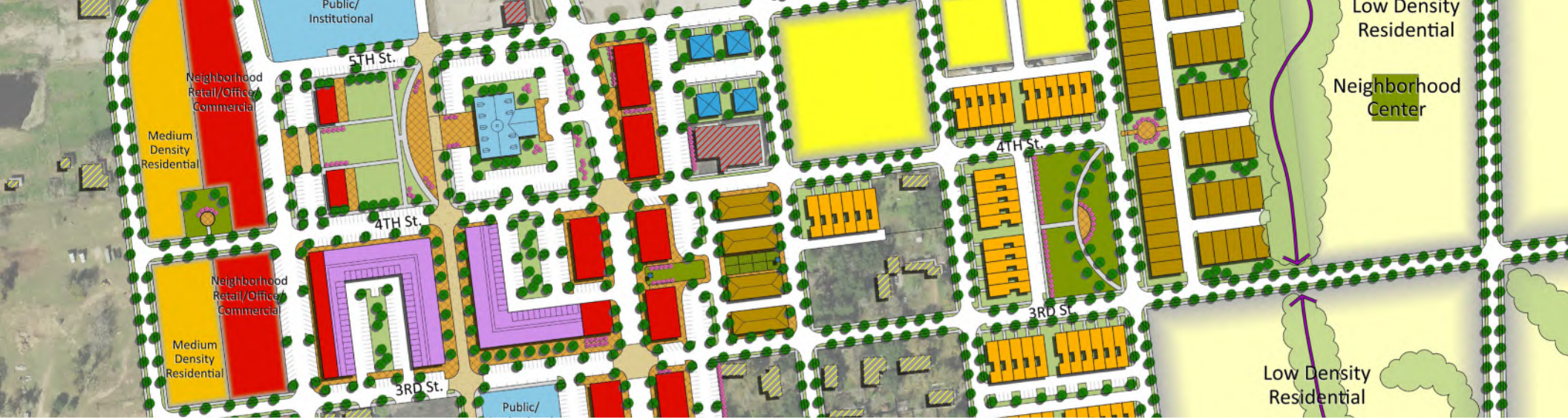

City of Fulshear

Livable Center Study

2019

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Welcome to
FULSHEAR
CITY OF FULSHEAR

Table of Contents

Existing Conditions

Overview

Fulshear is a rapidly growing suburban community west of Houston. The city boundaries currently encompass approximately 10 square miles with an additional 40 square miles of extraterritorial jurisdiction (ETJ). Fulshear was established in 1824 and by 1898, the town was home to 250 residents. Over the years, the population has remained relatively low until the rapid growth of the Houston Metropolitan Area starting in the 1970s. As of 2017, the population was estimated at approximately 23,809 (City + ETJ) and anticipated to grow significantly over the next 10 years. In anticipation of future growth, the City is taking measures to preserve the existing character by establishing a plan to encourage development to complement the City's vision for the future. The development of the Livable Center Study will help plan for future development, prepare downtown for the increased population, and mitigate potential negative effects of development. When implemented, Fulshear can effectively welcome big city growth while maintaining small-town charm.

What is a Livable Center?

The Houston-Galveston Area Council's (H-GAC) Livable Centers Program works with local communities to develop planning studies and implement various transportation projects. The program is part of the 2040 Regional Transportation Plan strategy to improve multimodal mobility in the region. The intent of the program is to encourage walkable, mixed-use development, provide opportunities for multi-modal transportation options, create a greater sense of place, improve environmental quality, and promote economic development.

Suburban communities in the Houston Metropolitan Area benefit from these plans by promoting denser development patterns, reducing the need for vehicular trips, providing opportunities for walkability, bicycling and transit, and developing unique destinations that result in increased economic development. Each plan is unique, but generally provides recommendations for future development and strategies for land use, mobility, policy, and economic development.

Livable Center Program Goals

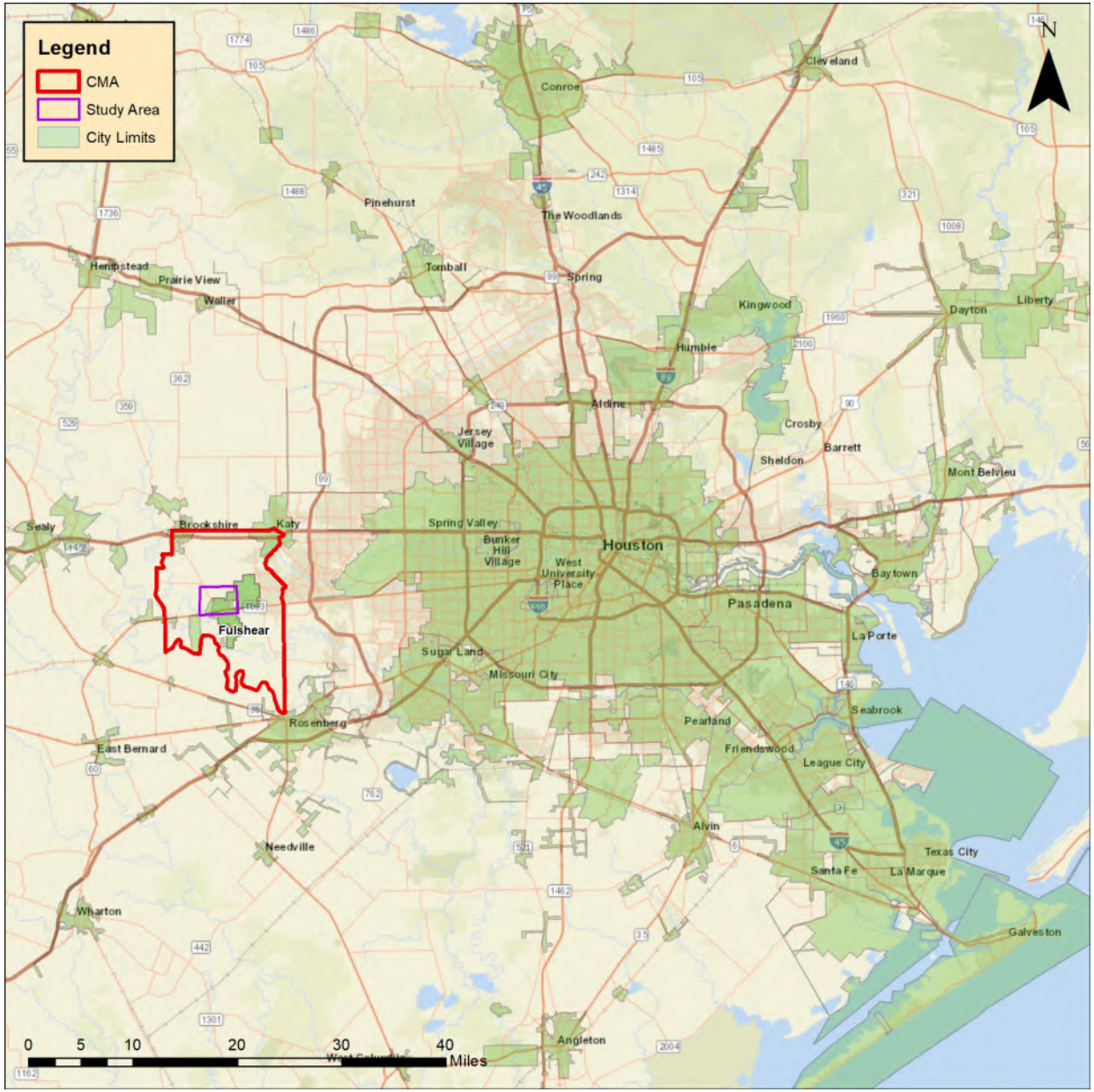
- Engaging the community and building capacity of study participants
- Creating walkable, mixed-use places
- Improving environmental quality, including preserving and creating open spaces
- Increasing economic development and revitalization
- Increasing the sense of identity and community and preserving history and culture

Source: H-GAC Livable Centers Brochure

Regional Context

Fulshear is located at the intersection of Farm to Market Road 359 (FM 359)/Main Street and Farm to Market Road 1093 (FM 1093) in northwest Fort Bend County. Downtown Houston is 33 miles to the east, and Wallis is 15 miles to the west. Interstate 10 at Brookshire is 7 miles to the north. Fulshear's city limits encompass approximately 33,280 acres of prime realty and is just 30 minutes outside of the 610 Loop. Spanning approximately 40 square miles, Fulshear is a home rule city and has a large ETJ which ensures the growth and expansion of this community in the future.

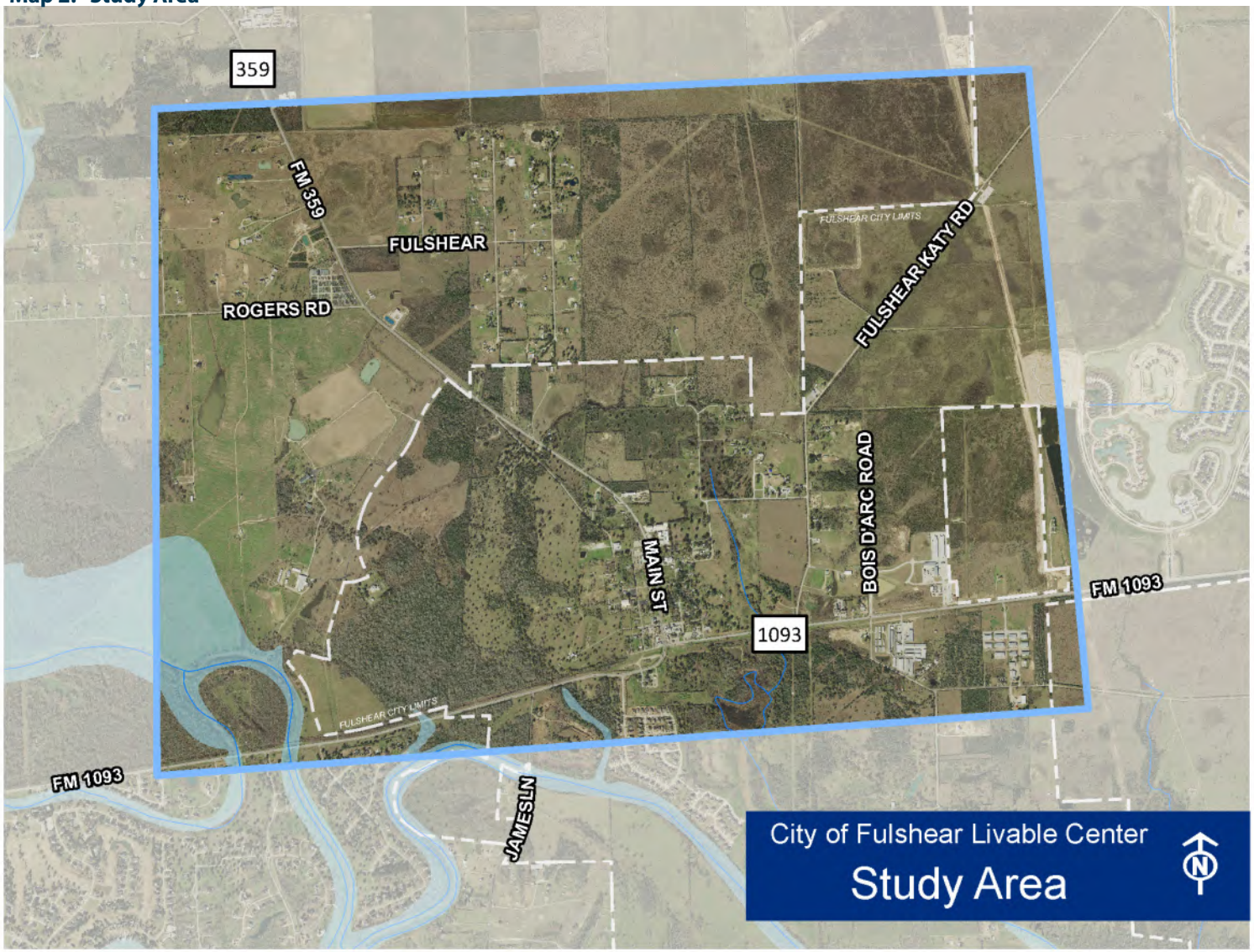
Map 1. Regional Context Map



The Study Area

The Study Area is generally bounded by Hunt Road to the north, Cross Creek Bend to the east, McKinnon Road to the south, and George Gordon Road to the west. Map 2. Study Area on page 4 shows the exact boundaries of the study area. The study area encompasses approximately 4,531 acres, and includes land within the City limits, as well as, the ETJ and is generally focused around the downtown area at the intersection of FM 359/Main Street and FM 1093. The following sections discuss existing conditions and characteristics within the study area.

Map 2. Study Area



Character

The character in the study area can be described as rural small-town charm. The area is generally agriculturally based with little development, however new residential is planned in the near future that will replace some of the currently vacant areas. The downtown area has retained the original street grid pattern and some older structures that help promote the small-town character. While some new development has started to be introduced into the area, most of the structures are older or homes that have been converted into businesses, adding to the small-town character.

Land Use

According to the Fulshear Comprehensive Plan, adopted in 2014, the study area is planned for land uses such as Estate and Suburban Residential, Urban Mixed-Use, Industrial, General Commercial and Manufactured Housing. In the downtown area, the land uses are primarily mixed-use which is common in original downtown areas with a grid street pattern. Land uses in this area include small office, retail, commercial, and single-family residential. Some public/semi-public uses are also located in downtown such at the Bob Lutts/Simonton Library, U.S. Post Office, Fulshear-Simonton Fire Station and some churches. Outside of downtown, land uses include agricultural to the west, some large lot single-family residential to the north, Fulshear High School and Huggins Elementary School to the east of the study area, and Office and Commercial along FM 1093.

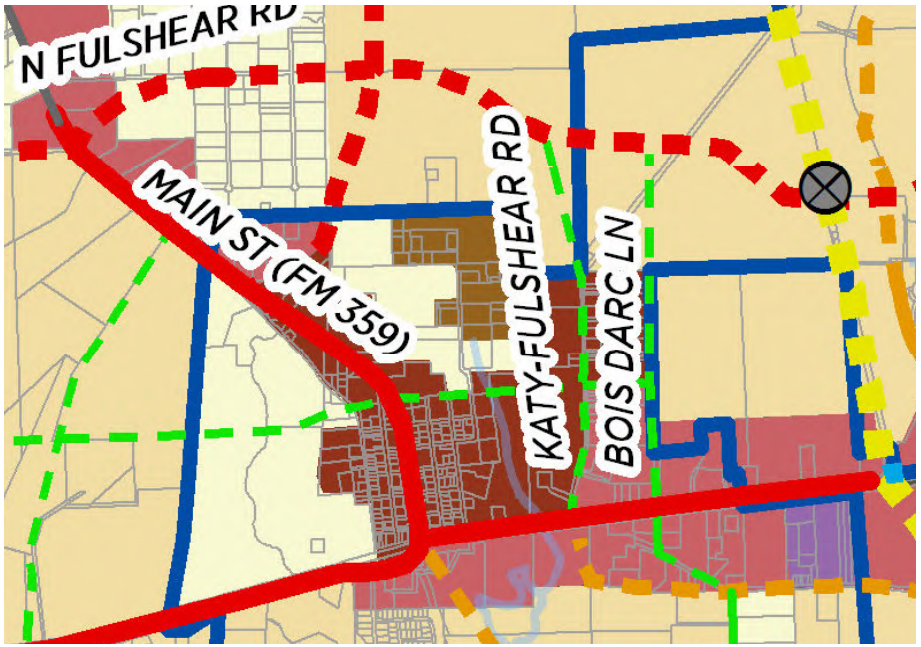
Connectivity

The study area is anchored by the intersection of FM 359/Main Street and FM 1093. FM 359 provides a connection from FM 1093 to Interstate 10 to the north. FM 1093 is an extension of the West Park Tollway that stretches from the Fulshear city limits to Houston. The existing street grid network provides an excellent framework for a pedestrian friendly environment. FM 1093 divides Fulshear horizontally. This creates a significant barrier to connectivity from southern neighborhoods to downtown.

Strengths and Weaknesses

The greatest opportunity in the study area is the large amount of undeveloped properties. With a blank slate there is opportunity to prepare for future development and mitigate the oncoming urban sprawl as opposed to retroactively repairing poor development. The existing downtown pattern and vacant properties are also opportunities to achieve the desired development type. The traffic volume and location of FM 359 and FM 1093 present hurdles to developing a traditional walkable downtown. Creative solutions will need to be explored to overcome the issues presented by these roadways.

Map 3. Fulshear Future Land Use in Study Area (2014 Comprehensive Plan)



Other Plans and Studies

Comprehensive Plan (2014)

The Fulshear Comprehensive Plan serves as a framework for future development and redevelopment in the city. The document is used as a reference for city leadership to guide policy decisions that will ultimately determine how the City develops. It provides recommendations for land use, growth management, mobility, parks, land use, and character. The comprehensive plan serves as a foundation for the development of the Livable Center Study.

The transportation plan identifies the location and capacity of future roadways throughout the City. The transportation plan is the basis for the mobility assessment conducted for the Livable Center Study. This study will further enhance the recommendations for the transportation plan and discuss the mobility framework of the downtown area.

Fulshear Comprehensive Plan (2014)

Parks and Pathways Master Plan (2018)

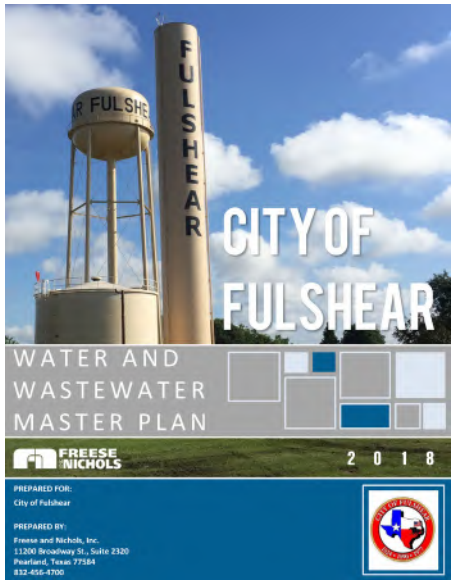
Initiated in January 2018, the Parks and Pathways Master Plan aims to develop a master document that identifies the location of and improvements to existing and future park facilities. The plan scope is city-wide, however much of the focus is centered around downtown. The plan proposes connections between downtown and various neighborhoods, a network of pathways throughout the City, and several new parks including a 5-acre park north of downtown, located within the Livable Center Study area. Facilities and pathways recommended by the Parks and Pathway Master Plan have been incorporated in this plan.

Downtown Drainage Master Plan (2018)

The Fulshear Downtown Drainage Master Plan establishes the existing physical features of the city and provides guidance for drainage control in the future. The goal of the plan is to identify drainage-related issues and effective solutions to address them. This is important in Fulshear and in the study area where drainage issues have been identified as a challenge for development.

Water and Wastewater Master Plan (2018)

The goals of the Water and Wastewater Master Plan are to evaluate the integrity of the existing water and wastewater systems, and to recommend a phased capital improvement plan (CIP) through the year 2036. The recommended improvements will serve as a basis for the design, construction, and financing of facilities required to meet Fulshear's water and wastewater capacity needs.



Fulshear Water and Waster Water Master Plan (2018)

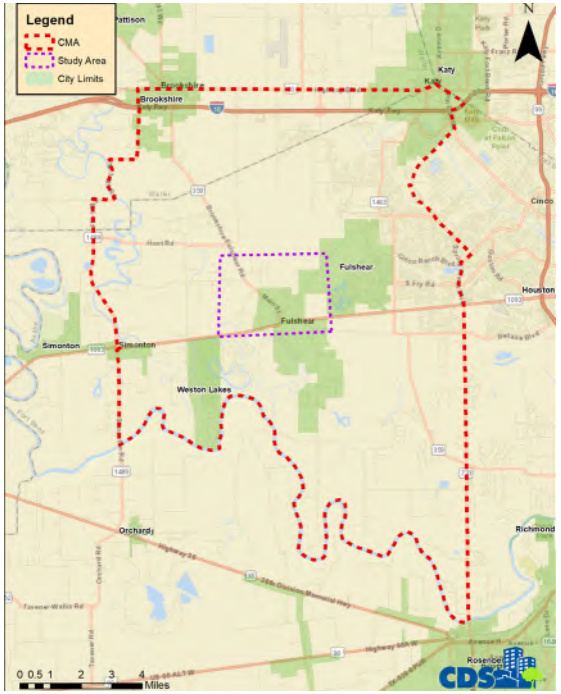
Demographic Characteristics

An assessment of demographic trends affecting demand in the study area was conducted. The assessment of the market area evaluates which land uses will be supported by providing an analysis of the social and economic characteristics of the study area and larger market area—including evaluation of population growth, income distribution, household characteristics, housing tenure (owner/renter), employment trends, and residential location patterns of the local workforce as it relates to the area's growth and development. The historical population growth, current population estimates, ethnic makeup, household size, educational attainment, current household income, employment, and income trends of the Study Area, the City of Fulshear, Competitive Market Area, and Fort Bend County were examined.

Fulshear Competitive Market Area (CMA)

The economic and development opportunities within the Livable Center Study Area are ultimately determined by the overall nature and volume of market demand in the greater area of which the Study Area is located. This area, known as the Competitive Market Area (CMA), encompasses an area that is roughly bounded by the following landmarks: FM 1489 on the west (Brookshire to Simonton), US 90 on the north, Brazos River on the south, Pin Oak / Katy-Flewellen / Spring Green / FM 723 on the east.

Map 4. Fulshear Competitive Market Area



Historical Population Growth and Current Estimates

According to data from the US Census, population in the Study Area increased significantly from 2000 to 2010 (172.8%). Since 2018, estimates for the Study Area show a continued increase of 13.6%. Over the same time period from 2000 to 2010, the CMA has seen tremendous growth at 253.7% while Fort Bend County experienced strong growth at 65.1%. Households have shown similar growth. Fulshear's population includes 66.9% in the age range 21 and over. Only 10.3% are over age 65 and 29.2% are under the age of 18.

Table 1. Population and Households, 2000 to 2023

Population	2000 Census	2010 Census	2018 Estimate	2023 Estimate	'00-'10	'18-'23
Study Area	97	264	693	787	172.8%	13.6%
City of Fulshear City Limits	1,012	2,971	12,198	22,594	193.6%	85.2%
CMA	8,367	29,595	64,894	72,917	253.7%	12.3%
Fort Bend County	354,447	585,375	780,355	862,825	65.1%	10.5%

Households	2000 Census	2010 Census	2018 Estimate	2023 Estimate	'00-'10	'18-'23
Study Area	38	103	280	320	168.3%	14.4%
City of Fulshear City Limits	360	966	2,624	3,003	168.2%	14.4%
CMA	2,945	9,470	20,851	23,580	221.5%	13.0%
Fort Bend County	110,912	187,384	252,605	280,636	68.9%	11.1%

Source: US Census, American Community Survey, Nielsen/Claritas 2016 Estimates – PCensus for ArcView (hereafter referred to as PCensus), PASA

Population by Age

The median age in the Study Area is 36.8 compared to 36.5 in Fort Bend County and Fulshear (city limits) and 35.8 in the CMA. Fulshear's population includes 66.9% in the age range 21 and over. Only 10.3% are over age 65 and 29.2% are under the age of 18.

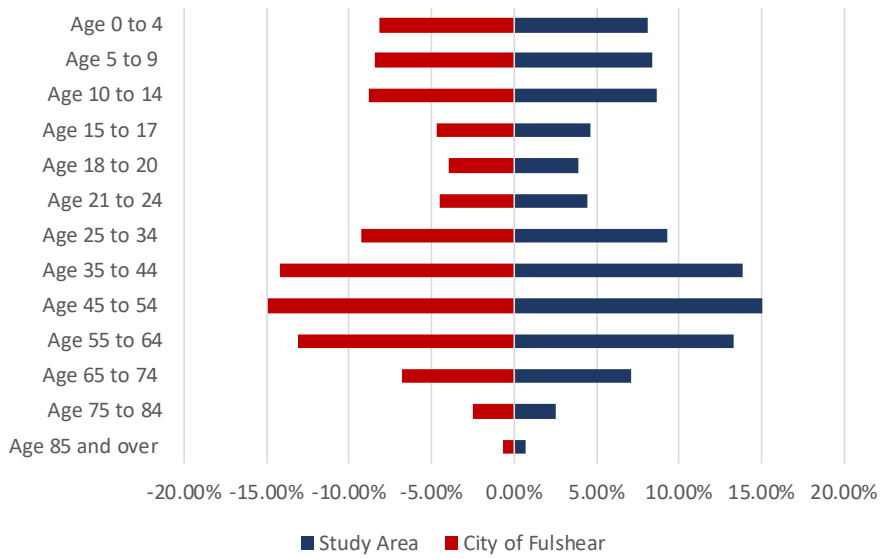
Household Size

According to Table 2. Household Size, 2018 on page 8, the Study Area has the lowest household size at 2.47 while the City, CMA, and County closely resemble each other. A noticeable difference is in the 1-person households which are slightly greater in Fort Bend County while 2-person households are greater in Fulshear.

Educational Attainment

The Study Area and Fulshear City have a lower portion of lesser-educated individuals in households as compared to the CMA and the County. The Study Area has roughly 42.8% of bachelor's degrees and professional and graduate degrees (master's and doctorate), compared to the CMA at 46.8% and 22.1% in the County.

Figure 1. Population by Age, 2018



Source: US Census, American Community Survey, PCensus

Table 2. Household Size, 2018

Category	Study Area	City of Fulshear	CMA	Fort Bend County
Total Households	280	2,624	20,851	252,605
1-Person Household	12.36%	12.36%	12.24%	15.12%
2-Person Household	32.38%	32.38%	29.20%	27.81%
3-Person Household	20.29%	20.29%	20.90%	20.05%
4-Person Household	20.79%	20.79%	22.86%	20.16%
5-Person Household	10.03%	10.03%	10.40%	10.13%
6-Person Household	2.53%	2.53%	2.99%	4.22%
7+ Person Household	1.61%	1.61%	1.41%	2.51%
Estimated Household Size	2.47	3.09	3.1	3.07

Source: US Census, American Community Survey, PCensus

Table 3. Educational Attainment of Population 25+ Years Old, 2018

Category	Study Area	City of Fulshear	CMA	Fort Bend County
Less than 9th grade	1.60%	1.59%	2.84%	5.10%
Some High School, no diploma	2.99%	3.04%	2.79%	5.13%
High School Graduate (or GED)	15.63%	15.65%	11.94%	17.98%
Some College, no degree	14.46%	14.20%	13.79%	20.35%
Associate Degree	8.92%	8.94%	7.55%	6.76%
Bachelor's Degree	37.83%	38.04%	38.70%	27.76%
Master's Degree	12.51%	12.41%	16.01%	12.51%
Professional School Degree	3.67%	3.75%	3.47%	2.20%
Doctorate Degree	2.36%	2.38%	2.92%	2.21%

Source: US Census, American Community Survey, PCensus

Household Income

From the year 2000 to 2018, the share of all households in the CMA making over $75,000 increased by 42.6%, with significant growth seen above $100,000. The Study Area also saw a concurrent increase in higher incomes over $125,000. The Study Area and the City have a significantly higher median income than the other areas.

Table 4. Median Household Income, 2000 to 2018

Household Income	Study Area		City of Fulshear		CMA		Fort Bend County	
Year	2000	2018	2000	2018	2000	2018	2000	2018
Households	38	280	160	2,624	2990	20851	111,158	252,605
Median Household Income	$59,184	$168,030	$66,667	$168,388	$58,785	$159,854	$64,691	$102,012

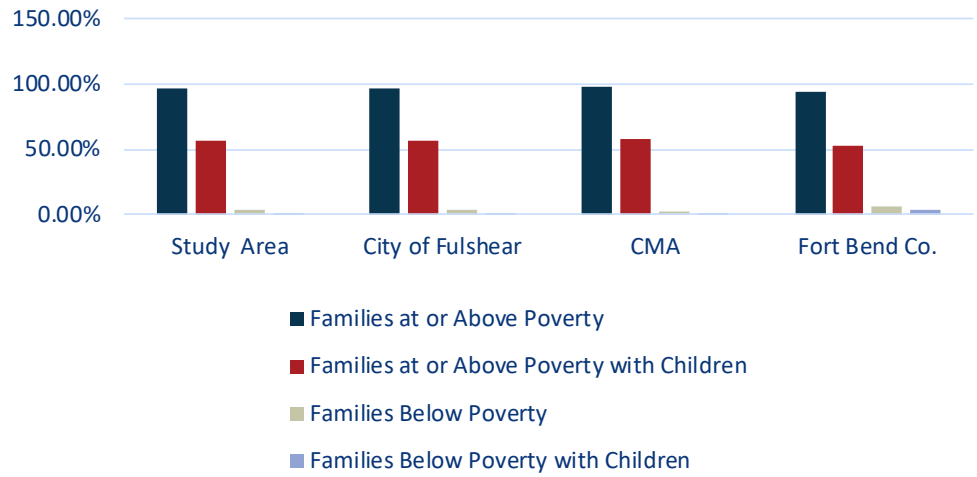
Source: US Census, American Community Survey, PCensus

Poverty Status

The poverty status of families is examined in order to ascertain the level of economic challenge. The data presented comes from the Census Bureau, which uses a set of money income thresholds that vary by family size and composition to determine who is in poverty. If a family's total income is less than the family's threshold, then that family and every individual in it is considered in poverty. The official poverty thresholds do not vary geographically, but they are updated for inflation using Consumer Price Index. The official poverty definition uses money income before taxes and does not include capital gains or non-cash benefits (such as public housing, Medicaid, and TANF).

According to 2018 estimates, the Study Area and City have a lower percentage of families in poverty, when compared with the CMA overall. Fort Bend County has the highest percentage of families below poverty.

Figure 2. Poverty Status, 2018



Source: US Census, American Community Survey, PCensus

Long-term Area Projections

The following presents population projections which estimate both the short-term and long-term demographic possibilities for the Study Area and CMA. Developers who are interested in investing in the area will likely consult such projections in order to determine how successful their project may be.

Short-term, demographic forecasts for the Study Area and CMA were determined by utilizing PCensus data, which uses a formula to project future numbers based on existing Census data trends. Long-term projections in the Houston MSA are provided by the Houston-Galveston Area Council (H-GAC), which offers five-year projections extending from 2015 to 2040. These estimates are available by Traffic Area Zones (TAZ).

CDS Community Development Strategies also provides future population projections, and these have been included. The projections by CDS are like the H-GAC's projections in that they are also connected to the TAZ geography. As can be seen in Map 5. TAZ Map for CMA on page 10, the TAZs associated with the CMA and Study Area are roughly equivalent to the area boundaries.

The following three tables display short-term Study Area and CMA projections based on Census trends, as well as longer term Study Area and CMA projections provided by the H-GAC and CDS Community Development Strategies.

Table 5. Short-term Study Area and CMA Projections Based on US Census Trends

Population	2000 Census	2010 Census	2018 Estimate	2023 Estimate
	8,367	29,595	64,894	72,917
Households	**2000 Census**	**2010 Census**	**2018 Estimate**	**2023 Estimate**
	2,945	9,470	20,851	23,580

Source: US Census, American Community Survey, PCensus

Table 6. Longer Term CMA Projections from the H-GAC

H-GAC Forecasts	2015	2020	2025	2030	2035	2040
Population	64,771	96,908	120,274	136,628	155,350	182,452
Households	22,158	33,415	42,432	49,305	58,086	67,299
Employment	13,701	18,798	23,003	25,009	27,176	29,782

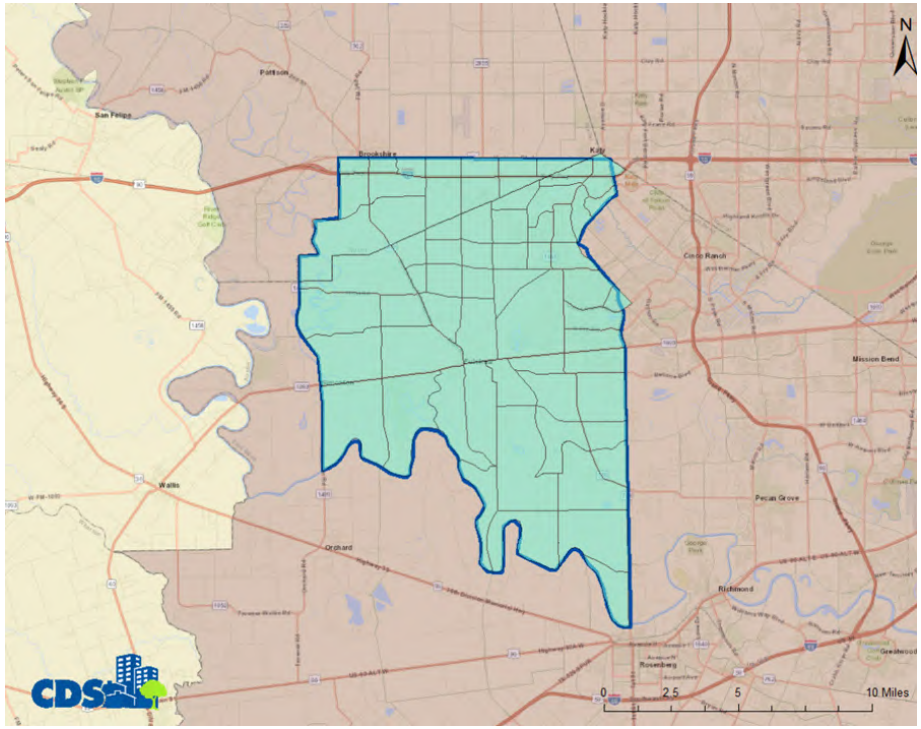
Source: H-GAC 2017 Forecasts

Table 7. Longer Term CMA Projections from CDS

CDS Forecasts	2015	2020	2025	2030	2035	2040
Population	47,683	63,444	91,401	129,315	167,884	20,4249
Households	15,007	20,757	30,927	44,813	59,238	72,864
Employment	11,010	14,498	20,524	27,750	34,759	41,820

Source: CDS Community Development Strategies 2017 Forecasts

Map 5. TAZ Map for CMA



The projections from the H-GAC and CDS also include estimates for households, and employment. Looking at jobs gains, both projections assume the areas will continue to grow, although the CDS is much more ambitious in its forecast for the CMA, while H-GAC estimates the Study Area will gain more employment. For our analysis, we will use an average of both forecasts due to the differences in actual numbers. The following will be used to illustrate the growth in the CMA. The 2025 projections from the H-GAC and CDS projections estimate the population in the CMA will increase by roughly 32%.

Table 8. Average CDS and H-GAC Projections for the CMA

Average	2015	2020	2025	2030	2035	2040
Population	56,227	80,176	105,838	132,972	161,617	193,351
Households	18,583	27,086	36,680	47,059	58,662	70,082
Employment	12,356	16,648	21,764	26,380	30,968	35,801

Source: H-GAC 2017 Forecasts, CDS Community Development Strategies 2017 Forecasts, CDS calculations

Employment and Economy

The following is local employment and economic statistics—key indicators used to examine the development potential of an area.

Employment by Occupation and Classification

As previously mentioned, the Study Area has a population of 693. Of that amount, 341—or 49.2%—are at least 16 years old and employed. The CMA has 30,426 employed, or 46.8%. There are 86.6% white collar and 7.2% blue collar workers in the Study Area. The largest percentage of the population are in Management occupations, followed by Sales/Related. As compared to the CMA, there is a slightly lower percentage of white-collar workers and blue-collar workers but a higher percentage of service and farm.

Employment Inflow and Outflow

To better understand local demand for various land uses, it is helpful to look at the jobs data provided by the Longitudinal Employer-Household Dynamic (LEHD), which is part of the US Census Bureau. While the most recent data available is from 2015 (and differs slightly from the employment estimates provided previously), it is still helpful in understanding present day commuting patterns. The Figure 3. Employment Inflow and Outflow, 2015 utilizes LEHD data to provide a visualization of where the jobs are in the CMA. There are 17,363 jobs in the CMA.

Table 9. Employment Inflow and Outflow, 2015

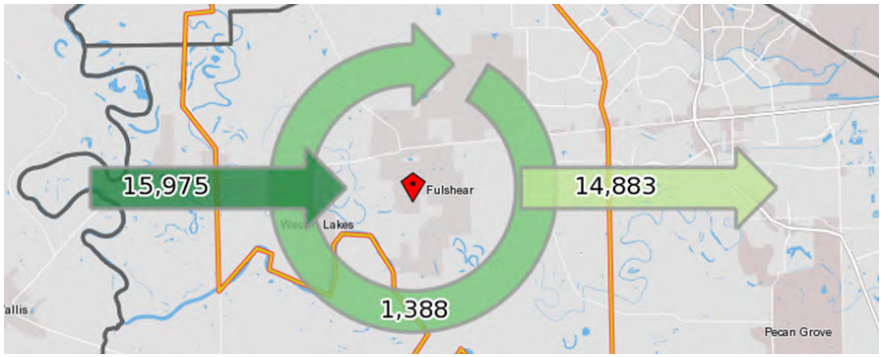
Employment Inflow/Outflow	CMA	
	Number	Percent
Employed in the Area	17,363	100.0%
Employed in the Area but Living Outside	15,975	92.0%
Employed in the Area and Living Inside	1,388	8.0%
Living in the Area	16,271	100.0%
Living in the Area but Employed Outside	14,883	91.5%
Living in the Area and Employed Inside	1,388	8.5%

Source: US Census Longitudinal Employer-Household Dynamics, 2015
Note: 2015 is latest data available from the Census LEHD

Near Term Job Growth – I-10 Corridor

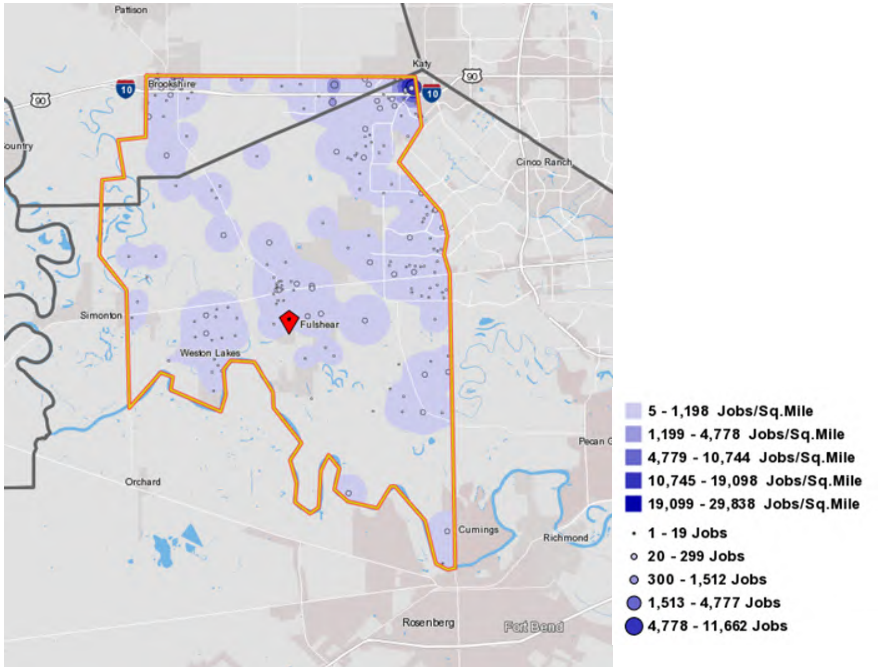
The most significant employment growth node occurring in the near term relative to Fulshear is the ongoing development of new industrial and logistics facilities in the I-10 corridor. Projects include a new Amazon distribution center, MAN Energy Solutions, Pepperl & Fuchs, and numerous others, joining existing employers such as Rooms to Go and Igloo. Per local economic development agencies, over 1,000 new jobs are expected within the next few years. The bulk of these are likely to be in the moderate wage ranges of $12 to $25 per hour, though on-site managerial staff will be higher.

Figure 3. Employment Inflow and Outflow, 2015



Source: US Census, LEHD 2015, CDS

Figure 4. Primary Jobs in the CMA



Source: US Census, LEHD 2015, CDS

Market Assessment Summary

Single-family Housing Market

CMA Single-family Housing Market

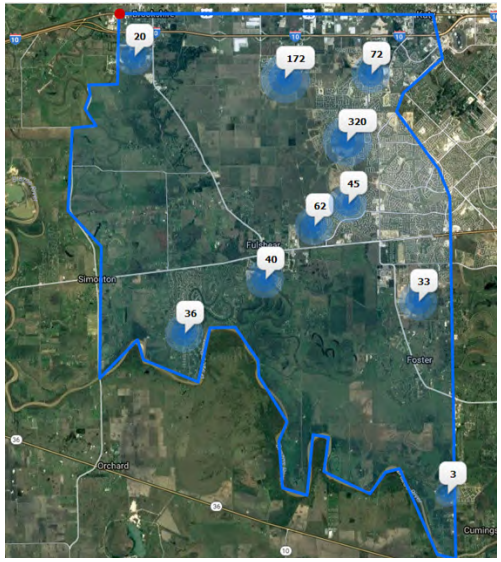
The CMA includes approximately 21,000 housing units of which 88% are owner-occupied. The median housing value of owner-occupied homes is $383,801. Less than 10% of the housing units are multifamily (10,859 units) in structures of at least five units.

There were 1,999 sales in 2017 in the CMA. The average price was $370,860 and the median price was $344,000. Prices rose 0.9% from 2016 to 2017. There are 819 active listings ranging from $85,999 to $2,449,000. The average list price is $447,711. The max priced homes are in Cinco Ranch. Comparatively, there were 1,848 homes sold in the CMA in 2016. The average sales price was $367,238 and the median was $345,000.

The CMA has large quantities of new construction, with locations shown in Map 6. CMA New Home Construction on page 12. There were 803 new construction homes sold in 2017.

There are several Master Planned Developments in Fulshear or its ETJ. There are 6,344 occupied lots and estimated 7,430 future lots in Fulshear and its ETJ. The median price is $379,215.

Map 6. CMA New Home Construction



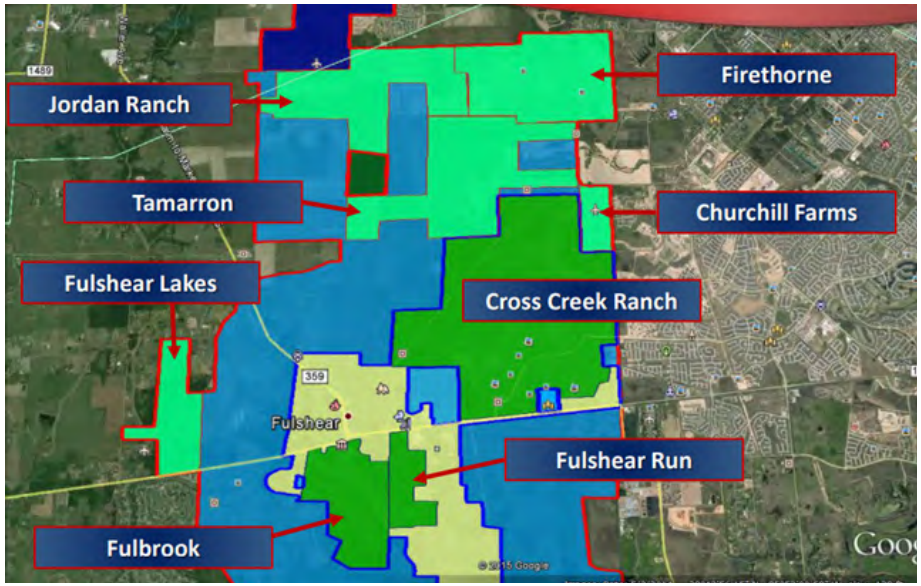
Study Area Single-family Housing Market

There are an estimated 284 single-family housing units in the Study Area. Approximately 91.9% of the occupied units are owner-occupied. The median value for owner-occupied housing is $405,021 which is greater than the CMA ($383,801). There are 726 single-family housing units according to PCensus in the City. The median value is $410,625 which is slightly above the Study Area and the CMA as well. There are 97.7% single-family housing units in the Study Area and no multifamily units. The largest share (38.9%) of the housing structures were built between 2014 and 2018. Only 7% were built before 1980.

In 2017, 28 homes in the Study Area were sold. The average sales price was $360,776 or $137.89 per square foot (psf). This is 2.7% lower average sales price than the CMA in 2017. There are 18 active listings (resale) in the Study Area currently. They range from $261,165 to $1,100,000.

Comparatively, there were 15 homes sold in the Study Area in 2016. The average sales price was $388,130 and the median was $367,000. In 2017, 19 new construction homes sold in the Study Area. The average sales price was $373,762 or $125.68 per square foot. This is 0.8% higher average new home sales price in the CMA in 2017. New construction subdivisions in the Study Area include Cross Creek Ranch, Fulshear Run, and Fulbrook on Fulshear Creek.

Map 7. Master Planned Communities in Fulshear



Potential Demand for Single-family Housing

To plan and project new housing units, the number of projected housing units is multiplied by the percentage of owners for single-family homes. As shown using the 87.6% of households owned in the CMA (2018 estimate) there is a potential demand to support 2,612 new homes through 2020 based on current lot supplies. For the broader category of single-family

housing, demand is demonstrated in the Study Area for regular detached homes. Supportable prices are generally in the $300,000 to $400,000 range with average square footage of 3,000sf. Lots are typically 50 to 65 feet wide, except for patio homes, which are on smaller lots.

However, regular detached single-family homes on typical suburban lots are not necessarily the type of home that will best fit into a "new downtown" environment. Generally, a more "urban" or small-lot configuration is desired, particularly to increase population density that is within walking distance of downtown services and amenities.

This study suggests incremental development (four to eight at a time) of attached townhomes on vacant or redevelopable sites (including infill sites) within a five to ten-minute walk of whatever is planned as the primary commercial core of the new downtown. For market viability, this development will likely need to be after enough public improvements to streetscapes and public spaces have been implemented to have a visible sense of walkability and centrality to the new district. Similar to the pricing of the Cross Creek Ranch townhomes, homes will initially likely need to be offered at a lower price than standard detached homes, in the $200,000s. However, once the new downtown becomes established as a leisure and business destination appealing to the upscale demographic moving to the CMA, the achievable price will likely increase.

Given the large amount of developable land in the Study Area outside the 10-minute walk to the core of the new downtown, we would also recommend other small-lot single-family product such as patio homes and small-lot detached homes.

Table 10. CMA Single-family Demand

Category	2015	2020	2025	2030
Total Current and Projected CMA Households	18,583	27,086	36,680	47,059
Incremental Housing Unit Demand	-	8,503	9,594	10,379
CMA Single-Family Demand (87.6%)	-	7,448	8,404	9,092
Less CMA Available Lots	-	-4836	-	-
CMA Single-Family Demand	**-**	**2,612**	**8,404**	**9,092**

Sources: US Census, American Community Survey, PCensus, CDS

Table 11. Study Area Single-family Demand

Category	2020	2025	2030
CMA Projected Single-Family Demand	2,612	8,404	9,092
Study Area Housing Unit Demand (1.3%)	34	109	118
Study Area Single-family Demand Annually	7	21	23

Sources: PCensus for Map Info, Copyright 2016 Tetrad Corporation, CDS, H-GAC

Townhome Examples

Small Lot Detached Example

Townhome Example

Multifamily Housing Market

CMA Multifamily Housing Market

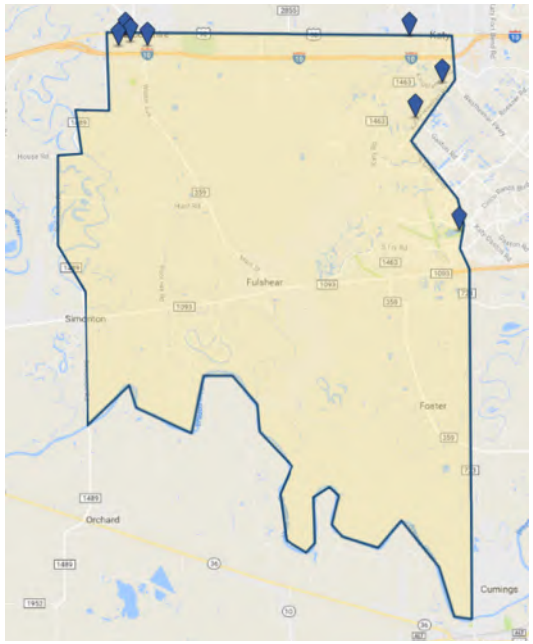
The CMA has experienced overall steady occupancy with vacancy ranging from 4.5% to 12.2%. Currently, vacancy is at the highest it has been since 2013. Rental rates for apartments have been steadily increasing since 2013. Rents have increased from $1.11psf to $1.30psf in this market over the past five years. Overall absorption in the CMA has been a positive 17 units annually.

There are 912 units in the CMA. Three hundred eighty (380) units are under construction (Class A). Most of the units are market rate, with 44 being affordable (4.8%). There are 160 Class A existing units; 340 are Class B and 524 are Class C. The average year built is 1994. Newer units are Class A. The 380 units under construction at Parklane Fulshear (27222 Fulshear Bend Dr.) are studio, one, two and three-bedroom units. These units are located on the east side of Fulshear in Cross Creek Ranch.

Study Area Multifamily Housing Market

The Study Area and the City of Fulshear includes no multifamily currently.

Map 12. Map of Multifamily Housing Locations in the CMA



Potential Demand for Multifamily Housing

Urban Lofts, Georgetown, TX

Using the 12.32% of households renting in the CMA (2018 estimate), there is a potential demand to support 667 new units through 2020 based on current units under construction and proposed. By 2025, there will additional demand for 1,180 units.

At 2018, Fulshear has an estimated 3.4% of the total CMA housing units overall and no multifamily currently. Assuming a 10.0% capture of the overall CMA multifamily units. Application of the capture rate to the CMA multifamily forecasted demand results in 66 units by 2020 and an additional 118 units by 2025 based on projected demand. It is not unreasonable to assume the Study Area could capture at least 50% of the Fulshear overall demand, or 32 units, by 2020. CMA absorption has historically been 18 units per year which appears reasonable for the forecasted demand in the Study Area.

Table 13. CMA Multifamily Demand

Category	2015	2020	2025	2030
Total Current and Projected CMA households	18,583	27,086	36,680	47,059
Incremental Housing Unit Demand		8,503	9,594	10,379
CMA Multifamily Demand (12.32%)		1,047	1,180	1,278
Less CMA Pipeline Units		-380		
CMA Multifamily Demand		**667**	**1,180**	**1,278**

Table 14. Study Area Multifamily Demand

Category	2020	2025	2030
CMA Projected Multifamily Demand	667	1,180	1,278
Fulshear Multifamily housing unit Capture Rate (10.0%)	66	118	127
Study Area Capture Rate 50%	32	59	63

Sources: CDS Community Development Strategies

Conclusions and Recommendations

There is not enough demand in the short-term in the Study Area to justify a typical new Class A apartment project of 175 units or more. However, the accumulated supportable demand for a Class A apartment project in the Study Area will eventually exist in the medium to long-term. In the short to middle term, Fulshear downtown developers should consider two other multifamily types:

- Small (under 20 unit) urban loft developments with top-of-market rental rates; these would need to be concurrent with public area and other commercial development improvements
- A workforce housing complex to serve the new retail and industrial / logistics employment coming to the greater market area

Urban lofts are a housing type more associated with larger cities or major suburban town center projects. However, they are proving to be market viable in many small-towns around Texas. Usually, they are developed as adaptive reuse of upper floors of older commercial buildings or hotels with each project consisting only of a small number of units. It is recommended that these kinds of projects offer rentals in the early years of downtown development. Once the neighborhood is firmly established as a desirable destination (as is the case with Georgetown), for-sale condominiums would have better viability.

Short-term is workforce rental housing or multifamily apartments with rates below suburban Class A, but above those offered in typical subsidized income-restricted properties such as those built through the Low Income Housing Tax Credit program.

Senior Housing

CMA Senior Demographics

There are currently no Senior housing projects in the CMA which includes the Study Area. The CMA includes 13,272 persons over the age of 55. 20.4% of the CMA population is over the age of 55. By 2023, the population over age 55 is expected to increase to 17,264 (by 3,992) or 23.6% of the total population. 84.7% of the total households from age of 55 to 64 have incomes over $75,000; Median income is $179,981.

Study Area Senior Demographics

The Study Area includes 164 persons over the age of 55. 23.6% of the total Study Area population are over age 55. By 2023, the population over age 55 is expected to increase to 210 (by 46) or 28% of the total population. 90.2% of the total households from age of 55 to 64 have incomes over $75,000; Median income is $193,498. Of the total 258 housing units in the Study Area, approximately 39.1% (101) are owner-occupied by persons age 55 and over; and 8.52% (10) are rental units occupied by seniors.

Potential Demand – Senior Housing

Using the same analysis as the market rate illustration, we have derived the demand for basic Age Restricted or Active Adult Apartment units (no medical services) based on household growth in the CMA and Study Area over the next five years. By 2023, there will be an additional 2,173 households in the CMA age 55 or 434 annually. Although the exact percentage of the population who would live in senior living developments are unknown, 4.13% of the current householders age 55 and over are renters in the CMA. Based on this number, 89 additional renter households will be in the CMA by 2023.

Table 15. Study Area Senior Housing Demand Projections

Category	2018	2023
Study Area Senior HH Growth	7,236	9,409
Incremental Senior HH Growth		2,173
4.13% CMA Households age 55+ Renters		89
50% Fulshear Share of HH age 55+ Renters		44

Sources: CDS Community Development Strategies

It is estimated that Fulshear could capture 50% of the CMA demand based on the current supply and demonstrated demand. The Study Area could capture 100% of the estimated market growth based on the percentage of households age 55+ currently renting in the Study Area and the lack of Senior Housing in the CMA. The total future Study Area household growth results in 44 additional renters in the next five years (by 2023) age 55+.

Conclusions and Recommendations

Senior Housing appears to be feasible currently in the Study Area. Townhomes may be more appealing to this group of renters. There is currently no Senior Housing in the CMA. Senior Housing pricing, unit mix, and amenities would entail a higher-level study in the future.

Retail Market

CMA Retail Market

The largest existing concentration of retailers in the CMA is in the Cinco Ranch area, along the Katy Freeway, and along FM 1093 which intersects Fulshear. There are 168 retail buildings including 2,488,845sf in the CMA. The average rental rate is $25.02psf (NNN) with a vacancy rate of 7.6%. There is 229,445sf currently under construction and an additional 855,000sf proposed.

The CMA retail vacancy rate has continued to increase over the past 4 years. Rates have gone from 2.5% to the current 11%. Net absorption has been positive in the market. The leasing outlook over the next 60 months is for continued absorption.

A critical factor in consideration for commercial retail development is the buying power of the market area that a potential development site is located in. Buying income can be measured by the level of disposable or expendable income from consumers in a market area. The CMA's effective buying income of $170,360 on average per household is extremely high.

Psychographic analysis is used to identify consumer segments and match retail demand categories in the trade area(s). This system is used to understand and profile the population in the market area for the purpose of targeting the largest consumer lifestyle segments. Every household is defined in terms of 66 demographically and behaviorally distinct groups.

Specific lifestyle segments will be quantified and ranked for the trade area. The top segments, described in this section, are correlated to likes, dislikes and purchase behavior relative to retail goods and services. The largest household segment in the Study Area is Networked Neighbors (28.5%) followed by Fast Track Families (22.7%).

- **Networked Neighbors** is a family portrait of suburban wealth, a place of million-dollar homes and manicured lawns, high-end cars and exclusive private clubs. This lifestyle is characterized by married couples with children, high technology use, graduate degrees, and six-figure incomes earned by business executives, managers, and professionals.

- **Fast-Track Families** lead busy, active lives often centered around the schedules and interests of their children. Always on the go, they are frequent restaurant diners, drive larger SUVs, visit Pinterest, and tend to shop in bulk at wholesale clubs.

Study Area Retail

Currently, 14 retail/commercial buildings with 183,824sf are in the Study Area. The vacancy rate is 1.9% which is extremely low with rental rates at $24.45NNN. Vacancy has been volatile in this market ranging from 0% to 13%. Rents remained steady at $18 from 2013 to 2015 and have recently increased into the $25 range. Absorption has been positive.

According to research provided by CoStar, July 2017, sales per square foot at all but a few public retailers have declined to an average of around $325 in recent years, down from nearly $375 in the early 2000s. Applying this average per square foot sales to the estimated expenditures in the CMA, there is support for 650,751sf in the CMA over the next five years. The CMA includes 2,488,845sf currently with an additional 229,445sf under construction and another 828,987sf proposed. There does not appear to be enough demand at the current time for additional retail in the CMA based on estimated expenditures.

Existing Retail

Interviews with Old Town Retail Property Owners

According to several of the multi-tenant commercial property owners in the Old Town area, few of these properties have exclusively retail occupants; generally, they have a mix of retail / dining tenants, office tenants, and even industrial users.

Retail rents are moderate by metro Houston standards, though high-visibility retail spaces do have higher rates. The sample size is small, but there appears to have been a moderate amount of turnover. Retail

Small-Scale Retail


Local Restaurant


Urban Style Environment

businesses in Old Town tend to be local independent in nature, rather than national brands (Ace Hardware, the largest retail business, is an exception).

It is not surprising to have turnover, especially for independent restaurant businesses, as such ventures are inherently risky. Few interviewees had substantial comments about needed improvements, but enhancing walkability was strongly emphasized by at least one.

Development Recommendations

» A quantitative analysis indicates that there is not sufficient demand in the immediate future for large-scale retail development in the CMA. Despite this, CDS recommends incremental, small-scale retail development in the Study Area for economic development, as local independent businesses already dominate this part of Fulshear.

» Independent local businesses serving the Study Area's population generally prefer, lower rent retail space in newer space which can typically rent for much higher rates per square foot. The challenge will be to create new space while keeping lease rates affordable.

» Another challenge will be to create an urban environment that will help such businesses be successful. At present, there are few elements to spur activity outside of drive-by traffic on the main roads; this somewhat limits physical development opportunities for retail to those corridors. Furthermore, the lack of walkability hinders potential cross-shopping benefits. Urban design and environmental / social programming efforts are needed to help draw interest to interior block faces, provide convenient parking, facilitate walking between properties and create reasons to visit such as programmed events or casual leisure attractions for the public (playground, public art, special garden, etc.) that activate these areas of the Old Town.

» It is the opinion of CDS that new retail space should be focused on facilitating local businesses in the categories of food and drink, such as a wine bar, beer garden, coffee shop, café, ice cream, or grill; personal services including boutique healthcare (dentist, chiropractor, etc.), beauty / grooming places such as various types of salons; and fitness, health and wellness businesses, such as a local cross fit, yoga, pilates, or alternative health niche businesses. While not traditionally "glamorous", these categories will be "traffic drivers" as they encourage regular visits by residents and are resistant to competition from Internet commerce. Boutiques for "soft goods" such as clothing and specialty commerce such as art galleries can mesh well with these businesses, but are less likely to be anchors for retail activity, due to their risky nature in the context of the accelerated evolution of retail now occurring.

» Retail space should be added only in small increments of less than 10,000 square feet at a time, preferably in concert with adjacent public space improvements. Building design needs to balance between attractiveness and affordability for tenants. Atelier / workshop spaces with storefronts for retail sales might be appropriate for the perimeter locations if local artisans express interest in siting their activities there.

Office Market

CMA Office Market

There are 44 office buildings totaling 374,053 square feet in the CMA. The vacancy rate is 18.1% and gross rents are at $21.51psf. The average year built is 1978. There is currently 4,900sf under construction and an additional 9,800 proposed. The development is occurring in Cross Creek on the east side of Fulshear. Throughout the entire CMA there are no existing Class A buildings. Clearly this is a Class B and C market, although the complete lack of any Class A office space may create a small opportunity for a one-off type office project, perhaps a component of the Study Area.

The vacancy rate in the CMA has been somewhat varied, ranging from below 4% in late 2013 to a high of 25% in late 2015 and mid-2016. Current office vacancy for the CMA is 18.1%. Gross rents have also fluctuated between $16psf and $30psf; rents are currently $21.51psf.

Study Area Office Market

The Study Area includes 13 buildings with 184,638sf. The office development is located along major roadways, FM 359 (Main St.) and FM 1093. The Study Area includes 49.4% of the overall CMA office development.

The current vacancy rate is 15.2% in the Study Area with rental rates at $21.67NNN. On average, 2,445 sf has been absorbed in this area per year. There is no new development under construction or proposed for the Study Area. Rates have been decreasing in the Study Area since 2013. Absorption has been positive overall. Vacancy increased from 2013 to 2016 and has been leveling off at 15%. The vacancy can be attributed to two buildings, 30525 1st St. with a 66.5% occupancy and 8045 FM 359 with 0% occupancy.

Interviews with Commercial Property Representatives

CDS conducted interviews with several commercial property owners in the Old Town area to ascertain general market conditions for office space. Though the sample size was limited, it appears that demand for office space has been increasing in recent years, with a corresponding increase in lease rates. At least one interviewee commented on the trend away from small industrial users (auto shops etc.) and toward office users.

Neighborhood Scale Office Example

Urban Office Example

Flex Office Example

Potential Demand – Office Space

An office space per office employee factor ranged from a low of 325 square feet in 2007 to a high of 365 square feet in 2010. It rebounded to 343 square feet per employee in 2012. CCIM reported in a recent article in 2015, that office space per employee is becoming less with companies increasing the proportion of collaboration and team space in offices, along with more space devoted to amenities. These flexible spaces are offsetting some of the square footage lost to smaller dedicated work spaces. For now, 200 to 250 sf per worker is still a reasonable estimate for most traditional firms, but at the same time, 100 to 150 sf is closer to what some of the larger public firms are now achieving.

Using 150 square feet per employee, the estimated office space needed in the CMA by 2020 is 511,050 sf for employment growth based on H-GAC/ CDS projections or 102,210 sf annually. Absorption in the CMA overall has been 2,057 sf annually over the past five years.

Table 16. Future Office Demand for the CMA

	2015	2020	2025
Employment Projections	12,356	16,648	21,764
Incremental Increase		4,292	5,116
81.68% Labor Force/Prof. Jobs		3,505	4,178
150 SF per Job		525,750	626,700
Less: CMA Pipeline Space to 2020		14,700	
Incremental Demand		511,050	626,700
Annual Demand		**102,210**	**125,340**
49.3% Study Area Development		**50,452**	

Source: PCensus, CDS Community Development Strategies, H-GAC

Based on annual absorption, the CMA should be able to absorb approximately 10,285sf over the next five year period. However, employment is forecasted to increase by 30%. CDS estimates that 102,210sf would be ambitious over the next 5 year period instead of annually. Therefore at the historical capture rate of 49.3% the Study Area could absorb 50,452sf or 10,090sf annually. The demand could increase as the above future office demand table indicates, so this is a conservative estimate.

This Study Area is probably not suited for a traditional Class A spec, multi-tenant office building at this time, which would typically be 40,000 square feet of leasable area or larger. Such space would likely require too high lease rates for the small businesses that will be generated in the area, and absorption of the space would take too long for the upfront investment.

However, as the previous analysis shows, a supply of new office space will be important as Fulshear's population grows. Furthermore, small scale office space will be very compatible and synergistic with other uses in a newly developing downtown area. CDS recommends the creation of relatively small to moderate increments of office space in Fulshear's new downtown. Buildings will probably not exceed three stories, and ground floor spaces may be used for either retail or office space, while second and third floors would focus more on office or medical users.

For instance, office suites above retail in a town square like development may be successful. An example of this is Kingwood Town Center which provides office space above street level retail and restaurants. The office space in Kingwood Town Center on the northeast side of Houston is typically occupied by local businesses like real estate, title, insurance and financial management businesses and other personal services like law, specialty boutique or alternative health businesses.

Potential Commercial Development Program - Additional Points

The development of commercial space in the new downtown Fulshear, as described above and in the previous Retail Market section, will occur in relatively small increments, perhaps mixed office-retail buildings of 10,000 to 15,000 square feet. Additional points that will help guide development are as follows.

- As noted above, ground floor spaces may flex between retail and office. However, spaces best suited for dining may need to be designated with a proactive kitchen buildout and grease trap access. This will lower the barrier to entry for a new restaurant tenant. However, access to natural gas lines (vs. Propane tanks) may prove to be severely limited in the downtown area.
- The core office demand is likely to come from independent businesses providing services to the local population. One reason such businesses often choose space in retail centers is that it is relatively more affordable and may have more flexible lease terms when compared to high-quality office properties. Also, some office landlords may be reluctant to create spaces for small tenants of under 2,000 square feet, whereas in-line retail spaces are as good a match in terms of space. So, a challenge in Fulshear will be to create downtown office space that is attractive and well-constructed but still affordable to these types of businesses.
- Another option for office occupancy (and potentially retail as well) would be a small business incubator to assist emerging businesses in the earliest stages of their growth. In many respects an incubator could have physical similarities to coworking in terms of space layout, though additional private offices might be needed as well. Furthermore, to function as an incubator, technical assistance and educational programming will be needed. Such an operation will require the involvement of the public sector and/or a nonprofit or philanthropic organization. Also, some for-profit financial institutions such as national banks have philanthropic efforts which might support an incubator.
- For either of the previous two options, community awareness will be an important requirement to success. CDS strongly recommends working with local business organizations and other community groups to understand the level of interest and the specific needs of emerging small businesses before committing funds to construction and operation.
- The continued rapid growth of highly educated households in Fulshear's CMA, coupled with growth in "empty nester" households or households where both adults are free to pursue careers rather than focus on internal household work, implies that there will be an increasing number of entrepreneurs generated by the local population, or workers who may relocate their office closer to their home. In early stages of such ventures, the business owners may not be ready to undertake a formal office lease. This makes shared office space, or coworking space, an option. While not yet with a proven track record in emerging Houston suburbs, an office developer still might consider allocating a block of space to a coworking operation to cater to such business operators, based on recent and expected economic and demographic growth trends in Fulshear. A downtown Fulshear coworking space would likely not be as large as those spaces in the urban core of the region, but later expansion could be possible as office development in downtown continues. A developer might seek a coworking operator as a tenant rather than directly operate the space. It should be noted that previous or concurrent implementation of public improvements for walkability and parking are likely a prerequisite to attracting both a third-party operator and the coworking tenants.

Mobility and Connectivity

Regional Arterial System

The Regional Arterial System (RAS) constitutes the portion of the local street and road network which, in conjunction with the system of highways and transit services, provides for significant mobility throughout the region and accessibility between communities. FM 1093 and FM 359 are such roadways. FM 1093 serves as a conduit for traffic to and from the area south of Interstate 10 and north of US 59/IH 69 for access to and from the freeway network serving the Houston Metropolitan Area.

The Westpark Tollway extends westward from the City of Houston along FM 1093 to Grand Parkway (SH 99) just east of Fulshear and is being further extended along FM 1093 toward Fulshear. In this currently programmed improvement, FM 1093 will be upgraded to a tollway to the edge of Fulshear (just east of FM 1463) where it will transition to a divided highway through Fulshear.

Interstate 10 is seven miles to the north of FM 1093 and is accessed to and from Fulshear along FM 359. FM 359 is a regional connector roadway that facilitates traffic along the highway corridors west and north of Brookshire to travel into the FM 1093/Westpark Tollway corridor. Much of the current travel along this FM 359 to FM 1093 passageway is related to the ongoing construction of the highway improvements as well as growing residential and commercial development along FM 1093 east of downtown Fulshear.

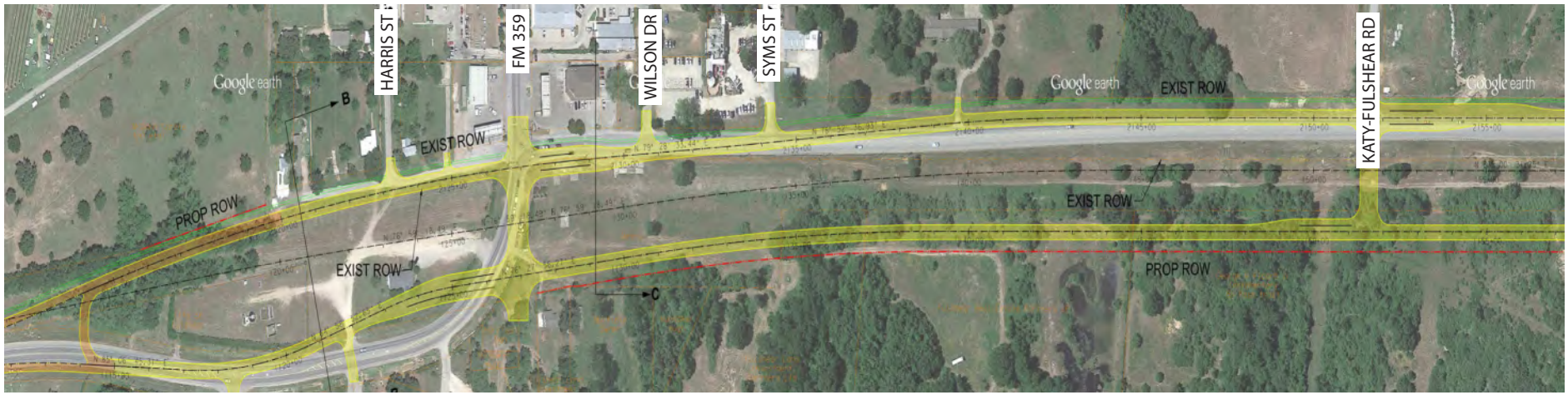
Pending Roadway Improvements

FM 1093/Westpark Tollway (TxDOT)

According to the TxDOT schematic design concept, beginning at FM 1463, the tollway will transition to a divided highway with a signalized intersection for the proposed Texas Heritage Parkway. At grade crossings would be provided at Charger Way, Katy Fulshear Road and Main Street with signalized intersections anticipated for each intersection. The median between the divided highway is configured for subsequent provision of main lane uninterrupted flow freeway with the improved FM 1093 serving as the frontage roads of the freeway.

At the intersection with FM 359/Main Street in downtown Fulshear, the current program of improvements would provide the two future service road intersections with Main Street, providing two through lanes in each direction along Main Street on the approaches to the two intersections. Main Street to the south of FM 1093 would connect and transition to the existing Fulshear Trace roadway. Main Street to the north of FM 1093 would transition from a four-lane cross section to the existing two-lane cross section at some distance north of FM 1093.

Figure 5. Preliminary Planned Improvements to FM 1093 near Downtown Fulshear



Source: TxDOT

Figure 6. Pending Regional Investments in Local Roadway Network Near the Study Area

Texas Heritage Parkway (Fort Bend County)

The Fort Bend County Mobility Bond allocated $4.5 million toward the $47 million cost of implementing the Texas Heritage Parkway concept between IH-10 and FM 1093, in partnership with the area development community and public entities. The parkway would have roundabout traffic control at arterial intersections.

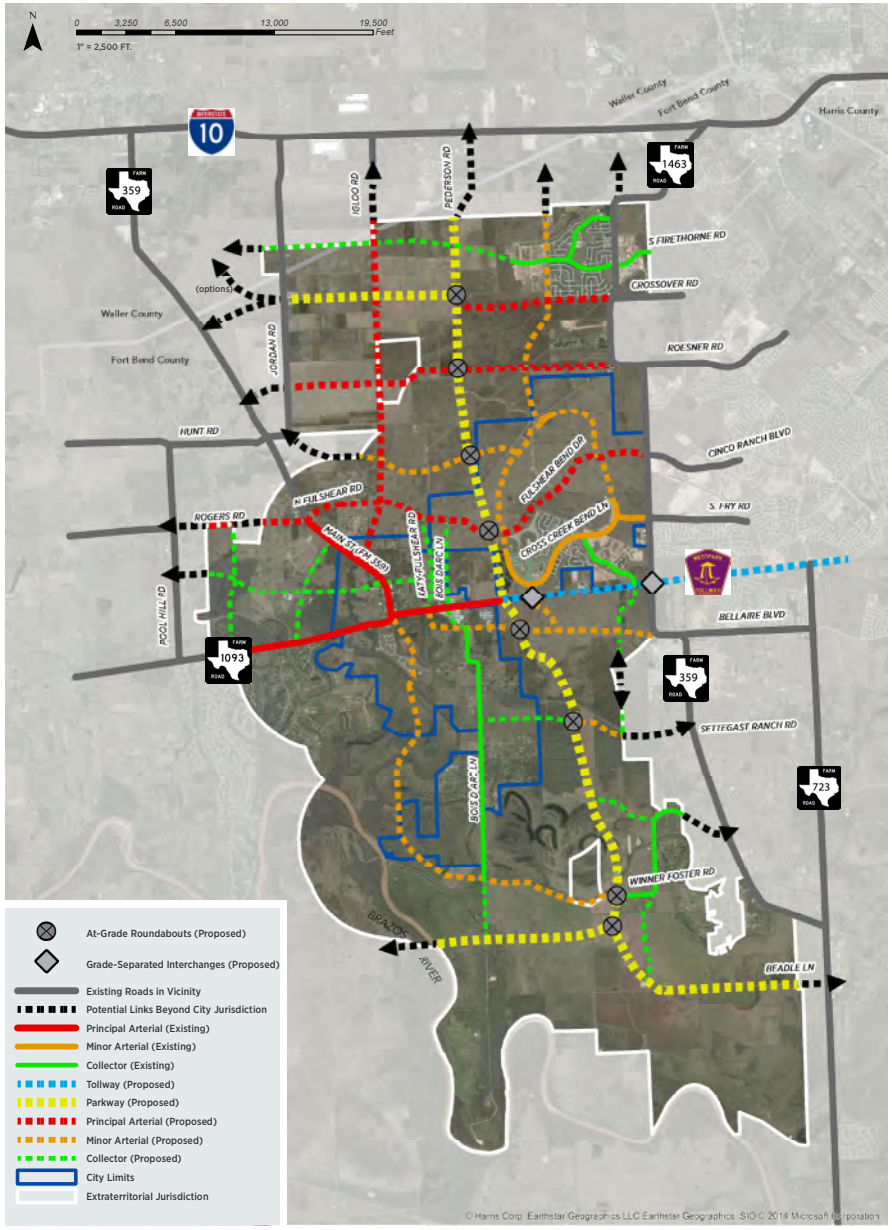
Katy Fulshear Road (Fort Bend County)

The Fort Bend County Mobility Bond provided $3.3 million to construct a four-lane concrete boulevard between FM 1093 and Huggins Drive.

Huggins Drive (Fort Bend County)

The Fort Bend County Mobility Bond covers the $2.5 million cost of a new east-west road link between FM 359/Main Street and Katy Fulshear Road.

Figure 7. Study Area Fulshear Thoroughfare Plan (2014)



Fulshear Thoroughfare Plan

The City of Fulshear has an adopted Thoroughfare Plan that provides a vision for long range development of the network of roadways within the Extraterritorial Jurisdiction (ETJ) of the city. The Thoroughfare Plan map, last updated in 2014 as part of the city's Comprehensive Plan, is shown in Figure 7.

The Thoroughfare Plan shows the extended network of roadways that would serve the future transportation needs of the city, as well as roadway connections into the adjacent county and other communities. Most notably in regard to transportation planning for Downtown Fulshear, the Plan shows:

- FM 1093 and FM 359 as Principal Arterial roadways through the Downtown area of Fulshear;
- The continuation of Main Street to the south of FM 1093 as a Minor Arterial connecting to Fulshear Trace and extending further southward to a connection to the planned Fulshear Parkway;
- Fulshear Parkway will provide another significant north-south connector roadway between IH 10 and FM 1093;
- A major east-west arterial roadway would be created by extending Rogers Road eastward of FM 359 as N. Fulshear Road and connecting to Fulshear Bend Road through the Cross Creek Ranch development. The new arterial roadway corridor would provide for east-west movement parallel to FM 1093;
- Charger Way/Bois D'Arc Lane would serve as a north-south Collector roadway between Fulshear Road and the southern extent of Fulshear, with a crossing of FM 1093; and
- Establishment of Huggins Drive as an east-west Collector roadway extending westward from the school complex at Charger Way to an intersection with Main Street and extending westward to the western extend of the city's ETJ.

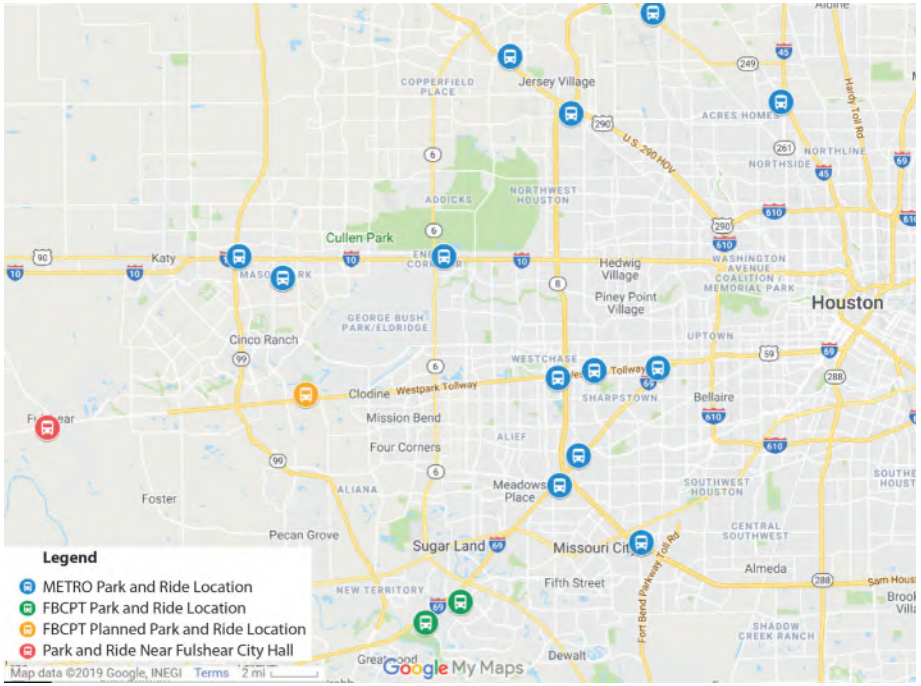
Multimodal Transportation

Transit

There is a Park and Ride lot located adjacent to the Fulshear City Hall that can be used by those interested in ridesharing to destinations throughout the metropolitan area. Shown in Figure 8 are the locations of nearby Houston METRO park and ride lots, none of which are very close to Fulshear. METRO is planning a new park and ride facility along the Westpark Tollway near Mason Road.

Fort Bend County runs a demand responsive public transportation service that serves many cities in the county. In Fulshear, about 2,000 rides per year are provided, mostly serving to and from the Fulshear Senior Center.

Figure 8. Park and Ride Locations Near Fulshear



Source: ridemetro.org, fortbendcountytx.gov

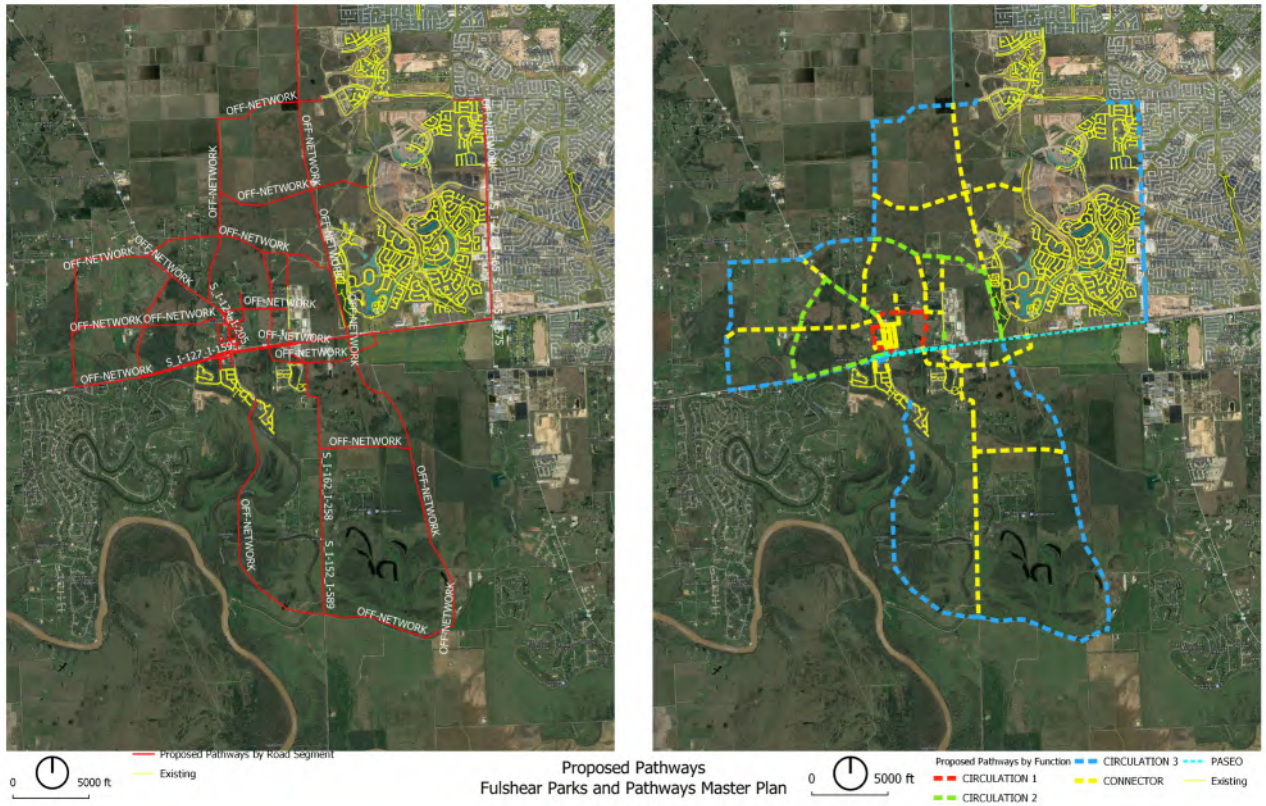
Bicycle and Pedestrian

The 2014 Comprehensive Plan included a concept for a Central Bike Loop. The idea here is to expand on the Flewellen Creek greenway in Cross Creek Ranch, with bikeway alignments generally along creeks north and south of FM 1093. In 2018, the City began developing a Parks and Pathways Mater Plan which identifies the off-street trail network through a series of circulation paths as illustrated in Figure 9. The desire was that this plan leads to a continuous bikeway loop in the center of the city. Other bikeway segments from this central loop could provide links to various community destinations (e.g., downtown, schools, parks, etc.). Longer-distance bike routes could also tie into and radiate outward from the central loop.

There is a significant interest for on-roadway regional bicycling using existing roadway shoulders and lanes. Many bicyclists within the region use Fulshear as one of their key designation points along their routes. An annual bicycle ride, the Michael T. McCann Memorial Ride, brings hundreds of like-minded bicyclists to Fulshear to celebrate common interests in bicycle touring using the roadway network.

Within the downtown study area of Fulshear, there are currently no pedestrian accommodations except for along the retail storefronts of one block of Main Street. There are sidewalks and paths along the streets and greenways in the newer residential developments south and east of the downtown study area. The Fort Bend County Toll Road Authority (FBTRA) acquired thirty-one miles of abandoned rail in 2015 for the purpose of converting rail ways to right-of-way to be used as a multi-use trail as part of the Rails-to-Trails initiative. A portion of this rail network includes a 100-foot wide segment that runs along FM 1093 south of downtown Fulshear. This region trail system provides additional connection opportunities to the plan pathways plans as well as the regional trail network.

Figure 9. Parks and Pathway Master Plan Off-Street Network



Issue Identification

Several existing and emerging transportation issues compete with the creation of a walkable and livable downtown area for Fulshear.

FM 1093 Crossings

The programmed improvements to FM 1093 would have limited crossings within the City of Fulshear as shown in Figure 5. Preliminary Planned Improvements to FM 1093 near Downtown Fulshear on page 21. West of Fulshear Katy Road, there would only be the Main Street crossover between the westbound and eastbound lanes of FM 1093. This limited circulation near downtown, in conjunction with the limited street network parallel to FM 1093, would push much of the traffic in the central part of Fulshear to the intersection of Main Street at FM 1093, requiring the intersections to be larger and more complex. FM 1093 will become a major rift in the connectivity between the northern and southern sectors of the city.

Traffic Capacity for Main Street/FM 359

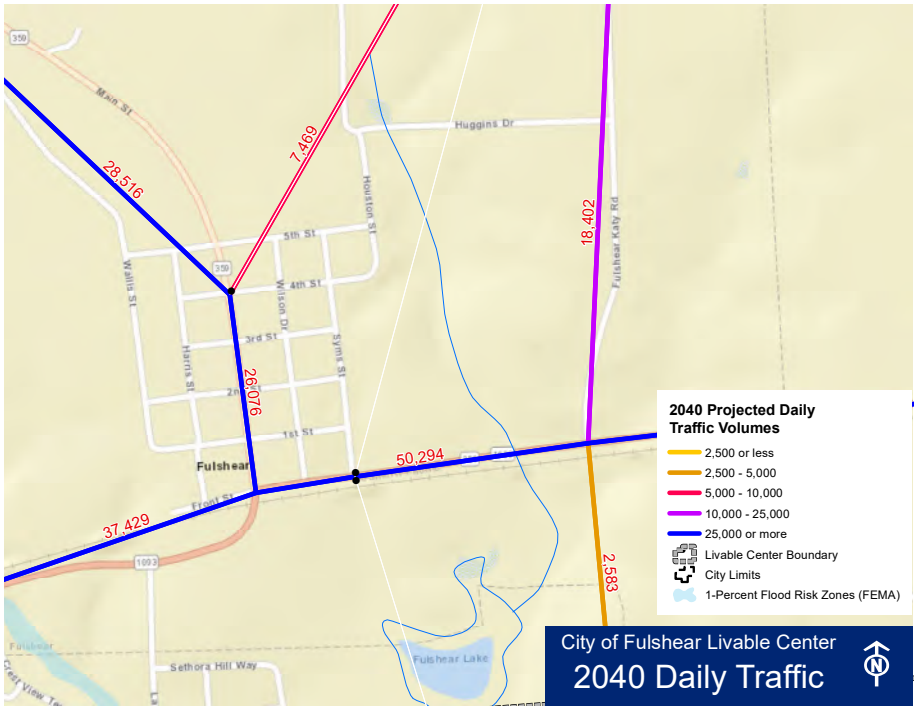
The Houston-Galveston Area Council (H-GAC) has developed forecasts of travel demand for the 2040 planning horizon as part of its regional transportation planning efforts. Traffic volumes are forecast to increase from about 7,000 vehicles per day (vpd) in 2018 to about 28,000 vpd by 2040.

FM 359 will become an increasing barrier to local traffic circulation within Fulshear and hinder the potential to establish a walkable environment along Main Street.

Pedestrian Accommodations

There is currently little to no consideration of pedestrian mobility within downtown aside from some storefront retail locations in one block of Main Street. To enhance the walkability and livability of downtown, pedestrian accommodations need to be provided along the street frontage of each block. Sidewalks will need to transcend the driveway access and parking accommodation for the development on each site.

Figure 10. H-GAC 2040 Travel Demand Forecast, Vehicles Per Day



Main Street without Sidewlkas

Harris Street without Sidewalks

2nd Street without Sidewalks

Public Engagement

Public Engagement Process

The importance of public engagement in the development of the livable center study cannot be understated. The success of any plan is dependent upon significant public input and consensus among the community. Without buy-in from the community, no plan can truly be successful. Citizens, stakeholders and leadership must believe in a plan to move forward initiatives and support the ultimate goals. During the Livable Center Study, input was collected from a variety of sources including current and future residents, downtown business owners, community organizations, and other target stakeholders.

The public engagement process had a two-prong purpose. The first was to educate community members and stakeholders about the Livable Center Program, and the benefits of the study. The second was to give insight regarding the needs and desires of the community. Several methods were used to gather input including: The Advisory Group (AG), staff meetings, business owner interviews, community meetings, public events, and an online survey.

Advisory Group Meeting # 2

Community Meeting #1

Freedom Fest 2018

Advisory Group Meetings

The Advisory Group (AG) was made up of twelve members representing current residents, downtown business owners, community organizations, the Chamber of Commerce, and a City Council liaison. The AG members served as ambassadors of the plan in the community to promote the plan and educate their fellow constituents. The AG met five times to discuss important issues facing the community and guide the development of the plan utilizing their unique perspective. Each AG meeting was open to the public. Following the planned meeting discussion, time was set aside to for comments and questions from the public.

Staff Meetings

City Staff was closely in tune with the changes in the community and development patterns. City Staff was interviewed to understand existing conditions in the study area, inform about upcoming plans for development, and ensured the coordination of other concurrent plans affecting the study area.

Community Meetings

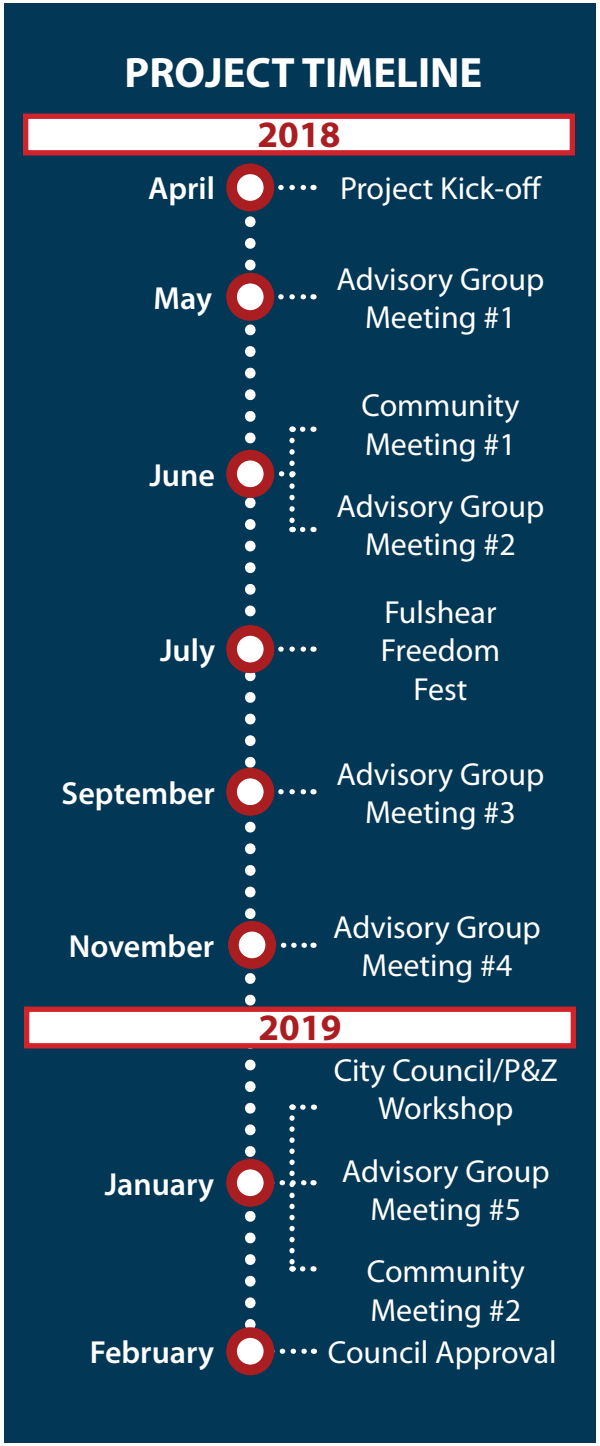
Two community meetings were held to present the Livable Center Study and to gather input on the plan. Both meetings were held at the Irene Sterns Community Center. The first meeting involved an educational presentation about the Livable Center Study process and was followed by an open house with public input stations. At the second meeting, the draft of the Livable Center Study was presented with conceptual plans and recommendations. Input gathered from these meetings directly influenced the final recommendations by guiding the development of the plans and initiatives based on what the community would like to see in the study area.

Community Events

The consultant team set up a booth at the annual Fulshear Freedom Fest to gather input from those attending the event. Visitors to the event included people who live both inside and outside of Fulshear. The event took place inside of the study area and provided a prime example of how downtown is utilized for community events.

Online Survey

To reach as many people as possible, a ten-question survey was posted on the project website where residents could learn about the project and give input. The questions asked participants their opinion of the current downtown, thought about transportation options, how people typically navigate downtown, what responders would like to see or change in the study area, and what their vision for downtown Fulshear is. The survey collected a total of 481 responses from those who live, work, visit Fulshear, or have a stake in Fulshear. The results of this survey are discussed in the following section.



Public Input Summary

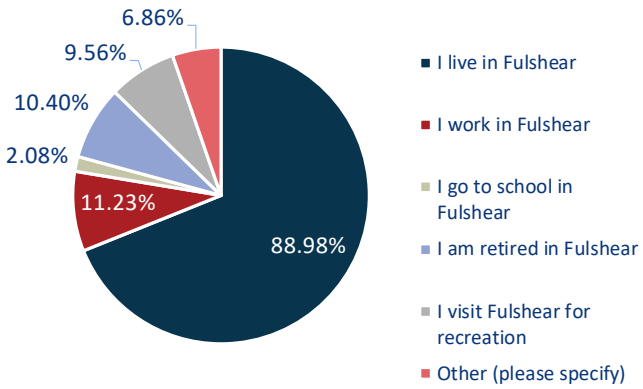
Based on the responses received from different public input methods, most people do not feel comfortable walking or biking in downtown, find it difficult to park, and do not spend a large amount of time in the area. Alternatively, most people are interested in seeing downtown revitalize by incorporating elements like boutique retail, restaurants, and public gathering space. Respondents are also open to the idea of redirecting traffic on Main Street/FM 359 and introducing a variety of medium density housing options.

The following figures illustrate the questions and responses from the Online Survey and public input boards.

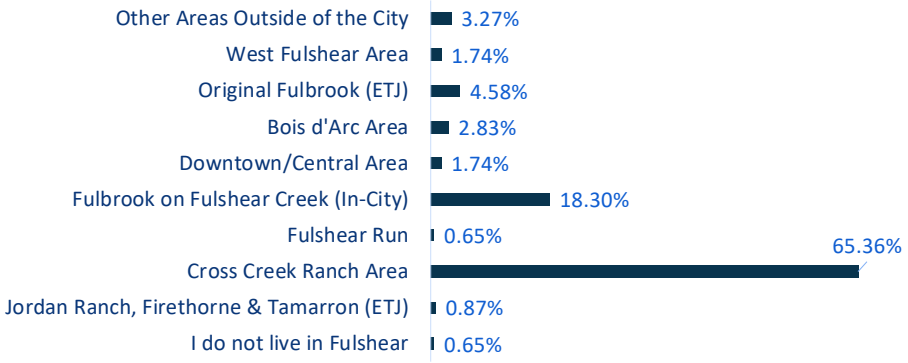
Overall, how would you rate the "study area" in the following statements:

Greatest Percentage of Responses	Statement
Neutral	The roadways are well maintained and provide adequate connections
Strongly Disagree	I can comfortably and safely walk to destinations (school, work, shopping, recreation, etc.)
Disagree	I can comfortably and safely ride my bicycle to destinations (school, work, shopping, recreation, etc.)
Strongly Agree	I would like to see more trails/sidewalks/bike paths
Strongly Agree	I would like to see more quality single-family housing
Strongly Disagree	I would like to see quality multifamily housing
Neutral	I would like to see quality retirement community housing options
Strongly Agree	I would like more desirable retail, restaurant, and entertainment establishments
Strongly Agree	I would like to see public or civic spaces for gathering, recreation, cultural events
Strongly Agree	I would like to see more places for businesses to locate within the study area

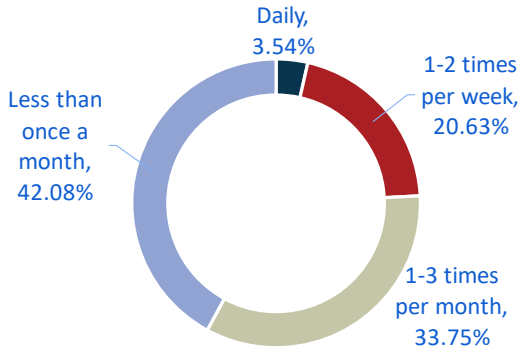
Which best describes you? Check all that apply.



If you live in Fulshear, which Neighborhood do you reside?



How often do you Shop or dine in Downtown?



How would you rate the following statements about Downtown?

Greatest Percentage of Responses	Statement
Strongly Agree	Downtown is the heart of the community
Neutral	Downtown is easily accessed
Strongly Agree	Regular events enhance the appeal of downtown
Strongly Agree	Large annual events enhance the appeal of downtown
Strongly Agree	I want more specialty/unique shopping downtown
Neutral	I want more convenience/routine (drugstore, groceries, etc.) items downtown
Strongly Agree	I want more restaurant options downtown
Neutral	I want young professional, families, and retirees to live/rent in downtown
Strongly Agree	I want coffee shop(s)/café(s) downtown
Strongly Agree	A strong retail presence in downtown is important
Strongly Agree	I am optimistic about the future of downtown

What improvements or activities would encourage you to visit Downtown more often?

Top 2 Improvements to Encourage People to Visit Downtown

1. More Retail and Restaurant Options
2. Pedestrian Connections

Please rank the importance of each of the following:

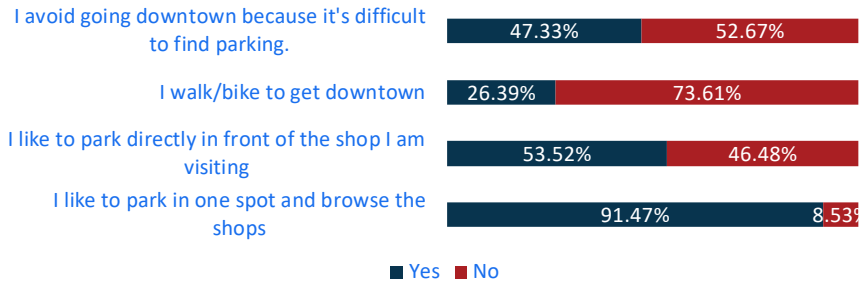
Level of Importance

Most

Least

1. Variety of Retail and Shopping Opportunities
2. Mobility Connections for Walking, Biking, or Vehicular Travel
3. Public Spaces/Green Space
4. Employment or Job Opportunities
5. Variety of Housing Types or Choices

Please select Yes or No for each of the following statements:



Preferred Housing Type

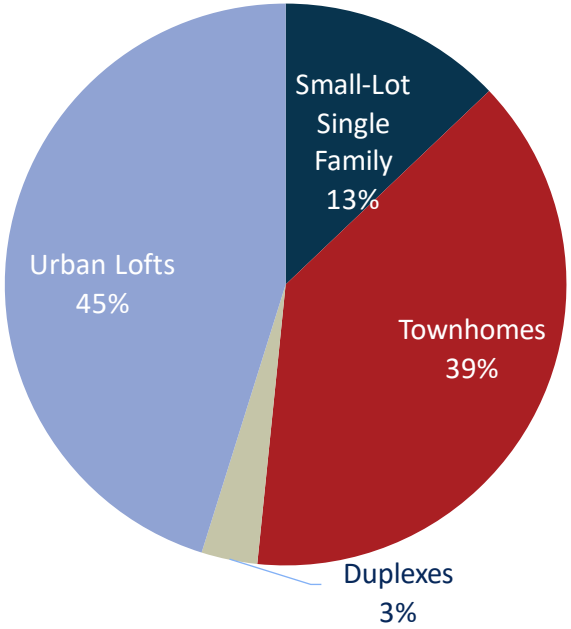
The market assessment revealed that downtown could absorb additional housing units within a range of housing types. Participants were asked to choose the housing type they would prefer to see in downtown.

Small-Lot Single-family

Townhomes

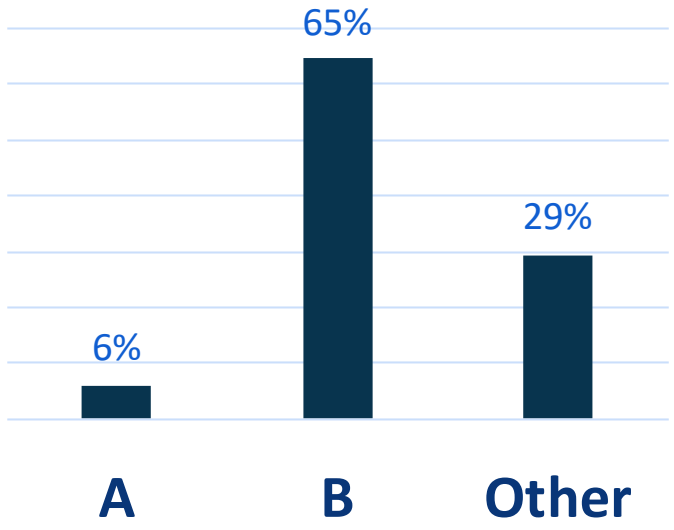
Duplex

Urban Lofts



Preferred Roadway Configuration

To calm traffic on FM359/Main Street, alternative roadway configurations were explored. Participants were asked to choose the alternative roadway configuration for a one-way couplet they prefer or provide additional ideas.



Option A
(Harris St. and Main St.)

Option B
(Wallis St. and Main St.)

Option C

Ideas submitted under this category included providing a by-pass around downtown.


More Trails and Green Space
Safer Walkable and Bikeable Connections
Clear Community Vision
Improved Downtown Aesthetics
Downtown as a Destination
More Unique Shops and Restaurants
More Parking
Family Friendly Places
Keep Small Town Charm
Create Town Center
More Recreation Parks
Walkable Main Street
Encourage Mixed Use Development
Improved Vehicular Connections
Improved Streetscape
Improve Traffic Flow
More Public Gathering Spaces
Encourage Small Business

Conceptual Approach

Conceptual Approach

Purpose of the Concept Plan

The Fulshear Livable Center concept plan is a guide for future development in downtown and the study area. The recommendations in this study were generated using a multi-dimensional, conceptual approach that considers different forces that influence the physical development of Fulshear. The project team developed the conceptual approach by recognizing the market-based potential and community desire, then addressing both by focusing on action-based recommendations that utilize economic development strategies to result in effective catalyst projects.

Central Themes

The conceptual approach was developed by analyzing the existing conditions, future opportunities, and the needs identified through public input. The public input process revealed several overarching themes that are based on reoccurring comments from the community. These themes establish the collective desires of the community and were used to drive the design of the concept plan and reflected in the plan in a variety of ways.

The themes are:

- **Theme 1**: Create a walkable and pedestrian friendly environment through transportation improvements that encourage multi-modal transportation options.
- **Theme 2**: Encourage the sustainable growth and development of downtown by incorporating appropriate development types that support and promote a downtown center.
- **Theme 3**: Develop distinct identity for downtown Fulshear that preserves the existing character and welcomes new growth while maintaining a consistent design.

Development of the Study Area Concept Plan

Market Assessment

The market assessment conducted as part of this study assesses the existing market conditions and identifies the demand and potential for the study area. This assessment was used as the foundation of the concept plan. By understanding the types of development that can be supported in the study area, the appropriate land uses can be incorporated into the plan. While the market assessment does not identify specific number of units with all land uses, it does discuss approximate amounts to consider. The conceptual plan was developed with this information in mind and shows the potential build-out of downtown but allows for flexibility in the future.

Study Area Land Use Plan

The study area land use plan shows the future land uses and transportation network for the study area. The land use plan is based on the market study, current future land use plan, and known future developments. These were all used to organize land uses in the most appropriate way and increase connectivity in the transportation network. The plan gives guidance for where land uses should be developed in the future and influence the future character of the study area.

Downtown Concept Plan

The street network and development pattern of the downtown area is distinctly different than the surrounding area and present a different opportunity for future development. For this reason, the downtown area was set apart as the downtown district. To preserve the existing character and capitalize on the existing neighborhood features, the Advisory Group decided to develop a separate concept plan to define the future development of downtown. This downtown concept plan goes into further detail than the study area land use plan by identifying appropriate density for the area and illustrating what the downtown could look like once the plan is Livable Center Study is implemented.

Transportation

Three major elements of the downtown area concept address the local need for mitigation of the traffic impact of regional transportation improvements.

Transportation Concept #1. Reduce the impact of traffic growth on Main Street

Figure 12. One-Way Pair Option B Utilizing Main and Wallis Streets

During evaluation of potential traffic mitigation measures, two concepts were developed for creating a one-way pair to reduce the direction of traffic from Main Street, one using Harris Street (Option A) and the other using Wallis Street (Option B) as the other street of the pair. Crossing a one-way street with only half the traffic volume would be much preferred to crossing the larger and busier two-way roadway.

Review of the pros and cons of each one-way pair alternative with the project advisory group and at public meetings identified Option B, the one-way pair of Main and Wallis Streets as the preferred alternative. Highlights of Option B include:

- The one-way pair would reduce traffic by approximately one-half on Main Street. The other half of the traffic would be less disruptive on an improved Wallis Street than on an improved Harris Street;
- Having the other paired street two blocks away means a greater dispersion of the effects of through traffic on FM 359 across two blocks, not creating one block in the middle that would have significant traffic on both sides of the block;
- The two-block separation of the one-way pairs allows Harris Street in the middle to be advanced as a pedestrian-oriented downtown focal center that could be closed for special events.

A third option, to develop a by-pass that would re-route FM 359 to the west of downtown, was also discussed. That option was considered too long range of a solution for consideration and had the potential to pull too much commercial energy from downtown Fulshear. Notably, there has recently been a study of a north-south roadway west of Fulshear that would provide such a traffic diversion and one of its alternatives considered a diversion of FM 359.

Transportation Concept #2: Enhance the Vehicular Crossings of FM 1093

The one-way pair of Main and Wallis Streets would require a pair of interchanges with FM 1093. One additional crossing of FM 1093 would need to be added to the TxDOT schematic design concept for the FM 1093 corridor improvement project. The new (one-way) crossing of FM 1093 at Wallis would connect to Lake Hill Farm Way to the south of FM 1093, providing another entrance to the residential development; a crossing roadway from Lake Hill Farm Way would tie to the roundabout on Fulshear Trace, giving the option for southbound traffic to either use the connector or eastbound FM 1093 to access Fulshear Trace.

The crossing of FM 1093 at Main Street, since it would only serve northbound traffic, would be able to be only two lanes in width, perhaps three if traffic volumes warrant; the same for the Wallis Street crossing. This reduced lane requirement would significantly reduce the complexity of the FM 1093 intersections and reduce the span of the bridges for the future freeway/tollway main lanes.

In addition to the one-way pair of crossings, an additional crossing of FM 1093 would be proposed for a local street that would be about midway between Katy Fulshear Road and Main Street to better accommodate circulating traffic from future commercial development along the eastbound and westbound FM 1093 frontage. Under the land use development concept, it was determined that an extension of Houston Street would be the location of the proposed added crossover.

Transportation Concept #3: Provide Enhanced Bicycle and Pedestrian Accommodations

The one-way pair would allow for the provision of better walking conditions along Main and Wallis Streets. Crossing Main and Wallis Streets would be facilitated by only having to navigate one direction of traffic at a time. Pedestrian accommodations would be provided along with enhancements to all the downtown streets from Wallis to Houston Streets and from 1st to 5th Streets. Harris Street, between 1st Street and 5th Street would receive heightened attention to the pedestrian realm and considerations to conversion to a pedestrian mall for special events. The east/west streets of 2nd and 4th Streets would also be accentuated as focused pedestrian conveyance streets and enhanced crossing of Main Street.


FM 359
STUDY BOUNDARY
Suburban Residential
Suburban Residential
Suburban Residential
Suburban Residential
ETJ
Estate Residential
General Commercial
Estate Residential
N. Fulshear Dr.
General Commercial
General Commercial
Rogers Rd.
Estate Residential
General Commercial
Suburban Residential
General Commercial
CITY LIMITS
Suburban Residential
Suburban Residential
Suburban Residential
General Commercial
Park
Suburban Residential
Estate Residential
General Commercial
Katy Fulshear Road
Bois D'Arc Rd.
General Commercial
Wallis St.
Main St.
Downtown
General Commercial
FM 1093
Suburban Residential
Suburban Residential
Estate Residential
General Commercial
General Commercial
Mixed Use
General Commercial
Industrial
FM 1093
CITY LIMITS
Suburban Residential
Suburban Residential
General Commercial
Suburban Residential
Industrial
STUDY BOUNDARY

Study Area Land Use Plan

The study area land use plan identifies the location and types of development for the study area. Much of the study area is currently slated for residential neighborhoods that are currently in the process of being developed. These known developments are accounted for in this land use plan. General Commercial development is located along FM 359 and FM 1093 to serve as a buffer between the heavy traffic along major thoroughfares and the residential areas. Additional, General Commercial nodes are shown in the northeast section to provide neighborhood services to the surrounding neighborhoods. The downtown area is designated as a separate district from the surrounding General Commercial areas. This designation was made to encourage a more dense or urban development pattern that can be supported in the downtown area, that would not be as appropriate in the surrounding areas. Further descriptions of the land use designations are shown in the following section.

Vehicular connectivity within the study area was designed to improve access throughout the area. The most significant addition is the utilization of FM 359 (Main Street) and Wallis Street as a one-way pair in the downtown area. Because of this, the future roadway designation for Wallis Street is shown as a Principal Arterial to meet the same level-of-service as FM 359. To support this change, an additional connection is shown across FM 1093 at Wallis Street and an extension of Mckinnon Road to provide access to FM 359 north bound.

Study Area Land Use Descriptions

The following are descriptions of the land uses as identified in the Study Area Land Use Plan. These descriptions are intended to give context and understanding of the type of development that is appropriate in the study area. Images are provided as examples of the types of development for each land use. Although some descriptions may coincide with the Downtown Concept Plan, these descriptions are only in reference to the Study Area Land Use Plan.

Estate Residential

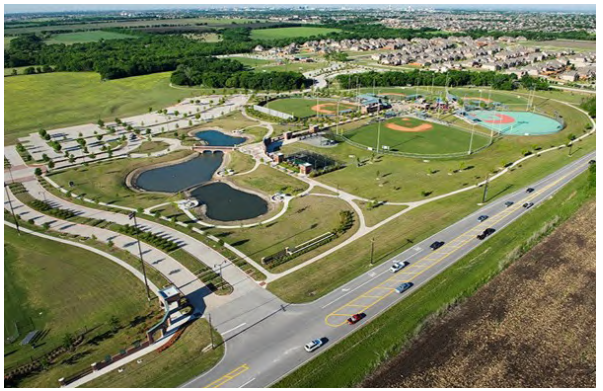
Estate Residential includes properties used for residential homes on large lots, typically 8,000 square feet or more. Homes in this land use designation are farther apart than suburban residential style neighborhoods. Some of the existing homes in the study area match this description and are appropriate for the rural context in the area.

Suburban Residential

Suburban Residential is representative of single-family home development of about 5-7 units per acre, which is a similar density to new neighborhood development in the area. Homes are typically on lots of about 6,000 to 8,000 square feet. These areas may include supplementary uses that support the primary use such as parks, recreation facilities, or schools.

Park

Within the study area, the Park land use is representative of regional park facilities designed to serve the greater Fulshear area. This type of facility is programmed for specific recreation purposes such as sports fields and playground equipment. Smaller local parks may be located within the study area to serve the local residential population. These parks are considered supplemental to the surrounding use and are not shown in the land use plan.



General Commercial

The character of the General Commercial land use is that of typical suburban commercial development. Businesses include a variety of service and retail uses such as grocery stores, restaurants, furniture stores, and other commercial services. This type of development may include larger commercial structures, is auto-oriented, and has a less dense development pattern than the downtown district.

Downtown

The development pattern in the downtown district is different from the typical suburban development of the surrounding areas. The Downtown district features a grid street pattern, smaller residential lots, and a unique design style. Structures in this area are typically 2-3 stories in height and have walkable streets that encourage pedestrian movement. The dense development pattern promotes on-street parking and consolidated parking areas rather than on-site parking areas. Uses in this area should include local businesses, small offices, medium density residential, and public gathering spaces in a mixed-use setting.

General Commercial Node

General Commercial Nodes aim to provide commercial uses that serve the surrounding residential development. Uses in this area primarily include neighborhood services like gas stations, convenience stores, daycare, and dry cleaners. Uses typically have a smaller footprint than the General Commercial land use along the major thoroughfares.

Industrial

The Industrial development represents light industrial uses such as processing, manufacturing, assembly, storage or repair of materials where all processes are conducted indoors with limited impact on neighboring properties. Light industrial uses range from small unit businesses with manual assembly to large production facilities.


Huggins Dr.
Low Density Residential
Neighborhood Center
Low Density Residential
Neighborhood Center
Low Density Residential
Neighborhood Center
Public/ Institutional
Neighborhood Retail/Office/ Commercial
Medium Density Residential
Neighborhood Retail/Office/ Commercial
Medium Density Residential
Neighborhood Retail/Office/ Commercial
Medium Density Residential
Public/ Institutional
Public/ Institutional
5TH St.
4TH St.
3RD St.
2ND St.
1ST St.
Boston St.
Wilson St.
Smith St.
Main St.
Adams St.
Walls St.
Highway Oriented Retail/Office/ Commercial
Highway Oriented Retail/Office/ Commercial
Highway Oriented Retail/Office/ Commercial
Highway Oriented Retail/Office/ Commercial
Highway Oriented Retail/Office/ Commercial
Highway Oriented Retail/Office/Commercial
EXIST ROW
EXIST ROW

Downtown Concept Plan

The concept for downtown Fulshear builds upon the existing street network and development patterns. The plan incorporates new mixed-use development and a variety of residential to create a new, vibrant downtown that is representative of historic Fulshear. New commercial development is provided along Main Street and Wallis Street to take advantage of the northbound and southbound traffic. The implementation of the one-way pair creates a more pedestrian friendly environment along these corridors. The core of downtown is generally bounded by Main Street to the east, 2nd Street to the south, Wallis Street to the west, and 4th Street to the north. Harris Street is presented as a pedestrian boulevard primarily intended for pedestrian usage and designed to deter vehicular traffic. The pedestrian-oriented design also serves to provide a "center" of downtown that had not existed previously.

The eastern side of downtown is primarily shown as residential to match the existing residential development and to support the new retail on the western portion of downtown. Where existing residential is in place, infill residential that matches the existing scale closes the existing gaps and creates a more complete neighborhood. A variety of housing densities from townhomes to small scale patio homes are more conducive for a dense, walkable development pattern. Neighborhood parks act as community centers and provide outdoor gathering spaces on a neighborhood scale. On-street parking throughout the district provides additional parking opportunities to support the new development in the area. Continuous sidewalks improve the pedestrian network and provides safe pedestrian connections between the east and west portion of Downtown. A summary of the approximate size/number of units of each land use or product type is provided in Table 17.

Table 17. Proposed Land Use/Product Type Calculations

Land Use/Product Type	Approximate Size	Approximate Units
Low Density Residential	63 acres	
Single-Family Infill	8.5 acres	
Medium Density Residential (Townhome)		99 units
Medium Density Residential (Patio Home)		68 units
Public Facilities/Institutional (acre/footprint)	4.98 acres/14,250 square feet	
Office	30,000 square feet	
Neighborhood Retail/Office/Commercial	6.34 acres	
Highway-Oriented Retail/Office/Commercial	18.6 acres	
Mixed-Use (total square feet) First Floor Second Floor Third Floor	169,012 square feet 87,674 square feet 169,012 square feet 169,012 square feet	+/- 400 units +/- 80 units +/-160 units +/- 160 units
Park	+/- 2.8 acres	

Downtown Land Uses

The following are general descriptions of each land use proposed in the downtown concept plan.

Low Density Residential

Low Density Residential include residential homes that are single-family generally in a traditional neighborhood design with walkable blocks, a variety of lots sizes where most lots are typically less than 6,000 square feet, and homes that incorporate front porches and driveways.

Single-Family Infill

Infill development is new development that takes place in an existing developed area where vacant lots may exist. Residential infill in the downtown area will take place on vacant lots within the existing neighborhood to the east of Main Street with new residential structures that match the existing homes.

Medium Density (i.e. Patio Homes)

Medium Density Patio homes are a type of detached single-family home where homes are generally clustered and share common open spaces. Patio homes are generally on lots of less than 5,000 and have a zero-lot line.

Medium Density Residential (i.e. Townhomes)

Medium Density Residential Townhomes provide a medium level of single-family home where units can be attached or detached. Homes range from 2-3 stories, generally have limited outdoor space, and utilize shared green spaces.

Public Facilities/Institutional

Public Facilities and Institutional uses generally include any offices or facilities that are utilized by a public or non-profit entity typically engaged in a public service. Such facilities may include, but not limited to fire stations, police stations, libraries, City offices, religious institutions, and cultural or community centers.

Office

Office in the downtown setting is primarily low-density office that fits into the urban fabric. Example of office uses that may be appropriate include law offices, insurance offices, and an architect's office. Offices may be in standalone structures, located near retail businesses, or incorporated in a mixed-use structure.

Neighborhood Retail/Office/Commercial

Neighborhood Non-Residential encompasses of all commercial and retail uses that are not residential but would be appropriate in a downtown setting. Structures in the downtown setting are generally attached structures that promote a walkable environment for pedestrians. Examples of appropriate uses include restaurants, boutique retail, personal services, small office, and specialty shops.

Highway-Oriented Retail/Office/Commercial

Highway-Oriented Non-Residential is reflective of small to mid-scale suburban highway development. Uses in this area typically require high visibility and lots of vehicular traffic. Development in this area is auto-oriented and accommodates on-premises parking. Highway-oriented uses are typical of suburban businesses like restaurants, corner stores, shopping, and small offices.

Mixed-Use

Mixed-use is a general term for the mixing of multiple uses such as office, retail, commercial, and residential. Vertical mixed-use describes a single structure with different uses on different stories and horizontal mixed-use describes the mixing of uses adjacent to one another. Retail uses are typically on the main floor and office or multifamily residential uses are on upper floors. Many of the uses that take place in Office and Neighborhood Retail/Office/Commercial would be appropriate.

Parks

Parks serve as public gathering spaces for both visitors and residents within the downtown area. The purpose is to provide places to linger, hold organized events, and to break up the urban space. Parks can be active or passive and do not always have to include green space, but could also incorporate plazas, gazebos or general seating.

Main Street Commercial

Key Features:

- Short setbacks on Main Street
- Parking in the rear
- One to two story commercial structures
- Wide sidewalks and pedestrian amenities
- Enhanced intersections

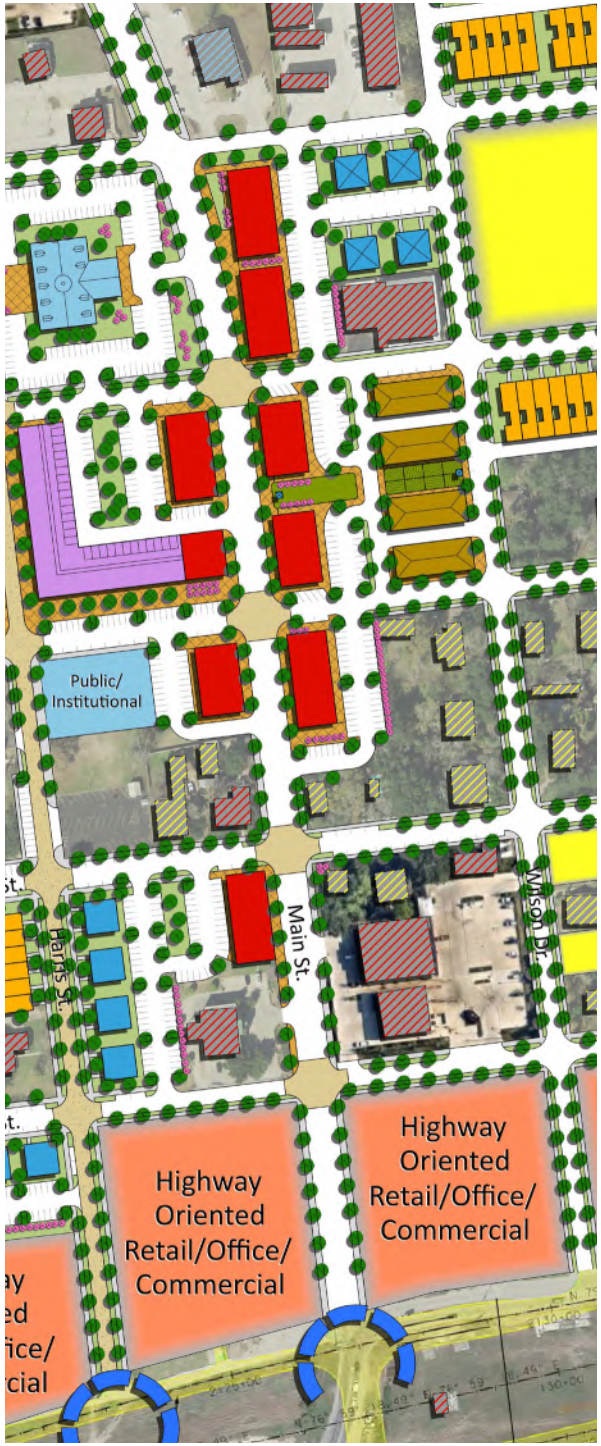
Main Street is one of the most identifiable corridors of downtown and one of the main entries to the downtown, therefore this is where visitors receive the first impression of the area. The character of Main Street is intended to be a pedestrian friendly commercial corridor. Structures fronting Main Street have short setbacks from the street with parking in the rear. With structures that are one to two stories, the enclosure of Main Street brings the street to pedestrian scale and gives the impression of a more downtown style street. By slowing down the speed of traffic on Main Street through the implementation of the one-way pair, it becomes a more pleasant environment to navigate by foot and may encourage visitors to stay and explore downtown Fulshear. The pedestrian realm incorporates benches, street trees, trash receptacles, and wayfinding signage.

The types of uses that may be appropriate in this area include a wide variety of commercial uses including restaurants, retail fronts, specialty shops, and neighborhoods services. These uses prefer buildings with small footprints and are more suitable for a downtown setting. Outdoor usage of the space such as patios for restaurants or sidewalk signage is encouraged to engage pedestrians.

Example of Enhanced Intersection

Example of Commercial with Patio

Example of Commercial Development



Wallis Street Commercial

Key Features:

- Short setbacks on Wallis Street
- One to two story commercial structures
- Wide sidewalks and pedestrian amenities
- On-street parking
- Street trees

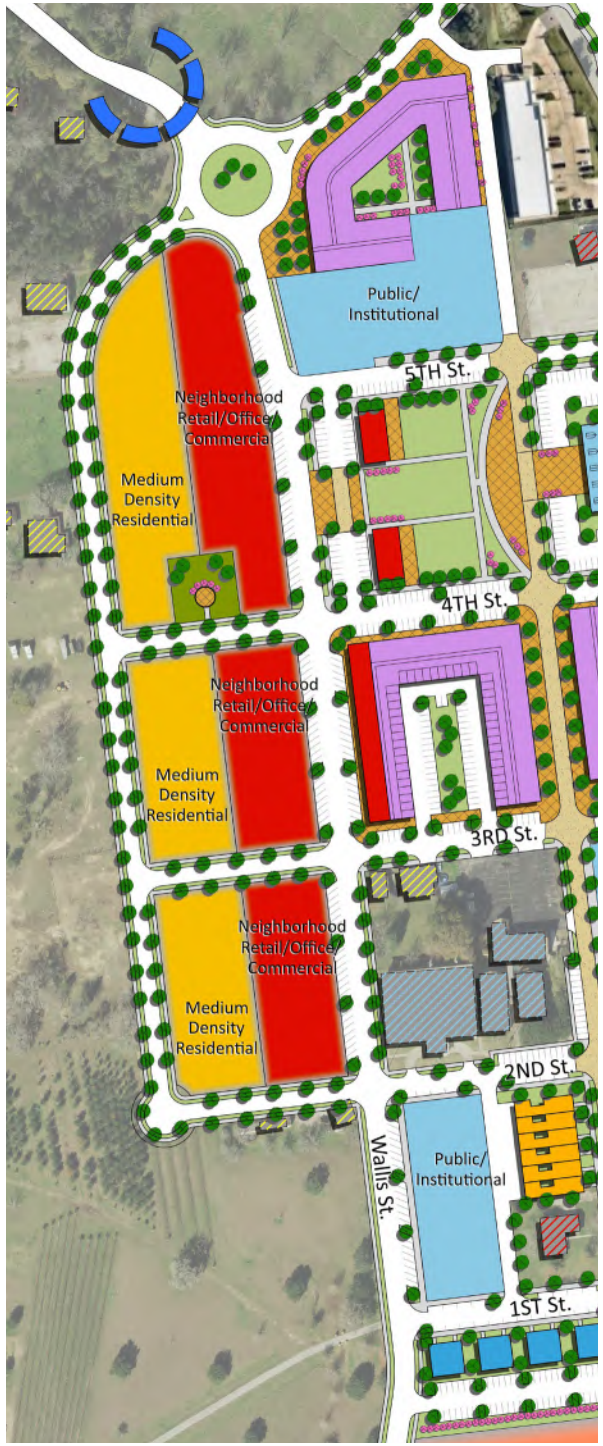
With the utilization of Wallis Street as the southbound roadway for the one-way pair with Main Street, Wallis Street can now be better utilized for commercial businesses. Neighborhood Retail/Office/ Commercial development is proposed along Wallis Street with Medium Density Residential located to the west. Medium density residential is within walking distance of the downtown core and help to support commercial businesses in downtown. A smaller pocket park is located to the west of Wallis Street to be utilized by residents in this area.

The commercial businesses can take advantage of on-street parking along Wallis Street, and regional parking in the area due to limited parking on the development site. Commercial structures in this area are one to two stories and, similarly to Main Street, the types of uses that may be appropriate in this area include a wide variety of commercial uses including restaurants, retail fronts, specialty shops, and neighborhoods services. These uses prefer buildings with small footprints and are more suitable for a downtown setting. Outdoor usage of the space such as patios for restaurants or sidewalk signage is encouraged to engage pedestrians.

Example of Sidewalk and Street Trees


Example of Commercial Development


Example of Townhomes



Main Street and Wallis Street

Key Features:

- Potential buffered bike lane
- One-way traffic
- Sidewalk
- Street trees
- On-street parking varies along ROW

The one-way pair of Main and Wallis Streets in downtown will transition from FM 359 as a rural highway with shoulders to the north of Fulshear to an urban section through the downtown to the intersections with FM 1093. To provide for ample capacity to accommodate the anticipated total travel demand of 28,000 vehicles per day, total of both directions, the typical section of both Main Street and Wallis Street one-way pair should provide for two or three through lanes. The provision of those two lanes could take on many forms, but within the downtown, between Huggins Drive and 1st Street, the roadways are anticipated to be an urban curb-and-gutter section as represented in the figure to the right, showing an ultimate street cross section fitting within 70 feet of right of way.

The typical section includes 10-foot wide sidewalks and a green space buffer along the edge of the roadway. In addition to the two lanes of traffic, the shoulders of FM 359 could be continued as buffered bike lanes through the one-way pair. The space allocation for the 10-foot wide sidewalks, green space and buffered bike lanes could be re-allocated as an additional travel lane, a parking lane or other uses as needs dictate.

Example of Buffered Bike Lane

Example of Buffered Bike Lane

Figure 13. Main Street and Wallis Street Typical Section Option 1

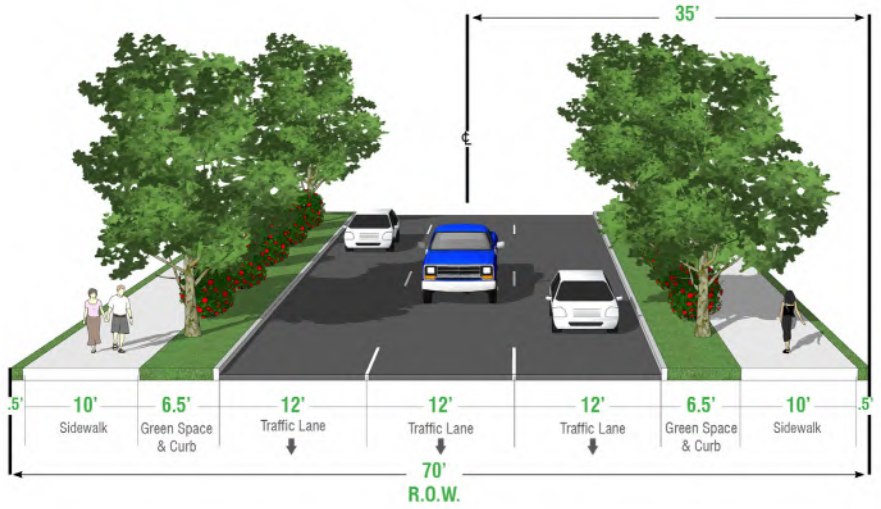
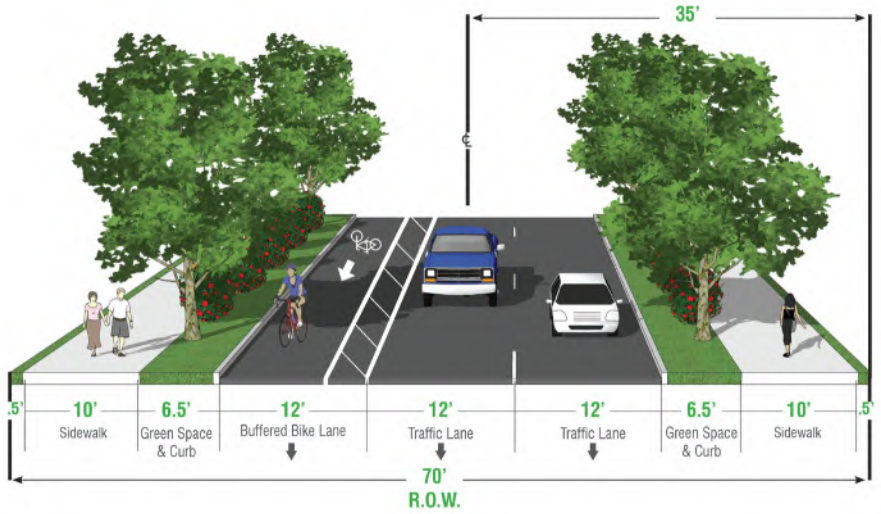


Figure 14. Main Street and Wallis Street Typical Section Option 2



Downtown Core

Key Features:

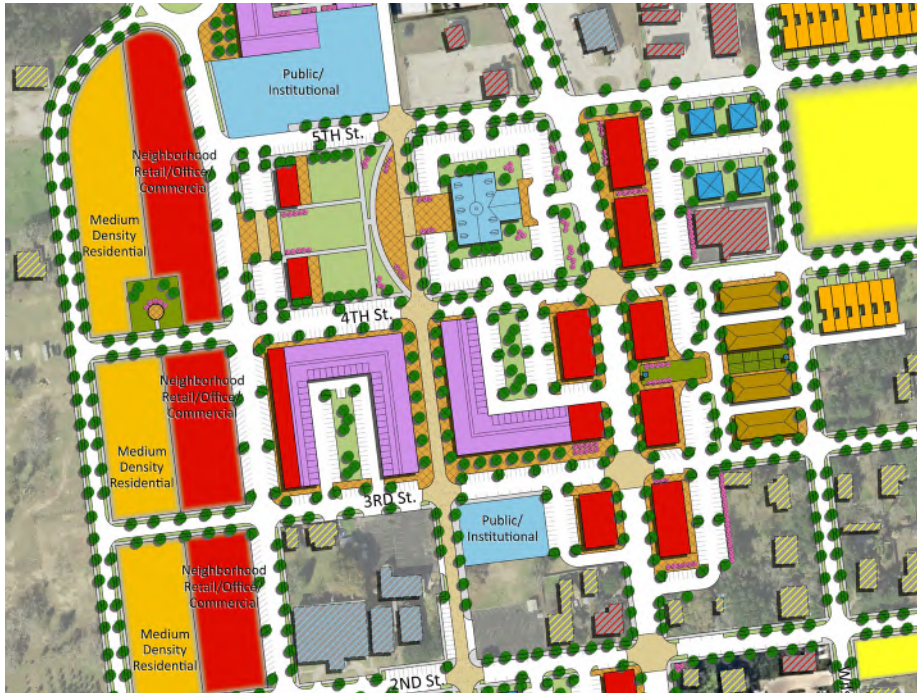
- » Public gathering space
- » Pedestrian boulevard
- » Wide walkable sidewalks
- » Street trees
- » Mixed-use structures

The downtown core will be recognized as the heart of downtown Fulshear. Generally bounded by 5th Street to the north, Main Street to the east, 2nd Street to the South, and Wallis Street to the west, the core creates a center that had not previously existed. Harris Street is intended to be a pedestrian boulevard lined with mixed-use development along both sides.

The mixed-use development along the corridor encourages a higher density development and more activity. Structures are 2-3 stories in height, generally, with retail on the first floor and office or residential on upper floors. Uses in these structures should be unique to Fulshear and attract visitors to stay. Entertainment and boutique retail use like restaurants, clothing stores, and specialty shops are highly encouraged. Outdoor use of space like restaurant patios is also encouraged to engage pedestrians.

Pedestrian amenities such as unique paving signals to visitors that something is special about this corridor, while street trees, benches, trash receptacles and wayfinding signage encourage pedestrian movement along the street. Limited on-street parking is available in the district to cater to pedestrians and deter vehicular traffic. On-street parking and potential long-term structured parking throughout the district serves business on Harris Street without cluttering the area with vehicles. Removable bollards at either end of Harris Street allows the street to be closed to vehicular traffic for special events or festivals.

A public gathering space should be located within the downtown core to serve as a location for special events like holiday festivals and public ceremonies. Outdoor plazas or parks are versatile areas that serve as the "center" of downtown and invite both active and passive uses of the space.



Example of Sidewalk Activity

Example of Park Event

Example of Sidewalk Amenities

Example of Commercial Development

Rendering of proposed Downtown Core

Downtown Core Streets

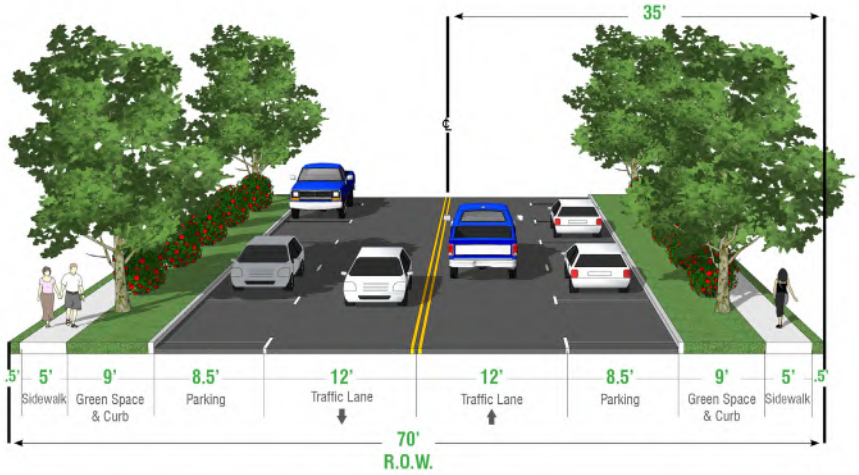
1st, 3rd and 5th Street

Key Features:

- Two-way traffic (full lanes)
- Sidewalks on both sides (5-feet minimum)
- Street Trees
- On-street parallel parking

The typical street section for 1st, 3rd and 5th Streets, between Wallis Street and Houston Street, would be a two-way, urban curb-and-gutter local street with curbside parking. The street section is shown below and would consist of one full lane in each direction plus curbside parking within 70 feet of right of way. This cross section has a 40-foot wide paved area mid-block, but the curb space for parking would have bulb-outs at the cross-street intersections to allow for two 10-foot wide lanes through the intersection.

Figure 15. 1st, 3rd and 5th Street Typical Section



2nd and 4th Street

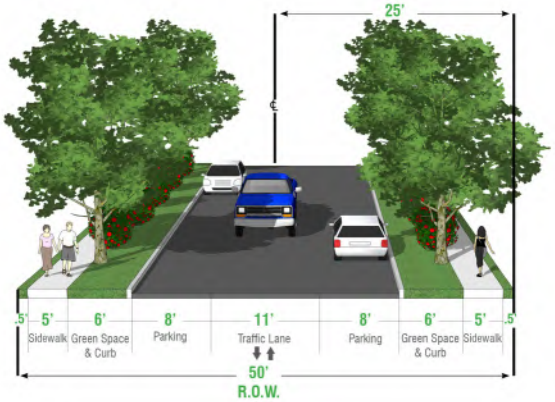
Key Features:

- Two-way traffic (in one central lane)
- Sidewalks on both sides (5-feet minimum)
- Street Trees
- On-street parallel parking

The typical street section for 2nd and 4th Streets, between Wallis Street and Houston Street, would be a two-way, urban curb-and-gutter local street with curbside parking intended for very low volumes of vehicular traffic at very slow travel speeds. The street section is shown below and would consist of one central lane to accommodate travel in both directions plus curbside parking as represented in the figure below showing an ultimate street cross section fitting within 50 feet of right of way. This cross section has a 23-foot wide paved area mid-block, but the curb space for parking would have bulb-outs at the cross-street intersections to allow two 10-foot wide lanes to pass through the intersection. At the crossing of Main Street, special treatments would be provided to accentuate the pedestrian crossing at these two streets.

During special events when Harris Street is transformed into a pedestrian mall, vehicular circulation on 2nd and 4th Streets, between Main and Wallis Streets, may be restricted.

Figure 16. 2nd and 4th Street Typical Section



Harris Street

Key Features:

- Two-way traffic (wide or narrow)
- Sidewalks on both sides (5-feet minimum up to 10 feet)
- Street Trees
- On-street parallel parking
- Street space convertible to pedestrian mall for festivals

The one-way pair option of Main and Wallis Streets creates Harris Street in downtown for a very special purpose as a local access street for pedestrian oriented development and for special event use as a pedestrian mall. On most days, Harris Street, between Huggins Drive and 1st Street would be a two-way, urban curb-and-gutter local street with curbside parking. Two options are possible:

Option A: One full lane in each direction plus curbside parking as represented in the figure below showing an ultimate street cross section fitting within 70 feet of right of way. This cross section has a 40-foot wide paved area mid-block, but the curb space for parking would have bulb-outs at the cross-street intersections to allow just the two lanes through the intersection; or

Option B: One central lane to accommodate travel in both directions plus curbside parking as represented in the figure to the right showing an ultimate street cross section fitting within 50 feet of right of way. This cross section has a 23-foot wide paved area mid-block, but the curb space for parking would have bulb-outs at the cross-street intersections to allow just the two lanes through the intersection.

Figure 17. Harris Street Option A

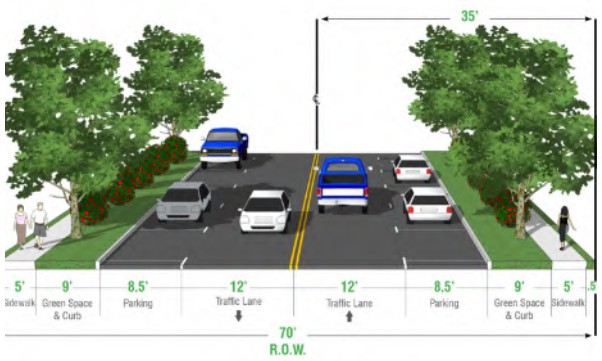


Figure 18. Harris Street Option B

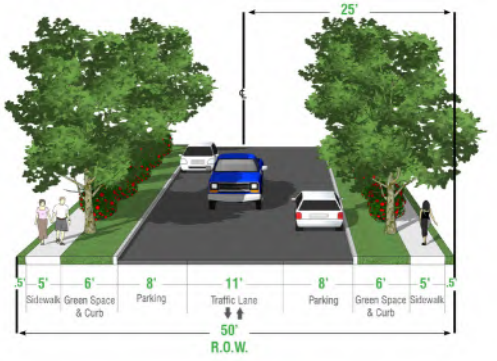
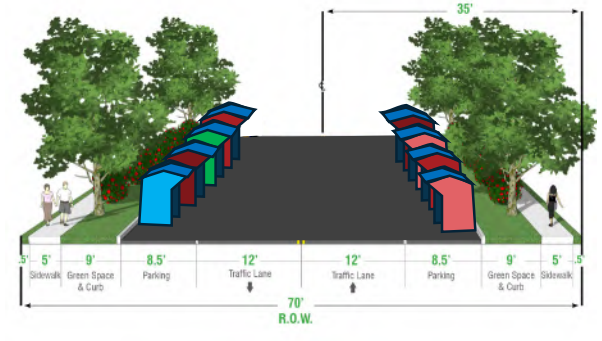
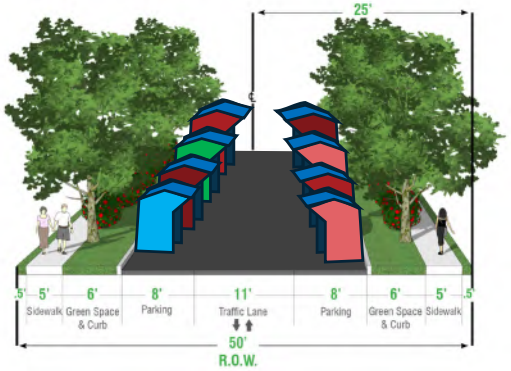


Figure 19. Harris Street Option A for Festival



During special events, Harris Street could be closed to traffic, creating a pedestrian mall, between 5th Street and 1st Street, and not allowing crossing traffic except at 5th and at 1st Streets, with a provisional crossing at 3rd Street. The wider 40-foot street foot print of Option A would provide a larger gathering area for street festival activities but would be a larger expanse of paved area during non-event times.

Figure 20. Harris Street Option B for Festival



Example of Street Festival from Freedom Fest 2018

Highway-Oriented Development

Key Features:

- » Auto-oriented development
- » Small to mid-scale commercial and retail
- » Access to FM 1093
- » Highway-oriented signage
- » On-premises parking

Development along FM 1093 is intended to reflect development commonly found along highways and high traffic thoroughfares. Development in this area creates a buffer between the heavy traffic along FM 1093 and the slower paced activity in the downtown core and residential neighborhoods. Uses in this area are generally more auto-oriented than those located in the downtown core with on-site parking and access to FM 1093.

Uses along FM1093 are businesses that prefer larger amounts of vehicular traffic than the boutique style businesses in the downtown core. Examples of uses that would be in this area include restaurants, mid-size offices, neighborhood goods and services, and gas stations.

Examples of Highway-Oriented Commercial and Retail Development

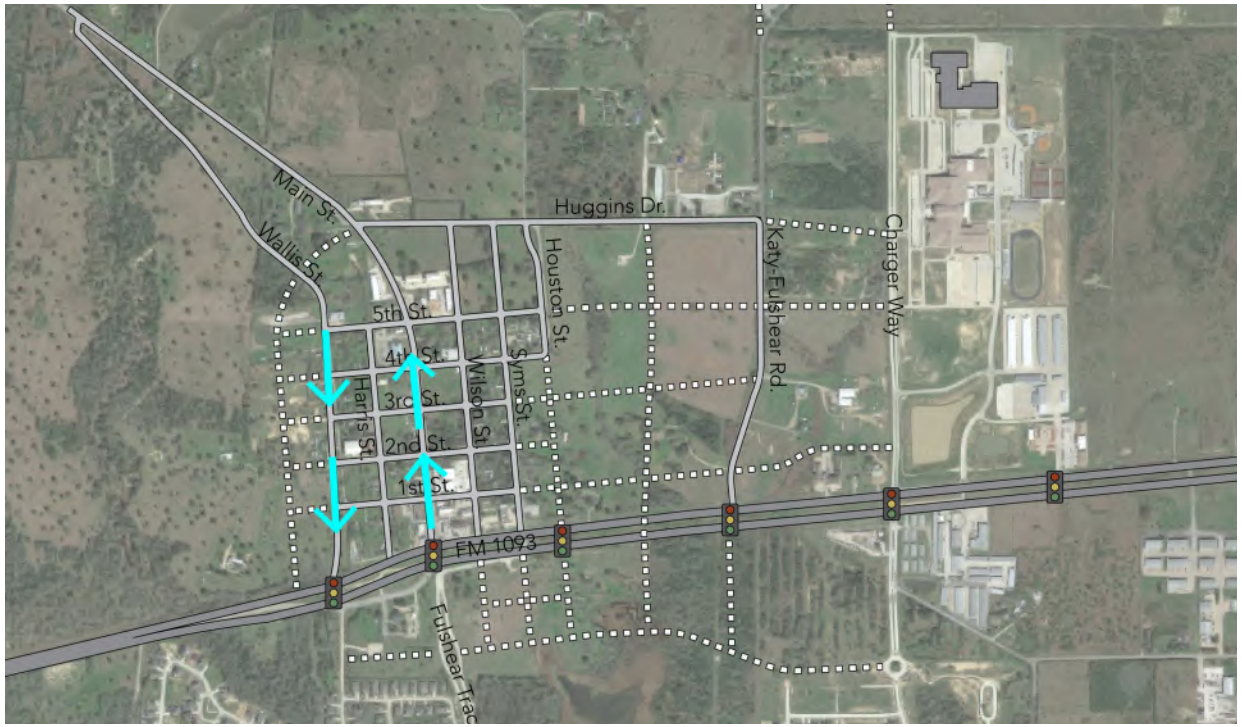
FM 1093 Crossings

The TxDOT-programmed improvements to FM 1093 would have limited crossings within Fulshear's city limits. West of Fulshear Katy Road, there would only be the Main Street crossover between the westbound and eastbound lanes of FM 1093. This limited circulation near downtown, in conjunction with the limited street network parallel to FM 1093, would push most of the traffic in the central part of Fulshear to the intersection of Main Street at FM 1093, requiring the intersections to be larger and more complex.

Two additional crossings of the improved FM 1093 divided highway are proposed under this downtown area concept.

- Wallis Street – to implement the one-way pair for FM 359 through downtown; and
- Future proposed extension of Houston Street – to improve the re-circulation distance for access and egress to businesses along the one-way segments of divided highway FM 1093 in the City of Fulshear and mitigate traffic diversions to the Main Street intersection.

Figure 21. FM 1093 Crossings



Residential Infill

Key Features:

- Infill residential of comparable size and style of existing housing
- Variety of housing sizes
- Complete sidewalk network
- Public gathering space

The existing character east of main street is more residential than the contrasting commercial to the west of Main Street. To preserve the character of the existing neighborhoods, new housing should match the existing size and character of the existing homes. Much of the existing housing in the downtown area is made up of single-family homes less than 2,500 square feet with a mix of wooden and brick facades.

Infill development describes new development that utilizes existing vacant lots to build new structures and fit into the existing infrastructure. Generally new development should not juxtapose the existing development and instead, match the existing character to not disrupt the existing homes. In this case, some new homes are designated next to existing homes and other are proposed in a new neighborhood format. New housing should be of comparable size and density of the existing residential. Proposed housing types include a range of densities like detached single-family, small lot patio homes, and townhomes. Mixing housing densities creates a more vibrant neighborhood and provides more opportunities for different family types.

Example of Patio Home

Example of Single-Family Infill

Example of Townhomes

Example of Townhomes

Traditional Neighborhood

Key Features:

- » Neighborhood Centers/Public Gathering Spaces
- » Completed sidewalk network
- » Dense single-family home neighborhood
- » Natural creek amenity

The most eastern portion of the downtown district is designated as low density residential in a traditional neighborhood design. Traditional neighborhoods typically have a variety of housing types, mixed land uses, walkable blocks and central neighborhood gathering spaces. This neighborhood type is designated to support the downtown commercial and to take advantage of the compact development design. The street network has been extended to provide access for future residents to access the downtown area on foot.

Neighborhood centers are not exclusively parks but should be areas for public gathering or public use. They may take the form of a park, community center, swimming pool, or public facility. These areas are designated to provide gathering space within a walkable distance to serve the surrounding neighborhood.

The existing creek through the area provides an opportunity to serve as an amenity for the surrounding neighborhoods. The creek can potentially provide a trail connection from FM 1093 to downtown and can be integrated into the existing trail network. Existing features of historical significance are important to promote community character. These places should be preserved, celebrated, or incorporated into public facilities.

Example of Short Setback and Sidewalk

Example of Neighborhood Center

Example of Zero Lot Line Patio Home

Example of Patio Home

Downtown Office

Key Features:

- » Low density office
- » Variety of office types
- » Walkable distance to Downtown Core

Office products can vary in size and structure type but will generally match the downtown development pattern. Like the retail development, office development should have short setbacks from the right of way and limited on-site parking. In the downtown core, office development may be an individual structure or incorporated in a mixed-use structure. Free standing structures may be in a strip shopping structure or a professional office type structure. East of Main Street, office development should fit into the neighborhood character and may be located in a existing home that has been renovated to be used as an office or constructed to match the neighborhood character. Example of businesses that would be appropriate include law offices, insurance office, architect office, graphic designer, and other small business offices.

Example of Neighborhood Office

Example of Professional Office

Example of Flex Office Space

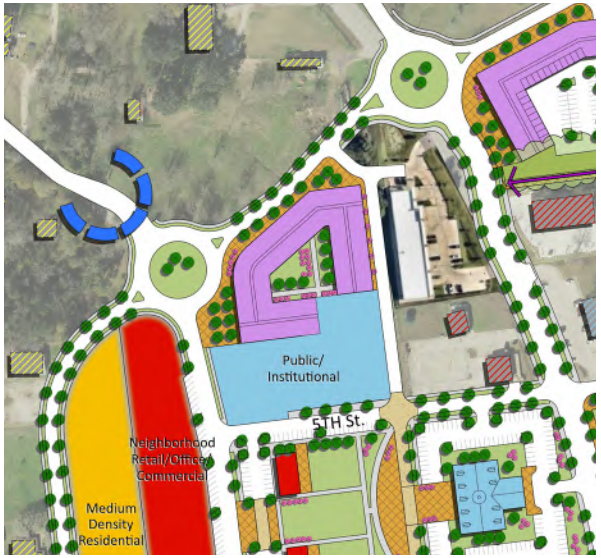
Example of Professional Office

Downtown Gateways

A city's identity is unique, establishes a special sense of place, and creates a strong identifiable image of the community. One way to show this identity is through gateway signage that signifies a visitor has entered a special area, like a city or district. The strategic location of gateway signage promotes the district, lets visitors know they have arrived and establishes the character of the district.

There are two types of gateway signage: major and minor gateways. Major gateways are located along the highway and designate the entrance to large areas such as a city. Such gateways could include monument signs, large-scale landscaping, and other features to define the area. Minor Gateways are a smaller version of major gateways that designate smaller districts and community areas with a distinct character or feature. These gateways are smaller than their major counterparts because they are located where vehicular trips are more local and traffic is slower. This type of signage would be appropriate for neighborhoods, commercial shopping areas, downtown districts, and industrial districts. Both major and minor gateways may have lighting, artwork, landscaping, or other features that highlight the local flavor of the city.

For downtown Fulshear, gateway signage should be located at the southern and northern entrances to downtown. The southbound entry on Wallis Street and the northbound entry on Main Street and the northbound entry on Harris Street are the key general locations to locate signage and designate the entrance to the downtown district. The design of the gateway signage should showcase the existing character of the downtown district, incorporate branding, and include enhanced landscaping with plants native to the Fulshear area.



Existing Major Gateway Signage

Example of Minor Gateway Signage

Example of Minor Gateway Signage

Example of Minor Gateway Signage

Economic Impact of Downtown Conceptual Plan

Tables 18 and 19, demonstrates the projected economic impacts of the conceptual plan at full buildout on the tax base of Fulshear fueled by 918 new residential units creating demand for 65,000 new square feet of retail and 410,000 square feet of mixed-use development.

The plan shows a $448 million overall growth in the city's property tax base which would translate into over $881,000 in new annual property tax revenues. The $24.46 million in new annual retail sales and hotel taxes would create over $500,000 in combined new sales tax revenues to the City of Fulshear and its Type A and Type B Economic Development Corporations.

Table 19. Economic Impact Summary

Concept Plan Revenue Summary	
New Mixed-Use	$130,235,500
New Residential	$266,725,000
New Retail	$13,007,600
New Office	$9,163,600
New Restaurants	$6,250,000
TOTAL NEW VALUE	$448,381,700
TOTAL NEW REVENUE	$881,372/year

Table 18. Economic Impact of Downtown Conceptual Plan

Fulshear Concept Masterplan

Project Summary

65,038	Retail	square feet
25,000	Restaurant	square feet
45,818	Employment (Industrial/Office)	square feet
15	Corporate/AirBnB Rentals	rooms
739	Low & Med. Density Residential	units
80	Multi-Family	units
99	Townhomes	units
520,942	Mixed-Use	square feet

Residential Total	918	units
Retail Total	65,038	square feet
Restaurant Total	25,000	square feet
Corporate Rental Total	136,800	rooms

Estimated Sales, and Sales and HOT Tax Revenue

Property Type	*Estimated Size*			*Estimated Sales*		*Estimated Available Revenue*
Retail	65,038	square feet	$	17,885,450	**$**	**357,709**
City						
Restaurant	25,000	square feet	$	6,250,000	**$**	**125,000**
City						
Corporate/AirBnB Rentals	215	room nights	$	306,375	**$**	**21,446**
City						
SUBTOTAL ANNUAL PROJECTED SALES TAX			$	24,463,271	**$**	**504,155**
Hotel Occupancy Tax 6% (room nights * rate per room * total rooms)						
City		**Starting in 2024**	$	306,375	$	21,446
SUBTOTAL ANNUAL PROJECTED HOT TAX					**$**	**21,446**

Estimated Total Property Tax Values and Revenue

ESTIMATED TOTAL AT BUILDOUT			**TOTAL Assessed Value**		**Estimated AV Tax Revenue/YR Available for Reimbursement** *@ $0.1587 per $100*
Real Property Tax (City of Fulshear)					
Retail	65,038	square feet	$	13,007,600	$ 10,321
Restaurant	25,000	square feet	$	6,250,000	$ 4,959
Employment (Industrial/Office)	45,818	square feet	$	9,163,600	$ 7,271
Low & Med. Density Residential	739	units	$	258,650,000	$ 205,227
Multi-Family	80	units	$	8,800,000	$ 6,982
Townhomes	99	units	$	22,275,000	$ 17,674
Mixed-Use	520,942	square feet	$	130,235,500	$ 103,336
SUBTOTAL VERTICAL DEVELOPMENT			**$**	**448,381,700**	**$ 355,771**
TOTAL EST. AV TAX VALUE AT COMPLETION			**$**	**448,381,700**	
TOTAL EST. ANNUAL TAX REVENUES AT COMPLETION					**$ 881,372**

Implementation

Overview

The envisioned redevelopment and expansion of Fulshear's downtown area and the accompanying conceptual plan offer an interesting glimpse into the City's development potential. The changes in land use, density, commercial building types and residential offerings are all key to creating the critical mass necessary to attract the developers, residents and businesses that will bring the vision to fruition.

This Livable Center Study offers clear insight on key elements mapping the path to manifestation. The scope and scale of development demonstrated in the conceptual plan will require new tools, tactics and metrics to measure success. Both regulatory and economic development tools are needed to create a framework for attracting and equipping private-sector developers and financiers. Appropriate regulatory means and measures ensure developers seeking to bring projects to Fulshear have a predictable path to creating the type, amount and intensity of development desired by City officials. Harnessing the civic momentum and community engagement generated by the current planning efforts can serve as a springboard for undertaking these next steps.

Texas' laws grant a myriad of powers to cities and counties to incentivize, finance and fund economic development programs. Collaboration between cities and counties is ever-increasing across the state as development needs become more and more complex. Likewise, partnerships between public entities and private (or not-for-profit) companies present a broad range of possibilities from the construction of projects to the provision of services. These public-to-public and public-private partnerships are most successful when cities have clearly articulated a path to defined outcomes.

Other important elements include planning effort and expense required to study, design and construct the mobility and utility infrastructure that precedes vertical construction. Funding and financing methods such as legislatively-provided economic development tools, public-private partnerships, and grants can be invaluable in leveraging municipal powers to enable large-scale planning efforts to manifest as projects. Not one of these tools used in singularity is enough to provide for complete build-out, rather they can each play a role in building an implementation toolbox.

Opportunities for community development, economic development and innovative governance abound as Fulshear moves through its next phase of growth and development. Planning for the work to come can help identify, explore and enact the necessary tools to capitalize on those opportunities.

Assessment

Smaller cities seeking growth strategies are well advised to quantify and identify measures to mitigate their development constraints. Specific issues include availability and suitability (physical, environmental and social) of sites, appropriateness of the regulatory framework for development, capacity for financial participation and ability to perform financial and/or regulatory oversight. Fulshear should engage in this discovery process in order to identify potential constraints to development and suitable solutions to overcome them. The following are a few things to note in this discovery process.

Land and Regulatory Framework

The conceptual plan presented in this study illustrates the availability of sufficient land to realize the vision of an expanded downtown. The fact that the properties shown in the plan are largely undeveloped provides an opportunity to employ a wide variety of regulatory (zoning) and development tools. The availability of previously undeveloped land also greatly decreases the likelihood of unforeseen environmental issues that may disqualify residential or commercial land uses. Availability and suitability of land is therefore not a likely constraint to Fulshear's growth.

The importance of establishing the right regulatory framework cannot be understated. City ordinances have the ability to encourage development, as well as achieve the desired development types through a variety of development controls such as land use, landscaping minimums, facade design, dimensional regulations, and subdivision regulations. By having the appropriate ordinances in place, the City is able to regulate certain aspects of development and capitalize on opportunities provided by undeveloped properties. Without such regulations in place, the City cannot appropriately influence new development and may not be able to achieve the vision of the concept plan.

Financial Capacity

Capacity for financial participation encompasses the interconnected topics of available financial assets, statutory tools and authorities, and debt capacity. Financial assets in this discussion reference cash on hand and/or cash flows from taxes/fees. These assets are critical to the planning, funding or financing of infrastructure and public facilities necessary to accommodate growth. While partnerships are a good way to introduce private financial assets into infrastructure and housing solutions, the public is hard pressed to go very far without access to cash or cash equivalents (bonds or credit). The clear question is "What monies does the City have to devote to realizing its vision?"

Development Finance Tools

The statutory tools and authorities provided by the State of Texas include a wide array of laws governing taxation, transportation, local governments and water, all of which provide tools that can be leveraged to effect development. The list of laws may be long, however the tools they provide are not all necessarily applicable to the future Fulshear envisions.

Understanding of the underlying mechanisms of Texas development laws is key to creating policies and programs that will equip the City for future development. It is sometimes the reflex of cities to identify and become comfortable with one or more tools which are then widely applied (or misapplied) as solutions. This has led to numerous instances of suboptimal outcomes and financial missteps across our region and state. The table on pages 62 and63, highlights tools that could be of benefit to Fulshear in realizing the Livable Center Conceptual Plan.

Stewardship and Oversight

Development programs are ultimately only as good as their stewardship and oversight. These tasks require that specialized skill sets be focused on negotiating, memorializing and monitoring effective and equitable programs on behalf of the public. Devoting public funds and authorities to programs or projects is relatively simple under the law. However, doing so in a manner that protects the public's interests while achieving the community's desired outcome requires careful consideration.

The City has existing Type A and Type B economic development sales tax corporations (EDCs) which can be useful tools in realizing the plan's recommendations. Furthermore, the City has engaged consultants to facilitate the development of the Fulshear's first economic development strategic plan in 2019. Cities can delegate varying degrees of authority to economic development corporations (EDCs). It is recommended that Fulshear empower its EDCs to develop and administer an economic development program which prescribes specific goals, tools and metrics for attracting and assessing new residential and commercial development in the downtown area as defined in this plan.

What Will It Take to Redevelop Fulshear?

In smaller jurisdictions, the time and careful planning required to successfully implement major development or redevelopment initiatives is often underestimated. Most of the planning that preceded the fairly rapid growth of cities like Sugar Land, Pearland and the Katy area quietly took place decades ago when there was little on the ground that reflected what we see today. These communities now reap the benefits of long-term investments in infrastructure, education, amenities and industry, which were guided by successive, interconnected layers of planning. So, what is needed to set a clear path for Fulshear?

The conceptual plan represents one of a nearly unlimited number of potential outcomes. The primary determiner of how likely the plan is to materialize is largely a question of control over the resources required to fund it. Cities with relative scarcity of financial resources are not often in the position to influence private development in a manner similar to that of the actual developers, employers, or partners (public or private) devoting the needed resources who have their own visions for the project. Clear maps and plans can be a great tool for illustrating the themes and standards that Fulshear seeks to embody, but highly restrictive or over-prescriptive planning may have a chilling effect on the desire of partners and investors to allocate resources. Fulshear's regulatory framework should provide an inviting assurance of predictable approvals and acceptance that embrace the standards set forth with correspondingly appropriate development codes and processes that are developed for the downtown area identified in the conceptual plan.

Cities develop in cycles as time, trends, and technologies evolve. This is equally true for Fulshear as it is for any other municipality. This Livable Center Study and conceptual plan are early signs along the path in this cycle of the City's development as the elected leadership, appointed officials, city staff and citizens chart a course for generations to come.

Economic Development Examples

Balcones Heights, Texas

The City of Balcones Heights, Texas and the San Antonio Transportation Authority (VIA) negotiated with a private developer to create a performance-based reimbursement of sales and property tax increases to offset the costs of development by $25 million over a 25-year period. The project involved creating a detailed financial analysis, complete with the sales tax, property tax, and cost projections; meetings with City officials to educate them about Chapter 380 capabilities and process; and presentation of the proposed development concept and financing methods to the City Council for approval.

Another significant portion of this project was the coordination of the design of a bus/ rapid transit (BRT) hub to serve the center and VIA's long-term business growth and employment plans. The center will be used as a crucial connector between skilled labor force and the San Antonio Medical Center.

Photo Source: viainfo.net/primo_service/

Tomball, Texas

The Four Corners Shopping Center in Tomball, Texas represents a gateway to the budding community. When a developer purchased the property in 2011, it was only 32% occupied and in steep decline. The developer and the City of Tomball worked to negotiate a Chapter 380 Agreement to allow for reimbursement of improvements to the Center to hasten its growth. Plans for the Center included a completely new facade, improved signage, and landscape beautification.

In just three years, the Center attracted a high-quality tenant mix including national restaurant chains, a major specialty goods retailer and was projected to attain 94% occupancy by 2015. The Chapter 380 agreement included a 3-year "transition" period while current Tenants' lease terms are fulfilled and a 10-year effective term of agreement to garner 75% of new Sales Tax revenues generated in the Center and 100% of increased Property Tax revenues with a cap of $2.1 million to the developer over the 13-year term.

Photo Source: Knudson, LP

Community Development Toolbox

Community development strategies are as numerous as the projects they facilitate and are not universally effective. There are a variety of regulatory and statutory tools and programs that may be appropriately utilized (alone or in combination) to achieve a specific desired outcome. The following tables provide an overview of various economic development and planning tools that can be employed to facilitate the implementation of the Livable Center Conceptual Plan. This "toolbox" is intended to provide appropriate options for Fulshear, as general guidance to implement plan recommendations. The following tables are neither comprehensive nor inclusive. There may be tools not listed that may also be appropriate. As circumstances change, new tools and methods may prove beneficial and should be considered as appropriate.

Table 20. Economic Development Financing Toolbox

Finance Tools	Action	Authority	Project Type	Requirements	PROs	CONs
Community Development Block Grants (CDBG)	Improvement Finance and Funding of Public Programs	Federal Authority – Funds flow to City via County or Council of Governments	Infrastructure, social programs, affordable housing and economic development programs	Compete with other small cities for available funds to benefit low-mod Census tracts	Properly structured application may provide wide benefits	Highly competitive-Federal oversight requirements, project specific
Grants and Loans	Business Development and Supplemental Improvement Finance	CH 380 of the Local Government Code – City	Programs to promote business development, commercial activity to promote local economic development	Developer Agreements pursuant to Sec. 380 of the Local Government Code (Sec 381 for Counties)	Ordinarily limited to "public" improvements	Does not provide additional sources of revenue to fund
Management Districts	Improvement Finance and Business Development	CH 211/375 of the Local Government Code – TCEQ approves creation; City support required	Public Improvements in a specifically designated district	Created by Legislature, additional taxing authority, appointment of a Board	Districts ordinarily can do anything that a general law city may do within its geographic boundaries	Creation and administrative costs significant, overlapping debt
Tax Increment Reinvestment Zone (TIRZ)	Improvement Finance	CH 311 of the Tax Code – City	Public Improvements to promote new or re-development of specifically designated zones	An ordinance, a Project & Financing Plan, appointment of a Board, increment only available	Works best with an active developer and catalyst project, County may participate	Limited to the increment, works best with an active developer and catalyst project

Table 20. Economic Development Financing Toolbox Continued

Finance Tools	Action	Authority	Project Type	Requirements	PROs	CONs
Municipal Utility Districts (MUD)	Improvement Finance	CH 54 of the Water Code – TCEQ with City consent	TCEQ or Legislature created taxing authority for water, sewer, drainage and park improvements	TCEQ or special legislation, 100 ac+ w/residential	Eligible costs fully reimbursed	Overlapping debt on local jurisdiction, expensive to establish
Public Improvement Districts (PID)	Improvement Finance	CH 372 of the Local Government Code – City	Public Improvements in a specifically designated district	Assessments for specific purposes in addition to property taxes	Fund non-municipal improvements	Assessments
Type A Economic Development Sales Tax Corporation	Business Development	Chapter 501 - 505 of the Local Government Code – City: municipal election to create or dissolve	Projects promoting development that creates primary employment	Revenues generated by up to ½ cent sales tax; established by municipal election	May be useful to fund relocation of industry	Primarily for job creations; expenditures are more limited than Type B
Type B Economic Development Sales Tax Corporation	Business Development and Supplemental Improvement Finance	Chapter 501 - 505 of the Local Government Code – City: municipal election to create or dissolve	Projects promoting commercial development and quality of life more generally	Revenues generated by up to ½ cent sales tax; established by municipal election	Provides public funds to leverage with other public or private funding sources	May fund wide variety of economic development projects including "quality of life"
Hotel Occupancy Taxes	Business Development	CH 156 of the Tax Code – City	Programs or projects to promote tourism and hotel and convention industries (heads in beds)	Revenues taxed on room rental, limited to tourism promotion	Funding for advertising or promotional materials for redevelopment	Limited uses
Property Tax Abatement	Business Development	CH 312 of the Tax Code	Business retention and expansion (new capital generation)	Requirements for investment and job creation established by the City, granted to individual business interest	Relatively simple to administer; deferment of revenues vs. capital outlay	Targets specific projects/ investments, not area

Table 21. Planning Toolbox

Planning Tools	Action	Authority	Tool Description	Requirements	PROs	CONs
Streetscape Design Standards	Aesthetic Improvements	City	Provision of pedestrian amenities and continuity of streetscape design	Sufficient ROW to locate amenities in pedestrian areas	Improves pedestrian experience	May require additional maintenance efforts
District Branding and Signage	District Identity	City	Promotion of distinct identity within a specified area	An established brand is needed to utilize in branding elements	Builds community identity through branding elements	Insufficient brand distribution may result in lack of brand recognition
Special District/ Overlay Zoning	Establish Regulatory Framework	CH 211 of the Local Government Code – City	Regulations specifically for a designated area with unique development needs	Identified boundaries of a contiguous area with similar development needs	Ability to create unique development and design criteria	Development may be costlier depending on requirements
Signature/Catalyst Project	Catalyst Development	City/Developer	A significant anchor project in the area to help to encourage development	Large tract of undeveloped property at key location	May be implemented by the City or a private developer	May require a large amount of capital to implement
Aesthetic Standards	Aesthetic Improvements	CH 211 of the Local Government Code – City	Unique exterior aesthetic requirements for designated area	Established design for an area that promotes area character	Allows for unique design for special areas by impacting new development and extensive renovations to existing development	May increase development costs

Implementation Plan

Elements of the Plan

The implementation plan has been developed to achieve the vision of the community and bring the concept plan to reality. Each recommendation is directly tied to an applicable theme to ensure recommendations align with the goals of the community. In addition, the recommendation is accompanied by a description of implementation strategies, appropriate regulatory tools, potential economic development financing tools and partnerships, time frames for implementation, and estimated cost to complete. This will serve as a valuable resource for city leadership when considering policy decisions, planning for future capital improvements, and making required budget allocations for implementation.

Recommendations

Each recommendation is intended to achieve one or more elements of the conceptual plan. Each recommendation gives detail about how to implement the recommendation and references suitable strategies to utilize. In some cases, a single strategy may be applicable to multiple recommendations.

Themes

Recommendations of the plan are directly related to one of the identified themes which generally fall under one of three categories: Transportation and Mobility, Economic Development, and Design and Character. Each recommendation supports the themes and achieve the ideas presented in the concept plan.

- **Theme 1**: Create a walkable and pedestrian friendly environment through transportation improvements that encourage multimodal transportation options.
- **Theme 2**: Encourage the sustainable growth and development of downtown by incorporating appropriate development types that support and promote a downtown center.
- **Theme 3**: Develop distinct identity for downtown Fulshear that preserves the existing character and welcomes new growth while maintaining a consistent design.

Approximate Cost

The approximate cost is intended to be a reference for future budget planning. Approximate costs are not exact costs for certain services but provide an estimated range to consider for planning and budgeting purposes. Actual costs should be assessed at the time of implementation.

Implementation Horizons

Implementation horizons are recommended based on when a recommendation should be implemented. Some recommendations may involve ongoing activities that set the stage for other recommendations or require prerequisite activities to occur prior to implementation. As opportunities arise and circumstances change, horizons may be revised. Horizons are described by 5, 10, and 20-year implementation horizons.

- **5 Year Horizon**: Projects are typically "low hanging fruit" and easier to achieve because they do not require a large amount of capital.
- **10 Year Horizon**: Projects may require more planning and capital than the 5-year horizon.
- **20 Year Horizon**: Projects need a large amount of capital, planning and coordination. These projects may require other steps to take place before implementation or may be on-going activities.

Economic Development Financing Tools

The economic development financing tools are suggested methods to financially support each recommendation. Every tool is not applicable in every case; however, a single tool may be utilized to fund multiple recommendations. The tools have been specifically recommended for Fulshear and are based on the Economic Development Financing Toolbox.

Potential Partnerships

Strategic partnerships with other organizations are often an effective way to achieve an economic development goal. Potential partnerships have been identified where teaming up with a certain organization or entity can positively impact the implementation of a recommendation.

Recommendations

1.1 Acquire Necessary Right-of-Way for Roadway and Sidewalk Improvements in Downtown

Connectivity and the pedestrian environment were often mentioned throughout the planning process. It showed the importance of the desire of residents to have a walkable and well-connected downtown, along with improved roadways and streetscapes. Presently, because of the lack of a completed sidewalk network and needed roadway improvements, the desired downtown does not exist.

Right-of-way should be acquired to create and construct roadway improvements, and pedestrian infrastructure and amenities. If right-of-way exists, it should be verified whether its enough or not for future improvements. Many of the roadways in the downtown area are currently open ditch and have narrow right-of-way.

There have been some cities who improved their roadways and streetscapes to assist in attracting developers and projects. If an area appears to have momentum and is ripe for development, just the interest in those locations can some time create catalytic projects.

Finance Tools:	City CIP
Potential Partnerships:	Fort Bend County, City, EDCs
Implementation Horizon:	5 - 20 Year
Approximate Cost:	Varies

1.2 Complete Sidewalk Network

Most of the downtown district does not have sidewalks and any movement through the district takes place on the street. Completing the sidewalk network along major and minor corridors improves pedestrian connectivity by creating a safe place for pedestrians to walk. Since most of the roadways are adjacent to open ditches, drainage areas will need to convert to curb and gutter to accommodate new sidewalks.

The size of new sidewalks will be based on the type of roadway and amount of right of way. The Parks and Pathways Master Plan include off-street trails that run through the downtown area. Completing the sidewalk network will be an essential part of implementing the Parks and Pathways Master Plan.

In most cases, the developer is responsible for providing a right-of-way easement and constructing sidewalks as part of development. In cases where development is in place, acquiring additional right-of-way may be necessary in order to construct the sidewalks. As roadways are improved in downtown, sidewalks should be included as part of the design.

Funding the plan will require funds allocated for capital improvements. One option is to prioritize downtown sidewalks as part of the Capital Improvement Plan. Another funding opportunity is through the initiation of a public improvement district or PID for downtown. PIDs utilize assessments on properties within the downtown, specifically for public improvements in the district such as sidewalks.

Finance Tools:	City CIP Public Improvement District
Potential Partnerships:	Developers, City, EDCs
Implementation Horizon:	10 Year
Approximate Cost:	Varies

1.3 Construct Pedestrian-Friendly Intersections at Key Locations

To create a more pedestrian-friendlier environment in downtown, it is necessary to improve pedestrian movement along Main Street within the downtown district. The current roadway is unsafe for pedestrians due to high speed traffic and the lack of crossing facilities. By creating enhanced pedestrian-friendly intersections at locations along the corridor, visitors can utilize both sides of Main Street and safely cross at designated crossing.

The conceptual plan identifies enhanced intersections on Main Street at 1st, 2nd, 3rd, and 4th Streets. The purpose of these intersections is to alert drivers that pedestrians are in the area, passively slow traffic, and improve aesthetics of the roadway. Features of the intersections include a change in street material, pedestrian crossing lighting or signage, and improved streetscape. A change in roadway material is a visual cue to drivers that something is different, creates a texture change on the roadway surface, and designates the area as a pedestrian crossing. Aesthetic improvements to the intersection include a unique material design on the roadway and landscaping at all four corners.

Finance Tools:	City CIP Public Improvement District
Potential Partnerships:	City, EDCs, TxDOT, H-GAC
Implementation Horizon:	10 Year
Approximate Cost:	Varies

Examples of Enhanced Intersections

1.4 Create One-Way Pair Utilizing Main and Wallis Streets

At the beginning of the process, it was determined a one-way pair would provide one of the best opportunities for encouraging development and creating a pedestrian-friendly environment in downtown. Crossing a one-way street with only half the traffic volume would be much preferred to crossing the larger and busier two-way roadway.

After the presentation of two one-way pair alternatives, the Advisory Group and community were in consensus of Main (northbound) and Wallis (southbound) Streets being the pair through downtown. The one-way pair would reduce traffic by approximately one-half on Main Street. The other half of the traffic would be less disruptive on an improved Wallis Street.

Having the other paired street, Wallis Street, two blocks away means a greater dispersion of the effects of through traffic on FM 359 across two blocks; not creating one block in the middle that would have significant traffic on both sides of the block. The two-block separation of the one-way pairs allows Harris Street, in the middle, to be advanced as a pedestrian-oriented downtown focal center that could be closed for special events.

Since FM 359 is a TxDOT thoroughfare, close coordination with TxDOT will be necessary throughout the process.

Finance Tools:	City CIP Public Improvement District
Potential Partnerships:	City, TxDOT, Fort Bend County
Implementation Horizon:	10 Year
Approximate Cost:	Varies

One-way pair utilizing Main and Wallis Streets

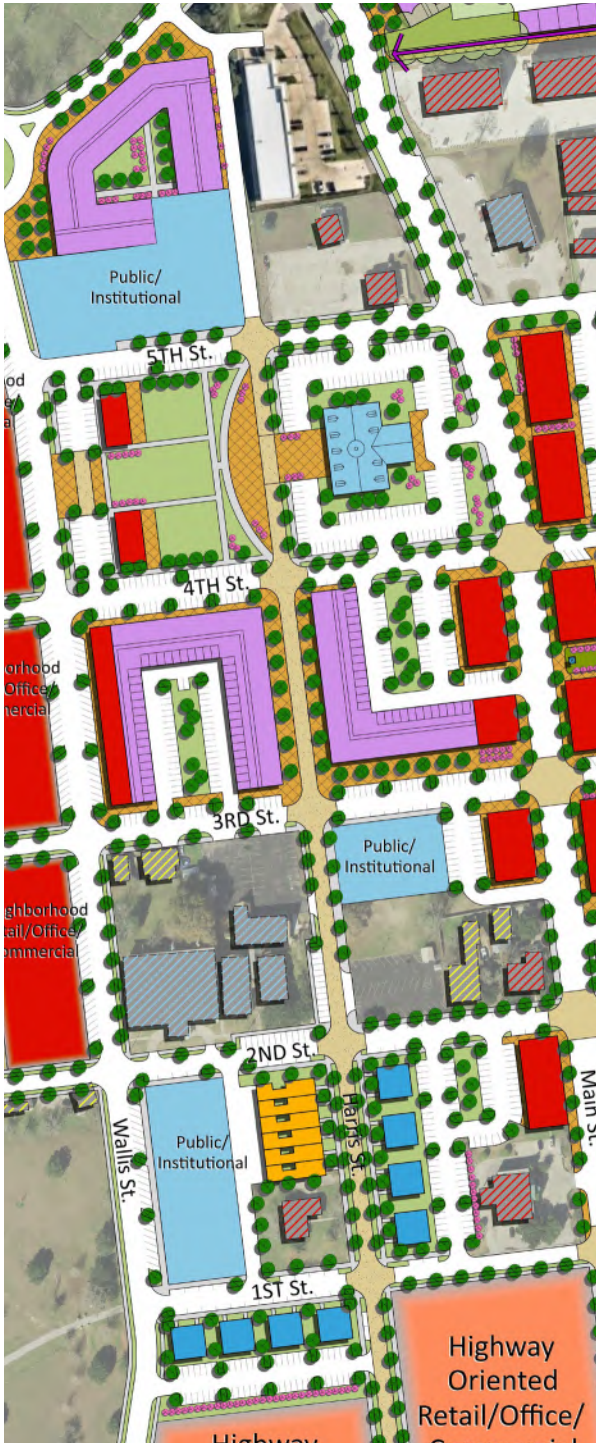
1.5 Plan for Public Parking Locations Near the Downtown Core

To meet the parking needs caused by the increase in density in the downtown district, public parking is proposed to be added near the downtown core. While some on-site parking is permitted, it is not encouraged for most developments in order not to disrupt the intended dense development pattern. On-street parking is also provided on most street throughout the district but will not meet the ultimate need.

Public parking locations will primarily serve the retail and commercial development. It will also serve the greater parking need during large community events such as Freedom Fest. Public parking areas are proposed at the northern and southern regions of the downtown core to allow for easy access to the core without being located directly in the area. The two locations currently shown on the conceptual plan are identified as Public/Institutional and intended as examples of where parking structures could be located. Actual parking locations may shift due to land availability. The structure at the northern end of Harris Street is shown adjacent to a mixed-use development and could potentially be incorporated as part of the development, while the example at the southern end is shown as a free standing structure. Any parking garage in the downtown area should have facade design requirements similar to that of the commercial structures to maintain visual continuity in the district.

The intent for the public parking locations is to start small and increase over time as downtown develops. Early, the public parking areas may only be surface parking. As downtown grows, so will the need for additional parking. In the next phase, one parking area may be come structured parking to meet the immediate need. When the need increases further, the second parking area may also become a vertical parking structure. As new development arrives, some multistory buildings (no taller than 2-3-story) may also incorporate parking garages with parking spaces designated for public parking.

Finance Tools:	City CIP Public Improvement District
Potential Partnerships:	Developer, City, EDCs
Implementation Horizon:	5 year
Approximate Cost:	Varies



2.1 Develop Downtown Economic Development Program

An Economic Development Program is a sustainable method by which to execute and monitor targeted incentives and programs offered by the City to encourage development. Through the program, the City will be able to organize available incentives and decide how to offer them to achieve certain economic development goals. If executed properly, economic development incentives, when coupled with an appropriate regulatory environment and necessary underlying infrastructure to support development, can effectively ignite the revitalization of neighborhoods, increasing tax revenues and encouraging business development. Program design should be dictated by the identified need and desired outcomes and directed toward closing strategic gaps and/or mitigating key obstacles to development.

Incentives offered through the program are determined by what can be funded and the types of agreements that can be entered. Many of the tools identified in the Economic Development Financing Toolbox on pages 62 and 63 are resources that could be initiated through the program.

Development and initiation of a program is hard to assign a firm financial cost to. It generally costs staff time (and associated legal, etc.) to create ordinances and rules related to the program. If a consultant is hired to assist with the creation and adoption of an ordinance, services can range from $25,000 to $50,000 depending on the level of stakeholder engagement involved. An economic development program would be administrated by the City of Fulshear or the appropriate respective program oversight body (once established.)

The City's forthcoming Economic Development Strategic Plan, which will cover a large geographic area including the downtown Fulshear area identified in the Livable Center Conceptual Plan, can incorporate key recommendations of this study to help focus City priorities and better identify incentives and programs to offer to meet the goals prioritized in the strategic plan.

Finance Tools:	See Economic Development Financing Toolbox
Potential Partnerships:	City, EDCs, Developer, Fort Bend County
Implementation Horizon:	5 Year
Approximate Cost:	Staff Time / $25,000 - $50,000 (Consultants) / Legal

2.2 Acquire Strategic Properties to Encourage Development in Downtown

To implement certain aspects of the conceptual plan, the City will need to acquire properties that can be used for strategic development. Acquiring land allows the City flexibility to determine where certain uses are located and control how they will be developed. Additionally, this allows the City to act as a catalyst for future development. The acquired land may be developed by the City for public purposes such as a park or public facility or it can be sold to a developer to develop as prescribed in the conceptual plan.

To develop a park/open space in the downtown core, acquiring properties may be necessary. The conceptual plan identifies the inclusion of a park or plaza in the downtown core, however the actual location would be determined by the land acquired by the City. Assembling of land for different purposes will take time and planning to adequately identify land and coordinate the transition from the current use to a new use. The City should acquire land as opportunities are presented.

For the acquisition of land, Public-Public and Public-Private Partnerships may prove beneficial depending on the property in question.

Finance Tools:	City CIP Public Improvement District
Potential Partnerships:	City, EDCs, Public-Public, Public-Private
Implementation Horizon:	20 Year
Approximate Cost:	Varies

3.1 Develop a Branding and Signage Plan and Implementation

A branding and signage plan involve coordinating the design and location of district signage throughout downtown. This plan would establish a design theme, types of signage, and where signage will be located throughout the district. Having consistent signage gives a sense of place and continuity throughout downtown and surrounding areas.

Signage types should include gateway signage at the entrances of downtown, wayfinding signage at key locations, and district signage on banners, street signs, and city signage. The design of the signage should be reflective of the character of Fulshear to reinforce Fulshear's identity and establish downtown as a unique destination. The signage should be located at strategic locations to help orient pedestrian and vehicular traffic in the district.

Gateway signage should be located on Main Street and Harris Street at FM 1093 as southern entrances, and Wallis Street at the future extension of Huggins Drive as identified on the Downtown Concept Plan. Minor gateway signage can also be located at the entrances to the downtown core. Wayfinding should direct visitors to public facilities and to key interests in downtown.

A Request for Qualifications (RFQ) could be published to solicit design teams and partners interested in developing the Branding and Signage Design Master Plan, including signage designs. The implementation section of the plan would identify which elements of the plan to install over time, how to efficiently budget funds for implementation, and identify partnering opportunities.

Finance Tools:	City CIP Public Improvement District
Potential Partnerships:	City, EDCs
Implementation Horizon:	5 year
Approximate Cost:	$50,000 - $100,000

Examples of Gateway Signage

Examples of Wayfinding Signage

Examples of District Signage

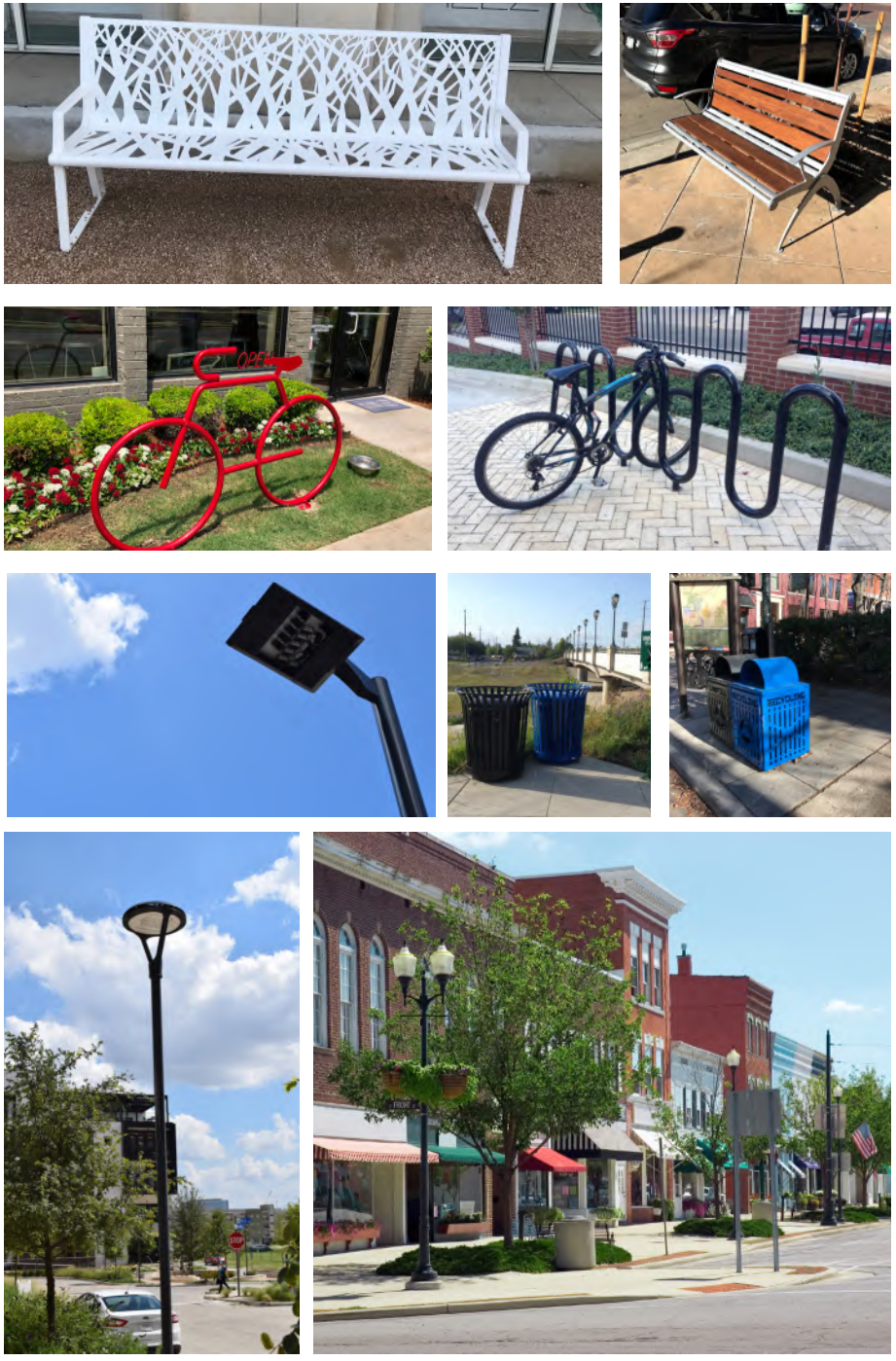
3.2 Develop a Downtown Streetscape Design Master Plan and Implementation

A Downtown Streetscape Design Master Plan identifies the design, types, and location of streetscape elements for the downtown district. The streetscape of the downtown district should welcome visitors and create an environment that makes it safe and comfortable for pedestrians to use. Streetscape elements may include, but are not limited to street trees, lighting, seating, bike racks, and trash receptacles. The design of the elements should be reflective of the character of downtown Fulshear.

The implementation plan should schedule when to install certain elements. This will assist with distributing funds for this effort. As roadway construction takes place in the downtown district, the elements of the Streetscape Design Master Plan should be installed during this time. This will reduce duplication of effort when working on the right-of-way. Request for Qualifications (RFQ) could be published to solicit design teams and partners interested in developing the Downtown Streetscape Design Master Plan, including element types and design theme.

Finance Tools:	City CIP
Potential Partnerships:	City, EDCs
Implementation Horizon:	5 year
Approximate Cost:	$150,000 - $200,000

Examples of Street Cross Section with Streetscape Amenities



Examples of Streetscape Amenities

3.3 Develop Zoning Regulations for Downtown District

The character and aesthetics of downtown are important to its success, and the City has the most control of the visual character through the administration of codes and ordinances. Zoning ordinances can determine the size, location, and design of new development. By implementing specific zoning regulations, new developments are designed to meet the City's vision through the regulation of how structures can be developed. To achieve the density and site design suggested by the conceptual plan, the City will need to put zoning regulations in place that are intended to impact development specifically in the downtown area.

The city should add a new zoning district or overlay zoning district that applies to the downtown district defined by the concept plan. The ordinances should regulate building setback, landscaping, parking requirements, residential density, and design standards. The following describes the type of regulations to influence downtown development.

Dimensional standards should promote a walkable downtown center therefore building setback should be short and close to the street. Building heights should be a minimum of two-stories in the downtown core and lowered as you move from the core. Lot sizes should promote density by encouraging smaller lots for residential uses, restricting the level of residential density or restricting the ratio of residential to commercial development in the downtown district. Landscaping regulations should define requirements for street trees and shared outdoor spaces. A building design manual should be created for structures in downtown to ensure continuity among buildings and promote the downtown character. Consider brick facades with special details that pay homage to the history of Fulshear.

The creation of new zoning regulations can be done by City staff or by a consultant. However, the planning department should be closely involved in the development of the regulations.

Finance Tools:	City Council/P&Z
Potential Partnerships:	City, EDCs
Implementation Horizon:	5 -10 year
Approximate Cost:	$160,000-$200,000

Example of Brick Facade on Downtown Buildings

Example of Limited Landscaping in Downtown Setting

Example of Short Setback and Street Trees

Implementation Plan Summary

Table 22. Implementation Plan Summary Table

	Recommendation	Finance Tools	Potential Partnerships	Horizon			Approximate Cost
				5-yr	10-yr	20-yr	
Theme 1: Create a walkable and pedestrian friendly environment through transportation improvements that encourage multimodal transportation options.							
1.1	Acquire necessary right-of-way for roadway and sidewalk improvements in downtown	City CIP	Fort Bend County, City, EDCs	■	■	■	Varies
1.2	Complete sidewalk network	City CIP PID	City, Developers, EDCs		■		Varies
1.3	Construct pedestrian-friendly intersections at key locations	City CIP PID	City, EDCs, TxDOT, H-GAC		■		Varies
1.4	Create one-way pair utilizing Main and Wallis Streets	City CIP PID	City, TxDOT, Fort Bend County		■		Varies
1.5	Plan for public parking locations near the downtown core	City CIP PID	Developer, City, EDCs	■			Varies
Theme 2: Encourage the sustainable growth and development of downtown by incorporating appropriate development types that support and promote a downtown center.							
2.1	Develop economic development program	See Economic Development Financing Toolbox	City, EDCs, Developer, Fort Bend County	■			Staff Time/ $25,000 - $50,000 (Consultant)/ Legal
2.2	Acquire strategic properties to encourage development in downtown	City CIP PID	City, EDCs, Public-Public, Public-Private			■	Varies
Theme 3: Develop distinct identity for downtown Fulshear that preserves the existing character and welcomes new growth while maintaining a consistent design.							
3.1	Develop a Branding and Signage Plan and Implementation	City CIP PID	City, EDCs	■			$50,000 - $100,000
3.2	Develop a Downtown Streetscape Design Master Plan and Implementation	City CIP	City, EDCs	■			$150,000 - $200,000
3.3	Develop zoning regulations for downtown district	City Council/ Planning and Zoning Commission	City, EDCs	■	■		$160,000- $200,000

FREESE AND NICHOLS

CDS COMMUNITY DEVELOPMENT STRATEGIES

KENDON