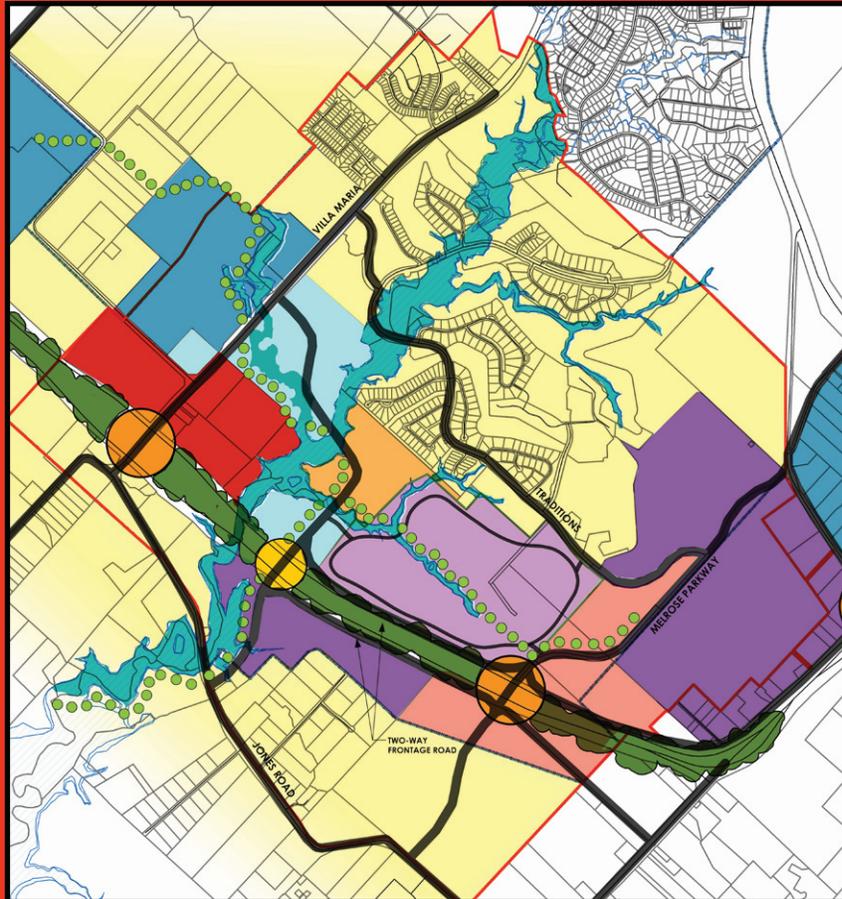


CITY OF BRYAN, TEXAS



SOUTHWEST BRYAN HIGHEST AND BEST USE STUDY JANUARY 2009

Table of Contents

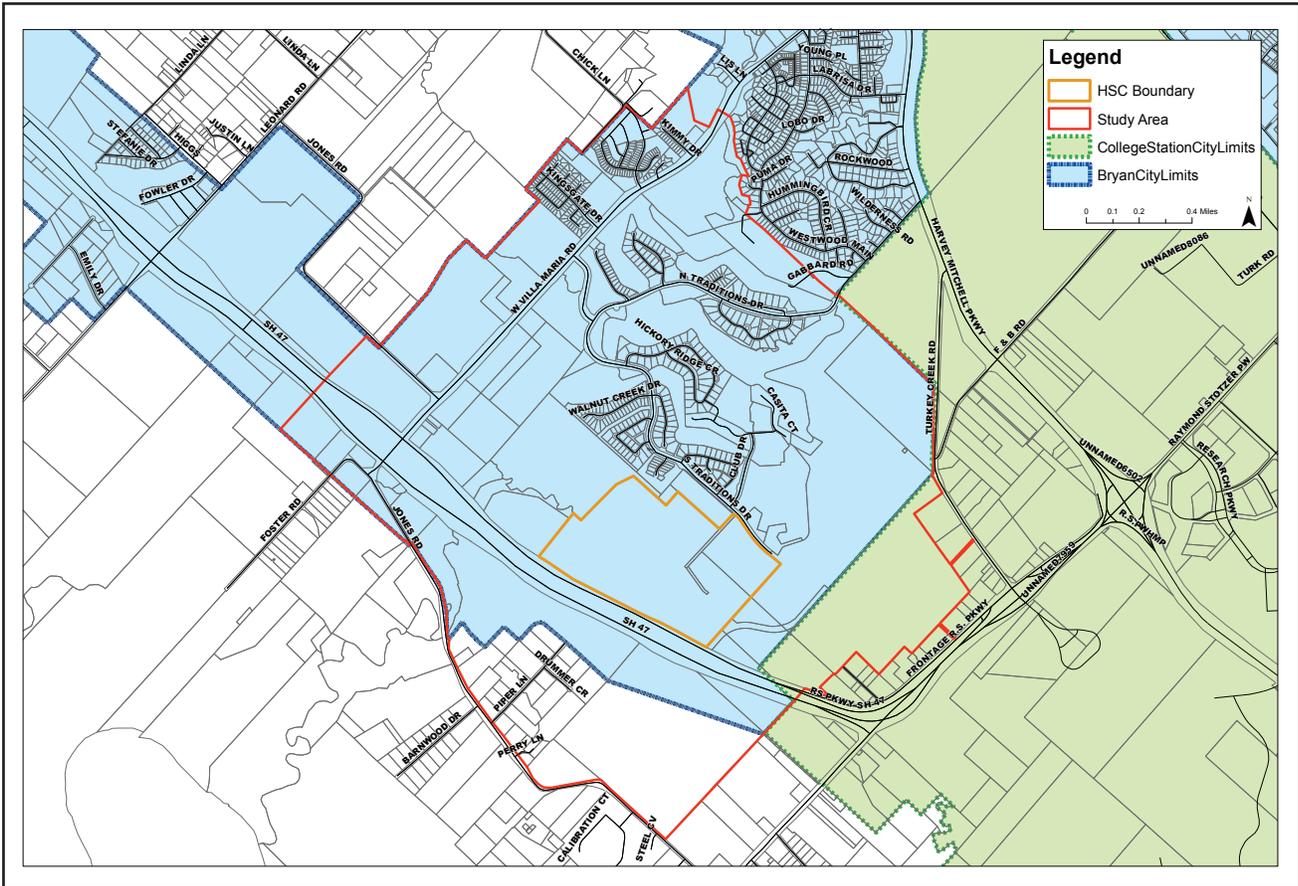
I. Introduction.....	Page 3
<i>Definition of Study Area</i>	
<i>Background</i>	
<i>Texas A&M Health Science Center</i>	
II. Inventory Analysis.....	Page 6
<i>Market Study Conclusions</i>	
<i>Stakeholder Interviews</i>	
<i>Summary of Planning Influences</i>	
III. Alternative Land Use Plans.....	Page 11
<i>Alternative 1</i>	
<i>Alternative 2</i>	
IV. Proposed Land Use Plan.....	Page 14
<i>Introduction</i>	
<i>Goals and Objectives of the Land Use Plan</i>	
<i>Land Use Concept Plan</i>	
<i>Land Use Characteristics and Implementation</i>	
<i>Descriptions and Characteristics of Land Use Categories</i>	
V. Proposed Design Concept Plan.....	Page 23
<i>Introduction</i>	
<i>Design Concept Plan</i>	
<i>Prototype Design Elements for Public Infrastructure</i>	
<i>Design Guidelines</i>	
Appendix A – Recommended Uses for the Proposed.....	Page 29
<i>Research/Flex Land Use Category</i>	
Appendix B – Market Study and Assessment.....	Page 30

I. Introduction

Over the last ten years, the City of Bryan has planned and invested significant resources into the southwest portion of the community. This planning and investment has helped create exciting new developments in the area, and the success of The Traditions and soon-to-be successful start-up of the Health Science Center represent initial 'returns' on those investments. The purpose of this Southwest Bryan Highest and Best Use Study is to develop a visionary, but realistic, corridor plan to protect these investments by ensuring compatible and synergistic land uses and quality development standards throughout the study area. The study will identify key land use, planning and design opportunities in the area, and then combine these opportunities with a market-based strategy for maximizing the overall economic development impact for the City. Ultimately, this study will seek to create a balance between the highest and best use of the land with a coordinated and comprehensive planning and design vision that ensures long term value and stability for all properties and investments within the study area.

Definition of the Study Area

The general limits of the study area are depicted in the map below and generally includes approximately 2,576 acres in the area between and around State Highway (S.H.) 47, Villa Maria Road, Turkey Creek Road, and Raymond Stotzer Parkway. Of this total 2,576 acres almost 76% is within the current city limits, 9.3% is in the City's extraterritorial planning jurisdiction and almost 15% is in the current municipal boundaries of College Station.



Study Area Limits

Background

In 1987, the Texas Department of Transportation designated the future location of State Highway 47. The highway was planned to provide a critical roadway connector from central Texas to the Brazos County region and the cities of Bryan and College Station and the main campus of Texas A&M University. As the construction on the roadway commenced, the cities of Bryan (and College Station) began to evaluate the planning and development options that might be realized with the introduction of this major new roadway segment.

Initial planning in the study area focused on light industrial uses, with College Station adopting a comprehensive plan identifying the S.H. 47 / S.H. 60 as a major gateway for their community and the Texas A&M University (TAMU) campus in 1997. Prompted by these actions and the opportunities that could exist for the City in this area, the City of Bryan began planning and development actions in the area about the same time. Then in 1998, the City of Bryan and several other entities began planning and preparation for a country club development and a home for the TAMU golf facilities. The City entered into a partnership with a development entity, new infrastructure was planned, designed and installed and in 1999, a proposed golf course residential development, The Traditions, became a reality.



Representative study area photographs

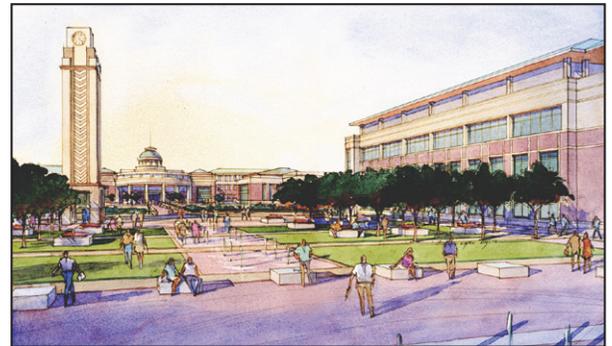
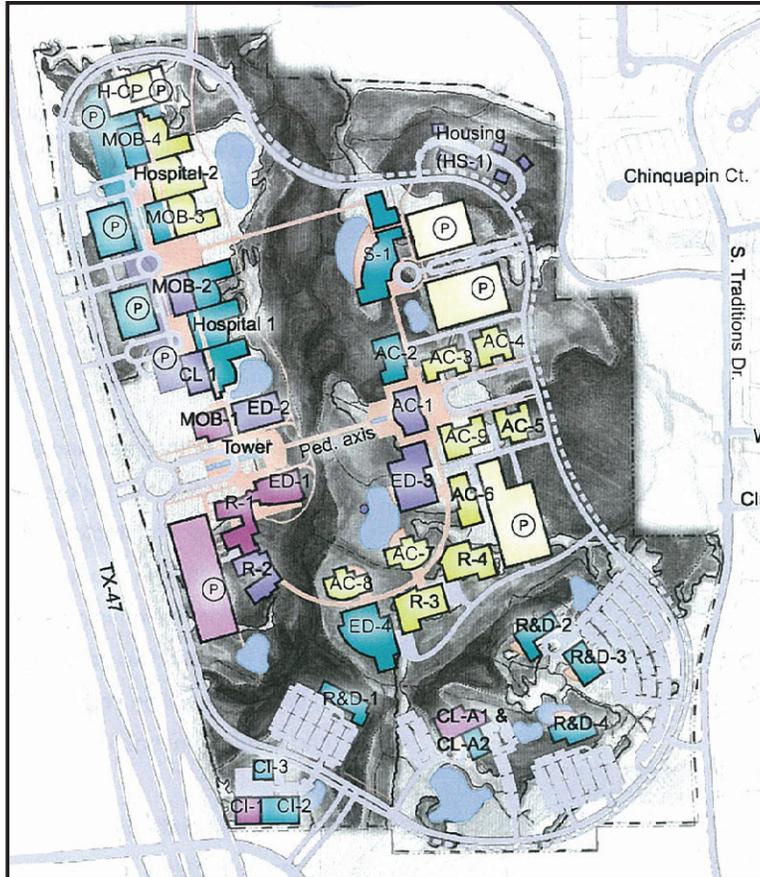


Texas A&M Health Science Center

The Texas A&M University System Board of Regents, on December 1, 2006, authorized acceptance of a gift of 200 acres along S.H. 47 in the City of Bryan for construction of a new campus for the Texas A&M Health Science Center. The future Bryan campus will allow consolidation of all Brazos County-based HSC components and programs and allows room for extensive growth. This land will be used for the Health Science Center (HSC) consolidated campus. This site will be the first major TAMU presence in Bryan in 130 years. The ground-breaking for the HSC Bryan Campus was in January of 2008 and the first two buildings, the Medical Education and Research Center and the Health Professions Education Center are scheduled for completion in 2010.

The new campus will be located on a 200-acre tract of land along S.H. 47 in west Bryan. A master plan has been designed to reflect a distinctive campus layout (see images below) that ties with surrounding developments, such as The Traditions and planned commercial centers and residential neighborhoods. This project currently involves several development partners, with the idea that the new HSC campus should be properly planned and designed in harmony with the surrounding area, and lead to complementary developments along the S.H. 47 corridor.

From an economic development standpoint, the Health Science Center Campus is a true long-term investment for the City of Bryan. This new medical campus will set the tone for future development of the S.H. 47 and West Villa Maria Road corridors on Bryan's southwestern edge. According to information provided by the HSC, the actual total economic impact of the HSC on the Bryan-College Station community is estimated at \$1.035 billion by 2010. Clearly, the magnitude and quality of this investment in the study area will generate opportunities for new growth in the area that will likely provide a quick and complete return on investment within the next several years.



HSC Site Plan and renderings

II. Inventory Analysis

As an important first step in the development of a land use vision, the planning team conducted an inventory and analysis of the existing conditions in the study area and local marketplace to determine the key issues and opportunities that will influence the final plan development. A comprehensive review of existing physical conditions in the study area was completed, as well as a review and analysis of current market conditions and interviews with local stakeholders. A brief summary of our findings is provided below.

Market Study Conclusions

Appendix B provides a full examination of these trends for the City of Bryan, and more particularly for the Bryan/College Station market, as well as the complete market investigations for a broad range of potential uses for the study area. The following represents the major findings concluded during the research and analysis of the market study.

The amount of undeveloped and unplanned land contained within the S.H. 47 study area, combined with the existing and planned land uses such as Traditions and the Texas A&M Health Science Center (HSC), creates possibilities for a variety of potential compatible future uses. The planning team conducted research and analysis to arrive at market-based projections for supportable land uses in the study area. These projections are illustrated in units and square footages in Table 1. Some explanatory notes for different land uses follow the table.

Summary of Estimated Market Supportable Future Land Uses

Land Use Category	Period in Years				
	0 to 5	5 to 10	10 to 15	15 +	Total
Single Family Housing (units)					
Under \$150,000	135	100	20	0	255
\$150,000 - \$249,999	20	75	150	150	395
\$250,000 and above	120	120	75	100	415
Senior Housing (projects)					
Active adult / independent living	25				25
Congregate living		250			250
Assisted living / skilled care			75		75
Multifamily Housing (units)	0	100	125	300	525
Commercial – Office / Flex (sq.ft.)	25,000	150,000	150,000	250,000	575,000
Commercial – Retail (sq.ft.)	1,500	85,000	25,000	40,000	151,500
Commercial – Lodging (rooms)	100	420	0	0	520

Source: CDS | Spillette

Estimated Market Supportable Future Land Uses Table

Single Family Residential Land Use Notes

1. The research indicated that the prevailing perception of the quality of public education activities and facilities in the study area will have a significant impact on residential development forecasts, particularly in the mid-price range home category. The single family housing projections for the \$150,000 to \$250,000 are based on the anticipated improvement in the public perception of Jane Long Middle School. Additionally, the demand from middle income retirees / empty nesters will drive this market segment. It may include both standard detached homes and denser product, such as patio homes or townhomes.
2. Single family housing under \$150,000 is expected to taper off after 10 years due to land price increases.

Senior Housing Land Use Notes

1. Actual unit count and specific housing product of each senior living component is difficult to estimate, but the analysis indicates that a market for the various Senior Housing product types exists.

Multi-Family Residential Land Use Notes

1. Multifamily housing built between 5 and 15 years out is projected to be oriented to HSC students/ employees and may be located on HSC property. The demand and support for the more typical apartment complex (not collegiate campus apartments) is anticipated in the later years.

Commercial Land Use Notes

1. The Office land use projections are based on the following assumptions: (1) the property owners in the northwest quadrant of the Villa Maria and S.H. 47 intersection will proceed with their proposed, owner-occupied office space; and (2) a planned office park, with gradual market-based buildout rates, will locate in the study area in the vicinity of HSC.
2. Retail projections assume that a grocery-anchored neighborhood center will be supportable in the next 5 to 10 years as additional residential units are created in the area. The grocery-anchored center will then be followed by additional neighborhood retail in later periods.
3. The Lodging land use projection for 5 to 10 years assumes (1) the Melrose Partnership and developer proceeds with their proposed 120-room Lodge facility at The Traditions Country Club, thus absorbing some of the potential market demand; and (2) a new full-service, mid-priced hotel with meeting facilities project is supportable in the study area, if and possibly only if, a developer or property in the area is first to market with this type of development.

Stakeholder Interviews

The planning team interviewed several local stakeholders (property owners, developers, real estate professionals, etc.) to gain additional insights into the issues and perceptions that could shape the planning and development opportunities in the area. Outlined below is a list of major highlights and conclusions resulting from these discussions.

Land Use Planning Issues/Comments

1. Preferred uses in the area mentioned by the stakeholders are as follows: boutique hotel, high end residential, mixed use, neighborhood retail, office, active adult, grocery stores, and athletic facilities.
2. Walkability and connectivity to the HSC site are important factors to consider in the overall design and planning of the area.
3. The HSC development is planned with the idea of a "campus in a forest" concept, where the unique and sensitive environmental features of the site are preserved and promoted through the site design.

4. Completion of the entire HSC campus is scheduled for 2020.
5. A critical mass of overall development may be a crucial component in order to determine related land uses. Many of the commercial uses that might result in the study area will require the demand and purchasing power created by the employees and visitors to the HSC and an increase in the overall number of homes in the area, thus a phasing plan for associated development in the area may be warranted. This phasing should be concurrent and coordinated with the overall HSC timeline.
6. Mixed-use development may be best located along Raymond Stotzer Parkway.

Design Issues/Comments

1. Most of the interviewees favored mixed-use developments, development design standards, landscaping and softscaping for projects in the study area. They were not opposed to stricter design guidelines for private developments in the study area, as long as the City maintains its ability to provide streamlined approval processes for developers. The straightforward approach and timeline for gaining action on a development proposal in Bryan is one of the City’s strongest competitive advantages over the College Station area. Enhanced design standards are not objectionable unless they begin to lengthen or confuse the process by which land use, zoning and site plan approvals are granted.
2. Stakeholders suggest Bryan look at using a point system method of providing objective development reviews and approvals to incentivize developers and create high design standards for study area.
3. Landscaped entryways and design features for the major roadway connectors and interchanges were mentioned frequently. The exact nature and quality of these gateways and designs were not easily defined by the participants. However, the Princeton campus was offered as an example, which includes tree lined parkways, sidewalks, large tree canopies, and landscaped buffers for buildings and roads.
4. Stakeholder’s feel that the development trend for the area should be less urban and more suburban.

Miscellaneous Issues/Comments

1. The public schools, which serve the current and future developments in the study area, are perceived to be inadequate. This perception, whether it is based in fact or on rumors, can potentially hinder the maximizing of development values or absorption rates if it is not addressed. It will be important in the future to improve the perception throughout the community of the schools in Bryan, i.e. improve “social infrastructure”.

Summary of Planning Influences

The Summary of Planning Influences exhibit (on the next page) provides a graphic illustration of the major factors that will influence the planning and design of public and private developments in the study area. The following is a summary of these “planning influences.”

Preservation of Environmentally Sensitive Areas

Natural drainage ways and densely vegetated areas characterize much of the western portions of the study area. The plan should ensure that these sensitive areas are protected and possibly use the HSC planning and development model/approach of “campus in a forest” on development sites that contain these sensitive areas.

Influence of Airport Approach Zones

Although the current approach zone restrictions will likely not inhibit near term development proposals, the long term growth of the airport (and possible expansion of approach zone cones) or the potential heights proposed for buildings in these zones may restrict the long term viability of certain uses.

Influence of TAMU Research Park

This research park represents a potential, direct competitor to the development types identified in the market study. The study area is a viable, competitive location for these uses, but the overall design standards within the study area will be critical competitive factors also.

Impact of Health Science Center

The overall impact of this development and The Traditions can not be underestimated or overlooked. These properties have established a quality standard for new projects in terms of development design standards and have created the opportunity for synergistic developments within the area.

Influence of TAMU (Main Campus to HSC to Riverside Campus Connection)

The S.H. 47 corridor could become the new connecting link among these influential uses and the corridor's overall “feel” and design concept should be elevated to the importance it holds in providing and enhancing the potential physical, social and aesthetic connections to TAMU campus sites and the City of Bryan.

Civic Uses in the Study Area

The presence of public and private schools, the Expo Center and the proposed TAMU Cemetery at Harvey Mitchell Parkway offers an opportunity to anchor the potential planning and design concepts in the study area due to their long term stability and ownership as a public use.

City-Owned Property in Key Locations

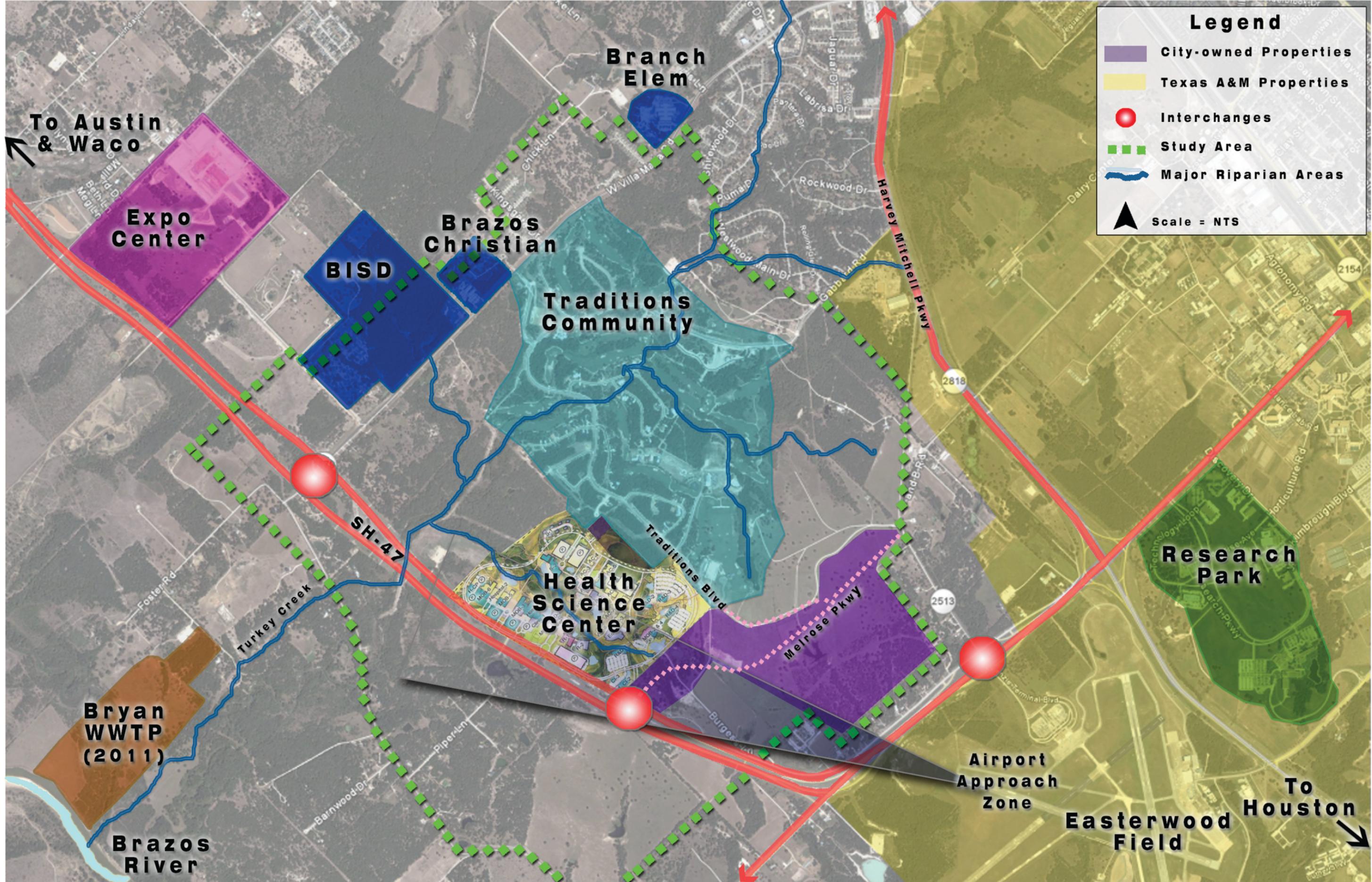
Bryan's stake in the planning effort is clear when ownership patterns are examined. The City's long term interests must be paramount in the Plan, because their short term property interests could be contrary to the long term maximizing of overall values in the broader study area.

Influence of Roadway Infrastructure

The current and planned roadways in the area have a significant land use impact due to the limited access across S.H. 47. The nature, location and design of access and cross-connections to S.H. 47 will be critical components in the overall land use and design vision.

City of Bryan Waste Water Treatment Plant

This infrastructure improvement will enable the maximizing of long term value in the area by providing needed sanitary sewer service to the study area properties.



Planning Influences - SH-47 Corridor

III. Alternative Land Use Plans

The following pages illustrate two alternative land use plans that were created for the study area based on the analyses and findings of our research. After review of these alternatives, the planning team and the City determined that the land use concepts and patterns depicted in Alternative 1 were preferable.

In general, these land use alternatives offered two approaches to the siting of the market supported land uses indicated in the market study. Key elements of each land use alternative are provided below.

Alternative 1 Land Use Plan

Key elements of Alternative 1 include the following:

- Expo Center anchors western entrance to Medical Parkway which starts at S.H. 21.
- Mixed Use Neighborhood serves as focal point for local retail/services/offices. Grocery-anchored retail center with urban form.
- Natural areas and The Traditions serve as good backdrops for higher density residential (apartments, townhomes) on Villa Maria.
- Sensitive environmental design features and principles are to compliment the “Campus in a Forest” design concept for HSC. Strict design standards to preserve natural features.
- Cross connection at S.H. 47 provides needed access to research/flex/office space area.
- A ‘Traveler’s Village’ concept of regional uses with urban density and form. Uses could include: hotel, senior/congregate complex, restaurants, and gas/food services.
- Research Park serves as a logical intellectual and land use extension of HSC and TAMU. The form, density, and style of this area should be more suburban in nature.
- TAMU Cemetery serves as eastern anchor to Medical Parkway.

Alternative 2 Land Use Plan

Key elements of Alternative 2 include the following:

- Villa Maria interchange area becomes centerpiece in the Medical Parkway. Serves as the regional and local hub of retail and services (i.e. retail, restaurant, hotels, gas, etc.). It is the gateway into Bryan.
- Residential uses along Villa Maria targeted at 6-8 units per acre (attached and detached).
- High end research/office sites near HSC that require good, but not great, access and visibility. Build-to-suit office (and limited retail/services) sites with great access and visibility to Parkway and HSC.
- Traditions remains a residential community and continues to build critical mass of buying power in the area. Possible apartment site at south end.
- Research/flex areas to accommodate forecasted demand for this land use type.

LAND USE LEGEND

- Low Density Residential
- High Density Residential
- Medical / Mixed Use
- Office / Services
- Research/Flex
- Mixed Use Regional
- Mixed Use Neighborhood
- Civic

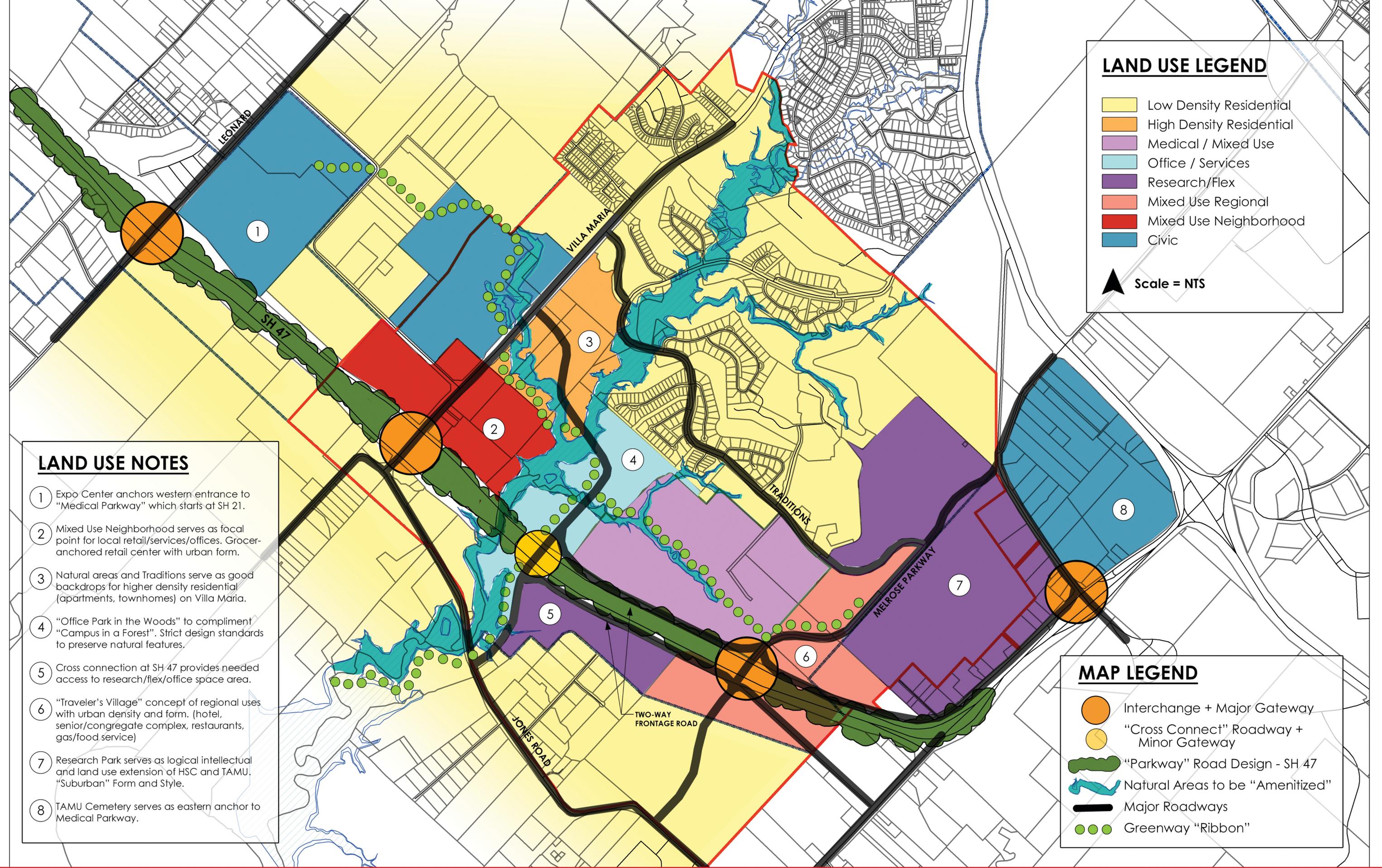
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LAND USE NOTES

- 1 Expo Center anchors western entrance to "Medical Parkway" which starts at SH 21.
- 2 Mixed Use Neighborhood serves as focal point for local retail/services/offices. Grocer-anchored retail center with urban form.
- 3 Natural areas and Traditions serve as good backdrops for higher density residential (apartments, townhomes) on Villa Maria.
- 4 "Office Park in the Woods" to compliment "Campus in a Forest". Strict design standards to preserve natural features.
- 5 Cross connection at SH 47 provides needed access to research/flex/office space area.
- 6 "Traveler's Village" concept of regional uses with urban density and form. (hotel, senior/congregate complex, restaurants, gas/food service)
- 7 Research Park serves as logical intellectual and land use extension of HSC and TAMU. "Suburban" Form and Style.
- 8 TAMU Cemetery serves as eastern anchor to Medical Parkway.

MAP LEGEND

- Interchange + Major Gateway
- "Cross Connect" Roadway + Minor Gateway
- "Parkway" Road Design - SH 47
- Natural Areas to be "Amenitized"
- Major Roadways
- Greenway "Ribbon"



LAND USE LEGEND

- Low Density Residential
- High Density Residential
- Medical / Mixed Use
- Office / Services
- Research/Flex
- Mixed Use Regional
- Mixed Use Neighborhood
- Civic

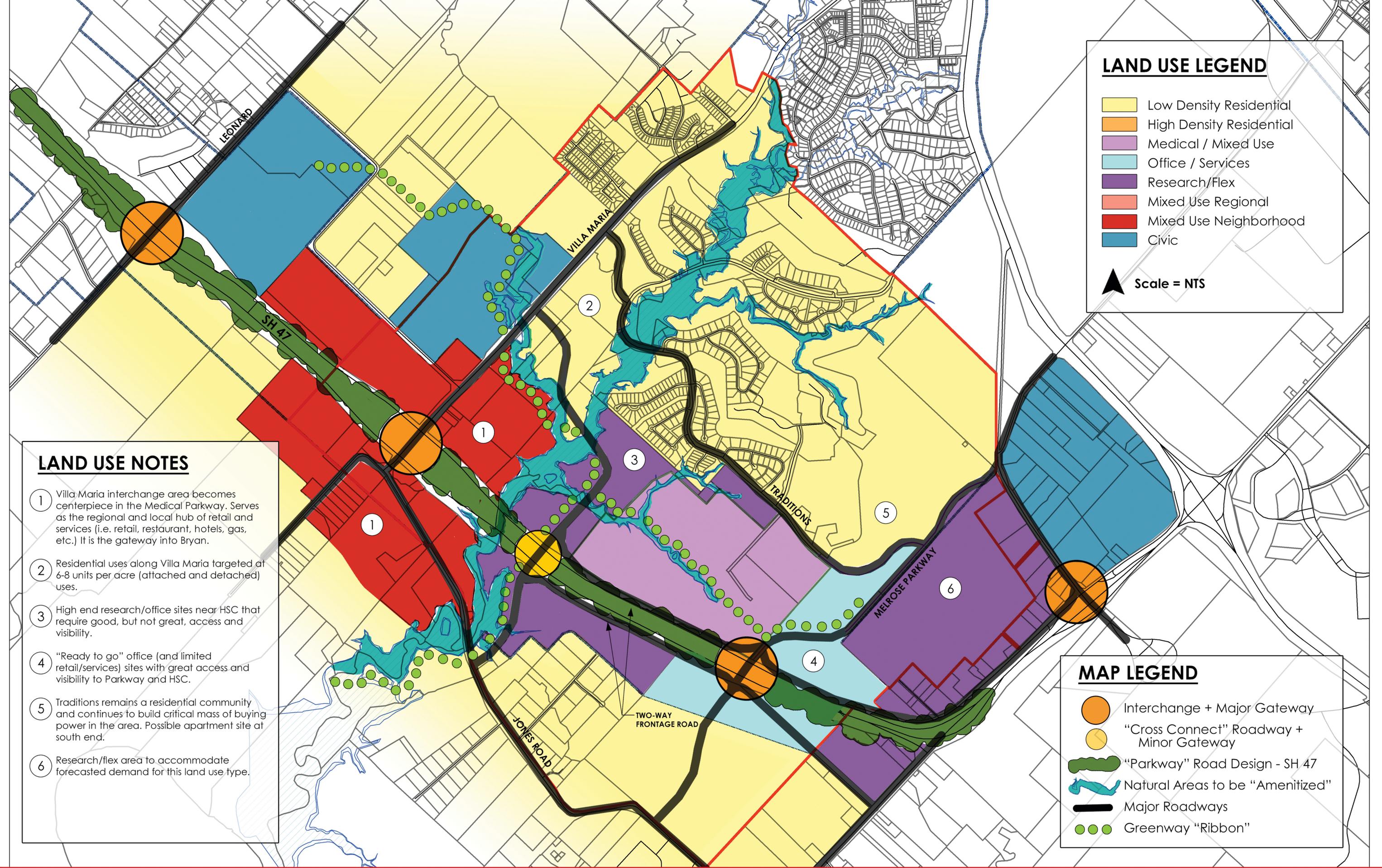
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LAND USE NOTES

- ① Villa Maria interchange area becomes centerpiece in the Medical Parkway. Serves as the regional and local hub of retail and services (i.e. retail, restaurant, hotels, gas, etc.) It is the gateway into Bryan.
- ② Residential uses along Villa Maria targeted at 6-8 units per acre (attached and detached) uses.
- ③ High end research/office sites near HSC that require good, but not great, access and visibility.
- ④ "Ready to go" office (and limited retail/services) sites with great access and visibility to Parkway and HSC.
- ⑤ Traditions remains a residential community and continues to build critical mass of buying power in the area. Possible apartment site at south end.
- ⑥ Research/flex area to accommodate forecasted demand for this land use type.

MAP LEGEND

- Interchange + Major Gateway
- "Cross Connect" Roadway + Minor Gateway
- "Parkway" Road Design - SH 47
- Natural Areas to be "Amenitized"
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- Greenway "Ribbon"



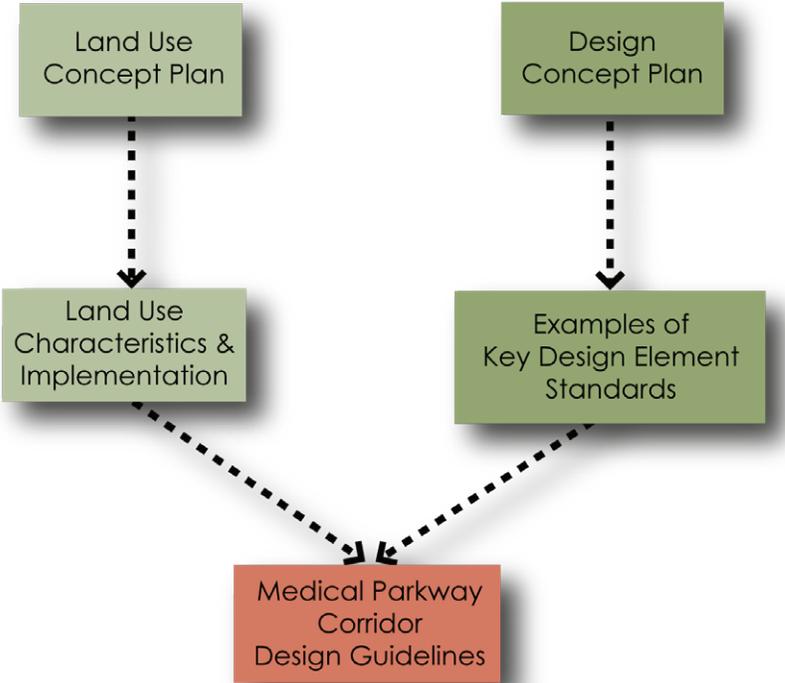
IV. Proposed Land Use Plan

Introduction

The City of Bryan has a unique opportunity in the S.H. 47 corridor to establish a coordinated land use plan and design standards to create a new and exciting growth area and gateway into the Bryan area. The Land Use Plan, presented in this chapter, seeks to maximize the return on investment that the City has made in the area over the last ten years by providing a set of land use categories that are supported by the market and arrange them in a pattern that respects the physical conditions in the area and the current and future transportation access characteristics of S.H. 47. Finally, the highest and best value of all properties in the area will be created and stabilized by the development and implementation of design guidelines for all developments in the area, both public and private in order that a connected and visually-appealing area is created.

To this end, the proposed Land Use plan recommends the City adopt two crucial elements that, when combined and used in tandem, will help to ensure quality, coordinated and high value land uses in the area. The figure below provides a graphic illustration of the Land Use and Design elements that form the Regulatory Framework for the Plan. First, the Land Use Concept Plan, and its corresponding Land Use Characteristics and Guidelines, establish the framework of land use regulations (i.e. uses, bulk standards, scale, and densities) of the proposed land use classifications arranged within the study area. This information is to be used by developers and the City to guide future land use and zoning decisions in the area because it provides an overall concept or land use vision for development of the area that supports the social and economic development goals of the City.

Land Use Framework



Second, the Design Concept Plan, and its corresponding images/examples of key design elements, provides an overall vision for the design and aesthetic qualities and aspirations for the S.H. 47 corridor area. Key design elements are identified in the Design Concept Plan and this Plan should be used by the City and developers as a supplementary tool for developing properties in the area. The Design Plan includes design ideas for key public realm improvements (i.e. road standards, greenway trails, etc.), that are to be developed in the area to raise the overall standard of community infrastructure and thus promote higher quality development projects. These concepts and design features will provide a necessary framework of aesthetic enhancements and development standards for new projects in the area, thus promoting developers to achieve a level of quality in their private developments that are already visible and in place in the design level and care exhibited in the public realm.

Finally, both the Land Use element and the Design element of the Plan come together and are connected via a set of proposed S.H. 47 Corridor Design Guidelines. This final regulatory and design tool would be developed and implemented by the City and be applied to all new projects in the study area. The design guidelines would not mandate quality design and/or particular site/building standards, but instead, recommend guidelines for developers to follow that would allow the unique character and design of their projects to mold, fit and connect with the other public and private developments in the area, thus ensuring a uniformity of value and development quality throughout the area without the necessity of the sameness of identical design character.

Goals and Objectives of the Land Use Plan

Ultimately, the proposed Land Use Plan for the S.H. 47 corridor intends to provide a land use and design framework for the area so that the following goals can be achieved. Any and all future proposals in the area should be evaluated against these goals and the degree to which the proposal fulfills them:

- Developments should create maximum (highest and best use) land values for the property **and** for the overall study area in order that the long term stability and prosperity of the area can be realized. Short term maximization of property values that do not lead to long term maximizing of overall community and land values in the area are not encouraged.
- Developments which create local employment and jobs are of paramount importance. Proposals which assist in generating employment and businesses that provide well-paying jobs are to be encouraged.
- The design and quality of development proposals should match the aspirational qualities of the design intent, consistency and quality of key developments in the area (Traditions and TAMU Health Science Center) and be consistent with the S.H. 47 Design Guidelines to ensure a long-term, mutually-beneficial gain for all properties in the study area.

Land Use Concept Plan

The proposed Land Use Concept Plan reflects a comprehensive and coordinated land use pattern for development in the study area that encompasses the study goals and objectives. Implementation of the Plan will occur over time, but the principle of creating a balance between the highest and best use of land and the overall design and value of the broader study area must be constantly nurtured and evaluated on a day-to-day, week-to-week basis throughout the process of build out.

The Land Use Concept Plan contains eight (8) land use classifications that are further illustrated on the Land Use Concept Plan Map (next page) and further described in the Land Use Characteristics chart which follows the Map. These land use areas are coordinated in their location, uses, densities and overall design features to create an integrated and flexible framework of potential uses for the community. Key elements of the Land Use Plan include the following:

- The existing Expo Center (designated as a **Civic** land use area) anchors the western entrance to the 'Medical Parkway' district of Bryan which starts at the intersection of S.H. 21 and S.H. 47.
- A **Mixed Use Neighborhood** node serves as the focal point for local retail, services, and office uses for the area at the S.H. 47 and Villa Maria Avenue interchange area. Neighborhood-scale uses are envisioned (i.e. grocery-anchored retail, professional offices, services, etc.). Regional commercial uses (i.e. hotels, office parks, etc.) should be very limited in this area.
- The northern limits of the proposed **Office and Mixed Use Neighborhood areas** along Villa Maria should be the local access roadway, connecting Villa Maria to the Health Science Center site and area. The planned development zoning overlay and proposed development design standards should be utilized to ensure context sensitive designs that preserve natural features and minimize incompatible uses, densities or building forms at the interface of residential and non-residential developments in this area.
- A **High Density Residential** node envisioned for apartment homes and townhouse uses that are designed to compliment the adjacent Traditions community and the proposed Health Science Center. Planned development overlay zoning and development design standards are recommended for development proposals in this land use area.
- Local roadway connectivity across S.H. 47 at the western edge of the HSC site will provide the needed access to a proposed **Research and Flex** land use area located on the south side of S.H. 47.
- A 'Travelers Village' concept of **Mixed Use Regional** uses (hotels, senior/congregate care complex, restaurants, gas/food services, offices, etc.) is planned in the southeastern portion of the study area (S.H. 47 and Melrose Parkway interchange area) to provide a critical mass of activity in this area. Urban densities and forms are recommended to compliment the urban scale and density proposed on the campus of the Health Science Center.
- A **Research/Flex** office/business park is envisioned for the area east of HSC (along either side of Melrose Parkway) to serve as a complimentary land use area to the activities occurring at the Health Science Center and TAMU. The density and scale of development should transition from urban in nature at the S.H. 47/Melrose Parkway intersection area to a less dense, more suburban form in the areas north of Melrose Parkway.
- The TAMU Cemetery and **Civic** land use area serves as the eastern anchor to the Medical Parkway district.

LAND USE LEGEND

- Low Density Residential
- High Density Residential
- Medical / Mixed Use
- Office / Services
- Research/Flex
- Mixed Use Regional
- Mixed Use Neighborhood
- Civic

Scale = N.T.S.

LAND USE NOTES

- 1 Expo Center "anchors" the western entrance to the "Medical Parkway" district of Bryan which starts at the intersection of State Highway 21 and SH 47.
- 2 Mixed Use Neighborhood node serves as the focal point for local retail, services, and office uses for the area. Neighborhood-scale uses are envisioned (i.e. grocery-anchored retail, professional offices, services, etc.). Regional commercial uses (i.e. hotels, office parks, etc.) should be very limited.
- 3 The new, local access roadway, connecting Villa Maria to the Health Science Center site and area, should be recognized as the northern limits of the proposed office and commercial areas along Villa Maria. The planned development zoning overlay and development design standards should be utilized to ensure context sensitive designs that preserve natural features and minimize incompatible uses, densities or building forms at the interface of residential and non-residential areas.
- 4 High density residential node envisioned for apartment homes and townhouse uses that are designed to compliment the adjacent Traditions community and the proposed Health Science Center. Planned development overlay zoning and development design standards are recommended for the area.
- 5 Local roadway connectivity across State Highway 47 at this location provides needed access to this proposed Research/Flex area.
- 6 "Travelers Village" concept of regional uses (hotels, senior/congregate care complex, restaurants, gas/food services, offices, etc.) to provide critical mass of activity in this area. Urban densities and forms are recommended to compliment the scale/density of the Health Science Center.
- 7 A Research/Flex "park" is envisioned for this area to serve as a complimentary land use area to the activities occurring at the Health Science Center and TAMU. The density and scale of development should transition from "urban" in nature at the State Highway 47/Melrose Parkway intersection area to a less dense, more "suburban" form in the areas north of Melrose Parkway.
- 8 The TAMU Cemetery serves as the eastern "anchor" to the "Medical Parkway" district.

MAP LEGEND

- Future Interchange
- Local "Cross Connect" Roadway
- "Parkway" Road Design for SH 47
- Floodprone Areas to be "Amenitized"
- Major Roadways
- Proposed Greenway "Ribbon"
- Bryan City Limits

Land Use Characteristics and Implementation

The Land Use Concept Plan contains a graphic display of the proposed land use categories (Low Density, Medical/Use, Mixed Use Regional, etc.) for the study area. The Land Use Characteristics chart (on the following page) provides a review of the critical features and descriptive elements of each land use category or classification. The purpose of the table is to summarize the specific characteristics (i.e. uses, densities, etc.) associated with each land use category. In addition to this summary table, a detailed discussion of each land use category begins on this page and follows on the pages after the chart.

The following pages act as regulatory and supplemental tools to the previous Land Use Concept Plan, and when taken together, permit a developer or property owner to construct a vision for their property in the context of the overall study area. Items to be used in developing any particular parcel of land include: the Land Use Concept Plan, specific future land uses, prototypical images of the land use/development types, table defining current zoning districts that apply to the new vision, and a guide giving step by step instructions for implementation recommendations. This set of material coupled together with design guidelines, developed following this effort, will ensure a quality development master plan and produce significant economic development revenue for the City of Bryan.

Land Use Designation	Characteristics of Land Use	Applicable Zoning	Implementation Recommendations
Low Density	This land use category is intended for single family detached and attached residential units, with a maximum of 8 units/acre. Multiple family dwellings are discouraged/prohibited.	The following existing City of Bryan Zoning Districts are most applicable; RD-7, RD-5, and PD-H	1. Require all developments to be implemented via the PD-H district requirements (Sec. 130-25). 2. Require all development to comply with the proposed Medical Parkway Design Guidelines.
High Density	This land use category is intended for single family attached and multiple family dwellings with a maximum of 15 units/acre. Non-residential uses (i.e. childcare, laundromats, nursing homes) are discouraged and are more appropriate for the "mixed-use" land use designations within the corridor.	The following existing City of Bryan Zoning Districts are most applicable; MF, PD-H (with uses restricted to residential attached and detached).	1. Require all developments to be implemented via the PD-H district requirements (Sec 130-25). 2. Require all development to comply with the proposed Medical Parkway Design Guidelines.
Medical/Mixed Use	This land use category reflects an existing master plan development for the site. The plan is a campus-oriented development with a mix of uses focused on the medical field which includes office and commercial uses.	The following existing City of Bryan Zoning Districts are most applicable; PD-M (with industrial uses discouraged)	1. Require development to comply with the development standards set forth in the "Campus Master Plan and Design Guidelines" prepared by HSC.
Office/Services	This land use category is intended for primarily low intensity office uses with limited retail and food service as accessory uses.	The following existing City of Bryan Zoning Districts are most applicable; C1 with emphasis on office uses; laboratory and medical. Discourage other types of commercial and residential.	1. Require a planned development approach to zoning (i.e. "development plan" required as indicated in Sec. 130-25). 2. Require all development to comply with the proposed Medical Parkway Design Guidelines.
Research/Flex	This land use category is intended for research and flex uses in an office/business park setting with permitted uses generally limited to those indicated in Appendix B.	The following existing City of Bryan Zoning Districts are most applicable; C1, or new Planned Development - Business Park (PD-BP) Zoning District	1. Create new PD-BP zoning district that incorporates uses indicated in Appendix 2 with the bulk and density standards of the C3 district. 2. Require all development to comply with the proposed Medical Parkway Design Guidelines.
Mixed Use Regional	This land use category contains a mixture of uses with an urban form and density that permits multiple family residential, commercial and office uses. Multiple family residential density is 30 units/acre.	The following existing City of Bryan Zoning Districts are most applicable; PD-M (with uses contained within the MF, C1, C2 and C3 zoning districts). MF and C1 uses encouraged and RD uses discouraged.	1. Require all developments to be implemented via the PD-M district requirements (Sec. 130-25), with restrictions as noted. 2. Require all development to comply with the proposed Medical Parkway Design Guidelines.
Mixed Use Neighborhood	This land use category contains a mixture of uses which are oriented towards a neighborhood scale. Local in nature the uses include retail, services, and office.	The following existing City of Bryan Zoning Districts are most applicable; C1, C2, MF, and PD-M. Regional commercial uses should be limited.	1. Require a planned development approach to zoning (i.e. "development plan" required as indicated in Sec. 130-25). 2. Require all development to comply with the proposed Medical Parkway Design Guidelines.
Civic	This land use category is primarily community-oriented and includes the following uses; educational, governmental, institutional, and religious.	Convert base zones with their applicable conditional and permitted "civic" uses.	1. Require a planned development approach to zoning (i.e. "development plan" required as indicated in Sec. 130-25). 2. Require all development to comply with the proposed Medical Parkway Design Guidelines.

Detailed Descriptions and Characteristics of Land Use Categories

Low Density Residential

The Low Density Residential land use category is intended for traditional, single-family detached residential dwellings in a suburban setting. The purpose of this category is to allow for residential development at the same time as preserving open space. Multiple family dwellings are discouraged/prohibited.

The existing Bryan zoning districts that relate to this land use designation include:

- RD-7000 – Residential
- RD-5000 – Residential
- PD-H – Planned Development – Housing



High Density Residential

The High Density Residential land use category is intended for single family attached and multiple family dwellings with a maximum of 15 units per acre. This includes: traditional houses, garden apartments, townhomes and condominiums. Non-residential uses (i.e. childcare, laundromats, nursing homes) are discouraged and are more appropriate for the mixed-use land use designations within the study area. The land use category is intended to create the opportunity for a variety of lot sizes, housing and ownership options.

The existing Bryan zoning districts that relate to this land use designation include:

- MF – Multiple-family
- PD-H – Planned Development – Housing



Medical / Mixed Use

This land use category reflects an existing master plan development for the site. The plan is a campus-oriented development with a mix of uses focused on the medical field which includes office and commercial uses. Medical facilities that provide patient care and associated services. This includes clinics, nursing care facilities, educational classrooms, out-patient clinics, offices, laboratories, teaching facilities, meeting areas, cafeterias, parking, and maintenance facilities.

The existing Bryan zoning districts that relate to this land use designation include:

- PD-M – Planned Development – Mixed Use (with industrial uses discouraged).



Office/Services

This land use category is intended for primarily low intensity office uses with limited retail and food service as accessory uses. This category encourages office parks, office buildings, corporate headquarters, hotels and ancillary service businesses. Residential and commercial uses are discouraged.

The existing Bryan zoning districts that relate to this land use designation include:

- C1 - Office (with emphasis on laboratory and medical uses).



Research / Flex

This land use category is intended for research and flex uses in an office/business park setting with permitted uses generally limited to those indicated in Appendix A. Principal uses are office parks, free-standing office buildings or corporate headquarters, banks, research and development uses, hotels, and ancillary service businesses and retail uses that support the office economy. The recommendation for this category is to create a new Planned Development District named 'Business Park'.

The existing Bryan zoning districts that relate to this land use designation include:

- C1 - Office
- New, Proposed Planned Business Park zoning district (recommended uses are identified in Appendix A)



Mixed Use Regional

The Mixed Use Regional land use category is intended for developments that are intense mixed use areas that create live, work, play opportunities. The category is envisioned to be pedestrian-friendly and generally located at the intersection of larger arterial streets. Intensity is typically concentrated towards the center of the development. This land use category contains a mixture of uses with an urban form and density that permits multiple family residential, commercial and office uses. Multiple family residential density is 30 units/acre.

The existing Bryan zoning districts that relate to this land use designation include:

- PD-M – Planned Development – Mixed Use (with uses generally limited to those permitted in the MF, C1, C2 and C3 zoning districts)
- PD-H – Planned Development – Housing



Mixed Use Neighborhood

This land use category contains a mixture of uses which are oriented towards a neighborhood scale. Local in nature the uses include retail, services, and office. This category applies to small-scale neighborhood shopping centers and small pedestrian-oriented retail districts. The Mixed Use Neighborhood category caters to pedestrian-scaled, walkable community services as well as community facilities, schools, parks, and churches. The category intends to serve the surrounding neighborhoods where the center's intensification is supported by existing or planned residential development, adequate infrastructure and adequate access.



The existing Bryan zoning districts that relate to this land use designation include:

- C1 - Office
- C2 - Retail
- MF – Multiple-family
- PD-M – Planned Development – Mixed Use (using the C1 and C2 zoning district's permitted uses)

Civic

This land use category is primarily community-oriented and includes the following uses; educational, governmental, institutional, and religious. These uses are generally located in areas that are convenient and accessible to all residents while providing buffering where appropriate.

Since most of the existing (or proposed) civic land use areas are currently zoned for these uses (or have existing conditional use permits associated with them), no base zoning district recommendations are needed.



V. Proposed Design Concept Plan

Introduction

The preceding Land Use Concept Plan, and its corresponding detailed characteristics, provides the land use patterns, use and density regulations for future developments in the study area, but the overall Plan for the S.H. 47 corridor must go beyond these use and intensity regulations. The design quality and levels achieved at the Traditions development and planned at the Health Science Center project represent a strong foundation for future design efforts in the overall study area. It is in the best interest of the City and the area property owners that the land use regulations promoted by this Plan be accompanied by a set of design guidelines that will apply to all developments in the area.

To this end, the proposed Design Concept Plan contains three important elements that will serve as guiding tools for developers and the City in the implementation of the precepts of this Plan. First, the overall Design Concept Plan (see next page) provides an examination of key public realm design elements that should be promoted and implemented during the planning, design and construction of public infrastructure throughout the study area. Second, several images of how these public realm design elements could be interpreted and designed are included as examples of the type and level of design quality that should be planned and constructed for the public elements throughout the study area. Third, the final tool in ensuring quality development in the area is the development and implementation of overall corridor design guidelines that apply to all public and private developments in the study area. Although the city's current regulations include design standards for this area, these regulations are insufficient to fully promote, aspire and ensure quality developments and building/site designs that are warranted in the study area.

Design Concept Plan

The Design Concept Plan illustration (on the next page) identifies the potential design features and concepts associated with the future public elements within the study area. Key concepts and features associated with the Design Concept Plan include the following:

- Enhance the planning, design and construction of S.H. 47 to develop a parkway interstate section at ultimate build-out. This parkway section should retain the mature vegetation within the existing and future median and introduce additional landscape elements to create a design feature for the area.
- Create a gateway design and landscape/streetscape hierarchy that provides a sense of arrival at key interchange and cross-connection areas and transitions these areas from a parkway interstate environment into various urban and suburban development forms and scales.
- Enhance the public realm design character of the area by improving the design features of existing streetscapes and requiring new local roadways to be constructed with cohesive design elements that visually link the study area's developments.
- Preserve and enhance the existing natural environment to provide an amenity for the sites.
- Create a greenway network that provides a continuous trail system and connects the study area to the City and the broader Brazos River corridor. Greenways should be integrated into overall site development designs, thus providing an additional layer of connective design features within the study area.

LAND USE LEGEND

- Low Density Residential
- High Density Residential
- Medical / Mixed Use
- Office / Services
- Research/Flex
- Mixed Use Regional
- Mixed Use Neighborhood
- Civic

Scale = N.T.S.

Major Design Elements

- 1 Enhance the planning, design and construction of SH 47 to develop a "parkway" interstate section at ultimate build-out. This parkway section should retain the mature vegetation and introduce additional landscape elements to create a design feature for the area.
- 2 Create a Gateway design and hierarchy that provides a sense of arrival and transitions these areas from a parkway interstate environment into various urban and suburban development forms and scales.
- 3 Enhance the "public realm" design character of the area by improving the design features of existing streetscapes and requiring new local roadways to be constructed with cohesive design elements that visually link the study area's developments.
- 4 Preserve and enhance the existing natural environment to provide an amenity for the sites.
- 5 Create a greenway "ribbon" that provides a continuous trail network and connects the study area to the City and the broader Brazos River corridor. Greenways should be integrated into overall site development designs, thus providing an additional layer of connective design features within the study area.

MAP LEGEND

- Future Interchange
- Local "Cross Connect" Roadway
- "Parkway" Road Design for SH 47
- Floodprone Areas to be "Amenitized"
- Major Roadways
- Proposed Greenway "Ribbon"
- Bryan City Limits

Examples of Prototype Design Elements for Public Infrastructure

Depicted on this page are examples of existing public realm areas and developments that exhibit the level and quality of design features and intentions that should be planned and constructed for the public elements in the study area. While these examples are not intended to be the exact designs or features to be used in the S.H. 47 corridor study area, they do represent prototypes that could serve as strong models for design consideration.



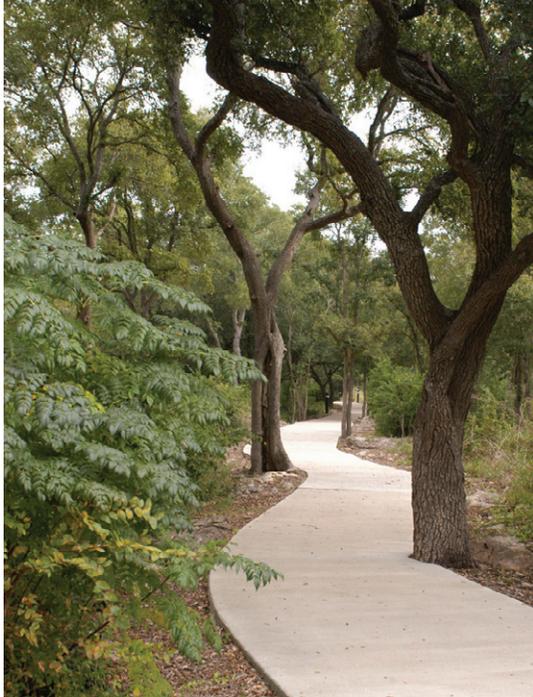
Example of design intent of roadways/parkways



Example of local roadway cross section



Example of enhancing natural environment



Example of design intent of trail network



Example of design intent of gateway features



Example of public realm improvements (mixed use)

Design Guidelines

Design Guidelines set forth a consistent standard of quality throughout an area. They establish a set of criteria for the physical and visual form of a single development or an entire community. The guidelines provide a framework that encourages creativity and diversity within a consistent palette that ensures the overall integrity and quality of design. Design Guidelines are intended to provide design professionals, property owners, residents, staff, and decision-makers with a clear and common understanding of the City's expectations for the planning, design, and review of development proposals in an area. The design guidelines will serve to supplement the minimum development standards in the City's zoning districts and are recommended as a replacement of the current S.H. 47 Corridor Design Standards by the City of Bryan.

This Study recommends that a set of design guidelines be prepared for the study area. The Study also proposes that the design guidelines be created for an overlay and deemed the 'Medical Parkway Corridor Design Guidelines'. If developed and implemented the guidelines will help to ensure that the study area will develop its highest and best use; establish an area to live, work and play; and be visually appealing.

The following design guideline tables were developed to provide the City of Bryan with an example of the recommended type and style of guidelines. The tables were broken into two different types; Public Sector and Private Sector.

PUBLIC SECTOR		
Access	Primary Roads	
	Arterial Roads	
	Collector Roads	
Block Length		
Building Placement	Setback	
	Lot Coverage	
Connectivity (Pedestrian/Bicycle)	Street	
	Trailhead	
	Greenway Ribbon	
Density/Intensity		
Landscaping	Primary Roads	
	Arterial Roads	
	Collector Roads	
Lighting	Street	
	Pedestrian	
	Bicycle	
Parking		
Service Area		
Signage	Gateway	
	Street	
	Pedestrian/Bicycle	

PRIVATE SECTOR		
Parking	On Street	
	Structured (Garage)	
	Structured Parking Landscape	
	Surface Parking	
	Surface Parking Landscape	
Screening	Ground Mounted Utility Units	
	Roof Mounted Utility Units	
	Trash Enclosures	
	Garbage Collection Location	
Landscape Requirements	General Landscape Requirements	
	Street Trees	
	Irrigation Systems	
Lighting	Street Lights	
	Parking Lights	
	Architectural Accent Lighting	
	Pathway Lighting	
Furniture	Dog Waste Stations	
	Trash Receptacles	
	Benches and Formal Seating	
Paving	Crosswalks	
	Sidewalk Paving	
	Parkways	
	Trails	
	Trailheads	
Architectural Form	Roof	
	Fence	
	Colors	
	Building Articulation	
Materials	Façade	
	Masonry Materials	
	Roof	
	Prohibited Materials	
	Windows	
	Awnings	
	Colors	
Gutters and Downspouts		
Signage		
Service Areas		

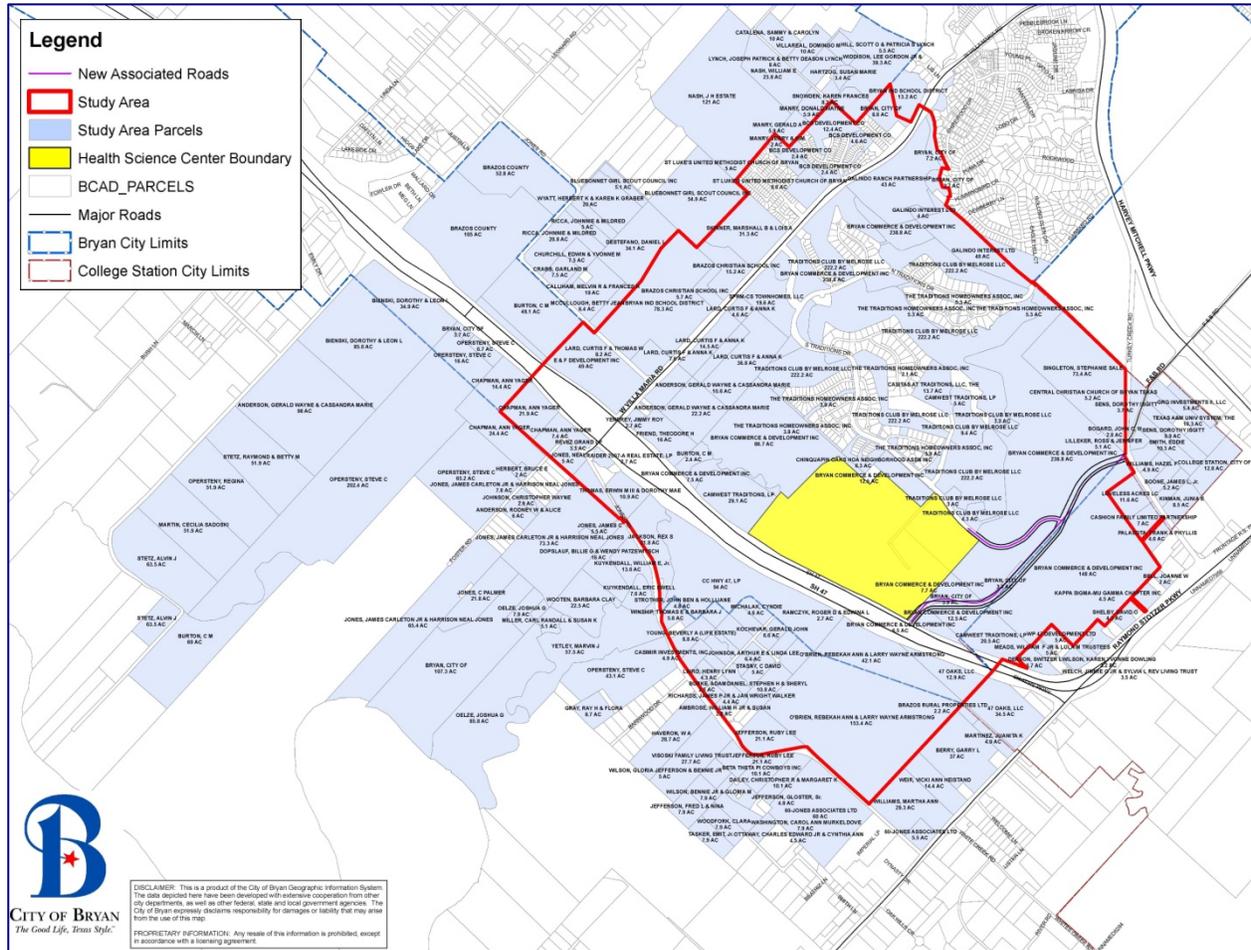
Appendix A - Recommended Uses for the Research/Flex Land Use Category

Office---Showroom/warehouse;
 Overnight delivery company;
 Business or trade school;
 Fitness center;
 Parking lots or garages, commercial;
 Reception Hall;
 Accessory or incidental uses to the main use (snack or food bars, automatic teller machines, etc.);
 Accessory structure (refer to section 130-34(a));
 Banks, savings and loans or credit union offices;
 Charitable uses
 Child care--Class B;
 Child care--Class C;
 Essential municipal uses;
 Recreational/community center;
 Fraternal/service organization;
 General office use (professional, administrative);
 Government (federal or state) owned structures, facilities, or uses;
 Hospital;
 Kiosk;
 Laboratory (scientific, research, medical, optical);
 Medical facilities or clinics;
 Museum/art gallery;
 Personal service shop or custom personal services;
 Pharmacies;
 Photography studio;
 Place of worship;
 Police station;
 Private utility office (no repair or outside storage);
 Radio or television broadcasting studio (without tower);
 Nursing home (retirement home);
 Schools;
 Temporary structures for uses incidental to construction work on the premises (to be removed at abandonment of construction work);
 Veterinary services (no outdoor pens or runs).
 Essential municipal/federal/state owned structures, facilities, and uses;
 Printing company;
 Recreational/community center;
 Restaurant

Appendix B - Market Study and Assessment

Southwest Bryan Market Assessment

Bryan, Texas



Prepared for:
The City of Bryan
 300 S. Texas Ave.
 Bryan, Texas 77803



January, 2009

Table of Contents

Table of Contents	i
Table of Exhibits	iii
Executive Summary	4
Demographic/Economic Trends	3
Population/Households.....	3
Employment/Occupation	5
Wage Levels and Household Income	7
Study Area Land Uses	9
Existing Land Uses	9
<i>Traditions Club</i>	9
<i>Other Single Family Residential</i>	9
Planned Future Land Uses.....	10
<i>Texas A&M University Health Science Center</i>	10
Market Assessment – Single Family Residential	11
Existing Conditions	11
<i>Existing Property Performance</i>	12
<i>Major Issues Affecting Development Opportunities</i>	13
Projected Trends and Demand.....	13
Market Assessment – Senior Residential Housing	14
Existing Conditions	14
<i>Major Issues Affecting Development Opportunities</i>	15
Projected Trends and Demand.....	16
Market Assessment – Multifamily Residential	17
Existing Conditions	17
<i>Major Issues Affecting Development Opportunities</i>	18
Projected Trends and Demand.....	18
Market Assessment – Commercial / Office - Flex	19
Existing Conditions	19
<i>Major Issues Affecting Development Opportunities</i>	19
Opportunities in the Southwest Bryan Market	20
Projected Trends and Demand.....	20
Market Analysis – Commercial / Retail	21

Existing Conditions	21
<i>Major Issues Affecting Development Opportunities</i>	22
Projected Trends and Demand.....	22
Market Analysis – Commercial / Hospitality	23
Existing Conditions	23
<i>Major Issues Affecting Development Opportunities</i>	25
Opportunities in the Southwest Bryan Market	25
Projected Trends and Demand.....	26
Additional Strategic Development Concerns, Opportunities, and Recommendations	28
SW Bryan Accessibility.....	28
Gameday Condos	28
Brazos County Exposition Complex.....	28
Nearby New Developments	29
Appendix	31
Health Science Center Case Studies	32
<i>Texas Tech- Lubbock</i>	32
<i>West Virginia University- Morgantown</i>	33
<i>University of Oklahoma- Norman</i>	33
<i>University of Georgia-Athens</i>	33
<i>University of Florida-Gainesville</i>	33
<i>University of Illinois- Champaign</i>	33

Table of Exhibits

Summary of Estimated Market Supportable Future Land Uses.....	4
Bryan/College Station Demographic Trends – Population Growth	3
Market Area Map	3
Bryan/College Station Demographic Trends – Population by Age.....	4
Bryan/College Station Household Trends – Households by Type.....	4
Bryan/College Station Demographic Trends – Education	5
Bryan/College Station and Brazos County – Occupation by Type	6
Brazos County – Occupation by Class	6
Bryan and College Station – Historical Employment.....	6
Bryan/College Station – Historical Employment by Industry	7
Bryan/College Station Income	7
Bryan/College Station Income Distribution.....	8
Bryan and College Station – 2008 Income by City.....	8
Bryan/College Station Household Trends – Housing Units	11
Bryan/College Station Home Sales by Price Range	12
Bryan/College Station Home Sales Volume.....	12
Bryan/College Station Historical Multifamily Permits	17
Bryan/College Station 2007 Multifamily Statistics	17
Bryan/College Station Hotel Room Count	23
Bryan/College Station Hotel Revenues.....	24
Hilton Hotel Revenues (Room and Meeting Space).....	25
Data on Other HSC Facilities	32

Executive Summary

The amount of undeveloped and unplanned land contained within the SW Bryan Study Area, combined with the existing and planned land uses such as Traditions and the Texas A&M Health Science Center (HSC), creates possibilities for a variety of potential compatible future uses. CDS | Spillette conducted research and analysis to arrive at market-based projections for supportable land uses in the SW Bryan Study Area. These projections are illustrated in units and square footages in the table below. Some explanatory notes for different land uses follow the table.

Summary of Estimated Market Supportable Future Land Uses

Land Use Category	Period in Years				Total
	0 to 5	5 to 10	10 to 15	15 +	
Single Family Housing (units)					
Under \$150,000	135	100	20	0	255
\$150,000 - \$249,999	20	75	150	150	395
\$250,000 and above	120	120	75	100	415
Senior Housing (projects)					
Active adult / independent living	25				25
Congregate living		250			250
Assisted living / skilled care			75		75
Multifamily Housing (units)	0	100	125	300	525
Commercial – Office / Flex (sq.ft.)	25,000	150,000	150,000	250,000	575,000
Commercial – Retail (sq.ft.)	1,500	85,000	25,000	40,000	151,500
Commercial – Lodging (rooms)	100	420	0	0	520

Source: CDS | Spillette

- Single family housing projections for the \$150,000 to \$250,000 price range account for expected improvement in the public perception of Jane Long Middle School and demand from middle income retirees / empty nesters. It may include both standard detached homes and denser product such as patio homes or townhomes.
- Single family housing under \$150,000 is expected to taper off after 10 years due to land price increases created by development of other products in the SW Bryan Study Area.
- The senior living components will likely be grouped together on a single campus.
- Actual unit count and specific housing product of each senior living component not estimated.
- Multifamily housing built between 5 and 15 years out is projected to be oriented to HSC students/employees and may be located on HSC property; more typical apartment complex (not collegiate campus apartments) is anticipated in the period beyond 15 years.

- Office / Flex projections assume (1) property owners at north corner of Villa Maria and SH 47 proceed with owner-occupied office space and (2) office park with gradual market-based buildout locates in Study Area. Retail projections assume grocery-anchored neighborhood center in 5 to 10 years, followed by additional neighborhood retail in later periods.
- Lodging projection for 5 to 10 years assumes (1) Melrose proceeds with 120-room lodge at Traditions Country Club and (2) Study Area is first to market with new full-service, mid-priced hotel with meeting facilities.

Demographic/Economic Trends

The economic and demographic trends affecting Bryan/College Station play a core role in the assessment of market demand for various land uses in the Southwest (SW) Bryan area. The economic climate impacts the income of area residents and the nature of demand for many commercial and residential land uses. Demographic and employment trends shape the type and makeup of the City’s population, determining demand for housing and retail uses.

Population/Households

The most basic measurements of Bryan/College Station (B/CS) demographic characteristics are its population and household levels. Changes in population, coupled with trends in household size, determine the number of households, which translates into the demand for housing. The following tables present historical and projected future population and household data for the SW Bryan Market Area, Bryan/ College Station, as well as Brazos and Burleson Counties.

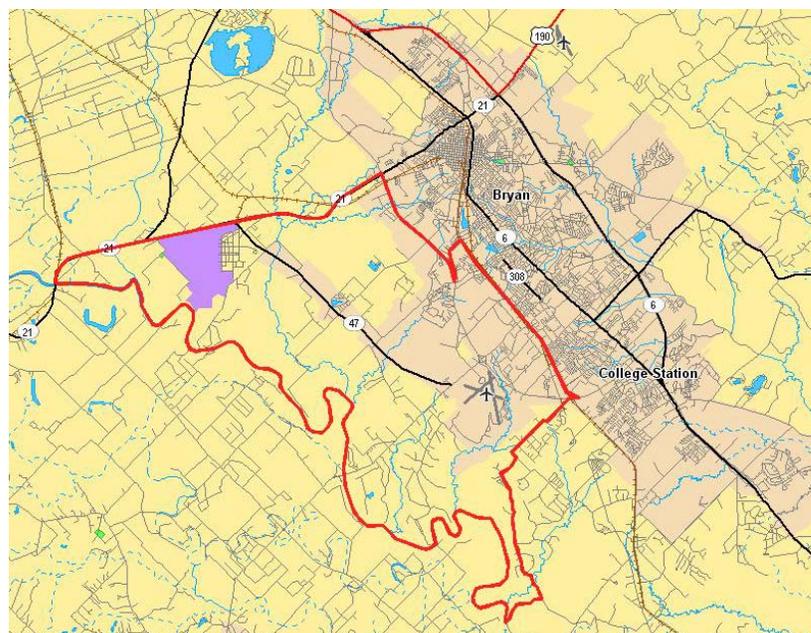
Bryan/College Station Demographic Trends – Population Growth

	Market Area	Bryan/College Station	Brazos/Burleson Counties
2013 Projection	15,176	147,842	188,053
2008 Estimate	13,860	141,143	179,187
2000 Census	12,230	133,550	168,885
1990 Census	8,066	109,077	135,487
Growth 2008-2013	9.5%	4.7%	4.9%
Growth 2000-2008	13.3%	5.7%	6.1%
Growth 1990-2000	51.6%	22.4%	24.7%

Source: Claritas and PCensus for MapInfo

The market area has been defined by a group of census block groups located in relevant proximity to the SW Bryan Study Area and is illustrated in the following exhibit. Population growth in this area has outpaced both B/CS and in Brazos and Burleson Counties combined during all periods since 1990. However, the overall number of population in the market area is still modest in comparison to the larger areas.

Market Area Map



Source: CDS | Spillette

According to data from Claritas, the age groups with greatest growth are under age four and over age 55. Conversely the age group from 18 to 24 has declined in size over the period from 2000 to 2008. The total population has seen an estimated 5.7% growth over this same timeframe, and the median age is increasing.

The following table, illustrating households by type, shows that the largest portion of households in the B/CS area in 2008 is made up of married couples, with a 39% share. According to estimates

from Claritas, average household size decreased slightly from 2000 to 2008. Largest growth categories include one person and married with children households. The proportion of nonfamily households has been decreasing; however, since such households include students with roommates, they still make up a significant share of the total market.

Bryan/College Station Demographic Trends – Population by Age

Age Distribution	2000 Census		2008 Estimate		Change 2000 - 2008	
	Count	Share	Count	Share	Count	% Change
0 to 4	8,278	6.2%	10,212	7.2%	1,934	23.4%
5 to 17	19,242	14.5%	21,225	15.1%	1,983	10.3%
18 to 24	46,655	34.9%	43,229	30.6%	-3,426	-7.3%
25 to 54	44,468	33.3%	48,049	34.1%	3,581	8.1%
55 to 64	6,327	4.7%	8,221	5.8%	1,894	29.9%
65 and over	8,580	6.4%	10,207	7.2%	1,627	19.0%
Total Population	133,550	100.0%	141,143	100.0%	8,363	5.7%
Estimated Median Age	23.5		24.2		0.6	2.6%
Estimated Average Age	29.5		30.3		0.8	2.7%

Source: Claritas and PCensus for MapInfo

Bryan/College Station Household Trends – Households by Type

Household Type and Presence of Children	2000 Census		2008 Estimate		Change 2000 -2008	
	Count	Shares	Count	Share	Count	% Change
1 Person Household						
Total 1 Person Households	12,881	26.6%	14,794	28.1%	1,913	14.9%
Family Households						
<i>Married-couple family:</i>	18,464	38.1%	20,542	39.0%	2,078	11.3%
With own children under 18	9,179	18.9%	10,461	19.9%	1,282	14.0%
No children under 18	9,285	19.2%	10,081	19.2%	796	8.6%
Nonfamily households						
Total Nonfamily Households	10,324	21.3%	10,384	19.7%	60	0.6%
Average Household Size	2.5		2.4		-0.1	-2.0%
Total Households	48,450		52,609		4,159	8.6%

Source: Claritas and PCensus for MapInfo

The B/CS population is highly educated relative to similar sized cities in the region as illustrated by educational attainment levels. This is obviously largely due to the presence of Texas A&M University. The majority of the student body is not represented in the table below because educational stats take into account only those above age 25. This age threshold is set in attempt to represent a sample which has completed their academic educating career. The large portion of the population that has a bachelor's degree or above can be explained by having the typical amount of educated professionals in the community plus university and associated staff and faculty. The population with postgraduate degrees is estimated to have been growing particularly rapidly.

Bryan/College Station Demographic Trends – Education

Educational Attainment Age 25 and Over

Education Level	2000 Census		2008 Estimate		Change 2000 - 2008	
	Count	Shares	Count	Shares	Count	% Change
Less than 9th grade	4,905	8.3%	5,013	7.5%	108	2.2%
Some High School, no diploma	6,309	10.6%	6,490	9.8%	181	2.9%
High School Graduate (or GED)	11,226	18.9%	11,897	17.9%	671	6.0%
Some College, no degree	11,436	19.3%	13,080	19.7%	1,644	14.4%
Associate Degree	2,541	4.3%	2,996	4.5%	455	17.9%
Bachelor's Degree	12,013	20.2%	14,465	21.8%	2,452	20.4%
Postgraduate Degree	10,876	18.3%	12,536	18.9%	1,660	50.5%
Total	59,306	100.0%	66,477	100.0%	7,171	12.1%

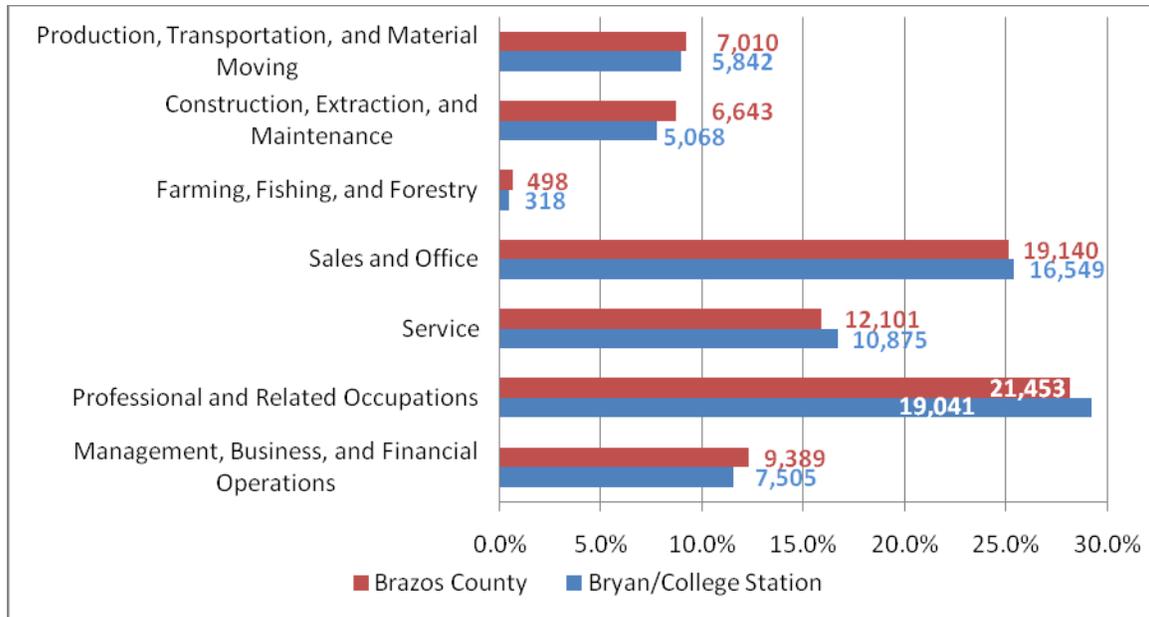
Source: Claritas and PCensus for MapInfo

Employment/Occupation

The largest two types of employment in the B/CS area are the Professional and Related Occupations and Sales and Office categories. These two categories represent a total of 53.2% of the entire workforce in Brazos County. The following chart, employment by type, presents a comparison of employment in Brazos County and B/CS by illustrating the percentage share of total employment in seven categories for the county and the cities. For example, 29.2% of total B/CS employment is comprised of Professional and Related Occupations employees, which is a larger portion of its total than in Brazos County, where 28.1% of the total employees work in the Professional and Related Occupations category. Numerical counts are included as a reference point in order to show the magnitude of actual counts rather than percent share only.

Total nonfarm employment in the B/CS area has increased at gradual pace over the past five years. The most recent available data from the Texas Workforce Commission sites 93,100 jobs in B/CS, up from 88,200 in 2003. Total employment growth of 4,900 jobs was steadily achieved, without any major shifts occurring over the period as a whole. The majority of employees in Brazos County (65.1%) are considered white collar, as demonstrated in the following pie chart. The remainder of Brazos County workforce composition includes 17.0% service and farm, and 17.9% blue collar employees.

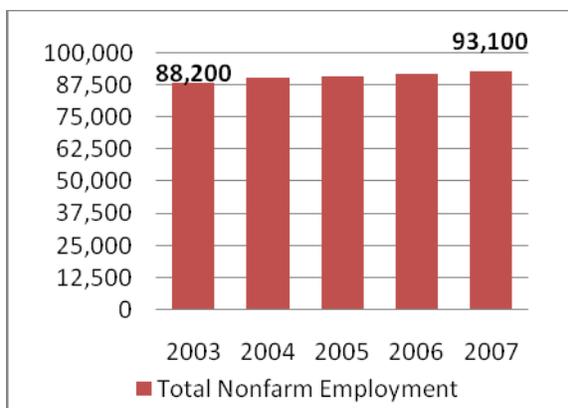
Bryan/College Station and Brazos County – Occupation by Type



Source: Claritas and PCensus for MapInfo

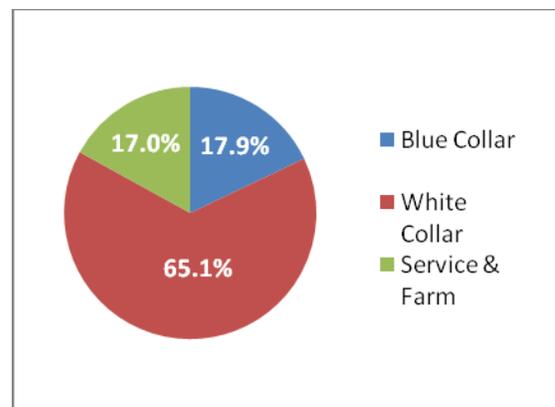
Future growth of employment, as mentioned before, is the key underlying driver for nearly all segments of the real estate market. In addition to total employment and employment by type of position, employment figures are also available by industry from the Texas Workforce Commission. The industry in B/CS with the largest total growth over the five year period from 2003 to 2007 is the Private Service Providing industry. This industry has the second largest amount of jobs in B/CS as of the 2007 count. In

Bryan and College Station – Historical Employment



Source: Texas Workforce Commission

Brazos County – Occupation by Class



Source: Claritas and PCensus for MapInfo

terms of percentage change from the previous period. Natural Resources, Mining and Construction had the largest change over this period with 23.2% positive growth over the 2003 figure. Those industries losing jobs over the past five year period include Financial Activities with a loss of 300 jobs and Government with a decline of 700 job positions.

Bryan/College Station – Historical Employment by Industry

	Period		2003-2007 Change	
	2003	2007	Count	% Change
Service Providing	76,600	80,000	3,400	4.4%
Private Service Providing	42,100	46,200	4,100	9.7%
Trade, Transportation, and Utilities	12,200	13,800	1,600	13.1%
Goods Producing	11,600	13,100	1,500	12.9%
Government	34,500	33,800	-700	-2.0%
Retail Trade	9,700	10,700	1,000	10.3%
Leisure and Hospitality	8,800	9,800	1,000	11.4%
Educational and Health Services	8,800	9,700	900	10.2%
Natural Resources, Mining and Construction	5,600	6,900	1,300	23.2%
Manufacturing	6,000	6,200	200	3.3%
Professional and Business Services	4,900	5,600	700	14.3%
Financial Activities	3,600	3,300	-300	-8.3%
Other Services	2,700	2,900	200	7.4%
Wholesale Trade	1,500	1,800	300	20.0%
Transportation, Warehousing, and Utilities	1,000	1,300	300	30.0%
Information	1,100	1,100	0	0.0%
Total Nonfarm	88,200	93,100	4,900	5.6%
Total Private	53,700	59,300	5,600	10.4%

Source: Texas Workforce Commission

Wage Levels and Household Income

Household incomes have generally been rising in B/CS. The following table illustrates the overall trends for household income in B/CS. All categories of measure show significant increase in the period from 2000 to 2008. The median income has risen 23.0%, the average income 26.7% and the income per capita has enjoyed a 28.3% growth. One factor which must be accounted for when analyzing these figures is the inclusion of several thousand college students who report little to no income, therefore weighing the figures down significantly. Without much more detailed information the exact effect the collegiate population has on these figures is difficult to determine. Distribution by cohort for household incomes in B/CS is illustrated below.

Bryan/College Station Income

Median, Average, and Per Capita Income

Income	Census	Estimated	Change	% Change
Measure	2000	2008	2000 - 2008	2000 - 2008
Median Household	\$27,016	\$33,222	\$6,206	23.0%
Average Household	\$41,057	\$52,001	\$10,944	26.7%
Per Capita	\$15,514	\$19,899	\$4,385	28.3%

Source: Claritas and PCensus for MapInfo

Bryan/College Station Income Distribution

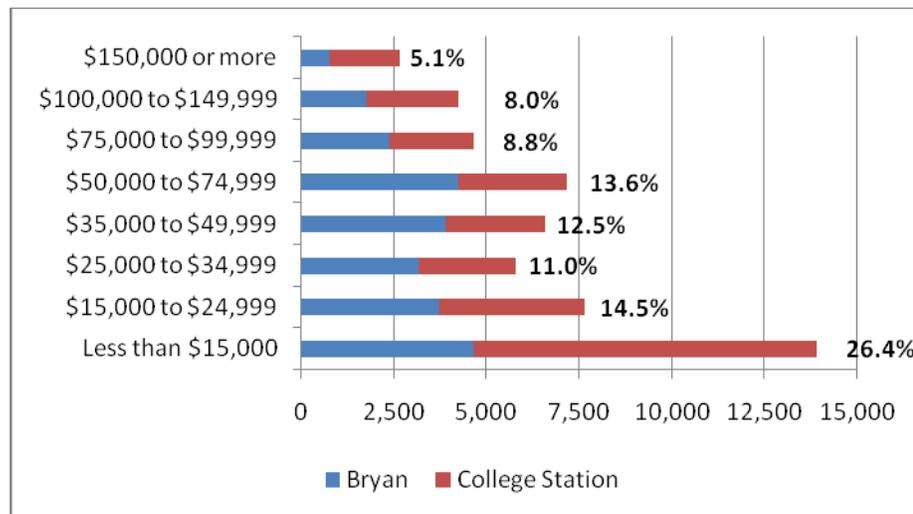
Income Cohort	Census		Estimated		Change	% Change
	2000		2008		2000 - 2008	2000 - 2008
	Count	Share	Count	Share		
Less than \$15,000	15,385	31.8%	13,903	26.4%	-1,482	-9.6%
\$15,000 to \$24,999	7,735	16.0%	7,647	14.5%	-88	-1.1%
\$25,000 to \$34,999	5,491	11.3%	5,783	11.0%	292	5.3%
\$35,000 to \$49,999	6,136	12.7%	6,573	12.5%	437	7.1%
\$50,000 to \$74,999	6,565	13.5%	7,177	13.6%	612	9.3%
\$75,000 to \$99,999	3,430	7.1%	4,634	8.8%	1,204	35.1%
\$100,000 to \$149,999	2,261	4.7%	4,234	8.0%	1,973	87.3%
\$150,000 or more	1,451	3.0%	2,658	5.1%	1,207	83.2%
Total households	48,454	100.0%	52,609	100.0%	4,155	8.6%

Source: Claritas and PCensus for MapInfo

Over the period illustrated from 2000 to 2008 all segments of income above \$25,000 have increased. The largest of these increases is in the categories of household incomes over \$100,000. While these groups together account for only 13.1% of the total households in 2008 the growth in these categories, coupled with the decline in the figures below \$25,000, this has a major impact on the overall figures for the area.

The adjacent graphic presents figures which show the breakout of income groups for both the City of Bryan, and College Station in conjunction and separately as well. The percentage figures located at the end of each set of

Bryan and College Station – 2008 Income by City



Source: Claritas and PCensus for MapInfo

bars represents the percent that income segment makes up of the B/CS area households. While College Station has a larger share of the higher income segments than Bryan does, they also have the majority of the households in the less than \$15,000 range due once again to the collegiate population.

Study Area Land Uses

A wide variety of land uses currently exist or are in process of fruition for the SW Bryan Study Area. The following section will further explore current land uses and known future planned uses for land within the Study Area.

Existing Land Uses

Current land uses within the SW Bryan Study Area include single family housing, recreational, office, industrial, and unimproved land. Single family housing accounts for the largest share of developed land within the Study Area. Current single family land uses include subdivisions and single family acreage tracts in a wide gamut of prices.

Traditions Club

Although there are multiple subdivisions in the Study Area, the Traditions Club has had an effect on the area that is unique in its own and can be considered as a catalyst to further development. The developers of the Traditions Club, The Melrose Company, created an upscale single family golf course development which has been strategically integrated into the natural landscape. This development was created through a partnership created with the City of Bryan to transfer the assembled land to The Melrose Company.

Custom homes, which are being built on for sale lots in the Traditions Club, range in value from \$500,000 to \$4 million, with lots in the \$95,000 to \$160,000 price range. The signature Jack Nicholas golf course is the focal point of the development, and offers a variety of views and open space amenities to the development. It has also become home to the Texas A&M University men's and women's golf teams through a partnership with the university. The successful partnership with and branding rights of Texas A&M University have been a crucial element of the success of the Traditions Club. With approximately 70% of its residents being former students of the university, it has become known as a premier place to retire in the B/CS area. Members of the Melrose Company, including President John Jordan, report good progress and success of lot sales, as well as citing a pent up demand for future lots within the development.

Future plans of the development include several pieces of adjoining land which is controlled by either The Melrose Company or their partnership with the City of Bryan. While development concepts for some of the available land have been determined, The Melrose Company is awaiting planning results from the City of Bryan prior to finalizing further land use decisions.

Other Single Family Residential

Other single family developments in the area include the subdivisions of Autumn Lakes, Oak Meadow and Dominion Hill, as well as numerous rural home sites including a variety of housing products. Most of these homes are in the first-time home and first move up category of homes. Prices in these subdivisions range from around \$130,000 to \$180,000.

According to Dan Jones of Stylecraft Builders, sales pace in the Autumn Lakes subdivision has been greater than originally expected, with all available lots sold already. There is land available in Autumn Lakes and current are plans to produce more lots in the subdivision. According to the Master Plan there will be a total of 123 lots in the subdivision when it is completed.

Planned Future Land Uses

Within the SW Bryan Study Area there is a large amount of raw undeveloped land. While there are several landowners with initial market impressions, or rudimentary thoughts on what they would like there site to become, the majority of the holders of raw land are waiting for the right catalyst to come to the area. There are multiple opinions on what the necessary catalyst may be, but most land owners were in agreement that the Texas A&M University Health Science Center has the potential to transform the entire area.

Texas A&M University Health Science Center

The Texas A&M University Health Science Center (HSC) is a master planned medical educational facility to be located along the State Highway 47 (SH 47) corridor within the bounds of the SW Bryan Study Area.

The HCS development plan includes four phases of physical development over time. Reports and documentation from representatives of the HSC cite beginning construction of phase one in October of 2009. The Campus Master Plan document calls for nearly 400,000 SF of construction in phase one. When complete the campus is to include over 4.1 million SF of total construction. This space will be allocated between 2.4 million SF of educational and research facilities, .3 million SF of affiliated partner research facilities and 1.5 million SF including a hospital complex and associated health partners. While many components are scheduled to come online within the next few years, full build out of these facilities, as stated in the Campus Mast Plan document, could take over 20 years.

The HSC is sure to have an impact on the SH 47 corridor. The announcement of the HSC and initial development is raising the awareness and expectations of the Study Area in the B/CS market. However, despite this positive effect, the majority of catalytic effects will not likely occur in the immediate future. The likely case includes a progressive impact, with continuing growth and effect contingent upon further completion of expected facilities laid out in the Campus Master Plan.

Market Assessment – Single Family Residential

In assessing the residential market in the SW Bryan Study Area and B/CS as a whole the CDS | Spillette team toured these areas in order to get a better understanding of the housing in the area. During the tours, the team visited multiple areas of town, including new subdivisions, and observed the type and condition of housing stock and the overall arrangement of housing with respect to the layout of the city. This field research complemented data from external sources and interviews both in person and by phone with other local real estate experts.

Existing Conditions

The B/CS housing market can be characterized as a market with a much larger amount of rental products than most. This is due to the amount of turnover in population of the community generated by the university. With the high concentration of students in the B/CS market, the nearly 60 percent renter share of housing units is not surprising. The other figure that can be expected in a market with a large portion of college students is a high share of multifamily units, which is also illustrated in the adjacent table.

Relative age of the housing stock in B/CS is fairly new, with an estimated 35.9% being constructed since 1990. This 66.1% change over the period from 2000 to 2008 shows the abundance of recent construction activity in this market. At the same time the decline of 4.6% of housing stock older than 1970, and 3.1% in homes built from 1970 to 1990,

illustrates the elimination of some older structures from the housing inventory. The recent addition of new construction in the market has increased the count of owner occupied units in the B/CS area by 14.6% in the illustrated period.

Single family properties within the SW Bryan Study Area somewhat follow the trend illustrated for the B/CS area. While the vast majority of the housing in this area is fairly new and would fall into the 1990

Bryan/College Station Household Trends – Housing Units

Housing Unit Characteristics

Total Housing Units	2000 Census		2008 Estimate		Change 2000 - 2008	
	Count	Shares	Count	Shares	Count	% Change
Occupied						
Renter occupied	28,839	59.5%	30,125	57.3%	1,286	4.5%
Owner occupied	19,611	40.5%	22,484	42.7%	2,873	14.6%
Units in Structure						
1, detached	2,248	4.3%	2,571	4.4%	323	14.4%
1, attached	22,967	44.3%	27,035	46.0%	4,068	17.7%
2 units	3,367	6.5%	3,714	6.3%	347	10.3%
3 or more units	19,931	38.5%	21,729	36.9%	1,798	9.0%
Mobile home/other	14,199	27.4%	15,613	26.5%	1,414	14.9%
Year Structure Built						
Built 1990 or Newer	12,719	24.6%	21,121	35.9%	8,402	66.1%
Built 1970 to 1990	1,496	2.9%	10,317	17.5%	8,821	-3.1%
Built 1969 or earlier	6,185	11.9%	5,962	10.1%	-223	-4.6%
Total Housing Units	51,788	100%	58,813	100%	7,025	13.6%

Source: Claritas and PCensus for MapInfo

or newer category, there is very little rental property in the Study Area. According to multiple local realtors, factors affecting this include the price point of some products offered (mainly Traditions Club) and the location relative to the University.

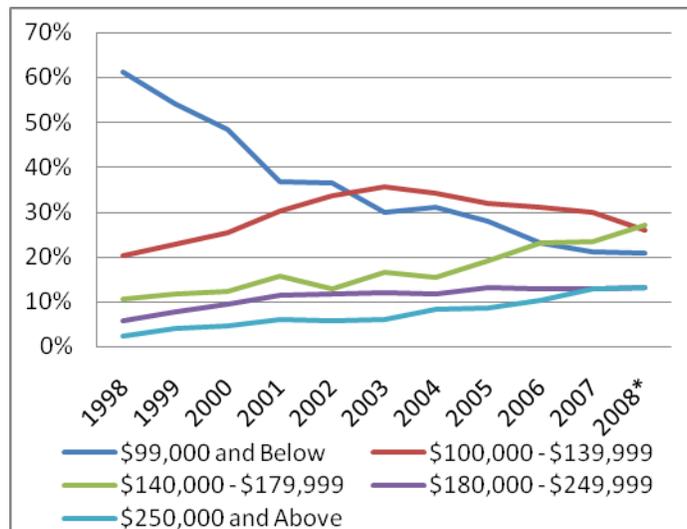
While the majority of the single family housing in the Study Area consists of recent subdivision construction there are other properties which are on large lots or acreage that are located within the Study Area as well. These properties are located mainly in the west and southwest portions of the Study Area.

Existing Property Performance

The percent distribution of homes sold through the MLS in B/CS has encountered a significant change in course over the past 10 year period illustrated in the chart below. Since 1998 the market segment including homes in the \$99,000 and below range has declined from 61.1% of sales in the market to 20.8%. The next price point of \$100,000 to \$139,999 peaked at 35.6% in 2003 and has since declined to only 26% of the market today. All price segments above \$139,999 have seen a gradual pattern of increase in the past 10 year period. These trends have changed the makeup of the market from being mostly comprised of lower cost housing to a market that is now fairly balanced across all price points.

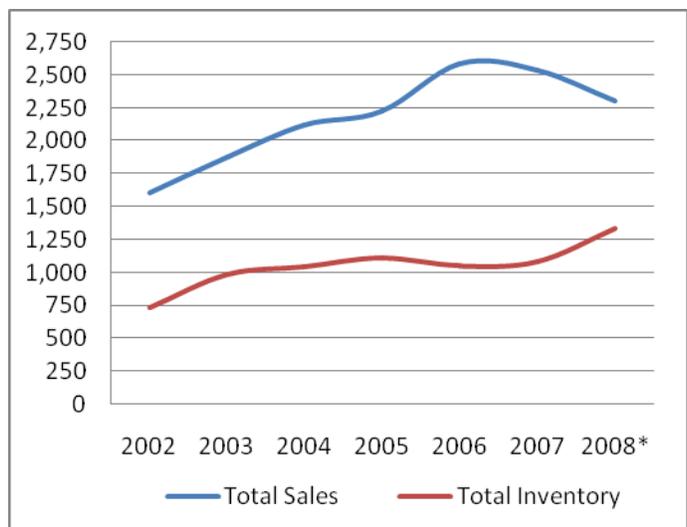
The graphic to the right depicts historical and projected home sales volume in B/CS. This data accounts for all single family homes sold through the MLS. B/CS enjoyed a strong upward trend in sales volume until the year 2006. The following year's sales totals were slightly down but a trend of record setting sales per month continued through 2007, when monthly sales records were broke five times. Data currently available for 2008 includes two months of record sales as well. However, as mentioned, overall sales pace has slowed since its height in 2006. Total home inventory closely follows the trend of sales throughout the entire period illustrated. This includes an up-tick in the inventory in recent period where home sales have declined.

Bryan/College Station Home Sales by Price Range



Source: Texas A&M Real Estate Center
* Year to date estimate

Bryan/College Station Home Sales Volume



Source: Dan Jones (Stylecraft Builders), CDS | Spillette
* Projected based on current year performance and historical trends

Major Issues Affecting Development Opportunities

Prevalent in most conversations with realtors and single family home developers was the mention of the disparity in the quality of schools within the SW Bryan Study Area. The dominant sentiment was that the perception of inferior public school quality beyond elementary grades limited the single family market. Though the negative reputation of the schools may not correspond with factual reality, most parents within the Study Area either send their children to private institutions for junior high and high school, or move their residences to different school districts.

One other development issue which was brought to the attention of the CDS | Spillette team is that there is a lack of infrastructure in place in the SW Bryan Study Area. While this did not seem to be a factor of most crucial importance to single family development, it is something that came up during interviews and research efforts. It is logical to conclude that the more infrastructure burden placed upon single family developers, the more difficult it is to provide quality homes within an affordable price range.

Additionally, the national downward economic trend and credit crisis likely will have an effect on the single family home market in the Study Area. Although Texas as a whole has fared much better than the national as a whole, the current credit crunch and consumer confidence levels will probably continue to slow the pace of home sales and appreciation in the B/CS market.

Projected Trends and Demand

Population growth projections combined with success of single family residential projects in the Study Area bodes well for further potential single family housing product. Tampering the current success however is the slight downward trend in sales overall, the lack of adequate infrastructure to all locations in the Study Area, and the perception of public school quality. Finally, the traditional growth of Bryan to the east and College Station to the south, especially regarding upscale housing, is a factor which works against some types of new housing development in the Study Area.

In spite of these challenges, current trends show that the Study Area can enlarge its market opportunities for housing development. CDS | Spillette believes that the success of recent single family developments and positive influence expected from construction of the HSC will overcome negative factors. With improvements in public school performance and infrastructure enhancements, the area will become more and more attractive to single family developers and the depth and breadth of the currently limited market will increase.

These factors plus the return of more positive national economic and consumer confidence levels should result in the SW Bryan Study Area becoming more attractive to developers and homebuyers alike. Homes with mid-range pricing would likely be supportable in the Study Area in addition to the product types recently offered, as mid-priced homes are gaining market share and acceptance in the overall market. This would begin to happen in a 5 to 10 year time frame. In addition, mid-priced units targeted at empty nesters, possibly consisting of townhomes or patio homes, would be supportable as well, most likely locating in close proximity to Traditions.

In the near term, demand for entry-level housing in the Villa Maria corridor will continue; the oncoming economic difficulties being experienced across the nation may slow down absorption somewhat, but existing absorption provides a reasonable guide as to near-future expectations. However, as mid-priced

housing becomes more feasible and the market desirability of Study Area properties increases, land prices will rise so as to render development of entry-level housing infeasible.

CDS | Spillette projects the following supportable single family unit quantities for various price ranges in the Study Area over time:

Land Use Category	Period in Years				
	0 to 5	5 to 10	10 to 15	15 +	Total
Single Family Housing (units)					
Under \$150,000	135	100	20	0	255
\$150,000 - \$249,999	20	75	150	150	395
\$250,000 and above	120	120	75	100	415

Market Assessment – Senior Residential Housing

Most metropolitan housing markets include some quantity of senior housing. Products offered to seniors can vary widely depending on the size and demographics in the area. Due to the location, demographics, retiring former Texas A&M student population, amount of attention and courting that the Study Area has received the CDS | Spillette team views it appropriate to speak to this particular category of residential land use.

Existing Conditions

Currently in the B/CS market there are several options for seniors to live in physically focused community. These options include active adult communities such as The Cove of Nantucket, Carriage Inn, Briar Meadows and others. Some of the assisted living options in the area are Arbor on the Brazos and the Millican House. Other, more campus type facilities, such as Crestview Retirement Community offer services from independent living to full nursing capabilities. These campus type facilities are sometimes known as continuing care retirement communities (CCRC) facilities, offering a spectrum of services depending on the level of medical assistance desired.

Interviews with both local professionals and out of town developers in the B/CS area about senior residential housing produce two principal findings. The first finding is that multiple out-of-town developers are very anxious to have the opportunity to build near the HSC in the SW Bryan Study Area. These developers are confident in the market, particularly Aggie alumni from outside B/CS, and are eager to build a CCRC-style campus in the Study Area. The other outlook expressed to the CDS | Spillette team is a bit more cautious and questions the depth of the B/CS local market. This comes from B/CS realtors and professionals, who think that while there is some demand in the market area, that the numerical significance of the market demand for senior or age restricted housing is fairly small.

Major Issues Affecting Development Opportunities

As mentioned in the previous section of this document, a lack of infrastructure in the SW Bryan Study Area may somewhat hamper development of a senior housing component. As is the case in most newly developing areas, public investment in infrastructure could help level the financial playing field. The SW Bryan area is currently attracting attention from developers but the lack of infrastructure has been cited multiple times as a possible hurdle to development in this area.

Another factor which should be addressed for any potential development opportunity is to understand the market and the geographic area which should be considered for a senior retirement type product in B/CS. The disparity in the opinions of the realtors and the developers appears to be largely a factor of market area definition. Many local professionals see the market as too shallow due to the fact that they look mostly at the limited size of the B/CS market, especially for upscale product. Out-of-town developers and investors, however, look at the entire State of Texas and even sometimes the nation as their market source area for a senior living and retirement facility in B/CS, similar to the approach taken by The Melrose Company with Traditions. Such developers are eyeing the growing national population of former Texas A&M students who attended the University as it massively expanded enrollment during the 1970s and are now approaching retirement.

During the interviewing process one local realtor did consider the market area for senior housing in B/CS to be of similar geographic scale to that voiced by the non-local developers. However, the realtor's opinion on the depth of the market that B/CS could absorb differed - former students have so many choices of beautiful places to live throughout the state and many of them will choose to go places where they can get more product or amenities for their investment.

CDS | Spillette also discussed senior living development with a highly experienced senior living development and management company that has been responsible for a multitude of projects across the US in recent decades. This company has had some experience developing and managing projects that are related to HSCs. According to a vice president and director of corporate marketing with that company, the following characteristics and concerns could be expected with a CCRC campus in the Study Area:

- An optimal site size would be roughly 30 acres.
- A congregate living facility of 275 to 300 units would be located in a multifamily structure of three to four stories.
- Another 20 to 30 units of independent living would consist of duplex-type product termed "villas," "townhomes," or "cottages."
- A separate single-story wing or building of 75 to 100 units in proximity to the congregate living facility would house a combination of skilled nursing, dementia care, and assisted living.
- Residents will typically be at least 75 years of age.
- The campus will be relatively compact and well-integrated, as residents and employees will travel and socialize on foot between one component and another.
- HSCs adjacent or in proximity can be minor selling points for the CCRC campus, but in reality may provide little real marketing or operational value and in fact can be problematic partners due to excessive bureaucracy and resident placement royalties charged.

- Adjacent open space or golf courses are desirable but again are minor factors in value creation. The most valuable aspect of proximity to Traditions will actually be the marketing exposure gained to a wide potential market through the Aggie network.

Projected Trends and Demand

It is the opinion of CDS | Spillette team that, though difficult to estimate with exactness, demand will exist for senior living in the Study Area. The optimism of out-of-town developers of an influx of former Texas A&M students whom are looking to retire in the B/CS area is ambitious but not entirely unrealistic. As a result of the enrollment increases during the latter half of the 20th century, the next 10 to 15 years will be characterized by a large number of former A&M students, many of whom have achieved high levels of affluence, reaching retirement and beyond. Many of these retirees are located in the major metropolitan areas of Houston, Dallas-Fort Worth, Austin, and San Antonio, and the Study Area will provide a reasonable option for them to live in a smaller metropolitan area with most typical suburban conveniences, as well as proximity to their alma mater.

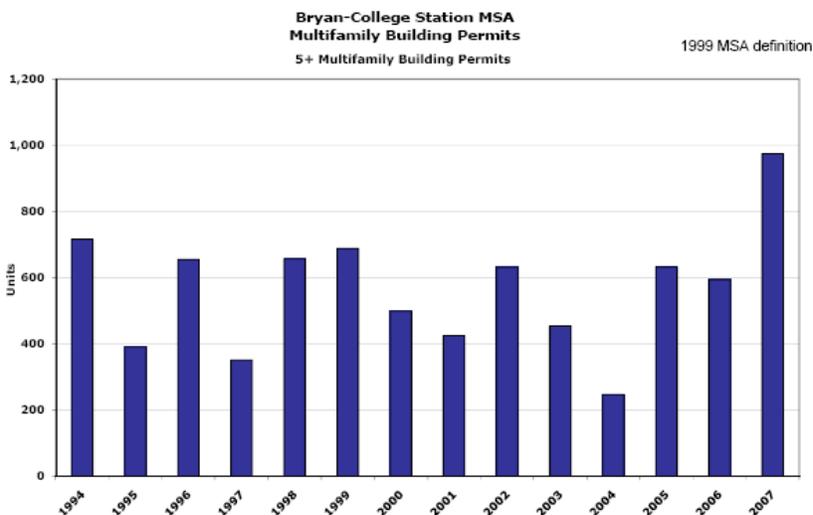
CDS | Spillette therefore projects that in the near to mid term, development of senior living facilities will begin with active adult or independent living product, such as townhomes or duplexes. Approaching the ten year time frame, multifamily products housing more intensively serviced living arrangements will be appropriate. The most educated guess is that a senior living campus will cover 30 to 50 acres, contain up to 50 units of independent or active adult living, 200 to 300 units of congregate living, and a high-level care component (nursing / dementia / assisted living). These projections are summarized as follows:

Land Use Category	Period in Years				
	0 to 5	5 to 10	10 to 15	15 +	Total
Senior Housing (projects)					
Active adult / independent living	25				25
Congregate living		250			250
Assisted living / skilled care			75		75

Market Assessment – Multifamily Residential

Multifamily has historically accounted for a large portion of the housing in B/CS. As previously mentioned, this is largely due to the demand for rental properties from the students of Texas A&M University. The majority of the multifamily properties in the B/CS area are located in College Station; however, there are considerable amounts of multifamily located in Bryan also. The chart below illustrates the number of multifamily units permitted in the B/CS MSA since 1994. The amount of growth in the market has been tremendous over this 14 year period illustrated, particularly in 2007. While multifamily permits issued over the five years previous to 2007 average slightly more than 500 per year, in 2007 alone there were nearly 1,000 permits issued.

Bryan/College Station Historical Multifamily Permits



Source: U.S. Bureau of Census, Real Estate Center at Texas A&M University, CDS | Spillette

Existing Conditions

Available statistics from the Real Estate Center at Texas A&M University report a strong multifamily market in B/CS for the year 2007. However, with the addition of close to 1,000 new units to the market and limited anticipated increases in University enrollment, the occupancy and rent levels are very likely to see a decline. While this is not positively assured, the CDS | Spillette team

Bryan/College Station 2007 Multifamily Statistics

	Bryan/College Station	Texas Metro Average
Average rent per square foot	\$0.74	\$0.80
Average rent for units built since 2000	\$0.83	\$0.89
Average occupancy	94.8%	92.8%

Source: Apartment MarketData Research, Real Estate Center at Texas A&M University, CDS | Spillette

has found no supporting evidence for any clear contradictory argument. During the course of several driving tours of the B/CS area the CDS | Spillette team has been able to identify multiple new large scale multifamily communities which have recently been completed or are still in the process of construction. These facilities appear to all be oriented toward college students and typically feature amenities that cater the college undergraduate population. The closest new property to the Study Area is a large new complex under construction on Wellborn Road at College Main. There is also development occurring on FM 2818 south of the Texas A&M Research Park.

The SW Bryan Study Area does not currently have any multifamily housing located within its bounds. However, there are some older multifamily complexes located near the Study Area on the northeast side. While there are some collegiate residents who have historically resided in these complexes the typical inhabitants are lower income families and non-student one person households.

Major Issues Affecting Development Opportunities

At the current time several issues affect possible development of multifamily in the SW Bryan Study Area. Included in these issues are lack of proper infrastructure, lack of critical population mass, lack of supporting services and retail in the area and the recent growth of new product elsewhere in the market. While these conditions will discourage standard multifamily development in the near term, this will change as the Study Area continues to grow and develop. Market factors including occupancy and rent trends will need to be assessed at a later time when multifamily is a more viable option for development. Specifically, the increase in employment and graduate students within the Study Area due to the HSC will provide a unique opportunity to satisfy demand for rental housing.

Projected Trends and Demand

It is the opinion of CDS | Spillette that the SW Bryan Study Area currently lacks necessary factors for viable standard multifamily development. On the other hand, the predicted sequence of events in the Study Area, including the fruition of multiple phases of the HSC and other nearby development, will likely change the feasibility of multifamily development in the area. This timeframe is dependent on several factors, but the CDS | Spillette team feels that it will be at least five years before multifamily of any magnitude would be supportable in the SW Bryan Study Area.

When the time comes that multifamily is a viable and supportable option there is a significant chance that at least some allocation of it will be built on the HSC campus. The type of product that the CDS | Spillette team considers most likely in this location will be tailored more for professional students and staff of the HSC. This population typically desires a higher quality finish out of the interior space, with less of the typical campus style undergraduate focus apartment complexes that is found throughout B/CS. Also, unit arrangement for such product will not necessarily be an apartment complex, although it very well could be. Other options could include high quality duplex and four-plex type units.

Currently the SW Bryan Study Area is considered to be on the periphery of the B/CS area. However, in the future (likely at least 15 years away) when the Study Area is regarded by the community as being an integral district of B/CS it is likely that an undergraduate geared multifamily development could occur in the SW Bryan Study Area. This will be due not only to a different perception of the overall area, but the location of the Study Area, with overall great potential access the Texas A&M University campus.

Based on these conclusions, CDS | Spillette has the following projections for supportable multifamily units in the Study Area:

Land Use Category	Period in Years				
	0 to 5	5 to 10	10 to 15	15 +	Total
Multifamily Housing (units)	0	100	125	300	525

Market Assessment – Commercial / Office - Flex

Employment growth in certain industries is a critical factor when considering the market for office space. The employment by industry table on page five breaks out types of employment and illustrates their trend over the five year period from 2003 to 2007. While the total non-farm employment growth over this period was 5.6 %, much of that growth was in categories which are not office space users such as Trade, Transportation and Utilities, and Goods Producing.

In addition, some of the traditional categories that can be considered as potential office space users lost employees during the last five year period. These include the Government and Financial Activities industries. While in the B/CS market much of the government category consists of university employees, the CDS | Spillette team has come to learn that Texas A&M University does have leased off-campus office space, and they could be considered as potential tenants for such reason if they experience employment growth. However, as previously mentioned, the government sector has declined over the period 2003 to 2007.

Existing Conditions

The existing office market in B/CS consists of a wide variety of products from small owner occupied one-story buildings to multitenant mid and high rise office product. Lease rates for these products have been reported in the \$13 NNN to \$24 Gross (expenses paid) range, which as always is dependent on location, quality and age, among other factors. Triple Net (NNN) expenses are estimated at approximately \$3.50 per square foot in this market. Therefore, the estimated NNN rent range in the market would be approximately \$13 to \$21.50. Vacancy in the market has been reported to vary significantly depending on several factors including building characteristics and location.

Another trend that has been cited by local professionals in the B/CS market is that office space users have been trending lately toward building or purchasing their own space rather than leasing it. Brokers and leasing agents in the B/CS market report that many small office space users have expressed interest in purchasing rather than leasing space.

Recently constructed product near the study area includes Valley Park Center. This office-flex development includes a 56,000 SF first phase, and the potential for two more phases with a maximum potential of an additional 100,000 SF. The first phase is completed and fully leased. Pre-leasing for phase two, scheduled to open summer 2009, is underway. Current rents in this facility are \$13 NNN.

Major Issues Affecting Development Opportunities

Due to its visibility and proximity to the major regional traffic arteries of SH 47 and SH 60, the site within the Study Area which is most likely best suited for office and flex space development is located on the southeast side of the Study Area and is partly within the College Station city limits. Therefore, a possible issue with developing office product in the given area could be policies and approval from the City of College Station, and their willingness to work with the City of Bryan in development of this site.

The Campus Point development by Midway Companies could potentially include new office space, though the exact development program is unknown at this time. Campus Point, located along University Drive (SH 60), would be competitive for many types of office users that prize the convenience of nearby retail and services.

Presently there is a well known research office park on the campus of Texas A&M University, which does have a large amount of land still available for development. While some might consider the park to be the prime location for certain types of businesses, there are several factors that often discouraged this from happening. The most significant of these factors is the difficulty in dealing with the University which oversees development within Research Park.

Since the mid 1980's while the research park has been in operation, there have been a number of firms that desired to move into the park but eventually abandoned their efforts due to the restrictive policies that are held by the park. While the exact count of firms or square footage which had historically sought a Research Park location is not known, the anecdotal evidence collected by CDS | Spillette indicates that the amount is significant.

Opportunities in the Southwest Bryan Market

An office park which is carefully positioned near the university and HSC, with excellent access to both, has the potential to do well in this market. An onslaught of demand should not be expected to occur overnight for such a project, however; B/CS is too small a market for rapid absorption of a large quantity of office product. Therefore, a carefully phased approach with available space for expansion would likely be a successful method to capturing office space users who find that Research Park does not meet their needs.

Space to be offered in such a development would likely include both traditional office space as well as high quality office flex space that could accommodate research and development uses. The park would be most attractive to technology and research-oriented users who do not place as much importance on being centrally located in close proximity to nearby retail and services as do other types of office users. It is important to note, though, that office users directly associated with the HSC will most likely locate on the HSC's own extensive property. Employers who locate in a separate Study Area office park will more likely be research or technology companies that have little direct relationship with the HSC but are drawn to the location by the attractive environment and the general prestige that HSC and Traditions will bring.

Also, due to current market conditions and potential tenant's interest in purchasing product, rather than leasing, build-to-suit product might be better accepted at the current time. However, over the long term market conditions and preferences could shift towards preferring leasing rather than ownership. At this time ground leases would be a potential option which should be considered.

Projected Trends and Demand

It is too early to tell if the current market favor toward owner-occupied space is a fundamental shift in this market or if it is just a temporary adjustment. From time to time, depending on a myriad of factors, markets do shift and concentrate towards ownership or leasing. However, most healthy markets and scenarios will balance out in the long run. The CDS | Spillette team does not expect any large structural shift from leasing in the B/CS office space market.

Even though the historical employment trend does not point toward any sign of large unmet demand for office space, there are other factors to consider, especially in the B/CS office market. The foremost non-typical factor that needs to be considered in the B/CS market is the presence and draw of the existing facilities and programs at Texas A&M University, and the construction and implementation of the HSC in

the SW Bryan Study Area. These institutions have and will continue to have a major draw for companies who desire academic locations and research capabilities due to the proximity and potential partnering with the academia of the university and the students located in the area.

CDS | Spillette projects the following demand for office and flex space in the Study Area:

Land Use Category	Period in Years				Total
	0 to 5	5 to 10	10 to 15	15 +	
Commercial – Office / Flex (sq.ft.)	25,000	150,000	150,000	250,000	575,000

Market Analysis – Commercial / Retail

Retail properties often complement each other and work synergistically to provide for a trade area's demand. The southwestern sector of Bryan, including the Study Area, currently contains very little retail and is somewhat removed from the major concentrations of retail development from which to leverage traffic and consumer awareness.

Existing Conditions

The B/CS the retail market is considered by local realtors and professionals to be at or near saturation with multitenant space. In recent years there have been a number of centers constructed or remodeled, which has provided the market with an influx of high quality, well located product choices. Some of these centers include the Tejas Center, Culpepper Plaza, Bryan Towne Center, Furniture Row Shopping Center and several others.

The addition of this amount of quality space to the market, through both remodel and new construction, has given market power to tenants for retail leasing in B/CS. According to realtors, tenants are beginning to have much more influence upon the terms and conditions of their leases. Asking rental rates in the market are currently in the \$18 to \$21 per square foot range triple net (NNN) for quality well located space, and there is currently both small and large amounts of contiguous space available.

There is a large retail development with space that has been vacant since its construction over two years ago. This may be partly due to the asking rent price in this particular center, which is being held steady at \$21 NNN, near the top of the market. A major commercial property firm reports that another center, the new Bryan Towne Center at Hwy. 6 and Boonville Rd., has had a slower lease-up and less favorable lease terms to the property owner (greater tenant improvement concessions for example) than anticipated.

In addition to this there are current rumors of significant amounts of additional retail entering the B/CS market area in the next couple of years. However, development activity is likely to be tempered by the national economic downturn which has led chain retailers to delay or cut back on expansion plans. This situation, coupled with the recent expansions in supply, make large-scale retail development unlikely in B/CS in the near term. However, there are still niche opportunities within the market.

Major Issues Affecting Development Opportunities

In closer examination of the SW Bryan Study Area, residents of the area are expressing frustration about a lack of neighborhood level retail such as grocery stores, dry cleaners, hair and nail salons and convenience eating establishments. The majority of the population in this area reports driving to areas toward the main corridors of Bryan and shopping at centers such as the Tejas center, located 3 to 4 miles away from the Study Area.

Retail properties are highly dependent upon a critical mass of population within a given trade area. Most large scale retailers run drive time or radii analysis of population within a market and determine if they need to enter that market based on the population, demographics, and current saturation of retail space the area. Currently the SW Bryan Study Area currently does not have much or any significant retail space, which bodes well for potential development of such neighborhood level retail.

The estimated population for the market area, as defined on page 4, is 13,860. However, the current population of the Study Area falls just short of the level needed to attract the neighborhood retail uses which many of the residents would like to see. The probability of attaining significant neighborhood retail will increase as the number of rooftops and daytime population grows.

Projected Trends and Demand

While lack of population is an obstacle to retail at the current time, there is a strong likelihood that the critical mass of population will be achieved in the future. This will come about upon construction and acceptance of new housing product into the market and/or a significant increase in daytime population from employment in the area. While both of these factors are important considerations for demand of potential retail product, population growth from new housing development, is the more critical of the two. Since the Villa Maria corridor is the principal thoroughfare connecting existing and new residential development, it is also the most likely location for a neighborhood-level retail center.

The CDS | Spillette team believes that while the SW Bryan Study Area will most likely reach the critical mass of rooftops (population) and daytime population, the type of retail that will be appropriate and expected in this area will be largely limited to neighborhood level offerings. In order to offer other types of retail, such as big box or community level retail, in the SW Bryan market area there would have to be a significant shift in metropolitan growth patterns resulting in a massive population increase in the population of western sides of Bryan and College Station. CDS | Spillette considers this scenario as unlikely during the time horizon of this study.

CDS | Spillette also projects some small-scale convenience retail uses to emerge in the Study Area in response to increased traffic and daytime population. Highway-oriented convenience retail (service station, convenience store) may locate along SH 47 at signalized intersections. Within HSC, convenience food and service outlets will likely serve the students and employees; it is possible that these establishments may not be open during evening hours.

Our projections for supportable retail space in the Study Area are as follows:

Land Use Category	Period in Years				
	0 to 5	5 to 10	10 to 15	15 +	Total
Commercial – Retail (sq.ft.)	1,500	85,000	25,000	40,000	151,500

Market Analysis – Commercial / Hospitality

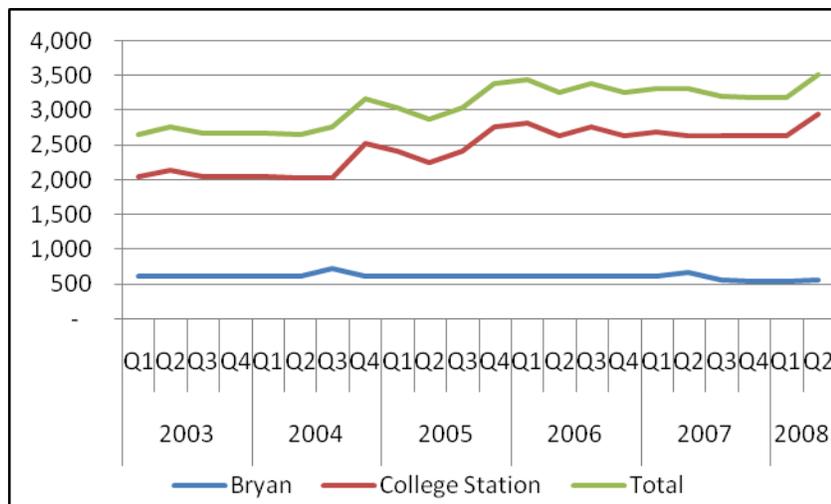
The Study Area’s proximity to Texas A&M plus the presence of the Health Science Center mean that there will be an inherent demand for lodging and meeting facilities. The Bryan-College Station area has experienced substantial growth in lodging facilities over the last decade, however, so any new hotel would have to address the right niche in this moderately sized market.

Existing Conditions

The State of Texas estimates that 3.3 million visitors traveled to Bryan-College Station in 2007, generating 6.24 million person-days of visitation, down from 6.65 million in 2006. An estimated 88 percent of visitors were from elsewhere within Texas. Leisure travel accounted for about three-quarters of total person-days, though nearly all of it was for a non-vacation purpose. State research estimates that 55 percent of visitors stayed in paid hotel / motel accommodations.

The Bryan-College Station Visitors Bureau reports that the market has reached about 3,400 hotel rooms. This is confirmed by data from the State of Texas Comptroller shown in the chart to the right indicating how many rooms were reported to its office for taxation purposes. College Station has accounted for all of the growth in room stock, while the room count in Bryan has decreased slightly. The years 2004 – 2006 were marked by significant supply expansion, including the following properties:

Bryan/College Station Hotel Room Count



Source: State of Texas Comptroller

Property	Rooms	Year Opened
Comfort Suites	90	2006
Holiday Inn & Suites Aggieland	116	2005
Amerisuites College Station	91	2005
Quality Suites	81	2005
Hampton Inn (Hwy. 6)	79	2005
America’s Best Value Inn & Suites	115	2004

National chain-flagged hotel properties have tended to locate along select thoroughfares: Texas Avenue, University Drive, and State Highway 6 (Earl Rudder Freeway). Only two such properties are located in Bryan; 20 are located in College Station.

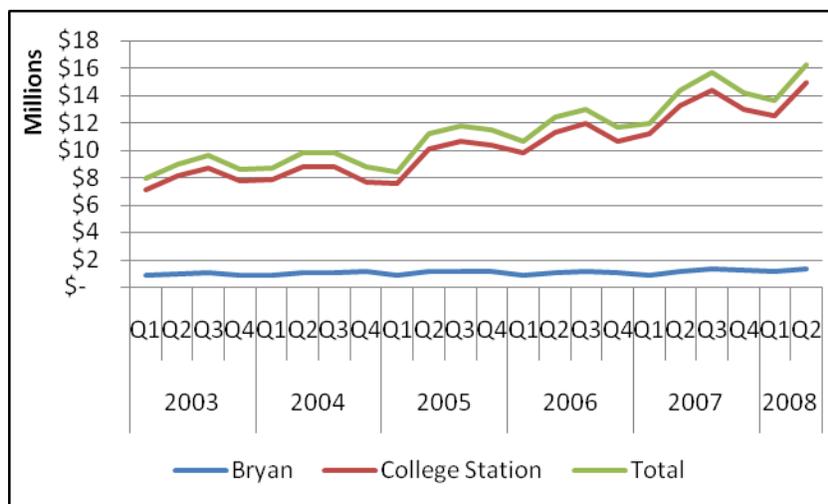
The hotel room and meeting facility revenue generated in the Bryan-College Station market has been increasing as well. The chart below illustrates the dominance of College Station in the market, accounting for more than 90 percent of total revenues. Revenues generated by Bryan hotels have been flat.

Certain hotel customers are exempt from paying state hotel tax. Texas A&M qualifies for the exemption, as do churches and charity organizations. The ratio of taxable to gross revenues provides an indicator of the share of roomnights purchased by the University and other exempt entities. In 2007, approximately 79 percent of revenues were taxable, most likely indicating significant demand generated by the University. It should be noted that Bryan hotels have about an 88 percent taxable share, which would logically be assumed is due to less University-generated business at Bryan properties.

Performance statistics point toward continued strengthening of the Bryan-College Station lodging market. Data provided by PKF Consulting show a marked improvement in market area occupancy rates over the last two years. The sudden increase in room supply likely suppressed overall occupancy in 2006; PKF’s statistics show a relatively unhealthy 51 percent for that year. By 2007, it had risen to about 60 percent; for the first seven months of 2008, it is estimated at nearly 72 percent, which represents a healthy market.

Despite improving occupancy, Bryan-College Station remains a moderately priced lodging market. Average daily room rates have risen from \$67.55 in 2006 only to \$68.18 for the first seven months of 2008. In contrast, average daily rates in Houston were approximately \$128 as of July. The affordable room rates mean that RevPAR, a measurement of hotel revenue generation that combines occupancy and average daily rate, was poor in 2006 at approximately \$35, rising to \$49 for 2008 through July.

Bryan/College Station Hotel Revenues



Source: State of Texas Comptroller

The Convention and Visitors Bureau states that a major reason for the moderate room rates is the dominant sources of business, which receive discounts off rack rates. The State of Texas rate is \$85 and the U.S. Government rate is \$78. State-level private associations, which are the “bread and butter” of the area’s group meetings market, pay rates of \$89 to \$99. Typically these guests stay in the better quality properties that otherwise offer the highest rack rates.

There are currently unmet needs for meeting facilities and group lodging. Group meeting size is limited by the maximum room block size of 1,500 rooms, spread across multiple hotel properties. The Hilton is the major group meeting hotel and has one large ballroom to hold up to 1,500 attendees, a smaller ballroom, and several meeting rooms. The Bureau has found that its facilities are not satisfactory for some association meetings. The University provides other meetings facilities at the Memorial Student Center (MSC) and Reed Arena. However, the MSC has limited exhibit space and Reed Arena has difficult parking arrangements, resulting in overflow demand for accommodating University-related meetings. The MSC is also closing for three years for renovation.

In Bryan, very close to the Study Area, the Expo Center has 29,000 square feet of exhibit space, but there are no breakout conference rooms. The Expo Center, which is relatively new and also includes a livestock pavilion and arena, has reportedly experienced strong demand and generates hotel room demand from its event attendees.

Major Issues Affecting Development Opportunities

The City of College Station has recently announced plans to build a convention center on University Drive at Tarrow (Chimney Hill property). Specifications for the amount of meeting space are not yet available. The site is located adjacent to the College Station Hilton.

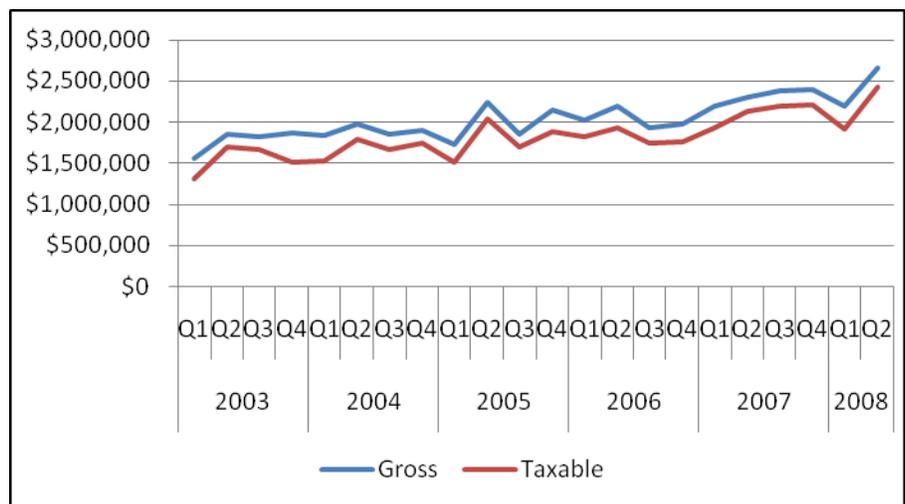
The Campus Point project by Midway Companies, in partnership with Texas A&M, could include lodging or meeting facility components. However, development is several years away and no definitive development program has been set. The project has a premier location at Texas Avenue and University Drive, across the street from the campus and in the heart of Bryan-College Station.

As a metropolitan area of less than 200,000 population with a limited corporate base and lack of general tourism appeal outside of University-related travel, Bryan-College Station’s potential for rapid growth and excess demand for hotel roomnights is limited, so at any given point in time it is doubtful that multiple similar properties could enter the market at the same time with early success.

Opportunities in the Southwest Bryan Market

The HSC is the primary factor in generating an opportunity for new full-service hotel development in the Study Area. The complex will on its own generate some demand for lodging, though likely not in sufficient quantity to justify a new property on its own. Rather, it is the creation of an appealing environment and critical activity mass between the HSC and Traditions that will create an acceptable location for a hotel.

Hilton Hotel Revenues (Room and Meeting Space)



Source: State of Texas Comptroller

The perception of the Study Area is too peripheral and isolated from Bryan-College Station today to be viable as a full-service hotel location. However, in reality it is close enough to the University and to businesses and activities in the University Drive corridor to be a reasonable lodging location, provided that a unique and destination-quality environment is created. The Visitors Bureau is finding excess demand for hotel rooms and meeting space numerous times throughout the year and believes that a new full-service hotel property is likely warranted. The rapidly improving occupancy of existing properties (mostly limited service or budget properties) indicates that travel demand is generally absorbing the burst of new supply.

The Hilton, although not a new property, is the most relevant comparable in the market today. After revenue trends from 2004 to 2006 that were slowly increasing to stagnant, it has benefited from the upturn in the market in 2007 and 2008, as shown in the chart on the previous page. It currently charges rack rates for regular rooms of typically \$120 to \$160 per night; meeting groups and government customers will pay considerably less as mentioned previously. Data from the State of Texas show that hotels in the Hilton's price range have had high occupancy rates in College Station, reaching above 75 percent during the middle two quarters of 2007 and the second quarter of 2008, well over the 65 percent benchmark for a healthy market.

The success of the Expo Center, coupled with the upturn in the lodging market, also creates an opportunity for a different type of property in the Study Area that would cater to Expo Center attendees. Such a property would be of a moderately-priced, limited service nature. A local professional real estate broker informed CDS | Spillette that the property on the north corner of Villa Maria and SH 47 that a development including a hotel is intended for that site.

Projected Trends and Demand

Although the impending national economic downturn may have some negative impact on demand for hotel roomnights and meeting space in Bryan-College Station, much of the area's lodging market base will likely be somewhat resistant to strong downturns. University-related business and state-level associations will still continue to come to the area, although they may exert pressure for greater discounts on room rates. Leisure travelers who are visiting for personal reasons are less likely to change plans to visit family and friends or attend events than they are to cut back on pure vacation travel; the affordability of Bryan-College Station and ease of travel from the other major metropolitan areas of Texas that comprise the bulk of the source market also work in its favor. So, while roomnight growth may level off somewhat, it would be unlikely to drop precipitously.

The need for new full-service hotel rooms and additional meeting facilities opens the possibility for the Study Area to support a new property. However, success will depend heavily on two factors: (1) creating a perception of the Study Area as a high-quality environment that stands out from other locations and (2) no other new full-service hotel property is developed first, particularly in a University Drive location (most notably as part of the Campus Point development). Failure to satisfy either of these conditions would likely preclude development of such a hotel in the Study Area, as the market is not large enough to support two new properties at once. The hotel development will face the additional challenge of financial feasibility given the constraints on room rates in the area, and it is possible that public incentives (such as reduced land cost) may be needed to make the project financially attractive.

Subject to these conditions, CDS | Spillette therefore projects a new 300-room full-service hotel within the Study Area a minimum of 5 to 10 years in the future, after HSC has developed facilities and activity

on its campus. The hotel will by necessity offer rooms generally in the price range of the Hilton, although it may achieve slightly higher rates by virtue of its newness.

CDS | Spillette also projects a 100-room limited service hotel on the site at the corner of Villa Maria and SH 47. This could feasibly occur in the near term, less than 5 years from now, depending on the availability of project financing.

Lastly, the developers of Traditions, Melrose, have indicated plans for a 120-room upscale lodge and conference center at the Traditions Country Club in conjunction with high-quality dining and wellness facilities. CDS | Spillette is not studying the feasibility of this specific concept in the scope of this study. Success of such a project will depend on Melrose’s ability to create an upscale resort environment that exerts destination appeal at the national level. On the assumption that Melrose can successfully accomplish this, CDS | Spillette is also projecting the proposed lodge to be developed during the 5 to 10 year time frame. It should be noted that Melrose’s concept should have positive ancillary impacts in the marketplace that would also boost the market perception of the potential 300-room mid-market hotel described above.

Our projections for supportable lodging development in the Study Area are summarized as follows:

Land Use Category	Period in Years				Total
	0 to 5	5 to 10	10 to 15	15 +	
Commercial – Lodging (rooms)	100	420	0	0	520

Additional Strategic Development Concerns, Opportunities, and Recommendations

In addition to typical market based factors and demand drivers there are several other items in the B/CS area which deserve consideration as well. These include regional activity centers as well as new and planned development not previously mentioned.

SW Bryan Accessibility

Land values and uses can often be highly affected by whether or not adequate access is present or available for an intended land use. In the case of the land in the SW Bryan Study Area there are some obstacles in regard to accessibility. While the area is situated around major thoroughfares, farm to market roads and even highways, issues of access to and from these main roadways are a concern. The lack of signalized connectivity to the aforementioned roadways prevents ease of access in the southern and southeastern portion of the Study Area. Construction of the proposed Melrose Parkway will increase accessibility to the Study Area, and the eventual inclusion of a potential signalized or grade separated intersection at SH 47 will greatly ease accessibility to the roadway. However, the proximity to the intersection of SH 47 and SH 60 decreases the likelihood that the Texas Department of Transportation would allow additional connection points.

Although accessibility still is a concern for the growth and development of the SW Bryan Study Area, the majority of the market supportable land uses identified in the summary land use table are not dependent on a large number of access streets or curb cuts. Retail is the primary exception because it is very dependent on accessibility; that type of product will likely locate near signalized intersections or along the Villa Maria Corridor, as opposed to areas closer to SH 60.

Gameday Condos

A development group with a unique residential product has entertained the idea of locating within the bounds of the SW Bryan Study Area. This group, Gameday Centers Southeastern, focuses on building housing which is customized for collegiate environments and centered on athletic sporting events. The products are for sale condominium units which are fully furnished. The Gameday group has completed projects of this nature already in multiple locations, including the University of Alabama and University of Georgia.

A local representative for Gameday told CDS | Spillette that they have been considering the B/CS market for some time. Their first attempt reached the point of having site plans and unit reservations for a conceptual project which was to be located very close to Texas A&M University's campus. This effort fell through. Now, the local representative says that the group is willing to look at land within the SW Bryan Study Area due to its close proximity to the university's campus.

Brazos County Exposition Complex

The recently constructed Brazos County Exposition Complex, located just northwest of the Study Area, has the potential to continue bringing in numerous events and people into the community. This facility is located on 150 acres of property near the corner of SH 47 and Leonard Road. It includes a 70,000 SF arena that has permanent seating for 3,000, along with a 60,000 SF Pavilion with horse stalls, livestock

pens, and cattle ties, as well as an exhibit hall of approximately 29,000 SF of space. Also on site are R.V. spaces with full hook ups, restrooms, and concession areas.

This facility has become the new home for the Texas A&M Equestrian teams and hosts not only their events but a wide variety of others as well. Some events held in the facilities already include various livestock shows and rodeos, field days, lawn mower races and prom for A&M Consolidated High School. With proper management, festival and event attendees will continue to spend in B/CS when they are in the area for an event. Therefore, the Brazos County Exposition Complex is a very important part of the SW Bryan area and can be looked towards as a complementary activity generator for this area.

Nearby New Developments

Apart from the Exposition Complex, there is little major development that is taking place in the immediate vicinity of the Study Area. The three most significant projects are:

- Aggiland Business Park: A flex/industrial park under development immediately to the southwest of the Study Area, with access primarily from SH 60. Many of the buildings constructed to date feature metal siding.
- A flex/office park under development near the intersection of FM 2818 and SH 60 (see the Office-Flex section above).
- The Aggie Memorial Cemetery under construction immediately adjacent to the intersection of FM 2818 and SH 60.

One other major project of note which could potentially affect the market feasibility of various land uses within the Study Area is Campus Point, a joint project of Midway Companies and Texas A&M University. This project will convert the 80 or more acres at the northwest corner of the Texas Avenue and SH 60 (University Drive) intersection into a relatively dense mixed-use center. Because the land is owned by the University and currently contains student housing, the planning and negotiation process to redevelop it will likely take several years. Specific future land uses have yet to be defined but could potentially cover a wide variety. This location is at the very heart of the metropolitan area and adjacent to the main campus of The University, so most uses considered for the project would be considered to have a competitive locational advantage.

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Appendix

Health Science Center Case Studies

Ancillary information below has been compiled by the CDS | Spillette team in order to further compare the Texas A&M University Health Science Center to other Health Science Centers located at major universities around the nation.

Data on Other HSC Facilities

	Health Science Centers					
	Texas Tech	University of West Virginia	University of Oklahoma	University of Georgia	University of Florida	University of Illinois
Address and Phone	3601 4th St. 2B430 Lubbock, TX 79430 806-743-2907	1150 HSC North Morgantown, WV 26506 304-284-7413	660 Parrington Oval Norman, OK 73019 405-271-4000	S 150 Paul Coverdell Ctr. Athens, GA 30602 708-542-5922	1600 SW Archer Rd. Gainesville, FL 32608 352-265-8000	1206 S 4th St. Champaign, IL 61820 217-333-2131
Programs	Allied Health, Medicine, Nursing, Pharmacy, and Biomedical Sciences	Dentistry, Medicine, Nursing, Pharmacy, Allied Health, and Public & Community Health	Allied Health, Dentistry, Medicine, Nursing, Pharmacy, and Public Health	Infectious Diseases, Basic & Translational Biomedical Sciences, Neuroscience, and Public Health	Cancer, Pediatrics, Cardiology, Neurology, Orthopedics, Transplants, and Women and Family	Community Health, Kinesiology, Recreation, Sports and Tourism, Speech and Hearing, Rehabilitation, and Aging and Disability
Built Sq Ft	Appx. 971,000	Appx. 450,000	1,716,720	143,000	Appx. 2.5 mil	Information Unavailable
Year Opened	1979	1972	1971	2006	1958	1965
Land Uses	Institutional, Public, Residential, Transportation/Utility, Commercial Service, Wholesale	Office, Institutional, Residential, Professional/Office, Business, Retail, Industrial	Institutional, Residential, Mixed Use Commercial, Parks/Open Space	Institutional, Residential, Shopping/Business/Trade, Leisure	Educational, Residential, Mixed Use, Conservation, Office, Commercial	Institutional, Residential, Office, Commercial, Parks/Open Space

Source: CDS | Spillette

The following list provides more insight to land uses within and around comparable HSC facilities identified.

Texas Tech- Lubbock

The residential properties surrounding the HSC are mainly single-family, but there are pockets of housing generally occupied by students. The HSC has influenced several doctor’s offices/medical services buildings to come to the area. The HSC has also contributed to the growth of shopping facilities, restaurants, and the need for increased apartment housing.

West Virginia University- Morgantown

The residential properties surrounding the HSC are mainly single-family, but there are pockets of housing generally occupied by students. The HSC has influenced several doctor's offices/medical services buildings to come to the area and has also contributed (along with WVU) to the growth of a major shopping center, restaurants, and the need for increased apartment housing.

University of Oklahoma- Norman

The residential properties surrounding the HSC are mainly apartments, which are occupied by students, staff, and visiting staff. The HSC is currently composed of 24 buildings. It has influenced many doctors (100+) to build private practices in Norman, and the HSC also invites nearly 1,000 doctors/researchers/other medical personnel to spend several months working and conducting research at the facility each year. The HSC has contributed to the major growth of apartments and single-family housing, shopping facilities, and restaurants.

University of Georgia-Athens

The residential properties surrounding the HSC are mainly single-family, but there are pockets of housing generally occupied by students. The HSC has influenced several medical offices/services buildings to come to the area. The HSC has also contributed somewhat to the growth of small shopping plazas, restaurants, and a small increase in apartment housing.

University of Florida-Gainesville

The residential properties surrounding the HSC are mainly single-family, but there is a larger area of housing generally occupied by students. The HSC has influenced many doctors to build private practices in Gainesville, and the center also invites nearly 1,000 doctors/researchers/other medical personnel to spend several months working and conducting research at the facility each year. The HSC has contributed to the major growth of apartments and single-family housing, shopping facilities, and restaurants. The Gainesville HSC is part of the Shands Healthcare System, which is the prominent healthcare system in Florida.

University of Illinois- Champaign

The residential properties surrounding the HSC are mainly single-family, but there is a larger area of housing generally occupied by students. Other information is unavailable due to lack of response from the university.