resurgence of small, local producers who are harnessing low-cost technology and changing markets to sell hundreds and thousands of locally produced consumer products. Documented early on by [Chris Anderson](#), and seen across the country today, these companies are often businesses with fewer than 20 employees and sell both in local markets and globally online.

These small-scale manufacturing business owners generally need dedicated production space of less than 5,000 square feet (often as little as 1,000 sq. ft), use clean technologies (think laser cutters), but need affordable, dedicated industrial/production space. They do not fit into office space because of noise, and most retail space is too expensive. So they often find marginal, cheap space at the fringes of our cities and survive on short-term leases or move far out into the suburbs.

The time is ripe for policy change and private sector investment to create this kind of development. The demand for small-scale consumer goods and locally made custom goods are growing, while access to tools and technology gets cheaper. We need to provide affordable space for our local producers to grow their businesses in our city neighborhoods. By doing this, we will be able to connect more people to good-paying jobs, strengthen our small business and startup sectors, and keep these jobs in the city.

Defining mixed-use industrial

A mixed-use industrial development is part of a reuse project that includes new buildings and rehabilitated older buildings, or the rehabilitation of an existing industrial/warehouse structure within a neighborhood with a variety of land uses. New construction is also possible, but the costs need to be offset within a larger project. Two examples begin to illustrate the opportunities for this product type.



INDUSTRIAL MIXED-USE ZONING

An analysis of design considerations

AsianNeighborhoodDesign
Draft: 02.23.07

INDUSTRIAL MIXED-USE

"small-scale manufacturing business owner generally need dedicated production space of less than 5,000 sf (often as little as 1,000 sf), use clean technologies (think laser cutters), but need affordable, dedicated industrial/production space. They do not fit into office space because of noise, and most retail space is too expensive"

"A mixed-use industrial development is part of a reuse project that includes new buildings and rehabilitated older buildings...within a neighborhood with a variety of land uses. New construction is also possible, but the costs need to be offset within a larger project."

At Greenpoint Manufacturing and Design Center "the average tenant is about 18 years in business, and average salaries are \$48,000 - well above local service sector salaries. The tenants are predominantly local artisans building products for the local market, but at manufacturing scales."

Steps for shaping mixed-use industrial spaces:

Zone for it: Communities need to protect existing industrial properties in targeted locations. Small-scale production can also be added as an optional use to other existing zones.

Provide financing and incentives: ...tools such as New Markets Tax Credits or Rehabilitation Tax Credits will be important for industrial redevelopment efforts...

Support business development: Producers should organize themselves to strengthen their community and exposure. Activities like meetups, showcase events, and local competitions all help promote a local producer sector... Partnering with shared tool spaces like TechShop can help identify future business members.

Shared Workspaces

TechShop

- Membership-based shared resources, including tools and shops for metalwork, woodwork, painting, electronics, textiles, bike repair, laser cutting, 3D printing
- Backed by R&D companies such as GE, Ford and DARPA
- 'Buy Local' sustainability trends encourage growth of local maker markets
- New TechShop- 1 of 8 nationwide- just opened in Crystal City
- Offers classes for networking and learning

IdeaSpace

- Memberships offered for "Coworking Space," "Dedicated Desk," or "Private Office"
- Provide shared resources for equipment, meeting rooms, event space
- Offers classes
- As of August, was looking for space (30,000 - 45,000 sf) in the District along the Green Line, after considering the Boilermaker Shops at Navy Yard

INDUSTRIAL MIXED-USE



Mosaica 601

INDUSTRIAL MIXED-USE

	2009
Residential	151 units
Craft Industrial	12 units
Total GSF	256,000
Site	1.83 acres

Key Elements

- 4 stories of residential above flex industrial/design space
- Mixed income rates for housing units
- Vertical integration of residential and industrial

