DOWNTOWN MASTER DEVELOPMENT STRATEGIES

SAN ANGELO, TEXAS

CITY OF SAN ANGELO, TEXAS - SAN ANGELO DOWNTOWN DEVELOPMENT COMMISSION - CATALYST URBAN DEVELOPMENT

Introduction

Through its Downtown Development Commission, the City of San Angelo is pursuing efforts to identify new investment opportunities within its Downtown core. To assist this effort, Catalyst Urban Development was engaged by the City to identify specific master development strategies and new investment project opportunities within the Downtown study area. This area is generally defined by Highway 67 to the north, the Concho River to the west, Washington Drive to the south, the Arts and Historic District to the southeast, and Main Street to the east.

Market Development and Programming Analysis

The base demographics that effect investment in the downtown real estate trade area and related market-based land use programming opportunities have been collected for presentation in this report. The trade area defined for these measurements includes the entire city limits of San Angelo and other immediate areas. These demographics were measured through the study of available data sources including the US Census Bureau's American Community Survey (ACS), Texas Department of Labor and Statistics, Texas Railroad Commission, Concho Valley Appraisal District, EASI, ESRI, and the City of San Angelo.

Real estate programming potential was measured by converting industry standard forecasted growth analysis for the targeted trade area to the range of real estate investment categories including office, retail, restaurant, and housing.

Demand Potential

The primary economic drivers effecting investment in the San Angelo marketplace include regional activities in the energy sector, growth and employment in the institutional sector that includes Angelo State University and area health care providers, and Goodfellow Air Force Base. These economic anchors allow San Angelo to have a more stable economy than West Texas communities that are primarily dependent on energy sector employment, and provide specific opportunities that can be applied to new investment in San Angelo's downtown. When measuring the economic growth anticipated for the defined trade area over the next ten years, and incorporating the unique out-of-market potential provided by San Angelo's primary economic drivers, land use demand has been calculated for the downtown study area that includes demand for over 600 multifamily units across multiple residential densities, 6 new restaurants, and over 220,000 sf of new office space in various tenant configurations.

San Angelo Downtown Opportunities
☐ Downtown Study Area
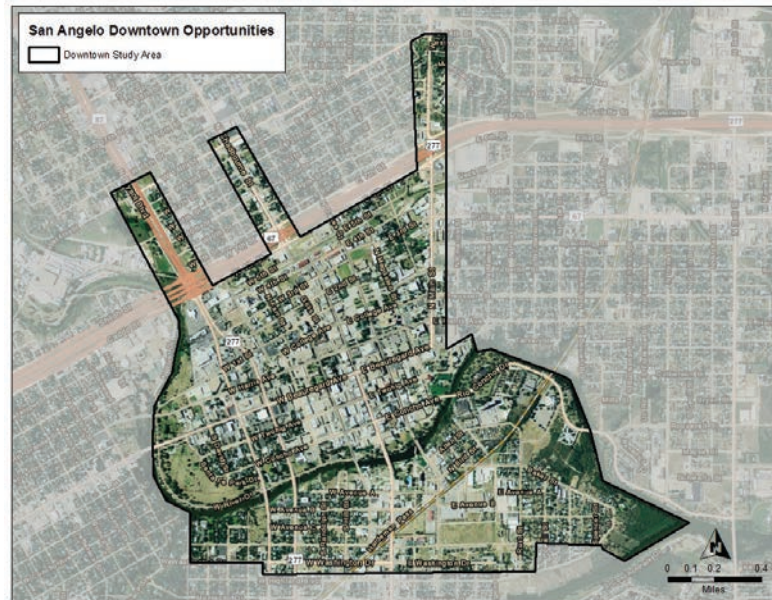
Map Sources: ESRI, City of San Angelo, Catalyst

EXECUTIVE SUMMARY

Summary Notes:

• Primary Economic Drivers: Goodfellow Air Force Base, Angelo State University, and the energy industry.

• Downtown trade area includes the full city limits of San Angelo.

• Primary demand potential has been measured to include:

    - 600+ Residential Units
    - 6 New Restaurants
    - 220,000+ sf of Office Space

SUMMARY OF ECONOMIC DRIVERS

DOWNTOWN SAN ANGELO

Energy Sector Potential

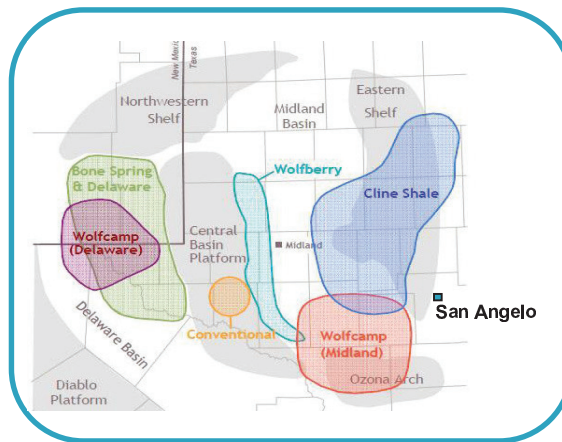With the discovery and current exploration of the potential associated with regional shale formations, it appears San Angelo is well positioned for stable growth over the next development cycle. While little information currently exists on the employment prospects associated with shale formations in the area, industry experts have indicated that the Cline, Spraberry, and Wolfberry shale fields may hold 20 to 30 billion barrels of recordable oil. This potential production is comparable to the Eagle Ford shale in southern Texas and we have therefore used it as a comparable to analyze such employment potential.

Comparable Shale Field Analysis

Eagle Ford shale formation has generated expanded oil and gas production in the last few years that has greatly enhanced local economies and employment. In 2012 alone, these activities generated roughly $1 billion in revenue to local municipal governments and $1.2 billion to the State of Texas. The Eagle Ford Shale formation is estimated to contain 10 billion barrels of recoverable oil, in addition to significant natural gas deposits. This is less than half of the estimated oil and gas deposits in the Cline shale.

Cline Shale Potential

With oil prices being over $100/barrel, the economics to extract oil from the Cline shale are profitable according to energy sector sources. This is anticipated to spark employment growth proportionally consistent with that associated with the Eagle Ford formation.

Permitting associated with oil production in the Eagle Ford shale formation have increased from .61 permits / day to over 8.48 permits / day since 2009. Similarly, permits associated with the Cline shale have risen from .62 permits per / day to 5.48 permits / day over the same period. This expansion in permitting indicates a measurable increase in employment

Like San Angelo, the City of Victoria benefits from its proximity to the shale formation and has experienced an employment growth rate of 2.18% for the previous three years.

For the purposes of determining employment potential and accounting for the volatility inherent in the energy sector, the projects for San Angelo include a 50% reduction to Victoria's 2.18% employment growth rate.
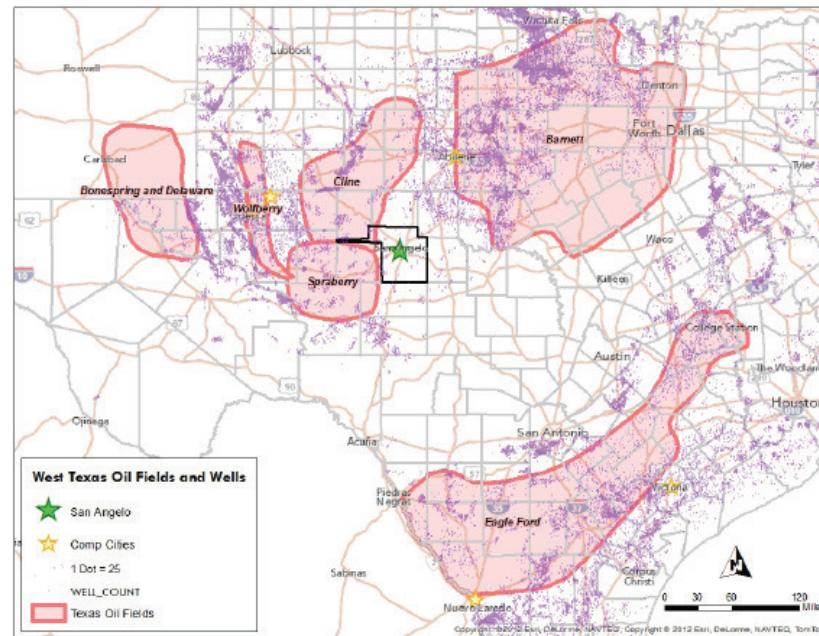
ENERGY SECTOR

Summary of Potential:

- Eagle Ford Shale field studied as comparable economic driver.

- Cline shale field estimated to drive economic development throughout the 10 year programming period.

- This analysis indicates the potential for over 5,000 jobs during the next 10 years.

Background

Goodfellow Air Force Base, a joint service base, in San Angelo is a major training facility for the United States Air Force. Over 9,000 students are trained in all services at the facility per year, and at any given time the base has over 5,000 military, 800 civil service, and 12,000 family members at the base. The Air Force Base, according to the San Angelo Chamber of Commerce, currently employs 5,165 employees, and has an annual impact on the city between 17,000 to 26,000 people annually.

The Army's 344th Military Intelligence Battalion is headquartered at the base, and along with the rest of the base, has a significant housing impact on the community.

There are 3,307 on base dormitory beds, and 241 dwelling units (single family homes, duplex homes, and four-plex homes) on campus.

The base estimates an impact of 3,000 to 7,000 off campus units. The top-tier of this demand can be shifted to properly positioned residential demand downtown

GOODFELLOW AIR FORCE BASE

Summary of Potential:

- Nine thousand students trained every year.

- At any given point over 5,000 military personnel, 800 civil service personnel, and 12,000 family members are stationed at the base.

- **5,165 employees** currently work at the base.

- 3,307 on campus dormitory beds.

- 241 total dwelling units
    - 25 Single Family Homes
    - 96 Duplex Homes
    - 120 Four-plex Homes

- An annual off-campus estimate of **3,000 to 7,000 units**.

- Goodfellow Air Force Base has an annual impact on **17,000 to 26,000 people** in the community.

Background

Angelo State University, a part of the Texas Tech University System, has an estimated economic development impact of $223 million for Tom Green County. The Angelo State University Centennial 2020 plan specifies Texas Tech University, and Texas Higher Education Coordinating Board (THECB), and the Texas Tech Report, projections. Each indicates strong enrollment increases for the university by 2020. The THECB reports have enrollment set to increase to 8,500, and the Texas Tech Report has a target of 10,000 enrolled students. This is with the backdrop of 1.2% growth over the last nine years.

The ratio of university related jobs per additional student is approximately 2:1. Therefore, 1,556 new jobs will be added if student enrollment increases to 10,000; and 806 new jobs if enrollment increases to 8,500.

As shown in the table below, depending on the projections used, there will be demand for 960 to 1,854 beds. Two recent and popular student housing developments, "The Grove" and "Angelo Place" have 2, 3, and 4 bedroom units, and an average of 3.14 beds per unit indicates an additional need for 360 to 590 total units by 2020.

Historical Enrollment and Target Enrollment

Goals

Goals	2010	2011	% Change	2011 Target	2012 Target	2015 Target	2020 Target
Fall Enrollment	6,856	7,084	3.33%	7,113	7,325	8,363	10,000
Undergraduate Transfer Students w/ More Than 30 Hours	332	400	20.48%	375	470	550	650
First-year Retention Rate	63.50%	61.40%	-2.10 pts.	64.00%	64.00%	66.00%	70.00%
Six-year Graduation Rate	31.50%	31.00%	-0.50 pts.	32.00%	32.00%	34.00%	37.00%
Sustainment of Hispanic Serving Institution Status [1]	26.20%	27.10%	0.90 pts.	26.50%	28.00%	29.00%	30.00%
Percent of Lower-division Courses Taught by Tenure-track Faculty	54.17%	55.80%	1.63 pts.	55.50%	56.00%	58.00%	61.00%
Total External Dollars Expended Annually	$2.04 M	$3.90 M	91.18%	$2.50 M	$4.50 M	$5 M	$6 M
Classroom Space Usage Efficiency Score	66	66	0.00%	70	70	74	91
Total Endowment	$99.32 M	$117.99 M	18.80%	$106.27 M	$120 M	$125 M	$150 M

Economic Impact on State and Region [1]							
Tom Green County Economic Development and Impact	$223 M	$238 M	6.73%	$241 M	$254 M	$328 M	$392 M
Annual Contribution to the Texas Workforce by Graduates of ASU	$494 M	$503 M	1.82%	$503 M	$513 M	$556 M	$602 M
Total Jobs Created from ASU Operations, Employees, Research, Students and University-related Visitors	2,244	2,387	6.37%	2,417	2,547	3,237	3,870
Total Household Income Created from ASU Operations, Employees, Research, Students and University-related Visitors	$104 M	$111 M	6.73%	$112 M	$118 M	$160 M	$191 M

Student Housing Needs		
Current Student body (2012)	6,888	students
Freshman	34	%
Sophmores	20	%
Juniors	16	%
Seniors	22	%
Graduates	8	%
Texas Tech Universities Report 2020 Projections	10,000	students
THECB 2020 Projections	8,500	students
Angelo State University On-Campus Housing Goals		
Freshman	70	%
Sophmores	70	%
Juniors	7	%
Seniors / Graduates	5	%

	ASU / TTU	THECB
Projected Growth (students)	**3,112**	**1,612**
Freshman	1,058	548
Sophmores	622	322
Juniors	498	258
Seniors	685	355
Graduates	249	129
Off-Campus Student Apartment Needs (students)		
Freshman	317	164
Sophmores	187	97
Juniors	463	240
Seniors / Graduates	887	459
Total Off-Campus Needs by 2020 (beds)	**1,854**	**960**
Total Units (3.14 beds/unit)	**590**	**306**

Angelo State University

Summary of Potential:

- Angelo State University has an economic development impact of $223 million for Tom Green County.

- Reports indicate the University will increase it's enrollment from 6,888 students to 8,500 to 10,000 students.

- This increase in students creates a demand for 960 to 1,854 off campus beds, or **306 to 590 new 2, 3, and 4 bedroom units**.

- The increased enrollment will create between **806 to 1,556 new jobs** for the area.

- An enrollment increase to 10,000 students will have an additional economic development impact on Tom Green County of $169 million.

TRADE AREA ANALYSIS

DOWNTOWN SAN ANGELO
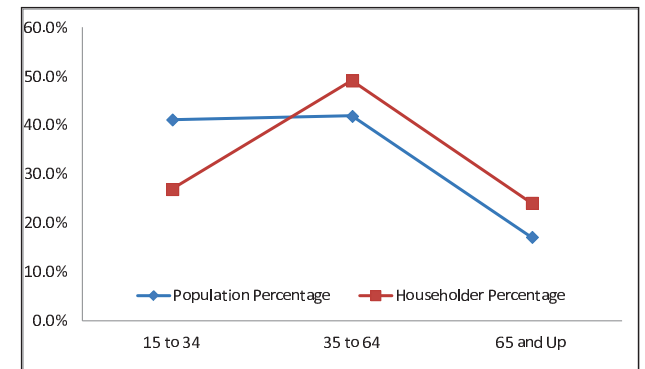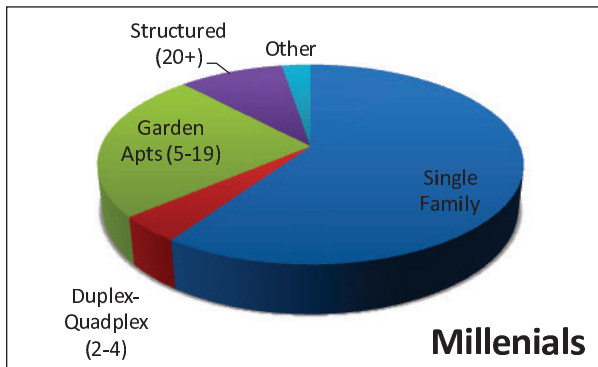
Trade Area

Traditionally, land use programming is calculated through the measurement of demographics within a 10-minute drive time of a particular site area. As Downtown San Angelo, and the City of San Angelo itself is a regional center within the West Texas community, a broader trade area designation is appropriate. As such, the city limits of San Angelo have been designated as the trade area boundary for all land uses except restaurants, which have been given a trade area boundary defined by a 15-minute drive time for larger market catchment.
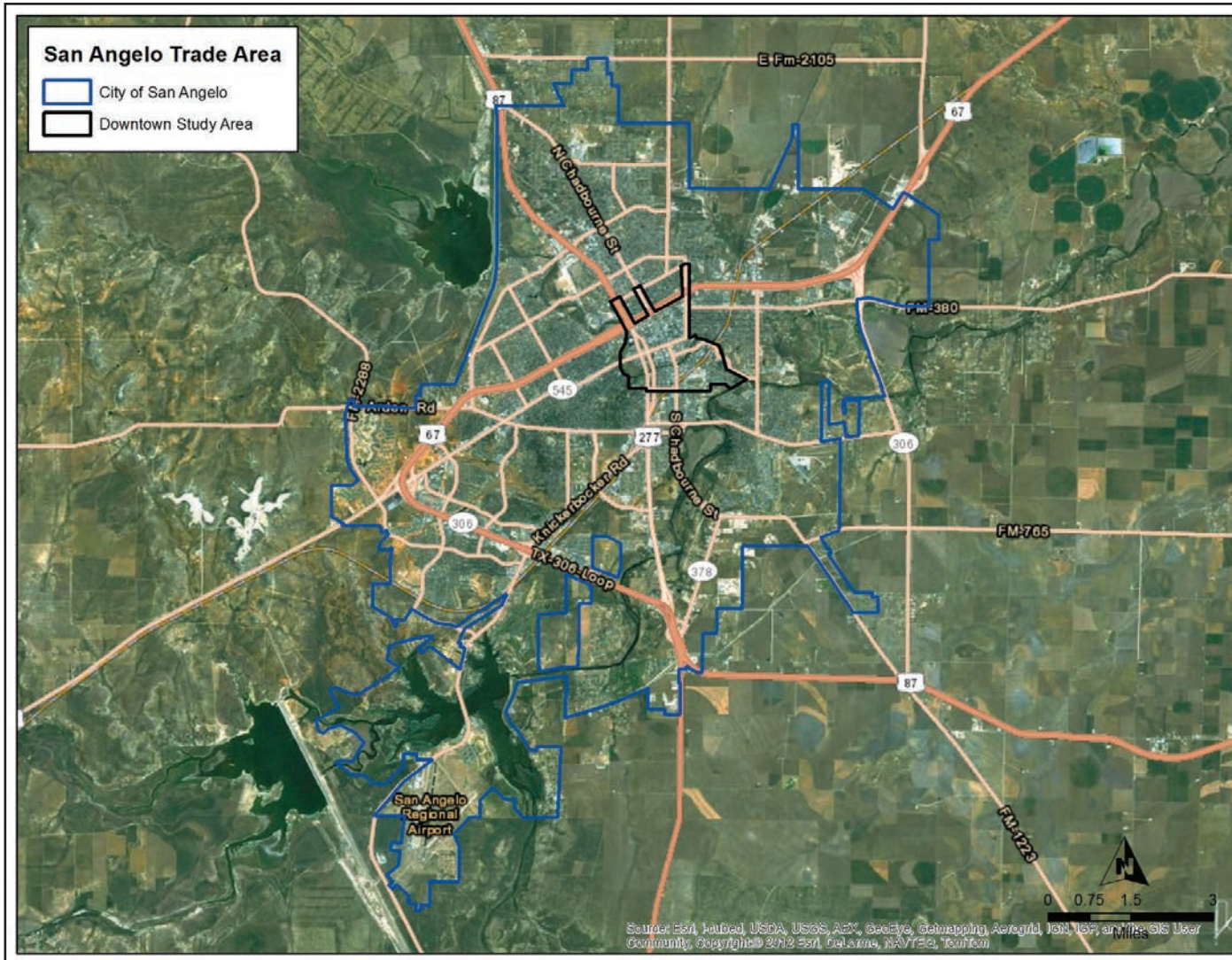
American Community Survey 5 year estimates (2007-2011), measured the population of San Angelo as 92,334. 51.3% of the population is female, and 48.7% is male.

Breaking down the population groups into generation groups, the largest population group is the Millennial generation at 33.0%, followed by Generation X at 23.0%.

This reflects the economic drivers in the area, specifically the education system and Angelo State University. The population is generally young, with Baby Boomers and the Silent Generation only making up 10.6% and 13.7% of the population.

As a percentage of households, the Millennial generation is under represented, while Generation X, the Baby Boomers, and the Silent Generation make up the majority of householders.

Population Totals		
Male	44,960	48.7%
Female	47,374	51.3%
Total population	**92,334**	

Under 5 years	6,769	7.3%
5 to 9 years	6,315	6.8%
10 to 14 years	5,171	5.6%
15 to 19 years	7,959	8.6%
20 to 24 years	9,494	10.3%
25 to 34 years	12,999	14.1%
35 to 44 years	9,811	10.6%
45 to 54 years	11,394	12.3%
55 to 59 years	5,301	5.7%
60 to 64 years	4,482	4.9%
65 to 74 years	6,348	6.9%
75 to 84 years	4,732	5.1%
85 years and over	1,559	1.7%
Total population	**92,334**	

Generation	Population	Percentage
Millennials	30,452	33.0%
Gen X	21,205	23.0%
Baby Boomers	9,783	10.6%
Silent Generation	12,639	13.7%

Population Groups	Total	Percentage
Under 15	18,255	19.8%
15 to 34	30,452	33.0%
35 to 64	30,988	33.6%
65 and Up	12,639	13.7%
All Groups	**92,334**	**100.0%**

Householders	Total	Percentage
15 to 34	9,480	26.9%
35 to 64	17,327	49.1%
65 and Up	8,482	24.0%
All Householders	**35,289**	**100.0%**
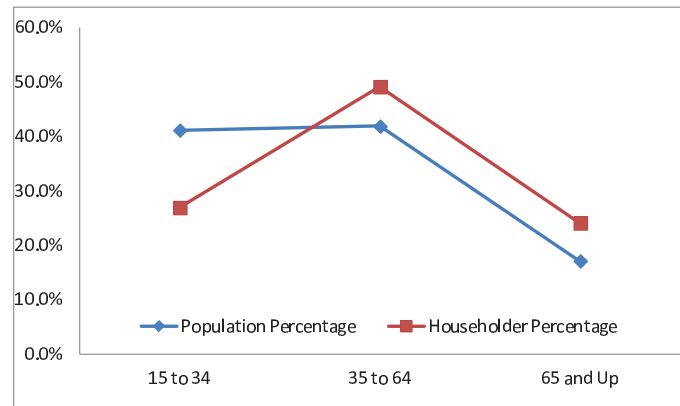
POPULATION STATISTICS

Summary Notes:

- 92,334 total population in San Angelo.

- 51.3% female; 48.7% male.

- Generation breakdowns
    Millennial - 33.0%
    Generation X - 23.0%
    Baby Boomers - 10.6%
    Silent Generation 13.7%

- As a percentage of householders, the Millennial generation is under represented.

American Community Survey 5 year estimates (2007-2011), measured 39,458 total households. 4,169, or 10.6% of these households are vacant, therefore 35,289 are occupied households.

Single family households make up nearly 75% of that total household market, with nearly 30,000 units. Townhomes are the second highest housing type with less than 10% of the total volume of single family households.

Vacancy percentages are close to 20% for the multifamily units, and less than 10% for the single family residences.

Renters occupy 36.6% of the housing market, approaching 100% renter occupancy rates in the higher density products. The majority of owner occupied households are in the single family market.

Medium Density MF (20-49)	High Density MF (50+)	Other
Low Density MF (10-19)		
Townhomes (5-9)		
Duplex-Quadplex (2-4)		
		Single Family

2011 City of San Angelo Housing (Units / Structure)	Total	Occupied	Vacant	Vacancy %	Owner Occupied	Renter Occupied	Renter Occupied %
Single Family	29,528	27,097	2,431	8.2%	21,569	5,528	20.4%
Duplex-Quadplex (2-4)	1,151	930	221	19.2%	65	865	93.0%
Townhomes (5-9)	2,591	2,322	269	10.4%	15	2,307	99.4%
Low Density MF (10-19)	2,037	1,631	406	19.9%	73	1,558	95.5%
Medium Density MF (20-49)	870	701	169	19.4%	11	690	98.4%
High Density MF (50+)	2,029	1,635	394	19.4%	57	1,578	96.5%
Other	1,252	973	279	22.3%	577	396	40.7%
All Units	39,458	35,289	4,169	10.6%	22,367	12,922	36.6%

The accompanying table breaks down ACS Survey information into households by number of units with specific age ranges shown. Our analysis of this information has uncovered an opportunity to better appeal to one specific demographic population; the Millennials.

When compared to older population groups, the Millennials (defined as a person ranging in age from 15 to 34) are marked by their propensity to live in more urban environments with access to a range of activities and social endeavors. This population group has sparked the urban redevelopment in the core of cities such as Austin, Dallas, and Houston. Unlike their older peers, they are generally not as satisfied living in single use apartment communities such as the majority of multifamily housing stock in San Angelo or the older single-family homes present in the neighborhoods surrounding ASU. Their presence in these buildings is likely to identify a lack of housing options in the San Angelo marketplace and can be leveraged for new growth in Downtown that is more suited to the Millennial generation's well-documented desires.

	Owner Occupied	Renter Occupied	Total	Percent of Total
15 to 34	**3,073**	**6,407**	**9,480**	**26.9%**
Single Family	2,976	2,669	5,645	59.5%
Duplex-Quadplex (2-4)	-	404	404	4.3%
Garden Apts (5-19)	-	2,289	2,289	24.1%
Structured (20+)	-	898	898	9.5%
Other	97	147	244	2.6%
35 to 64	**12,449**	**4,878**	**17,327**	**49.1%**
Single Family	12,096	2,379	14,475	83.5%
Duplex-Quadplex (2-4)	30	391	421	2.4%
Garden Apts (5-19)	23	1,406	1,429	8.2%
Structured (20+)	-	453	453	2.6%
Other	300	249	549	3.2%
65 and Up	**6,845**	**1,637**	**8,482**	**24.0%**
Single Family	6,497	480	6,977	82.3%
Duplex-Quadplex (2-4)	35	70	105	1.2%
Garden Apts (5-19)	65	170	235	2.8%
Structured (20+)	68	917	985	11.6%
Other	180	-	180	2.1%

Millennials

Gen X + Baby Boomers

Silent / Greatest Gen.
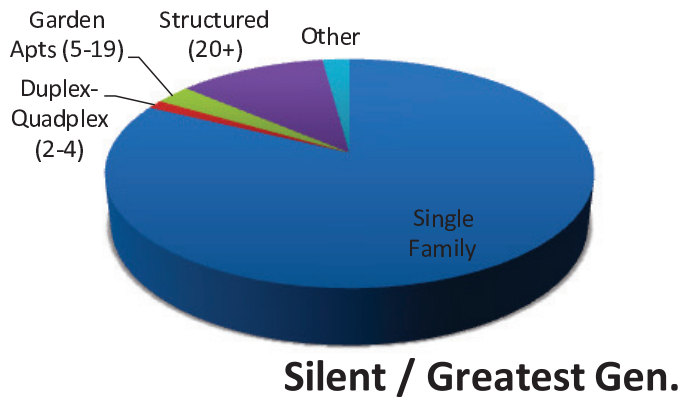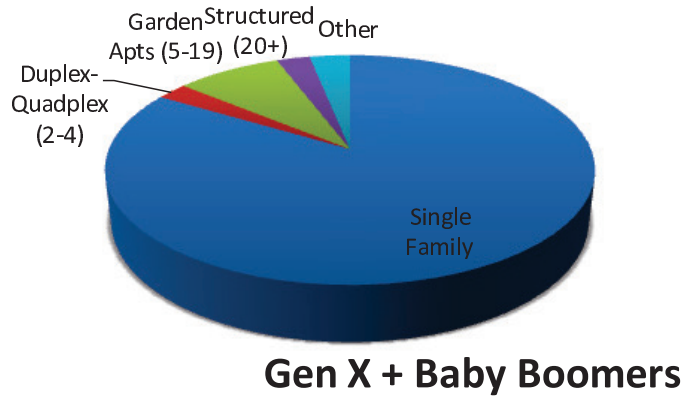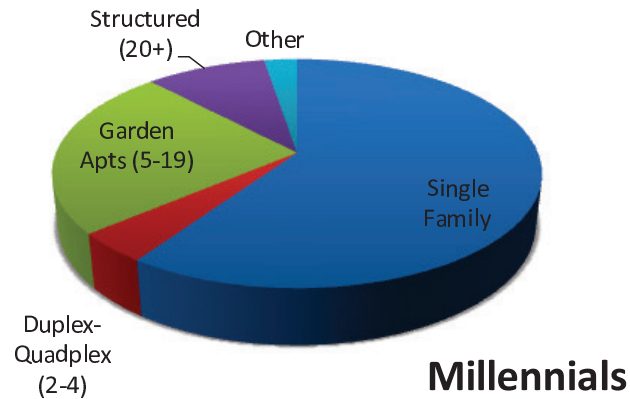
HOUSEHOLD STATISTICS AND UNIT SIZING

Summary Notes:

- The Millennial Generation are the least likely to stay in Single Family Housing.

- The Millennial Generation is more likely to stay in Garden Apartments (24.1%) than any other Generation.

- The Millennial Generation is also likely to reside in Structured Apartments (9.5%).

- Generation X and the Baby Boomer Generation will prefer to stay in Garden Apartments than Structured Apartments.

- The Silent and Greatest Generation are more likely to stay in Structured Housing (nursing homes and independent living) than Garden Apartments.

The majority of housing in the San Angelo marketplace was built before 1980, with the largest percentage of units having been built between 1960 and 1979. This identifies San Angelo's housing stock to be generally quite old when compared to other Texas communities and underscores the need for new investment due to a lack of product options and amenities. Given San Angelo's highest population percentage are those below the age of 35, the City's average age is comparatively young and the potential mismatch between these age ranges housing needs and desires with the conditions of the existing housing stock is an issue that will need to be addressed over time to allow the City to remain competitive.

Millennials

Gen X + Baby Boomers

Silent / Greatest Gen.
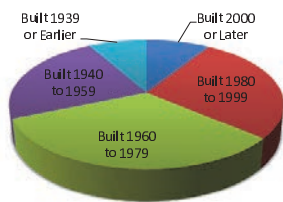
All Generations

	Owner Occupied	Renter Occupied	Total	Percent of Total
15 to 34	**3,073**	**6,407**	**9,480**	**26.9%**
Built 2000 or Later	457	597	1,054	11.1%
Built 1980 to 1999	646	2,442	3,088	32.6%
Built 1960 to 1979	899	2,150	3,049	32.2%
Built 1940 to 1959	886	917	1,803	19.0%
Built 1939 or Earlier	185	301	486	5.1%
35 to 64	**12,449**	**4,878**	**17,327**	**49.1%**
Built 2000 or Later	1,128	365	1,493	8.6%
Built 1980 to 1999	2,923	1,378	4,301	24.8%
Built 1960 to 1979	3,517	1,832	5,349	30.9%
Built 1940 to 1959	3,577	952	4,529	26.1%
Built 1939 or Earlier	1,304	351	1,655	9.6%
65 and Up	**6,845**	**1,637**	**8,482**	**24.0%**
Built 2000 or Later	536	83	619	7.3%
Built 1980 to 1999	1,645	564	2,209	26.0%
Built 1960 to 1979	2,354	734	3,088	36.4%
Built 1940 to 1959	1,674	145	1,819	21.4%
Built 1939 or Earlier	636	111	747	8.8%
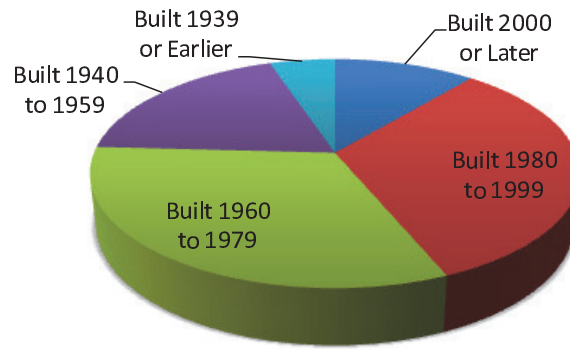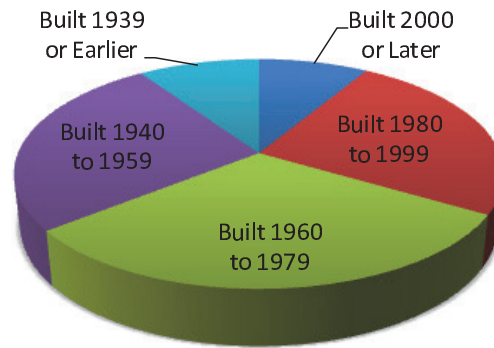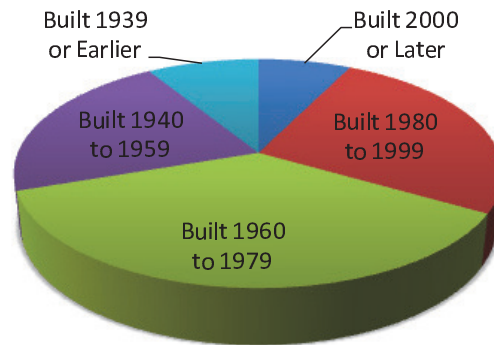
HOUSEHOLD STATISTICS AND HOUSING AGE

Summary Notes:

• The majority of households were built before 1980, with the largest percentage built between 1960 and 1979.

• The Millennial Generation lives in newer product at a greater rate than the other generations. 43.7% of the households they live in were built after 1980.

• Generation X, Baby Boomers, the Silent Generation, and the Greatest Generation, are fairly evenly distributed by the housing categories.

All Generations

Millennials
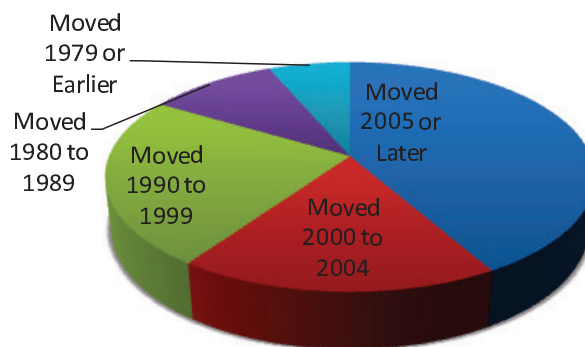
Gen X + Baby Boomers
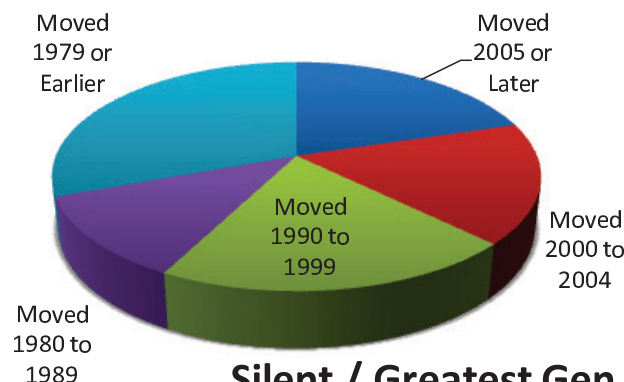
Silent / Greatest Gen.

	Owner Occupied	Renter Occupied	Total	Percent of Total
15 to 34	**3,073**	**6,407**	**9,480**	**26.9%**
Moved 2005 or Later	2,166	5,848	8,014	84.5%
Moved 2000 to 2004	734	344	1,078	11.4%
Moved 1990 to 1999	117	196	313	3.3%
Moved 1980 to 1989	19	19	38	0.4%
Moved 1979 or Earlier	37	-	37	0.4%
35 to 64	**12,449**	**4,878**	**17,327**	**49.1%**
Moved 2005 or Later	3,478	3,753	7,231	41.7%
Moved 2000 to 2004	2,517	593	3,110	17.9%
Moved 1990 to 1999	3,737	390	4,127	23.8%
Moved 1980 to 1989	1,654	95	1,749	10.1%
Moved 1979 or Earlier	1,063	47	1,110	6.4%
65 and Up	**6,845**	**1,637**	**8,482**	**24.0%**
Moved 2005 or Later	935	784	1,719	20.3%
Moved 2000 to 2004	934	510	1,444	17.0%
Moved 1990 to 1999	1,529	196	1,725	20.3%
Moved 1980 to 1989	906	91	997	11.8%
Moved 1979 or Earlier	2,541	56	2,597	30.6%

HOUSEHOLD STATISTICS - LENGTH OF RESIDENCE

Summary Notes:

- Nearly 50% of all move-ins have occurred since 2005. This reflects a relatively high transient population. The percentages by population group follow.

- 84.5% of Millennials have moved into their households since 2005.

- 49.1% of Generation X and Baby Boomers have moved into their households since 2005.

- 37.3% of the Silent and Greatest Generation have moved into their households since 2000.

Household Incomes Within Target Area

Household Incomes Outside Target Area

High Density 41.1%

Lower Density 41.3%

Medium Density 17.6%

	Totals	Percentages
Total Household Units	39,458	
Occupied Household Units	35,289	89.4%
Vacant Units	4,169	10.6%
Owner Occupied HH Units	22,367	63.4%
Renter Occupier HH Units	12,922	36.6%
Median Household Incomes		
Less than $10,000	2,549	7.2%
$10,000 to $14,999	2,742	7.8%
$15,000 to $19,999	2,665	7.6%
$20,000 to $24,999	2,635	7.5%
$25,000 to $29,999	2,369	6.7%
$30,000 to $34,999	2,114	6.0%
$35,000 to $39,999	2,203	6.2%
$40,000 to $44,999	1,549	4.4%
$45,000 to $49,999	1,626	4.6%
$50,000 to $59,999	2,866	8.1%
$60,000 to $74,999	3,857	10.9%
$75,000 to $99,999	3,631	10.3%
$100,000 to $124,999	2,010	5.7%
$125,000 to $149,999	1,055	3.0%
$150,000 to $199,999	680	1.9%
$200,000 or more	738	2.1%

Multi Family Housing	Occupied	Vacant	Total	Vacancy Percentage	Percentage of Total
Multi Family Lower Density	1,631	406	2,037	19.9%	**41.3%**
Multi Family Medium Density	701	169	870	19.4%	**17.6%**
Multi Family High Density	1,635	394	2,029	19.4%	**41.1%**
Total	3,967	969	4,936	58.8%	100.0%

HOUSEHOLD STATISTICS - HOUSING DENSITY & INCOME

Summary Notes:

- Median Household incomes are used as a major determinate for new real estate product types.

- For new residential development, households with median income between $35,000 and $100,000 are often isolated to determine the market for upscale attached residential, as well as retail/restaurant. 44.6% of the trade area households fall within this range.

- The majority of Multi Family density is in structures between 10-19 units (Low Density Garden Apartments), and 50+ (High Rise and High Density Structured Apartments).

- 20% of the Multi Family Market is considered Medium Density (20 to 49 units per structure).

In the 2010 Census there were 39,548 household units within San Angelo. 2010 5yr ACS Estimate show 44,952 jobs, which means there are approximately 1.14 jobs per household, or 0.88 households created for every job. These trends however are a baseline from 1990, 2000, and 2010 census data and do not take into account any new economic activity driven by major employers in the area, including a potential oil boom.

The baseline 2020 projection suggests an increase of 2,828 jobs, however, between the years 2010 and 2011, Census Bureau data shows 1,390 jobs have already been added (2011 ACS data has a figure of 46,392 jobs).

The latest Texas Workforce Development data for the San Angelo MSA show 47,500 in April, 2013. The San Angelo MSA covers the counties of Irion and Tom Green, but it is clear that recent numbers indicate that the baseline 2020 job projection of 47,780 will be surpassed.

The 2011 American Community Survey data shows that out of the 46,392 jobs in the City of San Angelo, 22,305 are considered "white collar". This White Collar percentage, a combination of Information, Finance and Insurance, processional, scientific and management, educational and health care, and public administration, is a robust 48.1%.

Therefore according to baseline data, out of the 2,828 new jobs created within the next ten years, 48.1%, or 1,360 jobs will be office oriented. These jobs will require office space. Any additional job growth will maintain the same percentage, depending on the industry.

	Population	HH Units	Employment
1990 Comp / EASI	84,474	34,891	n/a
2000 Census	88,439	37,699	n/a
2010 Census / ACS	93,200	39,548	44,952
2020 Projection	98,757	42,036	47,780
10 Year Growth	**5,557**	**2,488**	**2,828**

Employment Categories	Total	Percentage
Agriculture, forestry, fishing and hunting, and mining	1,017	2.2%
Construction	2,677	5.8%
Manufacturing	2,648	5.7%
Wholesale trade	995	2.1%
Retail trade	5,507	11.9%
Transportation and warehousing, and utilities	995	2.1%
Information	1,575	3.4%
Finance and insurance, and real estate and rental and leasing	2,529	5.5%
Professional, scientific, and management, and administrative and waste management services	3,570	7.7%
Educational services, and health care and social assistance	11,529	24.9%
Public administration	3,102	6.7%
Arts, entertainment, and recreation, and accommodation and food services	4,259	9.2%
Other services (except public administration)	2,392	5.2%
Armed forces*	3,597	7.8%
Total Work Force Employment:	**46,392**	**100.0%**
Office-Oriented Jobs	**22,305**	**48.1%**

Sources: 2010 Census, 2011 ACS 5 yr estimate, EASI, City of San Angelo Comprehensive Plan, Catalyst

EMPLOYMENT AND PROJECTIONS

Summary Notes:

- The American Community Survey 5 year estimate measures 46,392 jobs in San Angelo.

- 22,305, or 48.1%, are white collar or office jobs.

- Baseline projections are based upon growth since 1990. 10 year growth figures are:

    - 5,557 People

    - 2,488 Households

    - 2,828 Jobs

- 2011 estimates indicate an increase of nearly 1,500 new jobs. **More than half the projected baseline growth.**

The City of San Angelo has a number of large employers. The top employer is Goodfellow Air Force Base with 5,165 total employees. The Shannon Health System is second highest at 2,627 employees.

The next largest employers are part of the education system. San Angelo ISD and Shannon Health System are largely tied with the population of San Angelo. The former especially will grow as additional residents move into the city. Other organizations tied to the population of the city are the San Angelo Community Medical Center, City of San Angelo, and Tom Green County.

BlueCross BlueShield of Texas is tied to employment and jobs within the area, and as more jobs come, this organization will likely grow as well.

With the recent advances in the energy sector, it is anticipated that related employers will rise in these rankings.

Summary Notes:

- Goodfellow Air Force Base is the largest employer with over 5,000 employees.

- Angelo State University has 1,680 employees.

- The other top employers in the area are tied to population and job growth. These include:

  1) San Angelo ISD
  2) City of San Angelo
  3) Tom Green County
  4) Medical Facilities

- A potential new driver of population and employment could be the oil and gas industry.

Employer	Employees	Business Category
Goodfellow Air Force Base	5165	Military Training Center
Shannon Health System	2627	Hospitals and Clinics
San Angelo ISD	2041	Public School System
Angelo State University	1680	University
San Angelo State Supported Living Center	920	State School
San Angelo Community Medical Center	860	Hospital
City of San Angelo	855	Municipal Government
Tom Green County	727	County Government
SITEL, Inc.	572	Teleservicing
Ethicon (Johnson & Johnson)	510	Sutures/Needles
Lone Star Beef Processors	480	Beef Processing
Verizon, Inc.	459	Telephone Services
BlueCross BlueShield of Texas	400	Medical Claims Processing
Hirschfeld Industries	380	Structural Steel Materials
Performant DCS/HCS/VFI	375	Government Contractor
Reece Albert	330	Highway Construction
Baptist Retirement Center	301	Retirement Community
Stripes Convenience Stores	298	Convenience Stores
San Angelo Packing	269	Beef Processing

LAND USE PROGRAMMING

DOWNTOWN SAN ANGELO

Office Demand Calculations		
2011 Employment	46,392	jobs
10 year baseline Growth	2,828	jobs
Additional Jobs in ten year period		
ASU Projected Growth	806	jobs
Oil and Gas Market	5,012	jobs
Total Additional Jobs	**5,818**	**jobs**
Total Jobs	8,646	jobs
Projected Office-Oriented Jobs (48.1%)	4,159	jobes
Potential Building Area (using 250s sf/employee ratio)	1,039,697	sf
Assumed Vacancy Fill Rate	15.0	%
Downtown Capture Rate	25.0	%
Potential New Downtown Space (10 years+)	220,936	sf

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American Community Survey estimates measure a total of 46,392 jobs for 2011. The ten year baseline growth based on census bureau statistics dating back to 1990, measure a 10 year baseline growth of 2,828 jobs.

The one year employment growth from 2010 to 2011 is 1,500 jobs, nearly half the baseline growth implying additional jobs are being added due to recent investment in the energy industry.

Angelo State University is growing, and is projected to conservatively add another 806 jobs in the period.

During the ten year period, an additional 8,648 jobs will be added, including the baseline growth, and additional jobs spurred on by the education and energy sectors.

Utilizing the current office-oriented percentage of 48.1%, and applying it to the total number of new jobs, Catalyst projects an additional 4,159 office oriented jobs. This accounts for over 1 million sf.

Assuming 15% of this growth will fill current vacancies, and applying a conservative capture rate of 25%, San Angelo downtown can expect over 200,000 sf in new office space.

OFFICE ANALYSIS

Summary Notes:

- 8,646 total new jobs in San Angelo.

- 4,159 office-oriented jobs.

- 250 sf / employment ratio equates to 1,097,697 sf of potential building area.

- 15% vacancy fill rate.

- 25% downtown capture rate.

- **220,936 sf of potential new downtown space**.

Office Demand Calculations

2011 Employment	46,392	jobs
10 year baseline Growth	2,828	jobs
Additional Jobs in ten year period		
ASU Projected Growth	806	jobs
Oil and Gas Market	5,012	jobs
Total Additional Jobs	**5,818**	**jobs**
Total Jobs	**8,646**	**jobs**
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Assumed Vacancy Fill Rate	15.0	%
Downtown Capture Rate	25.0	%
Potential New Downtown Space (10 years+)	**220,936**	**sf**

Retail Leakage by ESRI's Business Analyst measures the difference between demand for different retail services, and the supply within a trade area. The City of San Angelo has a negative restaurant gap; however, since San Angelo is a regional draw, the restaurant demand trade area goes out further than the current supply/demand trade boundary.

The table below indicates that on a restaurant per population basis, San Angelo is right at the average of similar sized cities. With regards to sales per restaurant the graph to shows significantly lower than average (indicated by dashed red line), implying there is opportunity for increased total restaurant sales, either by more choice, or improved experiences.
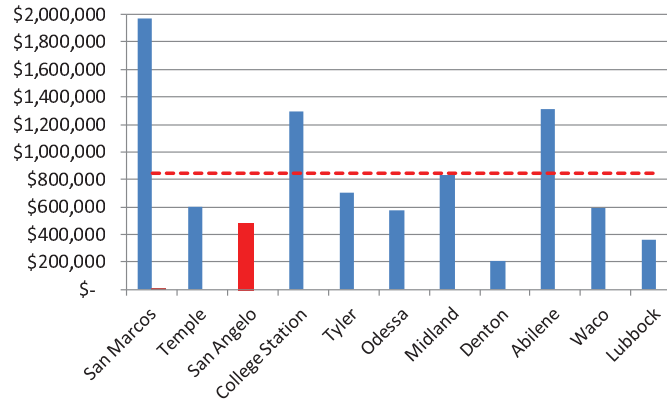
Industry Group	NAICS	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/Surplus Factor	Number of Businesses
Food Services & Drinking Places	722	$77,511,210	$103,581,369	-$26,070,159	-14.4	127
Full-Service Restaurants	7221	$30,396,531	$58,211,508	-$27,814,977	-31.4	50
Limited-Service Eating Places	7222	$39,800,255	$39,804,517	-$4,262	0.0	51
Special Food Services	7223	$2,141,674	$1,429,886	$711,788	19.9	6
Drinking Places - Alcoholic Beverages	7224	$5,172,750	$4,135,458	$1,037,292	11.1	20

| | City Totals (2012 ESRI) | | | | Downtown Area* (2012 ESRI) | | |
Cities	Population	Total Restaurants	Total Food and Drink Supply	Total Food and Drink Supply / Rest	Restaurant / Population (10,000)	Total Restaurants	Total Food and Drink Supply	Total Food and Drink Supply / Rest
San Marcos	47,433	89	$ 89,806,061	$ 1,009,057	18.76	19	$ 37,470,772	$ 1,972,146
Temple	69,307	90	$ 98,262,074	$ 1,091,801	12.99	7	$ 4,219,473	$ 602,782
San Angelo	95,293	127	$ 103,581,369	$ 815,601	13.33	20	$ 9,697,633	$ 484,882
College Station	97,074	112	$ 124,768,024	$ 1,114,000	11.54	23	$ 29,820,580	$ 1,296,547
Tyler	98,715	144	$ 133,254,061	$ 925,375	14.59	8	$ 5,656,169	$ 707,021
Odessa	102,361	152	$ 140,325,819	$ 923,196	14.85	14	$ 8,093,042	$ 578,074
Midland	115,168	158	$ 155,938,222	$ 986,951	13.72	14	$ 11,703,770	$ 835,984
Denton	118,240	135	$ 118,284,441	$ 876,181	11.42	14	$ 2,943,096	$ 210,221
Abilene	118,365	142	$ 160,079,930	$ 1,127,323	12.00	6	$ 7,844,041	$ 1,307,340
Waco	127,339	185	$ 186,378,388	$ 1,007,451	14.53	22	$ 13,062,822	$ 593,765
Lubbock	234,999	313	$ 283,604,470	$ 906,085	13.32	13	$ 4,657,184	$ 358,245
Totals	1,224,294	1,647	$ 1,594,282,859	$ 967,992	13.45	160	$ 135,168,582	$ 844,804

*Downtown Area an approximate area designated through aerial analysis

ESRI 2012 Business Analyst measure 127 restaurants within San Angelo, and 20 restaurants in the downtown area.

On the field studies by Catalyst, as seen in the map below counted 32 downtown establishments (including night life, bars, and delis).

Summary Notes:

- 32 total restaurants in the area including:

    - Pub Food

    - Bars

    - Mexican Food

    - Lunch

    - Music Venues

    - Private Venues

    - Ice Cream

    - Fast Food

    - Buffets

    - Deli / Sandwich

Legend	Restaurant	Type
1	Joes Brewhouse & Winery	Pub Food & Pizza
2	The Office Bar	Bar
3	Concho's	Bar & Food
4	Re Rees	Bar
5	Diegos Buritos	Mexican Food
6	Mesquite Bean	Breakfast Café and Coffee
7	Sealy Flats	Seafood, Music, and Bar
8	Miss Hattie's	Restaurant
9	Stangos Coffee Shop	Lunch and Late Night Café
10	Grinners	Bar
11	The Dead Horse	Bar
12	Tejano Country	Bar & Music
13	House of FiFi DuBois	Bar & Music
14	Chadbourne Street Deli	Sandwich / Subs
15	Fuente's	Mexican Food
16	Fat Boss Pub	Pub
17	Private Venue	Private Venue
18	Black Swan Gallery	Wine Bar
19	Blaine's Pub	Bar & Music
20	37	Ice Cream
21	Julio's Burritos	Mexican Food
22	McDonalds	Fast Food
23	Subway	Sandwich / Subs
24	Grandy's	Buffet
25	Quiznos	Sandwich / Subs
26	Burger King	Fast Food
27	TBD	Under Construction
28	Schlotzky's	Sandwich / Subs
29	Zero One Ale House	Bar & Pub
30	Sonic	Fast Food
31	FL's Garden	Private Venue
32	Los Panchitos	Mexican

Restaurants
- Restaurants
- 100 Yr Floodplain

0 0.1 0.2 0.4
Miles

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Map and Table Sources: ESRI, City of San Angelo, Catalyst

Demand for restaurants will increase with population growth. In 2011, the population of San Angelo was 92,334, and baseline population growth is 5,557. This number will increase due to additional economic activity occurring due to the education and economic sectors.

Angelo State University is conservatively expected to add 806 jobs, and the oil and gas sector will add 5,012 jobs. Total additional jobs, including baseline projections is 16,990 people.

This population increase, including growth from economic sectors, is 18.4%, and applying that to the total number of restaurants results in demand for 23 new restaurants in San Angelo.

Utilizing a capture rate of 25% indicates demand for 6 additional restaurants in Downtown San Angelo. There is also opportunity for existing restaurants to reinvent themselves to capture additional sales in line with downtowns of similar sized cities.

Restaurant Demand Calculations

Restaurants in San Angelo	127	restaurants
Restaurants in Downtown San Angelo	32	restaurants
2011 San Angelo Population	92,334	people
10 year baseline Growth	5,557	people
Additional Jobs in ten year period		
ASU Projected Growth	806	jobs
Oil and Gas Market	5,012	jobs
Total Additional Jobs	5,818	jobs
Additional Population created by jobs (1.96)	**11,433**	**people**
Total Population added in 10 year period	16,990	people
Population Increase as a percentage	18.4	%
Total Additional Restaurants in San Angelo	23	restaurants
Downtown Capture Rate	25.0	%
Total Additional Restaurants in downtown San Angelo	**6**	**restaurants**

RESTAURANT ANALYSIS DEMAND

Summary Notes:

- 16,990 additional population growth expected.

- Applying growth rate to number of restaurants creates potential demand for 23 new restaurants in San Angelo.

- A 25% capture rate indicates demand for **6 new Downtown San Angelo Restaurants.**

Baseline 10 year growth for households is measured at 2,488. Additional jobs in the ten year period, at a 0.88 hh created per job ratio, (San Angelo average), will create 5,120 new households. Applying a renter occupied percentage of 38.8%, and a target household income percentage of 46.6%, creates demand for 1,242 new multi family units. San Angelo Phase 2 is expected to supply 224 additional units, providing demand for 1,034 new multifamily units.

The approximate median age for existing multi family units in San Angelo is 30 years. Vacancy for product built within the last 30 years is 7.04%, and vacant for product built more than 30 years ago, is 14.51%. This indicates that there are 1,418 target renters in older product, creating a total pool of 2,452 multi family units. Applying a 25% capture rate equates to demand for 613 multi family units in Downtown San Angelo

Multi Family Demand Calculations		
Baseline 10 year Demand	2,488	households
Additional Jobs in ten year period		
ASU Projected Growth	806	jobs
Oil and Gas Market	5,012	jobs
Total Additional Jobs	5,818	jobs
Households created by Employees (0.88/job)	5,120	households
Total Households added in 10 year period	7,608	households
Rental Occupied Households (36.6%)	2,785	rental HH
Target HH Income (44.6%)	1,242	MF Units
Supply - San Angelo Place (Phase 2)	224	units
Multifamily Demand from Growth	1,034	units
Existing MF Supply Age (5+ units / structure)		
Within last 30 years	3,400	units
Vacancy Percentage	7.06	%
Older than 30 years	3,319	units
Vacany Percentage	14.51	%
Target Current Renters 35K to 100K	4,578	householders
Target Renters in Newer Product	3,160	householders
Target Renters in Older Product	1,418	householders
Multifamily Demand from Growth	1,034	households
Target Renters in Older Product	1,418	households
Total Target Market	2,452	households
Capture Rate	25	%
Downtown MF Market	613	MF Units

HOUSING ANALYSIS

Summary Notes:

- Baseline 10 year demand is 2,488 households.

- Additional jobs will add 5,180 households.

- Applying a rental occupied percentage rate and a target household income median rate equals demand for 1,034 units (including new supply coming online).

- There are 1,418 target renters living in multifamily product that is older than 30 years.

- The total target market for the City of San Angelo is 2,452 multi family units.

- Downtown San Angelo has demand for **613 multi family units** (using a capture rate of 25%).

The following table summarizes baseline growth for population, households, and employment, for the City of San Angelo, additional growth expected from Angelo State University and the Energy Sector, over a ten year period.

This total growth will lead to new development in the housing, restaurant, and office sectors of Downtown San Angelo. There are redevelopment opportunities available due to older product in the housing and office market and limited variety in the food industry.

Summary Sheet		
2011 Population	92,334	people
2011 Household	39,458	households
2011 Employment	46,392	jobs
Baseline Growth		
10 year population	5,557	people
10 year household	2,488	households
10 year employment	2,828	jobs
Additional Growth Expected from ASU & Energy Sector		
Population	11,381	people
Household	5,818	households
Employment	5,792	jobs
Total Growth		
10 year population total	16,938	people
10 year household total	8,306	households
10 year employment total	8,620	jobs
New Development within Downtown San Angelo		
Multifamily Units	613	units
Restaurants	6	restaurants
Office Space	220,936	sf

Summary Notes:

- Potential new development:

    - **613 MF Units**

    - **6 Restaurants**

    - **220,936 sf of Office Space**

PHYSICAL AND POLICY ANALYSIS

DOWNTOWN SAN ANGELO

San Angelo Downtown Opportunities

Downtown Study Area
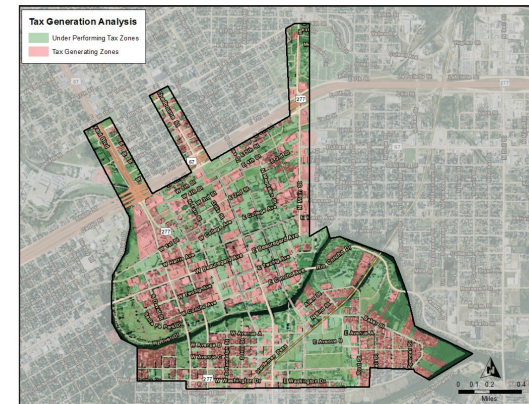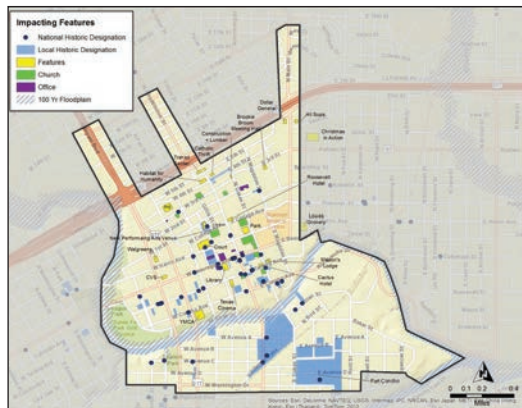
PHYSICAL AREA OPPORTUNITIES

Summary Notes:

- Existing factors include:

    - Regional core

    - Large urban footprint

    - Varied densities

    - Range of identities
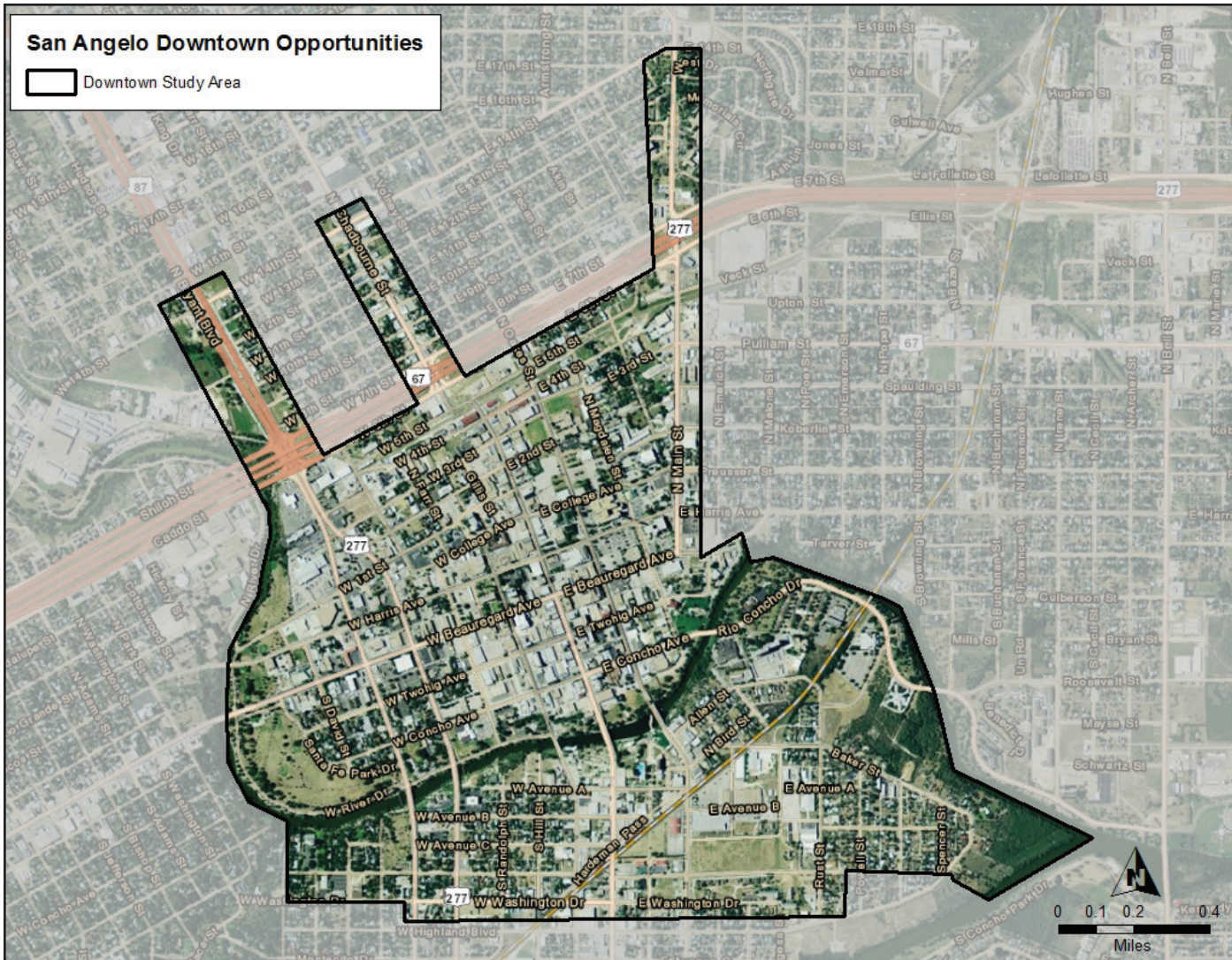
Downtown Infrastructure

Legend:
- Water Mains
- Wastewater Mains

Summary Notes:

- Map shows existing water and waste water utilities.

- Infrastructure is already in place.

- Infrsatructure will accommodate new redevelopment and reinvestment.

Ownership Type Analysis

- City
- Other Public
- Private

OWNERSHIP TYPE ANALYSIS

Summary Notes:

- Map shows parcels highlighted by ownership, city, and other public or private entity.

- River corridor is controlled by City of San Angelo.

- Tom Green County controls other property with potential for new development.

- Majority of land is is privately owned and property assembly for new projects will likely require private sector involvement.

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Land Assembly Analysis

- 1 Owner
- 2 - 3 Owners
- 4 - 5 Owners
- 6 + Owners
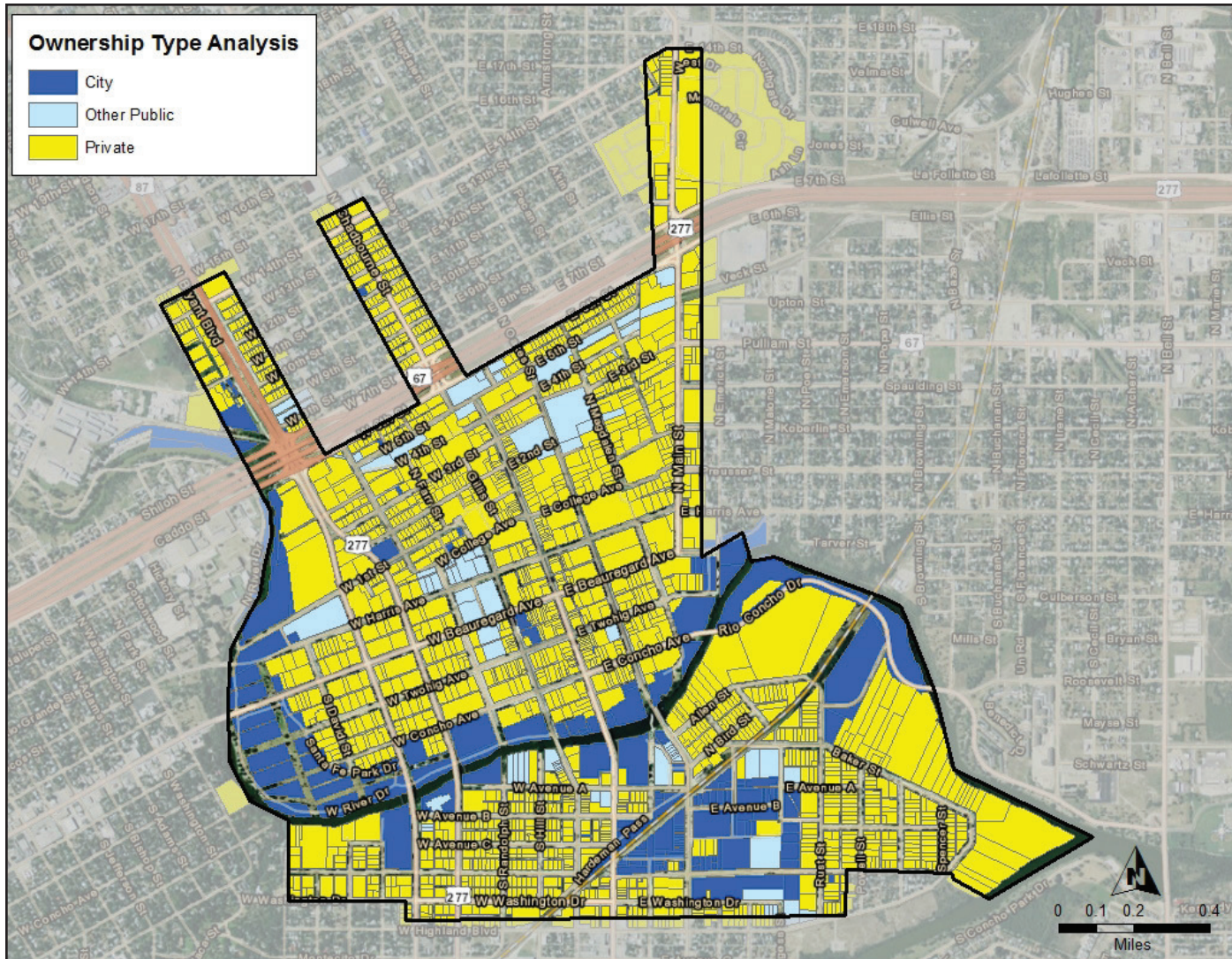
LAND ASSEMBLY ANALYSIS

Summary Notes:

- Map differentiates blocks by the number of owners. Blocks with fewer owners will be easier to assemble.

- There are simpler land assembly opportunities to the North.

- There are simpler land assembly opportunities near Fort Concho, the Art District, and the river corridor.

- Difficult land assemblies in the historic downtown core.

Assessed Value Analysis

$0 - $3.00
$3.01 - $6.00
$6.01 - $10.00
$10.01 - $15.00
$15.01 +
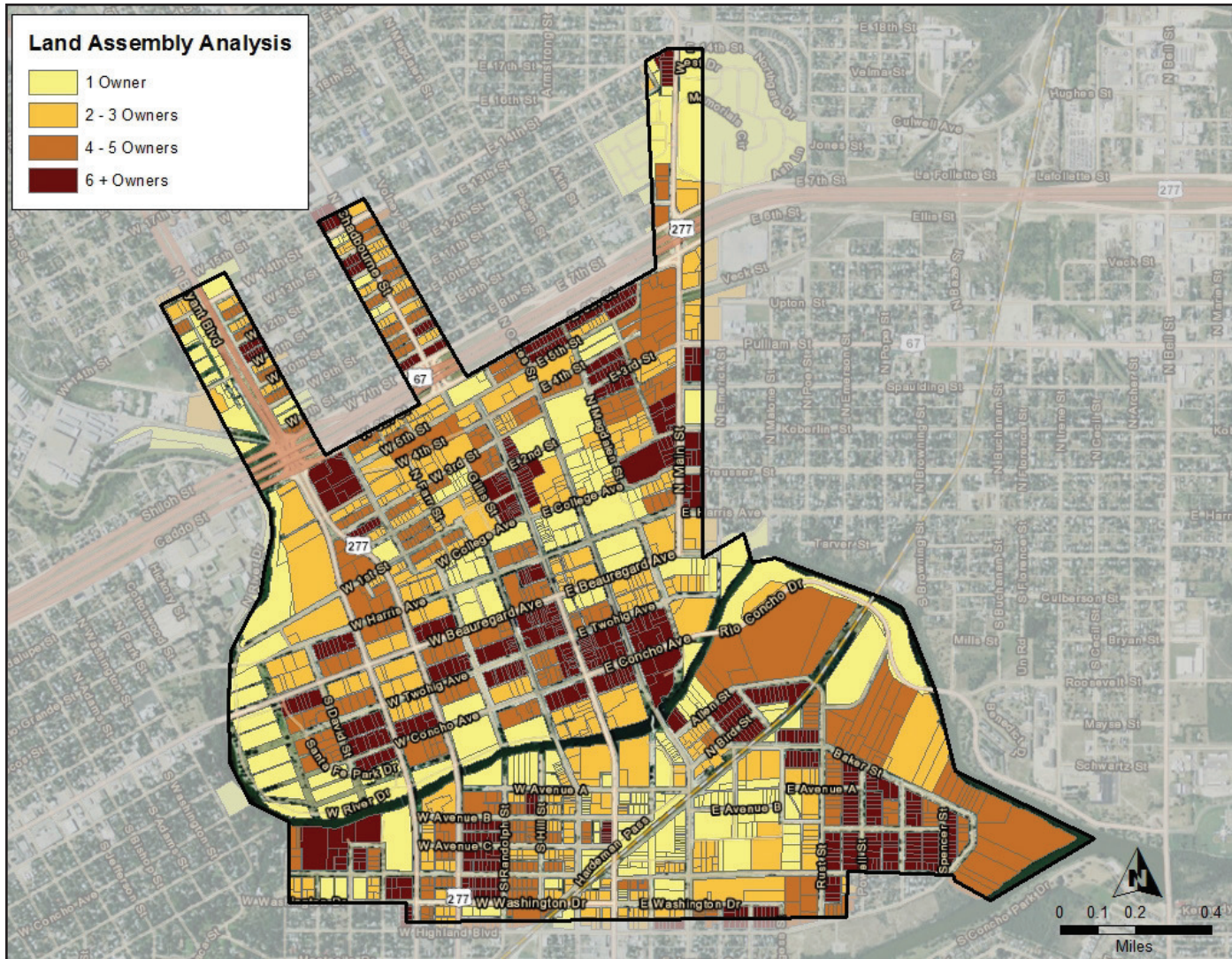
ASSESSED VALUE ANALYSIS

Summary Notes:

- Map shows parcels differentiated by assessed total value by square footage. Assessed values are from the local appraisal district.

- There are lower values in the Northern part of Downtown.

- There are lower values along the river corridor.

- There are lower values near Fort Concho and the Art Museum.

- There are higher values along Bryant and the primary highway 67 intersection.
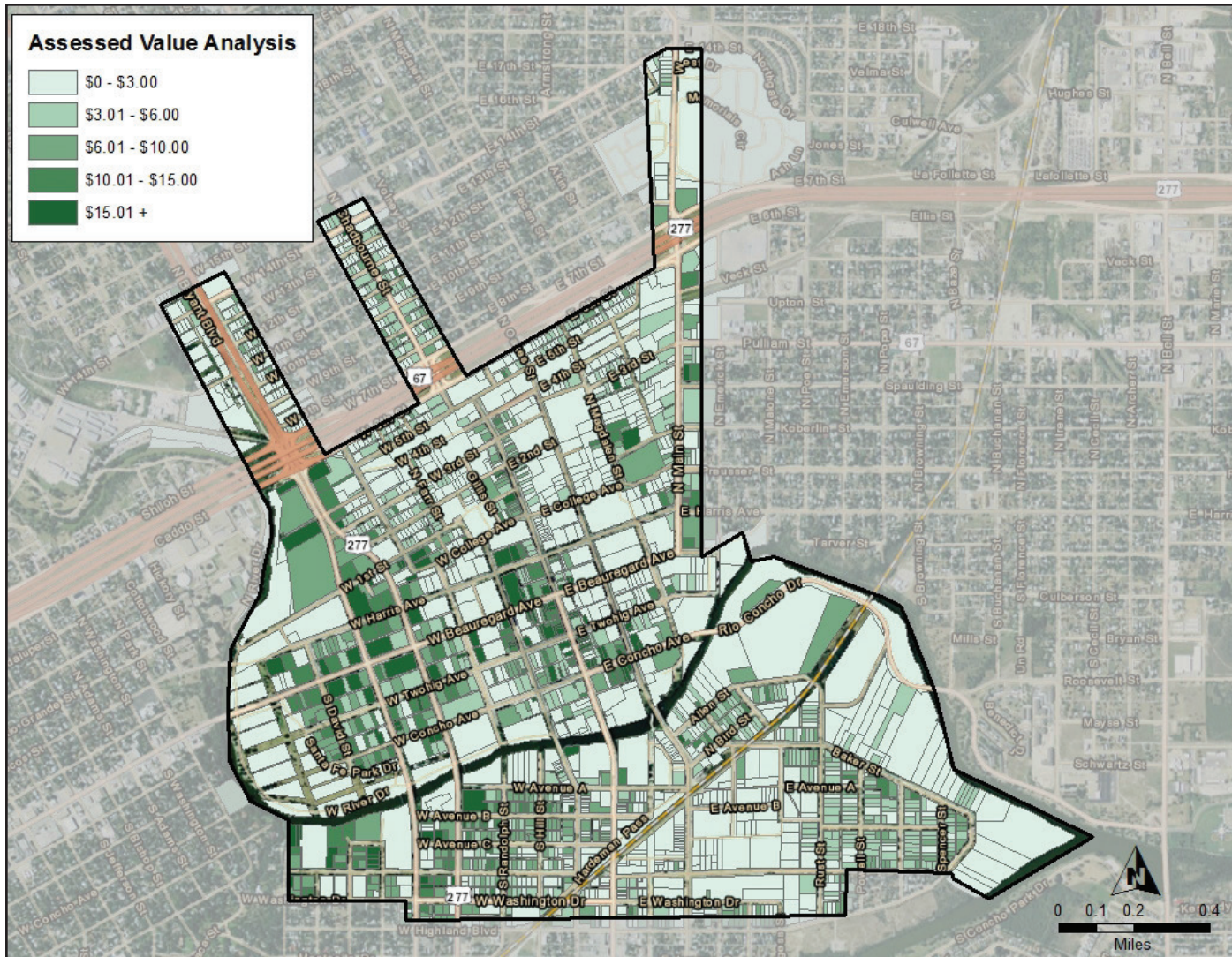
TAX GENERATION ANALYSIS

Summary Notes:

- This map measures tax generation potential by comparing assessed improvement values with lot acreage. Lots with improvements that generate tax revenue are highlighted in red, and potential tax generating parcels are in green.

- Due to a combination of publicly owned property and vacant/under utilized land, there are large zones of underperforming tax parcels within downtown.

SOURCES: ESRI, CITY OF SAN ANGELO, TOM GREEN APPRAISAL DISTRICT, CATALYST

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Central Business District
April 17, 2012

Legend
- River Corridor
- River Corridor Sign Area
- RCC Proposed 150ft Sign Area
- RCC Proposed Area
- Downtown Historic Overlays
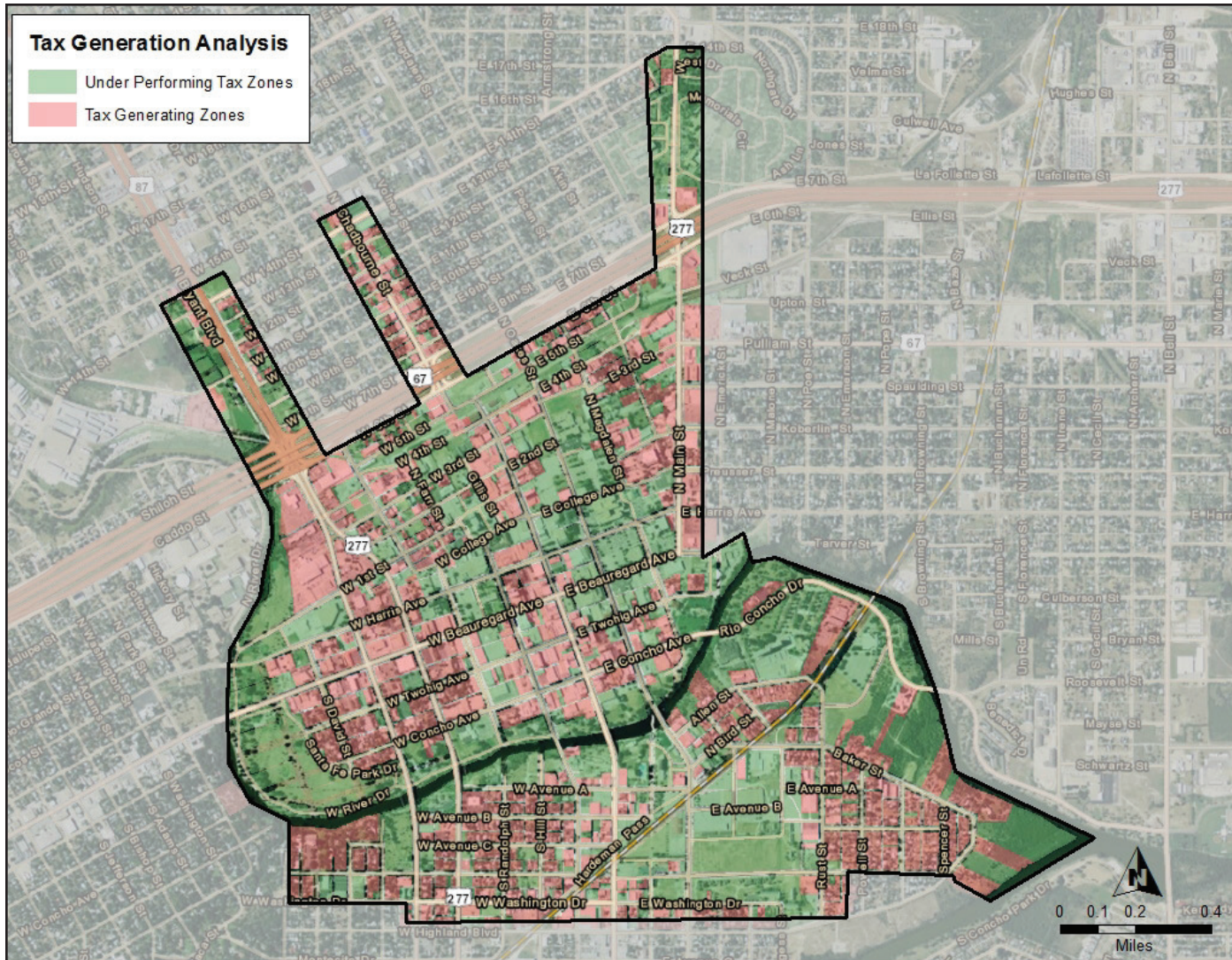
LOCAL REGULATIONS

Summary Notes:

- This map shows locally designated historic districts.

- Locally regulated historic districts have effect on what can be done within the downtown core.
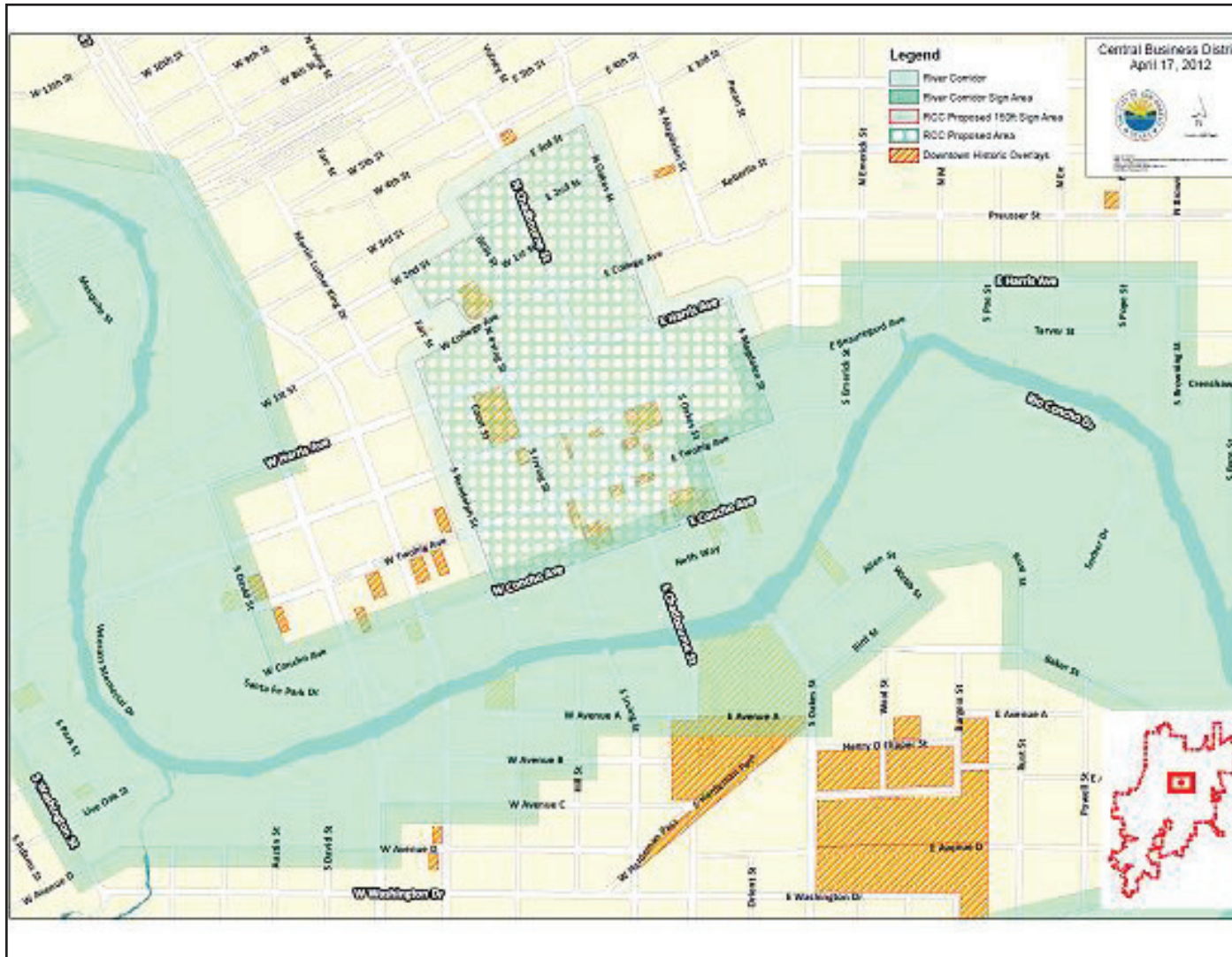
EASE OF DEVELOPMENT

Summary Notes:

- This map combines the elements of development from the previous maps in to blocks.

- Large groupings of redevelopment blocks are at:

  - North Bryant BLVD

  - MLK Dr. and Farr Streets

  - Oakes Street

  - Around Fort Concho

  - Around Art Museum

- These are theoretical and may not prove to be successful based on ownership and adjacency elements.

Identity Subdistricts

Legend:
- Beauregard Avenue
- City Hall and Court Center
- Bryant / Highway 67
- Concho River
- Historic and Art Walk
- Historic Concho Avenue
- Shannon Medical Center
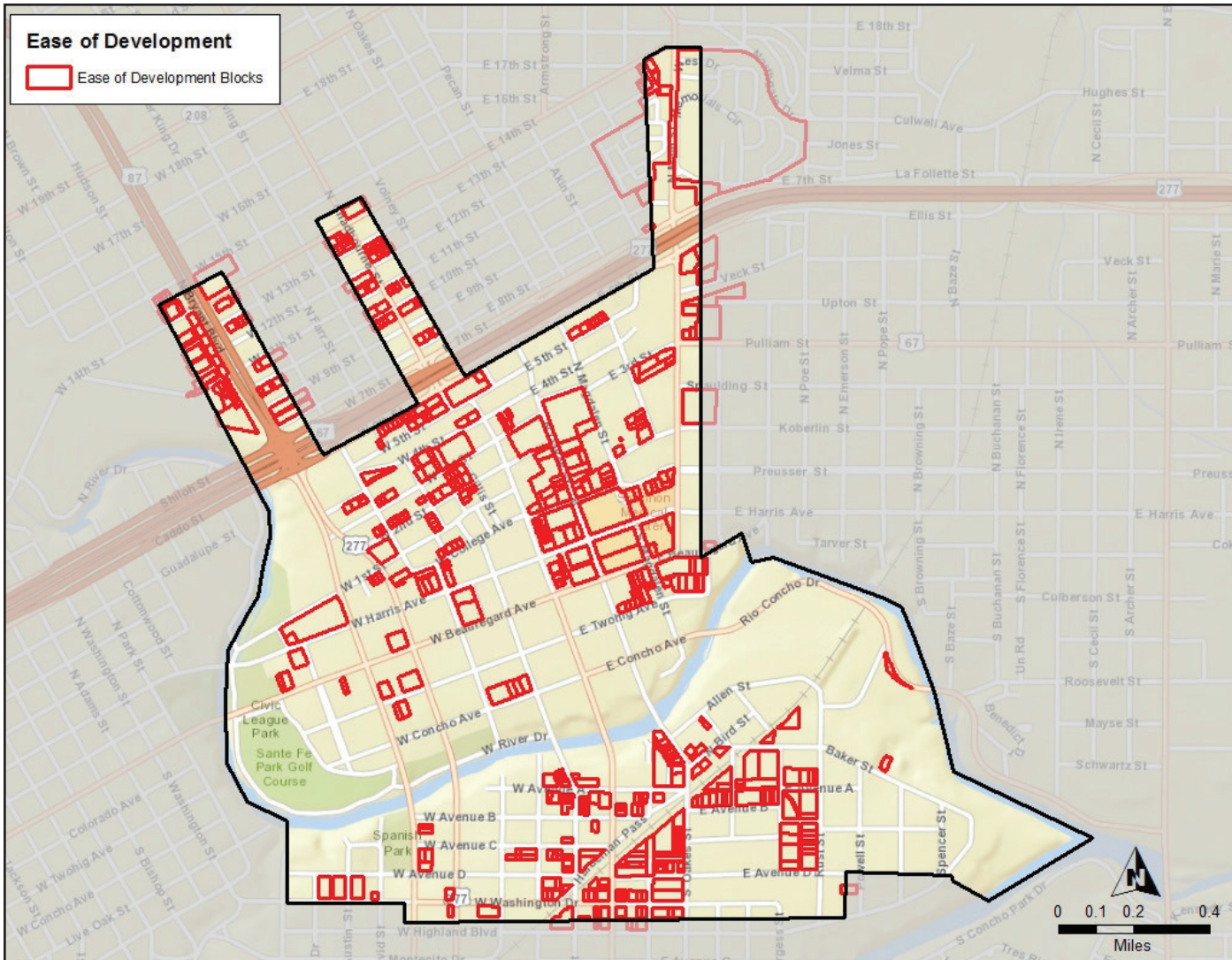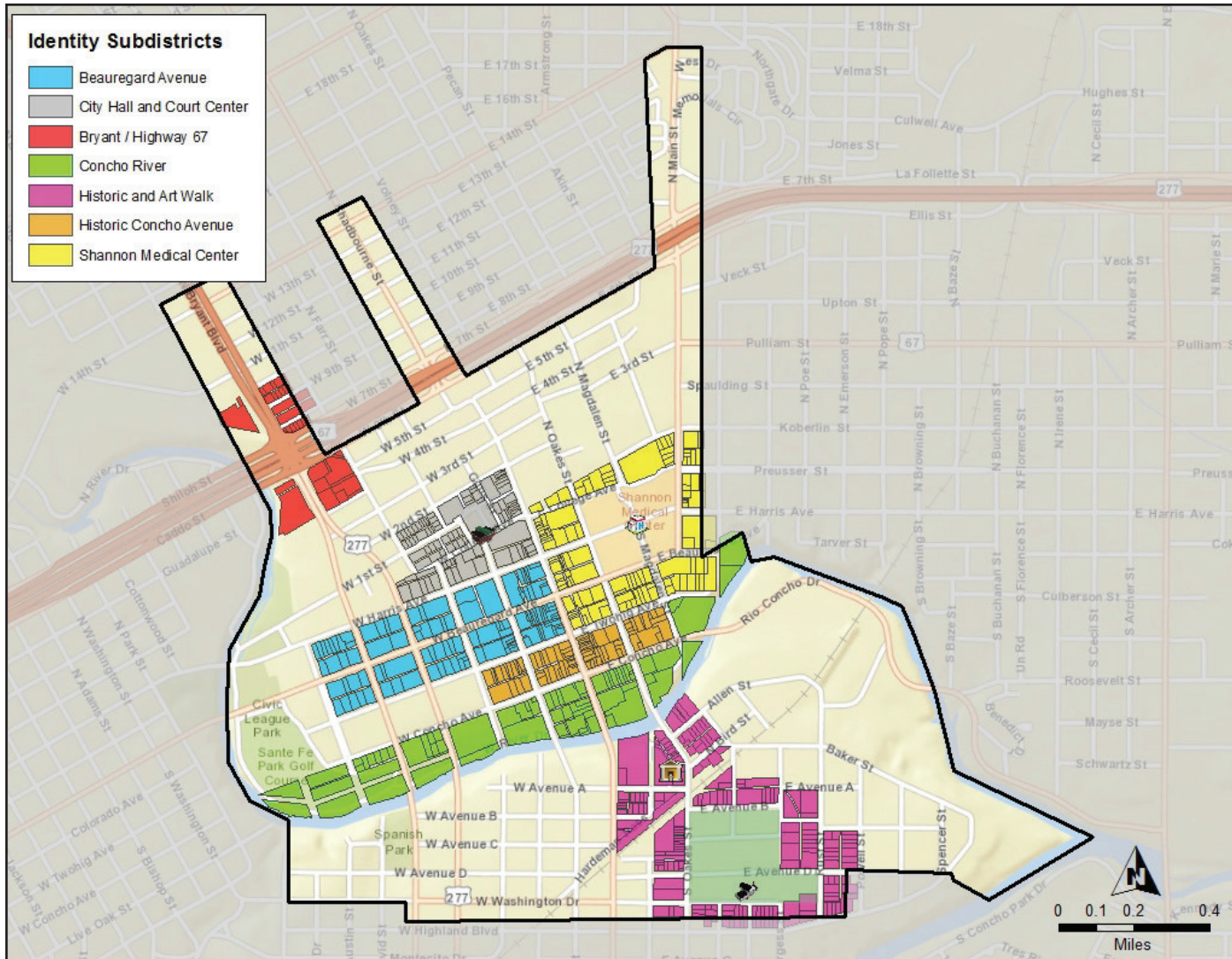
IDENTITY SUBDISTRICTS

Summary Notes:

- This map illustrates clear identity districts based on the following anchors:

  - **County Facilities**

  - **Shannon Medical Center**

  - **Art Museum**

  - **Fort Concho**

  - **Concho River**

  - **Concho Retailers**

  - **Primary Intersections**

- Connecting with these subdistrict identities will be key to the financing and marketing of future projects.

HISTORIC SITES

Summary Notes:

- This map shows historic sites as designated by the National Register of Historic Places, and the City of San Angelo Historic Preservation Society.

- New developments should be in line with regulation in place to preserve the rich character of these communities.
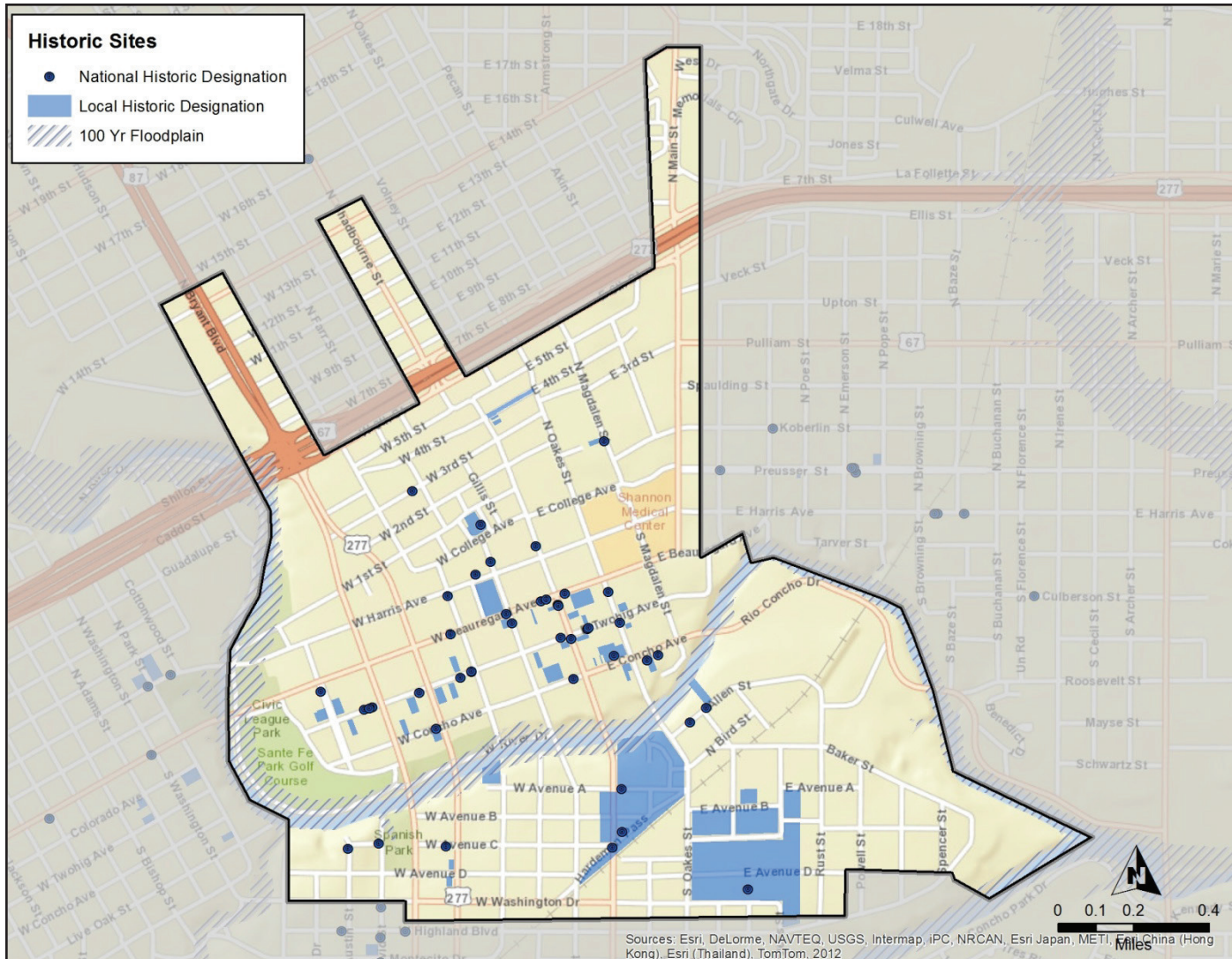
IMPACTING FEATURES

Summary Notes:

- This map layers in additional impacting features that affect new development.

- Additional elements to consider beyond historic sites include churches, and high rise office buildings,

- All development will also factor in the 100 year flood plain.
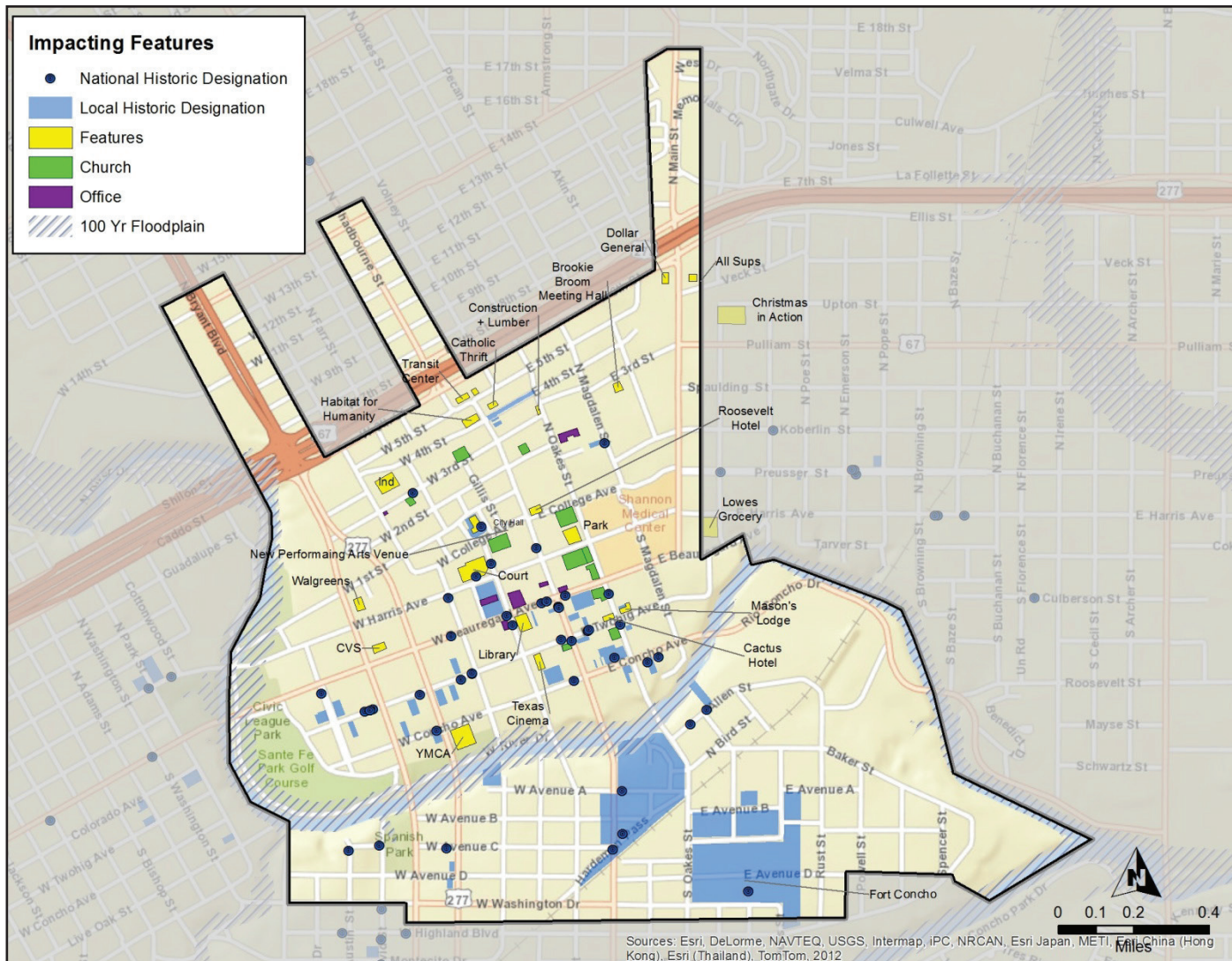
Impacting Features
- National Historic Designation
- Local Historic Designation
- Features
- Church
- Office
- Opportunity Sites
- 100 Yr Floodplain

OPPORTUNITY SITES

Summary Notes:

- This map shows potential opportunity sites layered in with all impacting features.

- The type and quantity of new real estate investment would be determined by the market demand and requirements for specific site location.
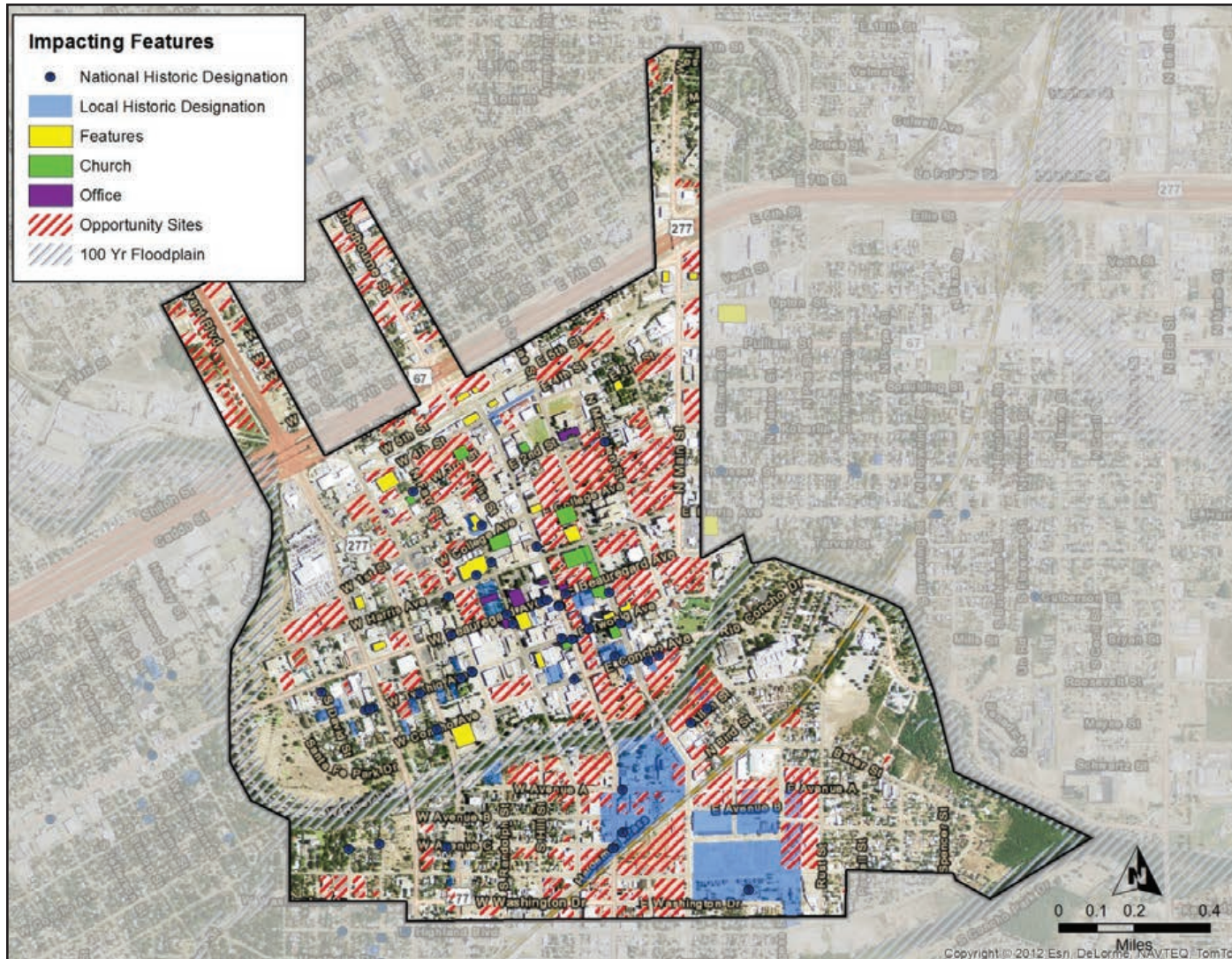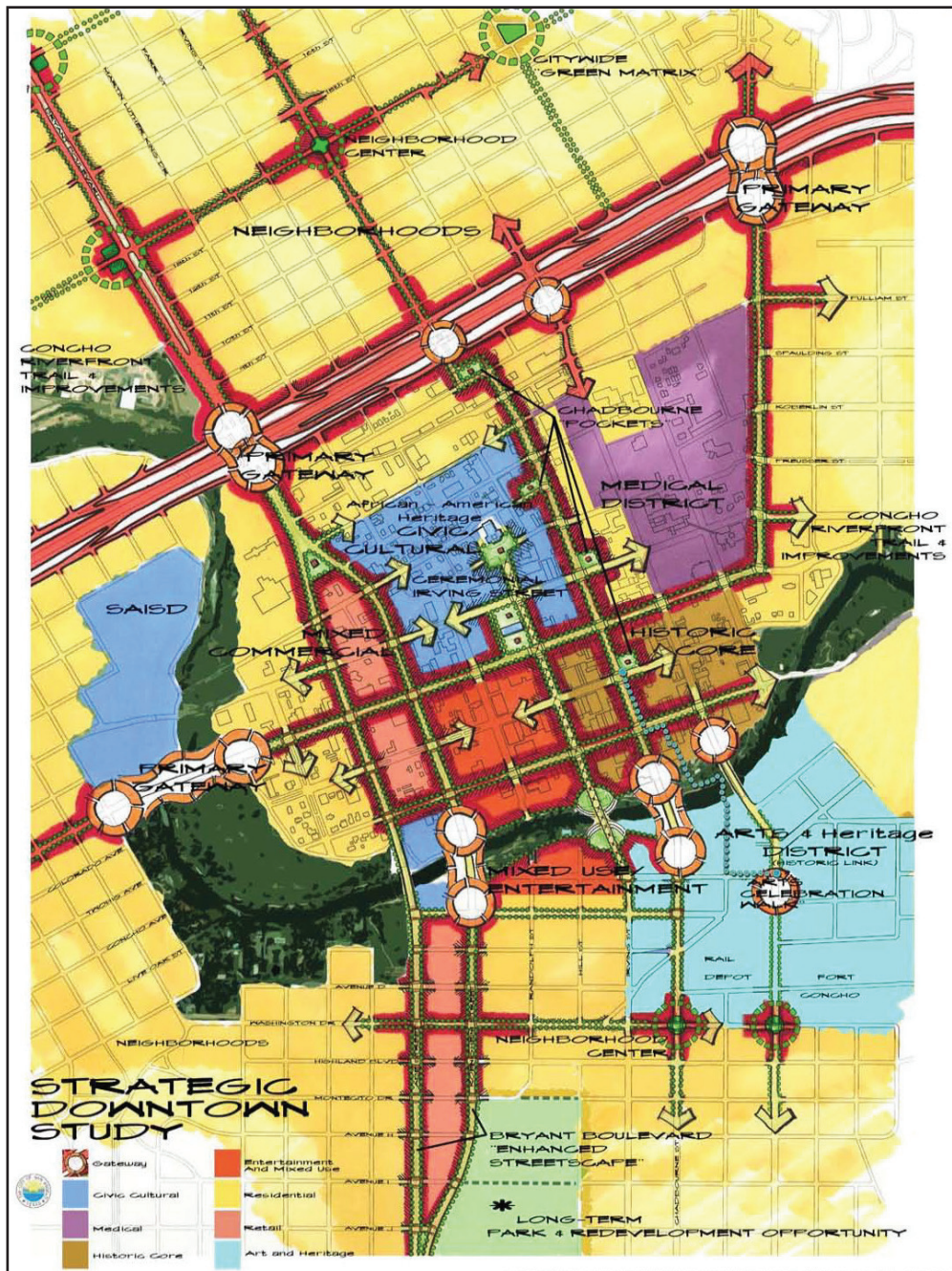
STRATEGIC DOWNTOWN STUDY

Summary Notes:

- The Comprehensive Plan update prepared for the downtown area includes sounds planning concepts that require additional vetting through a market and real estate analysis.

- This analysis has identified additional opportunities beyond the project areas identified in the Plan update.

- This market analysis and related programming concepts provides a more aligned master development strategy for specific projects within a 10-year development period.

Comprehensive Plan Update Districts

Bryant Gateway

Shannon Medical District

Irving Street / City Hall North

River District 3 – (Oakes – Rio Concho)

River District 1 (Koeningheim – Chadbourne) Central High School District River District 2 (Convention Center Area)

Shaded areas in black represent areas deemed to be in transition or underdeveloped; potentially suitable for initial catalyst projects.

Highway Commercial

Commercial Improvements   Medical District

SAISD

Civic Activity District   Riverfront Redev.

Arts/Heritage District

Riverfront Entertainment

Conv Center

Summary Notes:

- The programming and market study conducted in this report allow for nuanced development of restaurant, office, and residential uses.

- Shannon Medical District and Bryan Gateway are ideally suited for office and light industrial uses.

- There is opportunity for an additional restaurant district along Chadbourne.
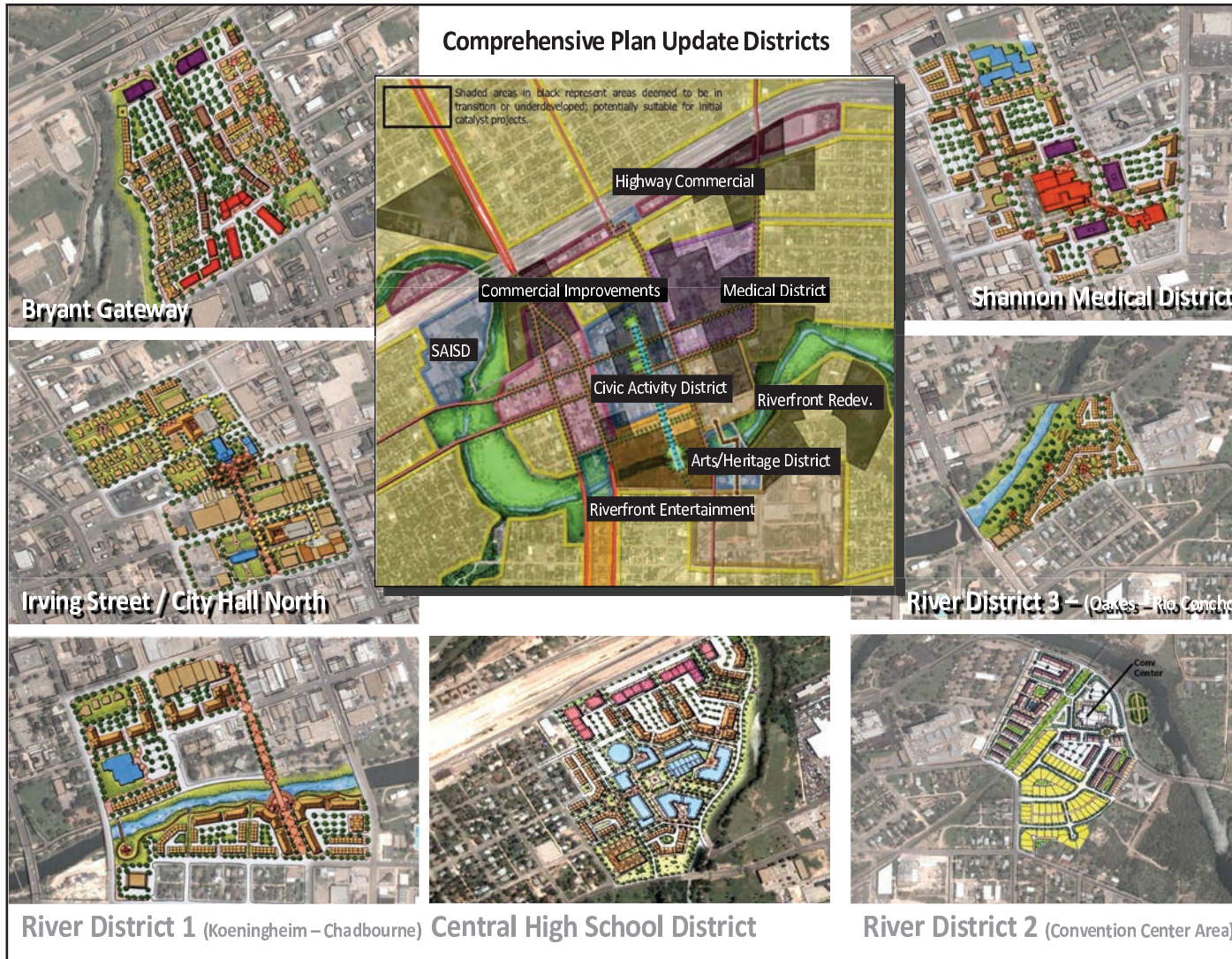
REDEVELOPMENT PROGRAMMING

DOWNTOWN SAN ANGELO
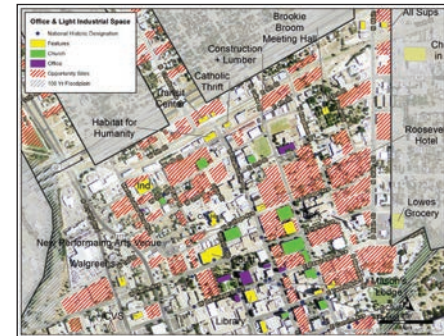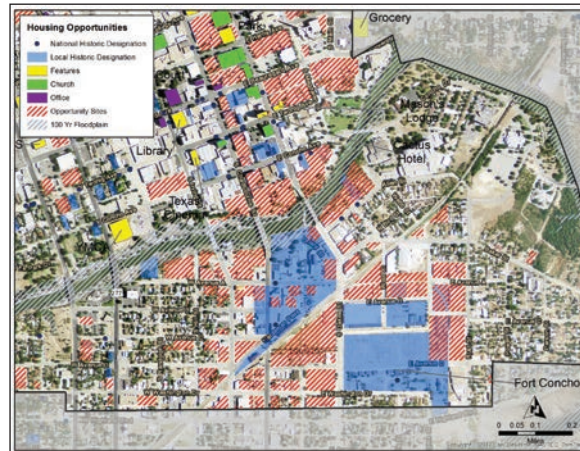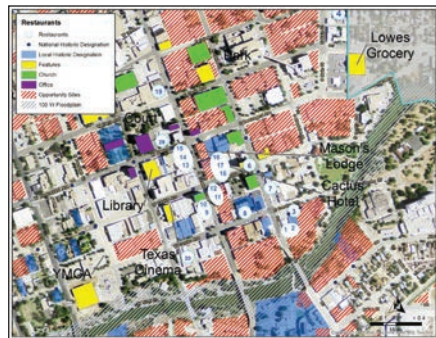
Background

The redevelopment program presented hereafter is the synthesis of the previous sections. The primary economic drivers in the area (energy sector, ASU, and Goodfellow Air Force Base), are each experiencing growth or continued activity that helps drive additional investment in the San Angelo marketplace. The trade area analysis, in conjunction with the growth experienced by the primary economic drivers, has identified new development potential as set out in the land use programming that centers on three themes: continued restaurant and entertainment investment, the addition of workplace and employment uses, and residential infill. The physical and policy analysis of the downtown area has identified various locations for the City, its downtown marketing agents, and property owners to focus efforts towards.

Downtown Focus Areas

Specific economic development policy should be created that focuses such efforts towards the creation of more recognizable development sub-districts to be created having clear regional identities. Specifically, the restaurant infill focus should be on and near Chadbourne Street, (within two blocks); new employment and office infill should occur to the north of Shannon Medical Center, around the rail station depot, and on and near (within two blocks) of the western portion of Harris Street; and residential infill activity should be focused along the Concho River and around the Fort Concho/Art walk area district. All economic development programs and policies within downtown that are devised to encourage the new investment in these focus areas should be tailored to address the following concepts.

Does the policy and activity…

- …strengthen the focus area's identity?
- …create potential for additional business revenue?
- …provide connections between activities?
- …improve pedestrian and vehicular infrastructure?
- …provide or reinforce usable and defined open space?
- …enhance safety and cleanliness?
- …encourage additional redevelopment and reinvestment?

Restaurant In-Fill Focus Area

The largest concentration of restaurants in Downtown San Angelo is along Chadbourne Street. Creating continued focus along Chadbourne and within two blocks on the east/west streets that cross Chadbourne will create the momentum needed to reach the critical mass required for a more definable downtown restaurant district.

Implementation Note: To better define and direct these efforts, economic development incentive tools may be utilized to offset the relatively high upfront tenant improvement costs required for such investment. This may include identifying and presenting these restaurant concepts to recipients of federal allocations of New Markets Tax Credits. The City or downtown interest groups may also assist this process by identifying potential investors interested in buying these tax credits, with a particular focus on companies experiencing high gains in the energy sector. This program may be well suited for companies focused on the region's energy sector in that they would get a double benefit from investing in such tax credits as they would receive the credit itself plus the more intangible returns associated with having a more vibrant downtown environment with restaurant and entertainment that will help attract and retain their employee base. In addition, the other programs identified as Urban Development Finance Tools shown in this document should be investigated for their applicability as well.

To better target specific restaurant potential, it is suggested Downtown San Angelo Inc. prepare a restaurant loca-

tion map highlighting all existing restaurants and identifying their cuisine and special activities/capabilities for marketing purposes. Further, a restaurant programming exercise should be prepared working with existing restaurant owners that identifies the existing voids in cuisine to better target new marketing activity towards specific types of restaurant investment to generate a stronger critical mass and selection for the broader marketplace.

Work Place In-Fill Focus Area
The largest driver of new employment in the San Angelo region is those companies associated with the energy sector. Targeted effort should be made on attracting these new employers to sites in the Downtown footprint rather than in the more traditional locations being developed on the periphery of the City. This is the case for such development on the edge does not capitalize on the critical mass in use and activity their employees can experience in Downtown. They are required to leave these areas to have lunch, acquire services, etc. that locating in Downtown would offer. From the City's perspective, such infill development in Downtown will introduce new daytime population that will further momentum in retail, service and restaurant investment, and will bring the added recognition that will strengthen San Angelo's Downtown identity as a regional center of mixed-use experience that can advance the City's brand itself.

The opportunity sites analysis highlights four areas for such new investment. First, the existing office buildings in San Angelo are equipped to handle more conventional office infill and should be marketed as such. Second, there are underutilized properties on the entire north side of downtown and around the railroad line that can accommodate larger footprint new development in which office may front the street with storage and parking behind.

There are additional opportunities around Shannon Medical Center for new health-science infill development. And there are smaller sites along West Harris for infill of single user executive office buildings.

Implementation Note: Given much of Downtown San Angelo's existing commercial, industrial and office building stock is older, or contained within more difficult land assemblies, attracting such new investment is much more difficult than the effort required to locate new construction on a greenfield site along the Loop. In addition, the needs of new office users are generally beyond the amenities existing office buildings can offer. As such, special economic development tools should be focused to mitigate these difficulties for new investors, make locating in downtown more economically attractive, and make existing assets more competitive and functional.

Such economic development tools should be targeted to these two user groups. First, any tax abatement that is considered for users in an edge-city condition should also be considered for Downtown locations. Secondly, New Markets Tax Credits are a tool that can be utilized for both new construction and renovations of existing office buildings downtown. Further, the City should define Downtown San Angelo as a special enterprise district that offers small businesses a host of amenities that can be marketed effectively by the Chamber and Downtown San Angelo Inc. These include allowing all downtown businesses to operate within a collected insurance program in which all insurance needs can be purchased at bulk rates (rather than rates for small operations only), identifying and making available small meeting space at no cost, and other incentives yet to be identified. Finally, the Downtown TRZ (and the other Urban Development Finance Tools identified in this document) should be utilized to incentivize new site

development in the areas of Downtown's northern zone.

Housing Infill Focus Area

The analysis has identified two areas suitable for immediate infill of various residential products within downtown. The neighborhoods surrounding the Arts Walk and Historic Fort Concho are ripe for lower density infill development that includes small lot single-family, attached single-family and townhomes, and lower density multifamily on primary corridors. The properties along the Concho River hold immediate potential for the infill of medium and higher density multifamily development, so long as these are implemented utilizing a higher quality standard of exterior masonry materials and architectural designs that compliment adjacent downtown structures. The addition of a new residential night-time population will further the goals for strengthened commercial development in downtown and provide a new population and activity that will help further Downtown's identity as a regional mixed-use destination.

Implementation Note: Housing development in and around the riverfront will carry higher site costs and material standards inherent and necessary in this high-visibility area. Such development will also carry costs associated with maintaining a fully connected public access with accompanying improved open spaces. As these higher costs add higher risk to the initial investors, and given such on-going development will require initial private successes to provide new comparables that future/on-going developments will require, the City and related groups such as the San Angelo Health Foundation may help mitigate this higher cost of development by making their lands available for purchase or ground lease at rates conducive to such initial development. Further, the downtown tax increment reinvestment program (and the other Urban Development

Finance Tools identified in this document) should be focused to assist in the payback of certain site improvements that further the larger goal of interconnectivity and public spaces in these areas.

DOWNTOWN REDEVELOPMENT

In the next ten years Downtown San Angelo has demand for six new restaurants. Locating restaurants along and near Chadbourne Street will create the critical mass needed for a more defined restaurant district.

The City of San Angelo should coordinate an effort to identify current cuisine options, and encourage a more diverse restaurant offering downtown through addition of new restaurant types. This should be done in close coordination with Downtown San Angelo Inc. and the existing restaurant owners. This should lead towards a collected marketing campaign for Downtown's restaurant and entertainment establishments.

These efforts should be economically incentivized to achieve initial catalytic investment.

Development standards should be enhanced to include tenant improvement and signage criteria aimed to create a stronger visual presence for restaurants Downtown.
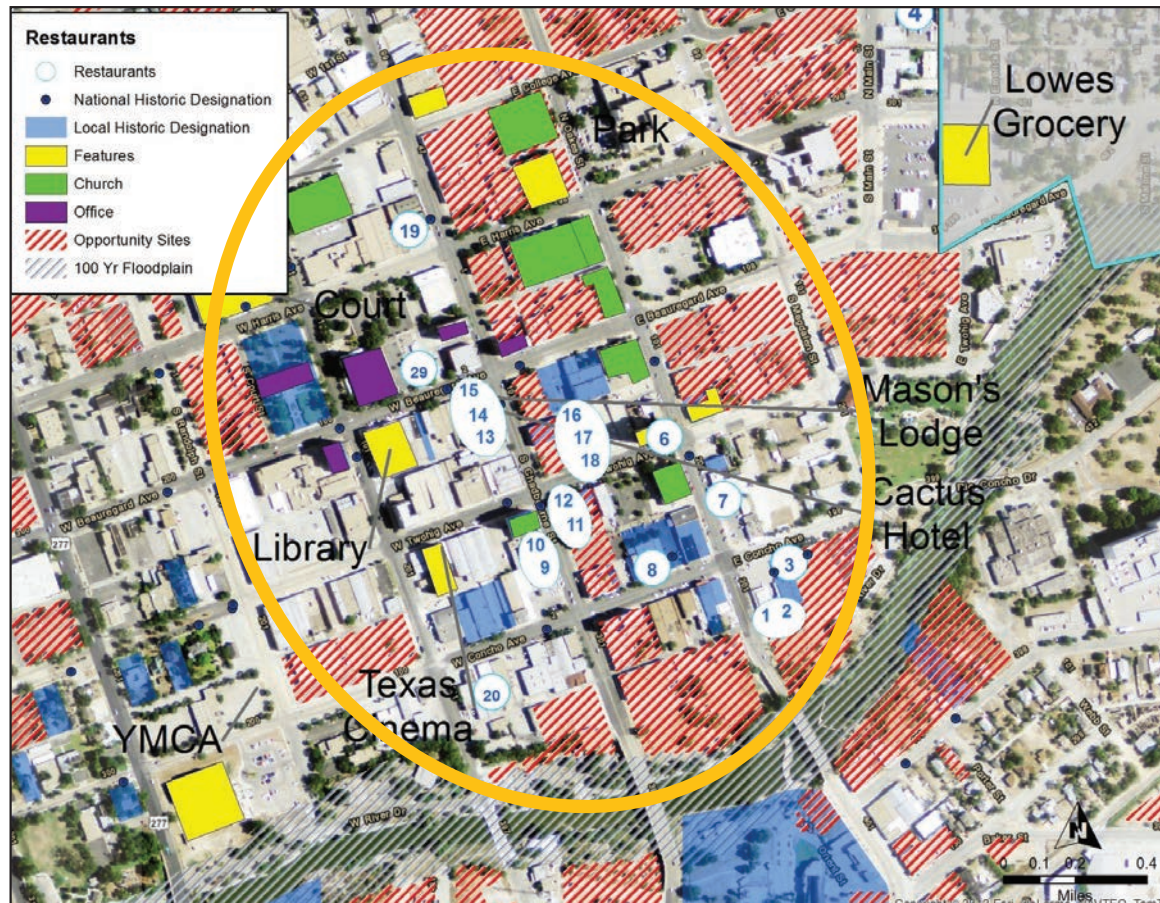
Chadbourne Area
- ▢ Parcels
- ▢ Appraisal District Parcels

RESTAURANT INFILL ZONE PARCELS

Summary Notes:

- This Chadbourne Area map identifies specific parcels that may hold potential for new restaurant in-fill. These are presented for informational and programming purposes only and should not be considered mandates for redevelopment or acquisition.

- Please refer to the following pages and note the map ID to cross reference parcels with ownership data.

Map ID	Tax ID	Total Appraised Value	Owner	Owner Phone Number	Owner Street	Owner City	Owner State	Owner Zip	Acreage	SF	$ / SF
1	2341800600000500	$ 49,150	West John J	(325) 655-8181	PO BOX 1329 S CHADBOURNE	SAN ANGELO	TX	76902	0.11	5,001	$ 9.83
2	2341800600000400	$ 40,500	West John J	(325) 655-8181	PO BOX 1329 S CHADBOURNE	SAN ANGELO	TX	76902	0.09	3,750	$10.80
3	2341800600000100	$ -	First Baptist Church	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.36	15,625	$ -
4	2341800600001100	$ 31,300	Chadwick Properties Ltd	(325) 651-6326	6002 WINNERS CIR	SAN ANGELO	TX	76904	0.16	7,068	$ 4.43
5	2341800600001300	$ 33,000	Chadwick Properties Ltd	(325) 651-6326	6002 WINNERS CIR	SAN ANGELO	TX	76904	0.07	2,833	$11.65
6	2341800600001400	$ 24,050	Chadwick Properties Ltd	(325) 651-6326	22 S CHADBOURNE	SAN ANGELO	TX	76903	0.13	5,500	$ 4.37
7	2341800600001500	$ 153,300	Capador Springs Lp / K&M Springs	(325) 651-0344	212 CEDARWOOD	SAN ANGELO	TX	76905	0.13	5,500	$27.87
8	2341700007001500	$ -	First United Methodist Church Of SA	(325) 655-8981	37 E BEAUREGARD AVE	SAN ANGELO	TX	76903	0.44	19,261	$ -
9	2341700007001700	$ 113,450	V Square Properties / Robert Meyer	(325) 944-7714	2104 DOUGLAS DR	SAN ANGELO	TX	76904	0.07	3,250	$34.91
10	2341700007001600	$ 98,050	Hopkins Timothy	(325) 658-1511	121 S CHADBOURNE	SAN ANGELO	TX	76903	0.07	3,250	$30.17
11	2341700007000400	$ 61,250	Daniel Susan Merle		118 S CHADBOURNE	SAN ANGELO	TX	76903	0.07	3,250	$18.85
12	2341700007000400	$ 131,700	Daniel Susan Merle		118 S CHADBOURNE	SAN ANGELO	TX	76903	0.07	3,250	$40.52
13	2341700007000100	$ 59,700	One East Twohig Partnership		1 E TWOHIG 2ND FLOOR	SAN ANGELO	TX	76903	0.37	16,250	$ 3.67
14	2341700001003100	$ 299,600	One East Twohig Partnership		1 E TWOHIG	SAN ANGELO	TX	76903	0.10	4,500	$66.58
15	2341700001003200	$ 58,450	Fickling Georgina L		2610 A & M	SAN ANGELO	TX	76904	0.09	3,750	$15.59
16	2341700001003400	$ 74,850	Swa Gito LLC	(325) 653-2582	204 S CHADBOURNE	SAN ANGELO	TX	76903	0.09	3,750	$19.96
17	2341700001003300	$ 9,000	Rogers Hicks & Rogers Properties LP	(325) 653-8095	210 S CHADBOURNE	SAN ANGELO	TX	76903	0.07	3,001	$ 3.00
18	2341700001002300	$ 122,650	Rogers Hicks & Rogers Properties LP	(325) 653-8095	210 S CHADBOURNE	SAN ANGELO	TX	76903	0.09	3,750	$32.71
19	2341700001002200	$ 60,050	Rogers Hicks & Rogers Properties LP	(325) 653-8095	1326 KENWOOD DR	SAN ANGELO	TX	76903	0.09	3,750	$16.01
20	2341700001002000	$ 40,350	Choate Guy & Eva Moutos-Choate	(325) 653-6866	PO BOX 1271	SAN ANGELO	TX	76902	0.09	3,750	$10.76
20	2341700001002100	$ 37,250	Choate Eva Mouto & Guy D		PO BOX 1271	SAN ANGELO	TX	76902	0.09	3,750	$ 9.93
21	2341700001001700	$ 9,100	7 West Twohig Partnership		201 S CHADBOURNE	SAN ANGELO	TX	76903	0.15	6,500	$ 1.40
22	2341700001001600	$ -	City of San Angelo	(325) 657-4241	PO BOX 1751 S CHADBOURNE	SAN ANGELO	TX	76902	0.02	1,000	$ -
23	2341700001001800	$ 22,500	7 West Twohig Partnership		201 S CHADBOURNE	SAN ANGELO	TX	76903	0.17	7,500	$ 3.00
24	2341700001000200	$ 47,100	Cranek Lindsay	(325) 651-6951	547 CEDARWOOD	SAN ANGELO	TX	76905	0.05	2,010	$23.43
25	2341700001000100	$ 70,100	Liberty Cafe LLC		3619 S JACKSON ST	SAN ANGELO	TX	76904	0.10	4,385	$15.99
26	2341700001000300	$ 96,200	Fleming Dan & Maylyn		9895 BENSON ROAD	MENARD	TX	76859	0.09	3,896	$24.69
27	2341700001000500	$ 44,200	Jewell Larry C Sr Dec&Patricia Anne		1319 S OAKES	SAN ANGELO	TX	76903	0.06	2,590	$17.07

Map ID	Tax ID	Total Appraised Value	Owner	Owner Phone Number	Owner Street	Owner City	Owner State	Owner Zip	Acreage	SF	$ / SF
28	2341700013001700	$ 65,400	Mohler Buster & Marilyn & Jay		1 S CHADBOURNE	SAN ANGELO TX		76903	0.13	5,600	$11.68
29	2341700013001600	$ 340,350	Citicorp North America INC	(800) 788-0002	PO BOX 30508	TAMPA FL		33630	0.63	27,651	$12.31
30	2341700013000200	$ 273,200	Reising Contracting LLC	(817) 488-0077	2221 E CONTINENTAL # 140	SOUTHLAKE TX		76092	0.56	24,405	$11.19
31	2341700013000300	$ 8,800	Chadwick Properties Ltd	(325) 651-6326	6002 WINNERS CIR	SAN ANGELO TX		76904	0.06	2,500	$ 3.52
32	2341700013000100	$ 269,400	Chadwick Properties Ltd	(325) 651-6326	6002 WINNERS CIR	SAN ANGELO TX		76904	0.25	11,000	$24.49
33	2341700008002900	$ 126,900	Fuentes John & Elizabeth	(325) 658-2430	101 S CHADBOURNE ST	SAN ANGELO TX		76903	0.12	5,331	$23.81
34	2341700008002800	$ 91,500	Strain Michael & Michelle L	(325) 655-6615	107 S CHADBOURNE	SAN ANGELO TX		76903	0.11	4,671	$19.59
35	2341700008001500	$ 125,500	Jett Robert W & Harris Robert H		4603 S JACKSON	SAN ANGELO TX		76903	0.23	10,001	$12.55
36	2341700008001400	$ 34,100	Lemmons Benjamin David & Ladell		113 S CHADBOURNE	SAN ANGELO TX		76903	0.06	2,500	$13.64
37	2341700008001350	$ 34,600	Juice Mule Inc		1649 BECKER LANE	SAN ANGELO TX		76904	0.06	2,500	$13.84
38	2341700008001300	$ 58,200	Vincent John B & Brandi N		5102 BEVERLY DR	SAN ANGELO TX		76904	0.09	4,000	$14.55
39	2341700008001100	$ 161,400	Vincent John B & Brandi N		5102 BEVERLY DR	SAN ANGELO TX		76904	0.21	9,126	$17.69
40	2341700008001200	$ 55,700	Cox Phyllis	(325) 658-3434	123 S CHADBOURNE	SAN ANGELO TX		76903	0.06	2,500	$22.28
41	2341700008000100	$ 55,700	Cox Phyllis	(325) 658-3434	123 S CHADBOURNE	SAN ANGELO TX		76903	0.06	2,500	$22.28
42	2341700008000200	$ 145,750	Rufenacht John E & Martha T	(325) 944-0967	3939 HATCHERY ROAD	SAN ANGELO TX		76903	0.17	7,501	$19.43
43	4076110000000100	$ 239,900	7 West Twohig Partnership		201 S CHADBOURNE	SAN ANGELO TX		76903	0.23	9,977	$24.04
44	4076110000000200	$ 186,600	7 West Twohig Partnership		201 S CHADBOURNE	SAN ANGELO TX		76903	0.23	9,977	$18.70
45	2341700002001600	$ 3,000	7 West Twohig Partnership		201 S CHADBOURNE	SAN ANGELO TX		76903	0.14	6,043	$ 0.50
46	2341700002001700	$ 82,800	Wilde Walter W & Joyce M	(325) 651-7744	20 E CONCHO	SAN ANGELO TX		76903	0.11	5,000	$16.56
47	2341700002001500	$ 24,600	Wilde Walter W & Joyce M	(325) 651-7744	20 E CONCHO	SAN ANGELO TX		76903	0.11	4,612	$ 5.33
48	2341700002001150	$ 52,400	Engle Garrick N		4325 GOODNIGHT TRAIL	SAN ANGELO TX		76903	0.05	2,000	$26.20
49	2341700002001300	$ 22,000	Dorner Cheryl	(325) 655-4495	219 S CHADBOURNE ST	SAN ANGELO TX		76903	0.05	2,001	$11.00
50	2341700002001200	$ 48,550	Stango Stephen P Jr	(325) 659-8999	221 S Chadbourn ST	SAN ANGELO TX		76903	0.10	4,210	$11.53
51	2341700002001400	$ 27,000	Valva Enterprises LLC		3435 CEDAR RIDGE LANE	SAN ANGELO TX		76904	0.05	2,075	$13.01
52	2341700002000200	$ 21,100	Valva Enterprises LLC		3435 CEDAR RIDGE LANE	SAN ANGELO TX		76904	0.04	1,590	$13.27
53	2341700002000100	$ 20,100	White Elizabeth Lou P		PO BOX 62116	SAN ANGELO TX		76906	0.24	10,625	$ 1.89
54	2341700002000400	$ 91,400	Wilde Joyce	(325) 651-7744	20 E CONCHO	SAN ANGELO TX		76903	0.49	21,561	$ 4.24

The yellow circles indicate opportunities for lower density and light industrial infill potential for new energy sector uses. The orange circle is better suited for medium density office uses, including and not limited to medical uses.

The City of San Angelo, in conjunction with the Chamber of Commerce and Downtown San Angelo Inc, should prepare a small business action plan that aims to provide certain amenities special to downtown employment uses that decrease operating expenses, increase efficiency, and add to a stronger workplace experience.
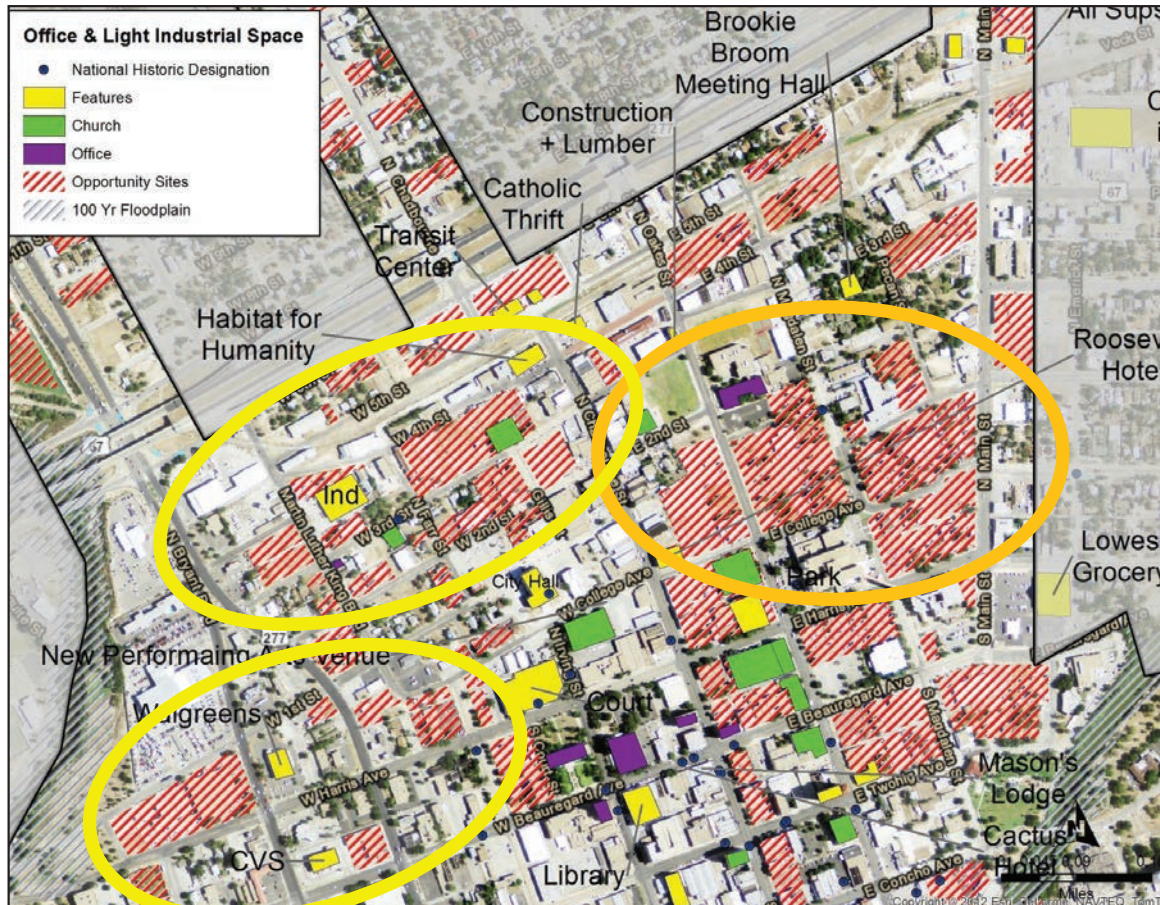
These efforts should be economically incentivized to achieve initial catalytic investment.

Shannon Medical Area
- □ Parcels
- □ Appraisal District Parcels

WORKPLACE INFILL CONCEPT -- SHANNON MEDICAL CENTER DISTRICT

Summary Notes:

- This Shannon Medical District Map reflects all the adjacent parcels to the medical center, which may be best used for office and health science uses. These are presented for informational and programming purposes only and should not be considered mandates for redevelopment or acquisition.

- Please refer to the following pages and note the map ID to cross reference parcels with ownership data.

Map ID	Tax ID	Total Appraised Value	Owner	Owner Phone Number	Owner Street	Owner City	Owner State	Owner Zip	Acreage	SF	$ / SF
1	1934300003300400	$ -	SAN ANGELO ISD	(325) 947-3838	1621 University Ave	SAN ANGELO	TX	76904	0.80	34,711	$ -
2	2546700000200300	$ -	FRIENDS OF RECOVERY INC	(325) 657-0016	Po Box 250 N Magdalen	SAN ANGELO	TX	76902	0.75	32,529	$ -
3	2546700000200500	$ 118,300	POLK TERRY D & MARY DARLENE		221 N Magdalen St	SAN ANGELO	TX	76903	0.20	8,644	$ 596,137.39
4	2546700000200700	$ 53,100	BOWLES JOE H		215 N Magdalen St	SAN ANGELO	TX	76903	0.18	8,050	$ 287,326.19
5	2546700000200800	$ 19,300	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.37	16,108	$ 52,190.37
6	2546700000200900	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.43	18,733	$ -
7	2546700000200600	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.48	20,910	$ -
8	1934300003200100	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.27	11,573	$ -
9	1934300003200200	$ 42,600	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76903	0.73	31,949	$ 58,081.97
10	1934300003100200	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.54	23,434	$ -
11	1934300003200100	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.07	3,047	$ -
12	1934300003100100	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.35	15,128	$ -
13	2341700022501000	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.30	13,211	$ -
14	2341700022500900	$ 33,000	FIRST CHRISTIAN CHURCH	(325) 653-4523	29 N Oakes St	SAN ANGELO	TX	76903	0.25	11,000	$ 130,676.38
15	2341700022500800	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.33	14,429	$ -
16	2341700022500500	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.77	33,495	$ -
17	2341700022500400	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.31	13,363	$ -
18	2341700022500300	$ 18,000	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.21	9,000	$ 87,117.77
19	2341700022500200	$ 15,000	L & D FAMILY LIMITED PARTNERSHIP		1512 Darlene Dr	SAN ANGELO	TX	76904	0.17	7,500	$ 87,117.64
20	2341700022500100	$ 18,750	L & D FAMILY LIMITED PARTNERSHIP		1512 Darlene Dr	SAN ANGELO	TX	76904	0.17	7,500	$ 108,897.05
21	2343180000100100	$ 1,292,400	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	3.88	168,957	$ 333,203.36
22	2341700021501200	$ 26,900	MARTINEZ ARMANDO G	(325) 653-5640	215 W Avenue N	SAN ANGELO	TX	76903	0.17	7,277	$ 161,024.76
23	2341700021501100	$ 12,950	STEPHENSON MARVIN B		1823 Edmund Blvd	SAN ANGELO	TX	76901	0.21	9,085	$ 62,089.81
24	2341700021501000	$ 14,600	BAUTISTA RUDY C JR & JEANNIE		123 N Main E Harris	SAN ANGELO	TX	76903	0.17	7,241	$ 87,825.48
25	2341700021500900	$ 40,800	BAUTISTA RUDY C JR		123 N Main	SAN ANGELO	TX	76903	0.16	7,007	$ 253,634.83
26	2341700021500800	$ 24,900	MIRANDA RICHARD N & MICHELLE C		107 N Main St	SAN ANGELO	TX	76903	0.26	11,187	$ 96,956.79
27	2341700021500700	$ 72,500	MIRANDA RICHARD N & MICHELLE C		107 N Main St	SAN ANGELO	TX	76901	0.18	7,705	$ 409,869.33
28	2341700021500600	$ 42,300	CABRERA YOLANDA & PARRA JOHNNY		915 Preusser	SAN ANGELO	TX	76903	0.21	9,154	$ 201,291.94
29	2341700021000100	$ -	SHANNON MEDICAL CENTER	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.33	14,484	$ -
30	2341700021000200	$ -	SHANNON MEDICAL CENTER	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.25	11,007	$ -
31	2341700021000300	$ 113,700	SAN ANGELO NEUROSURGICAL ASSN	(325) 655-4164	211 E College Ave	SAN ANGELO	TX	76903	0.23	10,157	$ 487,618.22
32	2341700021000400	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.24	10,350	$ -

Map ID	Tax ID	Total Appraised Value	Owner	Owner Phone Number	Owner Street	Owner City	Owner State	Owner Zip	Acreage	SF	$ / SF
33	2341700021000500	$ 20,600	SAN ANGELO NEUROSURGICAL ASSN	(325) 655-4164	211 E College Ave	SAN ANGELO	TX	76903	0.18	7,687	$ 116,737.10
34	2341700021000600	$ 26,250	SAN ANGELO NEUROSURGICAL ASSN	(325) 655-4164	211 E College Ave	SAN ANGELO	TX	76903	0.22	9,564	$ 119,561.98
35	2341700021000900	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.28	12,388	$ -
36	2341700021500100	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.21	9,316	$ -
37	2341700021000700	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.14	6,300	$ -
38	2341700021500300	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.06	2,477	$ -
39	2341700021001800	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.68	29,435	$ -
40	2341700021001600	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.44	18,999	$ -
41	2341700021001500	$ -	SHANNON REAL ESTATE SERVICES INC	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.44	18,999	$ -
42	2341700021001200	$ 211,300	SHANNON REAL ESTATE SERVICES INC	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.44	18,999	$ 484,467.50
43	2341700021001000	$ 20,300	SANCHEZ MARIO & DALIA		232 Copperwood Dr	LAKESIDE	TX	76108	0.08	3,432	$ 257,675.67
44	2341700021001100	$ 113,950	REGAL OIL INC	(325) 658-7521	Po Box 950 N Main	SAN ANGELO	TX	76902	0.29	12,727	$ 390,022.20
45	2343180001400100	$ -	SHANNON MEDICAL CENTER	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	2.49	108,352	$ -
46	2341700015000600	$ 75,250	WINGER MARK	(325) 655-8374	Po Box 60226 E Harris	SAN ANGELO	TX	76906	0.37	16,160	$ 202,842.50
47	2343180001500200	$ -	SHANNON MEDICAL CENTER	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.27	11,709	$ -
48	2342000800001100	$ -	FIRST BAPTIST CHURCH	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.10	4,167	$ -
49	2342000800001000	$ -	FIRST BAPTIST CHURCH	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.05	2,083	$ -
50	2342000800000900	$ -	FIRST BAPTIST CHURCH	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.05	2,083	$ -
51	2342000800000800	$ -	FIRST BAPTIST CHURCH	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.05	2,083	$ -
52	2342000800000700	$ -	FIRST BAPTIST CHURCH OF SAN ANGELO	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.08	3,542	$ -
53	2342000800001200	$ -	FIRST BAPTIST CHURCH OF SAN ANGELO	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.19	8,264	$ -
54	2342000800001600	$ -	FIRST CHRISTIAN CHURCH-SAN ANGELO	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	1.77	77,224	$ -
55	2342000800000600	$ -	FIRST BAPTIST CHURCH SAN ANGELO INC	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.10	4,167	$ -
56	2342000800000500	$ -	FIRST BAPTIST CHURCH	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.05	2,375	$ -
57	2342000800000400	$ -	FIRST BAPTIST CHURCH	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.05	2,375	$ -
58	2342000800002100	$ -	FIRST BAPTIST CHURCH SAN ANGELO INC	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.08	3,461	$ -
59	2342000800001400	$ -	FIRST BAPTIST CHURCH OF SAN ANGELO	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.05	2,000	$ -
60	2342000800001300	$ -	FIRST BAPTIST CHURCH SAN ANGELO INC	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.01	622	$ -
61	2342000800000300	$ -	FIRST BAPTIST CHURCH	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.09	3,834	$ -
62	2342000800000200	$ -	FIRST BAPTIST CHURCH TRUSTEES	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.08	3,666	$ -
63	2342000800000100	$ -	FIRST BAPTIST CHURCH TRUSTEES	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.34	14,999	$ -
64	2342000800001900	$ -	FIRST BAPTIST CHURCH	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.67	29,000	$ -

Map ID	Tax ID	Total Appraised Value	Owner	Owner Phone Number	Owner Street	Owner City	Owner State	Owner Zip	Acreage	SF	$ / SF
65	2342000800001800	$ -	FIRST BAPTIST CHURCH	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.52	22,501	$ -
66	2342000800001700	$ -	FIRST BAPTIST CHURCH	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.31	13,500	$ -
67	2341800600000600	$ -	FIRST BAPTIST CHURCH	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.03	1,250	$ -
68	2341800600000200	$ -	FIRST BAPTIST CHURCH	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.00	188	$ -
69	2341800600000300	$ -	FIRST BAPTIST CHURCH	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.00	188	$ -
70	2341800600000700	$ -	FIRST BAPTIST CHURCH	(325) 655-4101	37 E Harris	SAN ANGELO	TX	76903	0.11	4,750	$ -
71	2341800600000800	$ 115,450	TALLEY PATRICIA B		3706 Inglewood Dr	SAN ANGELO	TX	76904	0.33	14,250	$ 352,903.87
72	2341800600000900	$ -	FIRST BAPTIST CHURCH	(325) 655-4101	Po Box 2138	SAN ANGELO	TX	76902	1.12	48,926	$ -
73	2341800600001800	$ 20,800	ESTES & SIDENER LEASING CO	(325) 655-6936	16 E Beauregard	SAN ANGELO	TX	76903	0.13	5,663	$ 160,003.79
74	2341800600001600	$ 159,400	ANGELO REALTY PARTNERS LTD		Po Box 5891 E Beauregard	SAN ANGELO	TX	76902	0.10	4,279	$ 1,622,728.95
75	2341800600001700	$ 234,100	ESTES & SIDENER LEASING CO	(325) 655-6936	16 E Beauregard	SAN ANGELO	TX	76903	0.10	4,309	$ 2,366,602.72
76	2341800600001000	$ -	ROMAN CATHOLIC DIOCESE - SAN ANGELO	(325) 651-7500	Po Box 1829 S Oakes	SAN ANGELO	TX	76902	1.31	57,002	$ -
77	2341700006001500	$ -	FIRST UNITED METHODIST CHURCH	(325) 655-8981	37 E Beauregard Ave	SAN ANGELO	TX	76903	0.72	31,501	$ -
78	2341700006001800	$ -	ROMAN CATHOLIC DIOCESE - SAN ANGELO	(325) 651-7500	Po Box 1829 S Oakes	SAN ANGELO	TX	76902	0.10	4,500	$ -
79	2341700006001400	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.21	9,000	$ -
80	2341700006001300	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.21	9,000	$ -
81	2341700006001200	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.21	9,000	$ -
82	2341700006001100	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.21	9,000	$ -
83	2341700006001000	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.41	18,000	$ -
84	2341700006001900	$ -	SHANNON REAL ESTATE SERVICES INC	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.49	21,502	$ -
85	2341700006000100	$ -	MASONIC LODGE	(325) 655-3790	130 S Oakes St	SAN ANGELO	TX	76903	0.23	10,000	$ -
86	2341700006000200	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.13	5,500	$ -
87	2341700006000300	$ 38,300	WADE WILLIAM C		Po Box 224 E Twohig	LAKE JACKSON	TX	77566	0.18	8,000	$ 208,535.07
88	2341700006000400	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.25	11,001	$ -
89	2341700006000500	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.21	9,000	$ -
90	2341700006000600	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.34	15,001	$ -
91	2341700006000900	$ -	SHANNON REAL ESTATE SERVICES	(325) 481-6080	120 E Harris Ave	SAN ANGELO	TX	76902	0.11	5,001	$ -
92	2341700006000700	$ 165,600	FOX FISH & SABLE REALTY CORP		100 Bramble Brook Rd	ARDSLEY	NY	10502	0.34	15,002	$ 480,839.43

The yellow circle highlights lower density housing opportunities that can leverage the nearby cultural and historic amenities towards the creation of a more vibrant in-town community.

The orange circle highlights medium density housing opportunities around the Concho River that can leverage this riverfront location to better connect downtown to the Arts and Historic District, provide new gateways into Downtown, and create a stronger Concho River zone.

These efforts should be economically incentivized to achieve initial catalytic investment.

All developments should be designed to enhance the historic, cultural, and community features of the adjacent areas.
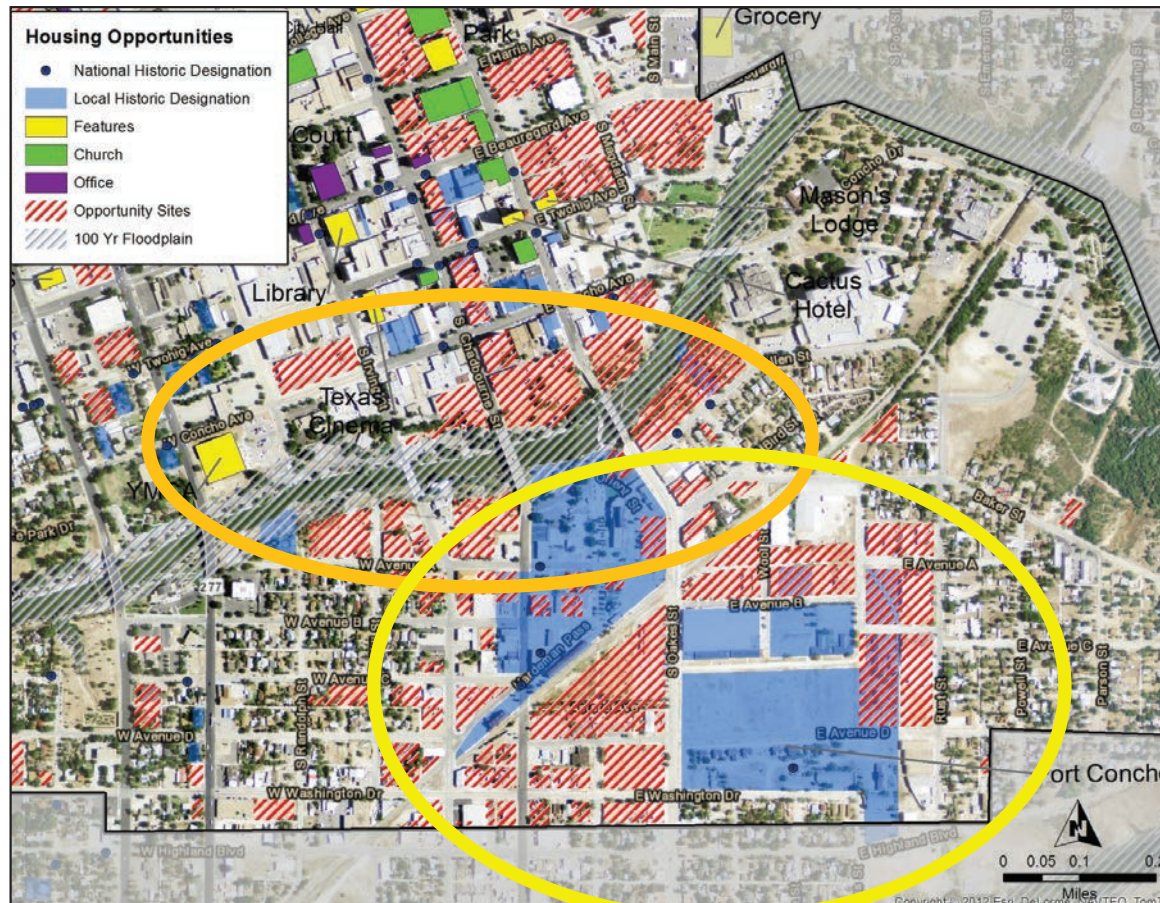
SOURCES: ESRI, CITY OF SAN ANGELO, NATIONAL REGISTER OF HISTORIC PLACE, CITY OF SAN ANGELO HISTORIC PRESERVATION SOCIETY, TOM GREEN APPRAISAL DISTRICT, CATALYST

Concho River Area
Parcels
Appraisal District Parcels

RESIDENTIAL INFILL ZONE -- CONCHO RIVERFRONT

Summary Notes:

- This Concho River District map shows potential development areas for medium density housing. These are presented for informational and programming purposes only and should not be considered mandates for redevelopment or acquisition.

- Please refer to the following pages and note the map ID to cross reference parcels with ownership data.

- These efforts should be economically incentivized to achieve initial catalytic investment.

Map labels: Irving, Twohig, Chadbourne, Oakes, Concho; building markers A, B, B2, C, C2, D, E, F, G
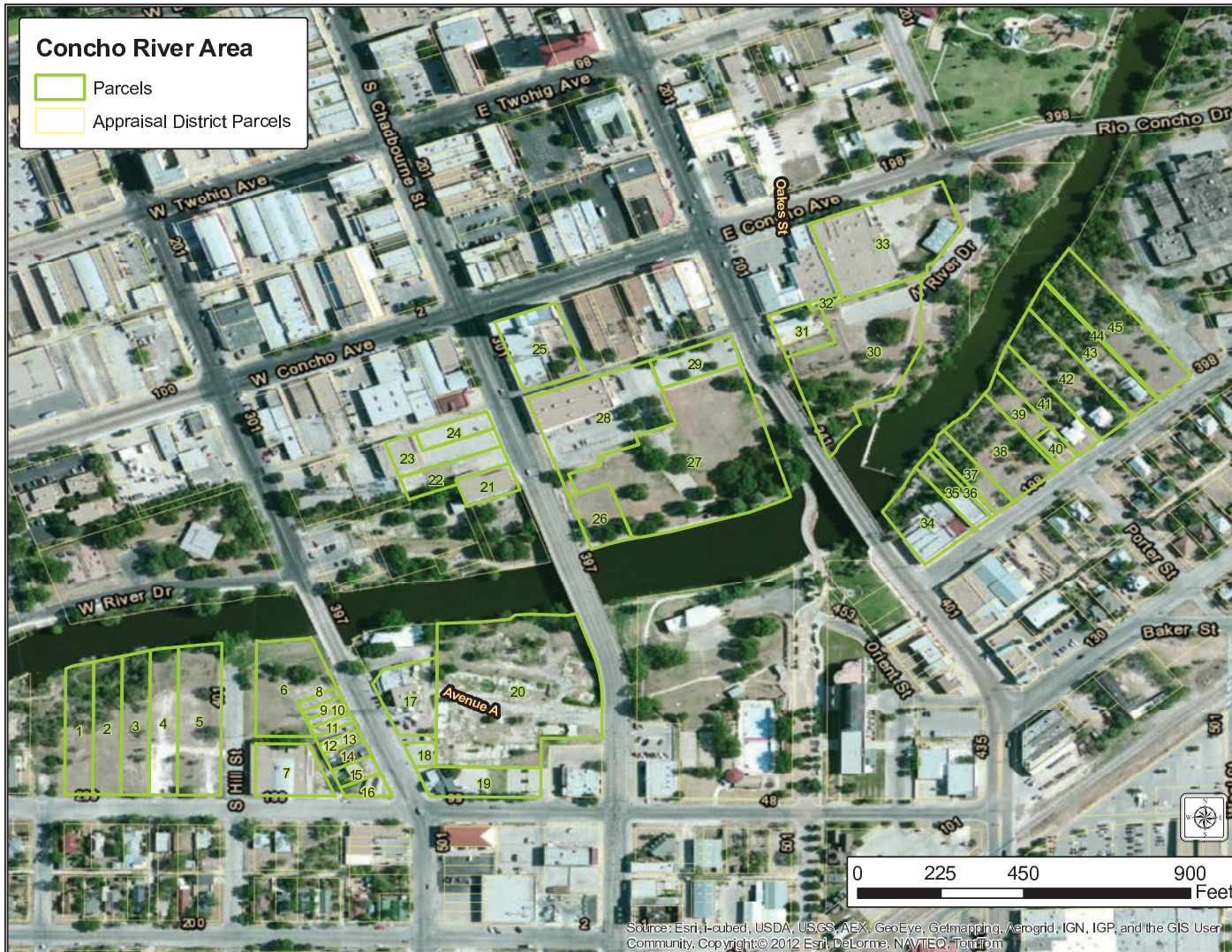
RESIDENTIAL INFILL ZONE -- CONCHO RIVERFRONT

Summary Notes:

- Properties fronting the Concho River are ideally located to allow the creation of a medium density residential community with direct access to Downtown's retail, restaurant and cultural user core, near the City's employment anchors, and focused on strengthening the riverfront experience.

- Development on both sides of the river will leverage the City's recent investments in the nearby public spaces and artwork, will provide pleasant views both to and from downtown, and provide a critical mass of ongoing residents that will further support downtown businesses.

RESIDENTIAL INFILL ZONE -- CONCHO RIVERFRONT

Summary Notes:

- This bird's eye view of anticipated improvements is taken from a viewpoint just east of the Art Museum looking northwest across the Concho River area. It shows the intent to deliver an urban experience to this important area in a manner that better connects the City's art and historic resources to the downtown retail and restaurant core through a residential riverfront.

	Map ID	Tax ID	Total Appraised Value	Owner	Owner Phone Number	Owner Street	Owner City	Owner State	Owner Zip	Acreage	SF	$ / SF
A	1	1123200004700100	$ 45,445	SAN ANGELO HEALTH FOUNDATION	(325) 486-0185	PO BOX 3550 W AVENUE A	SAN ANGELO	TX	76902	0.5216377	22722.54	$ 2.00
	2	1123200004700200	$ 47,518	SAN ANGELO HEALTH FOUNDATION	(325) 486-0185	PO BOX 3550 W AVENUE A	SAN ANGELO	TX	76902	0.5454315	23759	$ 2.00
	3	1123200004700300	$ 49,569	SAN ANGELO HEALTH FOUNDATION	(325) 486-0185	PO BOX 3550 W AVENUE A	SAN ANGELO	TX	76902	0.5689783	24784.69	$ 2.00
	4	1123200004700400	$ 51,373	SAN ANGELO HEALTH FOUNDATION	(325) 486-0185	426 W AVE B	SAN ANGELO	TX	76903	0.5896799	25686.46	$ 2.00
	5	2443210004700100	$ 81,052	SAN ANGELO HEALTH FOUNDATION	(325) 486-0185	426 W AVE B	SAN ANGELO	TX	76903	0.9303544	40526.24	$ 2.00
			$ 274,958							3.1560819	137478.9	$ 2.00
B1	6	2036900004801100	$ 73,127	SAN ANGELO HEALTH FOUNDATION	(325) 486-0185	419 S IRVING	SAN ANGELO	TX	76903	0.8393819	36563.47	$ 2.00
	(1.13 acres)		$ 73,127							0.8393819	36563.47	$ 2.00
B2	7	2036900004801000	$ 66,000	MAYFIELD PAPER CO	(325) 653-1444	PO BOX 3889 W Avenue A	SAN ANGELO	TX	76902	0.4958851	21600.75	$ 3.06
	8	2036900004800100	$ 5,000	SAN ANGELO HEALTH FOUNDATION	(325) 486-0185	419 S IRVING	SAN ANGELO	TX	76903	0.0573938	2500.073	$ 2.00
	9	2036900004800200	$ 5,000	SAN ANGELO HEALTH FOUNDATION	(325) 486-0185	419 S IRVING	SAN ANGELO	TX	76903	0.057394	2500.083	$ 2.00
	10	2036900004800300	$ 5,000	SAN ANGELO HEALTH FOUNDATION	(325) 486-0185	419 S IRVING	SAN ANGELO	TX	76903	0.0573933	2500.051	$ 2.00
	11	2036900004800400	$ 5,000	SAN ANGELO HEALTH FOUNDATION	(325) 486-0185	419 S IRVING	SAN ANGELO	TX	76903	0.057394	2500.083	$ 2.00
	12	2036900004800500	$ 5,000	SAN ANGELO HEALTH FOUNDATION	(325) 486-0185	419 S IRVING	SAN ANGELO	TX	76903	0.057394	2500.081	$ 2.00
	13	2036900004800600	$ 38,000	SINSEL THOMAS		PO BOX 2064 S Irving	AUSTIN	TX	78768	0.0573936	2500.064	$ 15.20
	14	2036900004800700	$ 17,750	SINSEL THOMAS		PO BOX 2064 S Irving	AUSTIN	TX	78768	0.1147875	5000.143	$ 3.55
	15	2036900004800800	$ 19,600	FARRIS W B III & JANICE Y		5362 ATLANTIC RD	SAN ANGELO	TX	76903	0.1147875	5000.143	$ 3.92
	16	2036900004800900	$ 8,200	WILLIAMS VILLARREAL LP		1500 RANKIN HWY	MIDLAND	TX	79701	0.1079887	4703.989	$ 1.74
			$ 174,551							1.1778114	51305.46	$ 3.40
C	17	313400000000600	$ 420,600	BAYOU CITY BROADCASTING LLC	(281) 719-9355	406 S IRVING	SAN ANGELO	TX	76903	0.5393414	23493.71	$ 17.90
	18	313400000000350	$ 7,300	BAYOU CITY BROADCASTING LLC	(281) 719-9355	406 S IRVING	SAN ANGELO	TX	76903	0.0953468	4153.308	$ 1.76
	19	313400000000300	$ 98,500	GRIFFIN FRED L	(325) 486-8661	434 S IRVING ST	SAN ANGELO	TX	76903	0.5060592	22043.94	$ 4.47
	20	313400000000500	$ 275,787	CITY OF SAN ANGELO	(325) 657-4241	PO BOX 1751 S CHADBOURNE	SAN ANGELO	TX	76902	3.1656046	137893.7	$ 2.00
			$ 802,187							4.306352	187584.7	$ 4.28
D	21	2341600000000100	$ 43,000	333 CHADBOURNE LLC	(972) 233-1566	119 S IRVING	SAN ANGELO	TX	76903	0.223836	9750.294	$ 4.41
	22	2341700200000400	$ 48,350	333 CHADBOURNE LLC	(972) 233-1566	119 S IRVING	SAN ANGELO	TX	76903	0.3214049	14000.4	$ 3.45
	23	2341700200000500	$ 35,300	A T & T COMMUNICATIONS OF TEXAS LTD		909 CHESTNUT ST RM 36-M-1	ST LOUIS	MO	63101	0.3730598	16250.48	$ 2.17
	24	2341700200000600	$ 20,100	A T & T COMMUNICATIONS OF TEXAS LTD		909 CHESTNUT ST RM 36-M-1	ST LOUIS	MO	63101	0.2008783	8750.257	$ 2.30
			$ 146,750							1.1191789	48751.43	$ 3.01

Sources: City of San Angelo, Tom Green Appraisal District, Catalyst

Map ID		Tax ID	Total Appraised Value	Owner	Owner Phone Number	Owner Street	Owner City	Owner State	Owner Zip	Acreage	SF	$ / SF
E	25	2341700300000700	$ 219,050	COOPER RAYMOND L & FAYE	(325) 655-9553	29 E CONCHO AVE	SAN ANGELO	TX	76903	0.6887244	30000.84	$ 7.30
			$ 219,050							0.6887244	30000.84	$ 7.30
	26	2341700300000100	$ 30,824	CITY OF SAN ANGELO - TRUSTEE	(325) 657-4241	PO BOX 1751 S CHADBOURNE	SAN ANGELO	TX	76902	0.3538161	15412.23	$ 2.00
F	27	2341700300000200	$ 255,993	CITY OF SAN ANGELO	(325) 657-4241	PO BOX 1751 S CHADBOURNE	SAN ANGELO	TX	76902	2.9383931	127996.4	$ 2.00
	28	2341700300000500	$ 123,844	FREEDOM FELLOWSHIP SAN ANGELO INC	(325) 227-4121	6018 LYNDHURST DR	SAN ANGELO	TX	76901	1.4215298	61921.84	$ 2.00
	29	2341700300000600	$ 31,681	CITY OF SAN ANGELO	(325) 657-4241	PO BOX 1751	SAN ANGELO	TX	76902	0.3636504	15840.61	$ 2.00
			$ 442,342							5.0773894	221171.1	$ 2.00
	30	2341700400000100	$ 161,631	CITY OF SAN ANGELO	(325) 657-4241	PO BOX 1751 S CHADBOURNE	SAN ANGELO	TX	76902	1.8552729	80815.69	$ 2.00
G	31	2341700400000400	$ 29,000	EGGEMEYER BOBBY	(325) 655-1166	35 E CONCHO	SAN ANGELO	TX	76903	0.3236413	14097.81	$ 2.06
	32	2341700400000500	$ 500	CONCHO CROSSING	(325) 653-1154	1500 SHAFTER	SAN ANGELO	TX	76901	0.0359937	1567.885	$ 0.32
	33	2341700400000200	$ 412,500	ELCO LLC	(325) 655-8933	5950 US HIGHWAY 87 N	SAN ANGELO	TX	76901	1.5135776	65931.44	$ 6.26
			$ 603,631							3.7284855	162412.8	$ 3.72
	34	1323500000000100	$ 48,400	EGGEMEYER BOBBY	(325) 655-1166	350 S OAKES ST	SAN ANGELO	TX	76903	0.6240004	27181.46	$ 1.78
	35	1323500000000200	$ 51,950	Harrison O D III & Ronny Et Al	(325) 944-3089	2200 DOUGLAS DR	SAN ANGELO	TX	76904	0.2538816	11059.08	$ 4.70
	36	1323500000000400	$ 7,700	Harrison O D III & Ronny Et Al	(325) 944-3089	2200 DOUGLAS DR	SAN ANGELO	TX	76904	0.0787663	3431.062	$ 2.24
	37	1323500000000300	$ 10,100	Gilman Donald M & Norma Braden	(325) 658-1071	140 ALLEN	SAN ANGELO	TX	76903	0.279263	12164.7	$ 0.83
	38	1323500000000500	$ 27,000	Gilman Donald M & Norma Braden	(325) 658-1071	140 ALLEN	SAN ANGELO	TX	76903	0.7891944	34377.31	$ 0.79
H	39	1323500000000700	$ 6,000	Gilman Donald M & Norma Braden	(325) 658-1071	140 ALLEN	SAN ANGELO	TX	76903	0.2698764	11755.82	$ 0.51
	40	1323500000000600	$ 54,400	Gilman Donald & Norma	(325) 658-1071	140 ALLEN	SAN ANGELO	TX	76903	0.1147874	5000.14	$ 10.88
	41	1323500000000800	$ 60,300	Gilman Donald & Norma	(325) 658-1071	140 ALLEN	SAN ANGELO	TX	76903	0.4722845	20572.71	$ 2.93
	42	1323500000000900	$ 68,700	Gilman Donald M & Norma	(325) 658-1071	140 ALLEN	SAN ANGELO	TX	76903	0.8183273	35646.34	$ 1.93
	43	1323500000001000	$ 62,350	Alvarado Evelyn	(325) 658-9015	8077 WILLOW LANE	SAN ANGELO	TX	76901	0.6623058	28850.04	$ 2.16
	44	1323500000001100	$ 3,298	City Of San Angelo	(325) 657-4241	PO BOX 1751 S CHADBOURNE	SAN ANGELO	TX	76902	0.037856	1649.009	$ 2.00
	45	1323500000001200	$ 10,000	Johnson Mark A & Eustis Stevan D	(325) 482-8610	PO BOX 5898 ALLEN	BROWNSVILLE	TX	78523	0.9635322	41971.46	$ 0.24
			$ 410,198							5.3640755	233659.1	$ 1.76

Note: All yellow highlighted figures do not have tax rates. They each assume a land value of $2.00/sf.

The following represents available finance tools that have been successfully utilized by other Texas communities in the redevelopment of target areas. Each of these programs should be studied further to determine their applicability to creating a stronger Downtown San Angelo.

Public Financing - Local
Tax Increment Financing
Land Donation/Write-Down
Industrial Development Program (NIFA)
Development Fee Rebates
Infrastructure Cost Participation
Sales Tax Sharing
Low Interest Loans / Subordination
Property Tax Abatement
Tax Exempt Financing
Leveraged Infrastructure Funding
Façade Maintenance Loan Program
Predevelopment Funding Grants
Encourage and Support Nonprofit Developers

Public Financing - State
Low Income Housing Tax Credits
Historic Rehabilitation Tax Credits
Community Development Tax
Community Development Assistance (CDA)

Public Financing - Federal
Fed. Historic Pres. Invest. Tax Credits
Community Development Block Grant
Job Training Partnership Act (JTPA)
Economic Development Administration (EDA)

Private Financing
Private Equity
Private Debt
Lending Pools - Shared Risk
Community Reinvestment Act
Land Donation (Quasi)
Public Improvement District (PID)
HUD 221(d)(4)
CDBG Section 108
New Markets Tax Credits

Image and Text Sources: Google Earth ,Catalyst
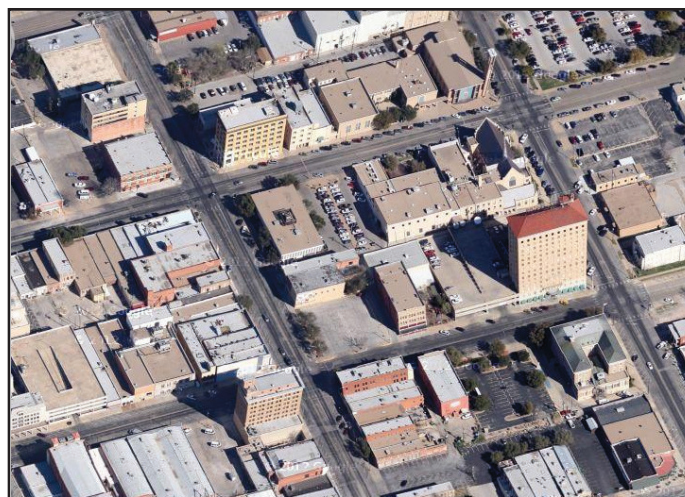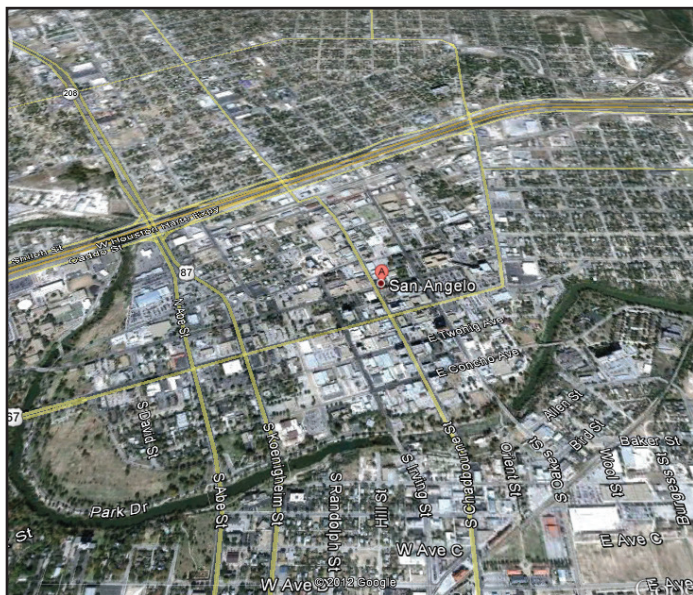
ECONOMIC DEVELOPMENT TOOLS

Summary Notes:

• Financing tools include Public and Private options.

• Public options include local, state, and federal sources.

• Private financing can help fill in the gaps, and allow for additional investment dollars to the area.

• Debt is available, as long as there is a match in equity.

Downtown San Angelo, through strategic planning, policy, and financing efforts, is positioned to leverage the current economic climate into a positive redevelopment strategy.

Such redevelopment efforts should be targeted towards specific investments and focus areas. This analysis suggests these efforts be particular to inducing restaurant, energy-sector employment, and new housing over the next 10 years.

Partnerships made between the City of San Angelo, the Chamber of Commerce, Downtown San Angelo Inc., Historic San Angelo, local businesses, and the private sector should be made to facilitate new development that can strengthen Downtown as a mixed-use and mixed-activity regional destination that is active in the daytime through the night-time.

Conclusion