



**Date: November 15, 2022 6:00 PM**

**Meeting: Comprehensive Plan Advisory Committee Meeting #4**

**Location: Santa Fe City Hall**

Organization	Attendee	Representation (Role)	Contact	Present
CPAC	Chris Anderson	Santa Fe Fire and Rescue (Deputy Chief)	fdchief700@comcast.net	
	Dr. Kevin Bott	Santa Fe ISD (Superintendent)	kevin.bott@sfsid.org	✓
	Gina Bouvier	Santa Fe Chamber of (Commerce Director)	info@thehiddenpalms.com	
	Janet Davis	(Resident)	Janet.davis24@verizon.net	
	Glennie Hefner	Planning & Zoning (Chairperson)	glenniehefner@me.com	
	Fidencio Leija	Economic Development Corporation (President)	info@fidencioleija.com	
	Robbie Nelson	ReMax Realty (Realtor) Chamber of Commerce (Chair)	robbie@robbienelson.com	✓
	James Newman	Galveston County Water Control Improvement District #8 (General Manager)	water65@comcast.net	
	Bill Pittman	City of Santa Fe (Mayor)	mayor@ci.santa-fe.tx.us	✓
	Dan Seal	Bay Area Houston Economic Partnership (Executive Director)	dan@bayareahouston.com	✓
	Dennis Wagner	Drainage District 1 (Chairman of Commissioners)	dennis@wagner1980.com	✓
	Gina Welsh	Santa Fe ISD Education Foundation (Executive Director)	gina.welsh@sfsid.org	
	Bob Wylie	Galveston County Water Control Improvement District #8 (Asst Secretary/Treasurer)	bwylie@ci.santa-fe.tx.us	
Attending	Kim Ross	Santa Fe ISD (Chief Academic Officer)	kim.ross@sfsid.org	
	Dana Marks	City Council Member		
City of Santa Fe	Alun Thomas	Acting City Manager	citymanager@ci.santa-fe.tx.us	✓
	Matthew Johnson	City Engineer	mjohnson@ci.santa-fe.tx.us	
	Rudy Zepeda	Finance Director	rzepeda@ci.santa-fe.tx.us	
Kimley-Horn	Mike Shelton	Project Manager	mike.shelton@kimley-horn.com 281-920-6588	✓
	Josie Ortiz	Planner	josie.ortiz@kimley-horn.com 281-920-6574	



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Andi Vickers

Junior Planner

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281-740-7653

✓

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1. **Call to Order** – Mayor Bill Pittman called the meeting to order.
  2. **Roll Call** – City Manager Alun Thomas led the roll call.
  3. **Business** – Mike Shelton presented the meeting agenda, emphasizing the need to accelerate due to the Planning and Zoning Commission meeting.
    - **Plan Vision & Goals**
    - **Public Feedback**
    - **Placetype Results from Public Meeting**
    - **Economic Development Data**
    - **Peer City Selection**
  4. **Next Steps**
  5. **Adjournment**



### **Vision and Goals**

Mike presented the vision and goals and requested the CPAC provide comments before the next meeting.

Alun said that “live, work, play” is cliché and that it should be replaced / removed.

Fidencio noted that he doesn’t like the “we don’t intend” phrase and noted Santa Fe’s emphasis on heritage and traditions.

Robbie suggested “supports incoming growth while protecting our integrity” for the infrastructure goal.

Alun wanted “pass-through” to be revised for the placemaking goal.

### **Public Feedback**

There was a general discussion about the previous public meeting:

- 25-30 participants attended
- The instructions for the activity did not seem to be intuitive; it took a while for people to understand the activity
- Need to spread the maps out more
- General lack of support for commercial center, high-rises, manufacturing, and warehouse, however these uses are essential for tax revenue
- General feedback from community that catalyst sites may not be correct
- CPAC members explained that growth is inevitable; this is the public’s opportunity to make your voice heard – that helped get people engaged/committed
- General concern that if they placed a sticker it would be written in stone; need to disarm that fear and explain the purpose more thoroughly
- Encourage people to add comments when they agree/disagree, specify type of park/commercial, etc
- Recommendation to create a map where participants can draw new / revised catalyst sites
- Recommendation to add landmarks to catalyst sites
- Recommendation to add new Bay Area Boulevard alignment to map
- CPAC concern that people think their opinions don’t matter, lack of trust in the city
  - No elected officials attended the last meeting
  - Fidencio is convinced that picking up the phone is the best way to get participants
  - Dan suggests that we create a sense of optimistic urgency
  - Get/advertise food
  - Next pocket market / library / pavilion; third Saturday in every month (January)
  - Investigate SFISD events



- Musical 1/28
- Band Christmas concert 12/15
- Sports events?
- City to create a "commercial" and/or billboard
- Possibly extend the project past April to incorporate the Rodeo (April 14-22); residents from every city in Galveston County will attend

### **Placetype Results from Public Meeting**

Mayor Pittman recommended adding a photo of a skate park in the parks and recreation placetype board.

Fidencio asked for images from our peer cities for the placetype images.

Fidencio noted that area south of the railroad will likely remain agricultural because of the rice fields.

### **Economic Development Data**

There was a request to compare economic data of "gulf coast" and "Galveston County".

Robbie offered to send additional data from HAR.

Fidencio commented that the retail leakage in motor vehicle and parts makes sense.

### **Peer City Selection**

Mayor Pittman recommended adding Willis, outside of Conroe.

Alun likes that Hutto was included in the peer city list, as it is a railroad town and experienced a lot of growth.

Fidencio likes that Denison was included, as they have experienced five years of recent growth.

Dan Seal noted that peer cities may be useful to help illustrate to the public what Santa Fe could be like one day.



### **Next Steps**

Kimley-Horn will address action items prior to the public meeting.

Kimley-Horn will send the flyer advertising the next public open house and update the website.

After the place type activity has concluded, Kimley-Horn will draft the Future Land Use Plan DRAFT for public comment.

CITY OF SANTA FE

# COMPREHENSIVE PLAN

# 2050



SF  
TX

**VISION**

2050

**Kimley»Horn**

Expect More. Experience Better.



# Agenda

- ▶ Public Feedback
- ▶ Vision & Goals
- ▶ Peer City Selection
- ▶ Economic Development
- ▶ Placetypes
- ▶ Catalyst Sites
- ▶ Next Steps

1. Public Feedback
2. Vision and Goals
3. Peer City Selection
4. Economic Development
5. Placetypes
6. Catalyst Sites
7. Next Steps / Public Meeting



## ▶ **Public Feedback**

- ▶ Vision & Goals
- ▶ Peer City Selection
- ▶ Economic Development
- ▶ Placetypes
- ▶ Catalyst Sites
- ▶ Next Steps

# Vision4SFTX

- 277 – subscribers to email updates
- 107 – “Future of Santa Fe” survey
- 42 – “Visual Preference” survey
- 24 – Mobility Budgeting





# Vision4SFTX

3577

Total Visits ⓘ

1088

Unique Users ⓘ

0:47

Avg Time (min) ⓘ

30

Comments

677

Survey Responses

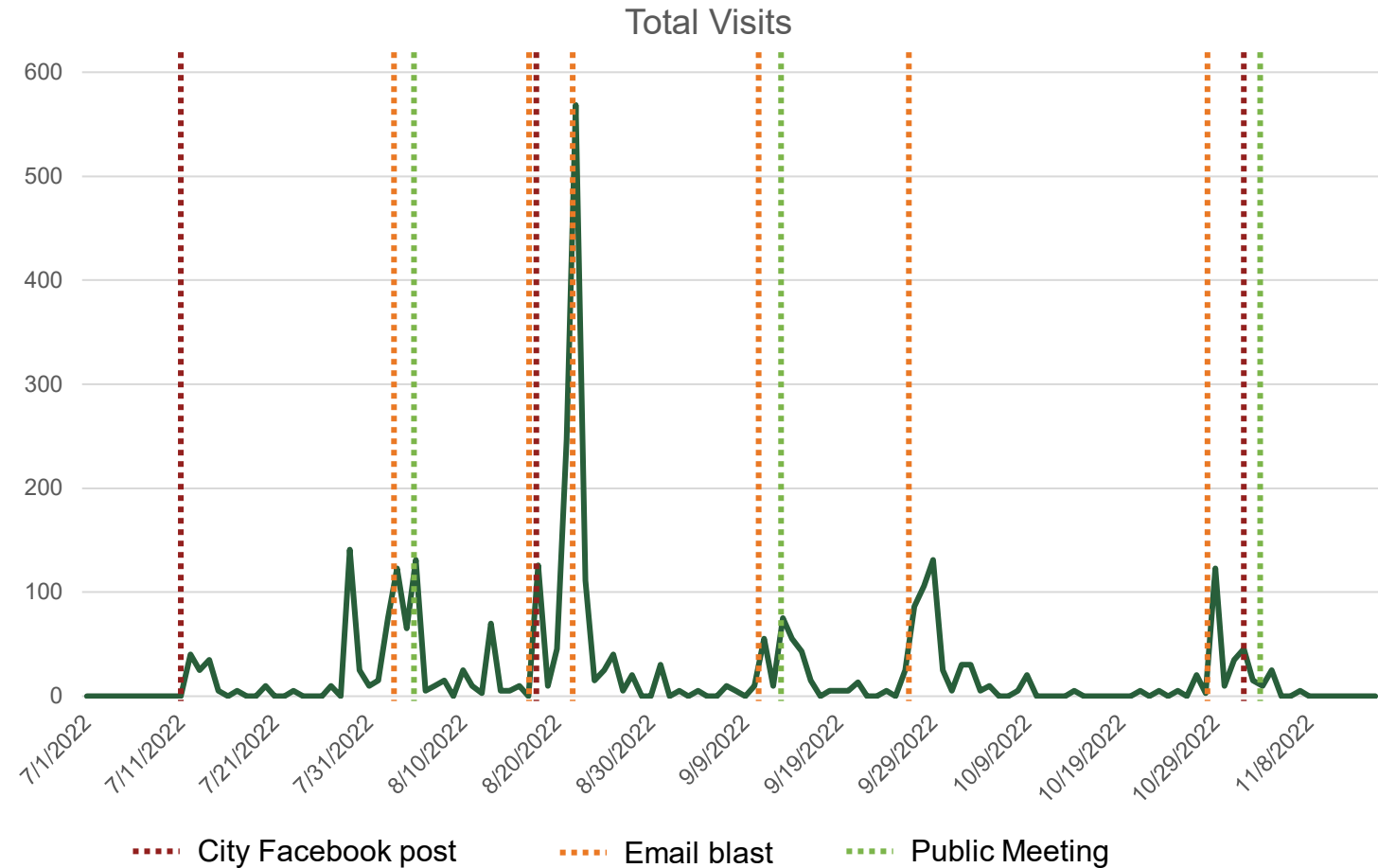
24

Budget Responses

108

Document Downloads ⓘ

- ▶ Public Feedback
- ▶ Vision & Goals
- ▶ Peer City Selection
- ▶ Economic Development
- ▶ Placetypes
- ▶ Catalyst Sites
- ▶ Next Steps



# Visual Preference Responses



# Mobility Budget Responses

Category	Percent of Allocation
Recreation	33%
Health & Safety	24%
Travel Choice	19%
Economic Prosperity	14%
Traffic	7%
Sustainability	3%

In-Person 1<sup>st</sup>: Health and Safety  
 In-Person Last: Sustainability

Online 1<sup>st</sup>: Recreation  
 Online Last: Sustainability



# Vision and Goals

# Vision

In Santa Fe, we don't intend to become the fastest growing city in Texas. Instead, we want our **careful growth** to enhance our **rural character** and **friendly community**. We are connected to City of Houston and surrounding places **without being defined by their complications**. We want to become a place where **families can grow, learn, work, play, and thrive** for generations.

# Goal – Land Use

Maintain a small-town feel while encouraging development of place types in locations that are compatible with the surrounding areas

# Goal – Infrastructure

Provide and maintain quality infrastructure  
(roads, drainage, water and wastewater) that  
supports incoming growth

# Goal – Housing

Encourage missing-middle housing types (duplexes, quadplexes, garden homes, or accessory dwelling units) that provide options for local workforce, the next generation, and those who wish to age-in-place



# Goal – Transportation

Increase connectivity across the city and allow  
for additional recreational transportation  
options and mode choice where appropriate

# Goal – Economic Development

Continue to support existing local businesses while attracting business types that can provide jobs, a variety of entertainment, and basic needs

# Goal – Placemaking

Put Santa Fe on the map as a destination rather  
than a pass-through City

# Goal – Parks and Open Space

Maintain current high-quality facilities and expand the parks network to provide a park or trail within a half-mile of most residences



# Peer City Selection

- ▶ Public Feedback
- ▶ Vision & Goals
- ▶ **Peer City Selection**
- ▶ Economic Development
- ▶ Placetypes
- ▶ Catalyst Sites
- ▶ Next Steps

City	Metro Area	Population (2020)	Median Income (2020)	Land Size (Square Miles)	Average Annual Growth (2015-2020)
Santa Fe	Houston	12,735	\$ 77,926	17.11	0.95%
Angleton	Houston	19,429	\$ 67,181	11.58	0.23%
Denison	Dallas-Fort Worth	24,479	\$ 50,701	30.40	1.70%
Alvin	Houston	27,098	\$ 57,114	22.61	1.06%
Hutto	Austin	27,577	\$ 87,333	10.08	5.96%
Friendswood	Houston	41,213	\$ 108,135	20.69	1.19%

# Economic Development



# Market Analysis: Baseline Conditions

## City of Santa Fe, Texas Comprehensive Plan



# MARKET ANALYSIS: Demographic Overview





# MARKET ANALYSIS: Population Characteristics

## Population and Age Statistic Comparison

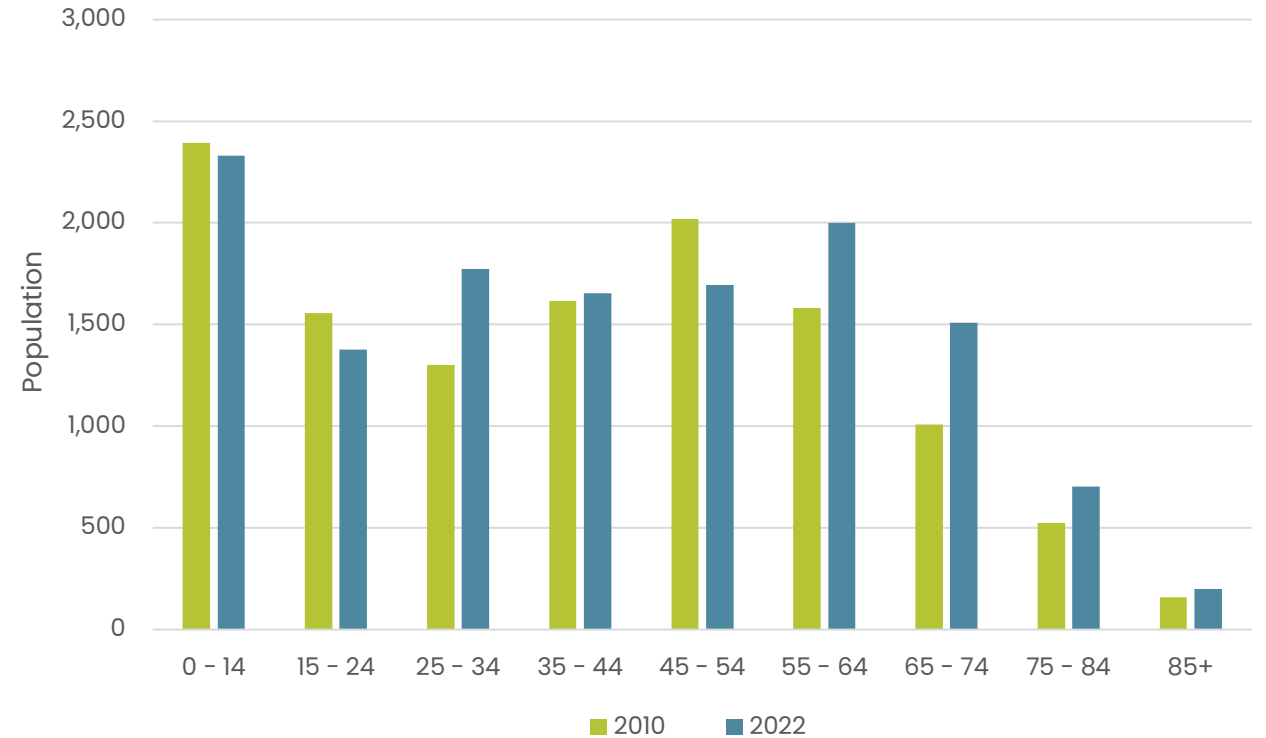
Source: ESRI BAO

Area	2022 Median Age
City of Santa Fe	41.9
Galveston County	38.9
Houston MSA	35.0

Area	Total Population		Annual Growth Rate
	2010	2022	
City of Santa Fe	12,153	13,238	0.7%
Galveston County	231,309	364,492	1.9%
Houston MSA	5,920,416	7,421,501	1.9%

## Santa Fe Age Cohorts

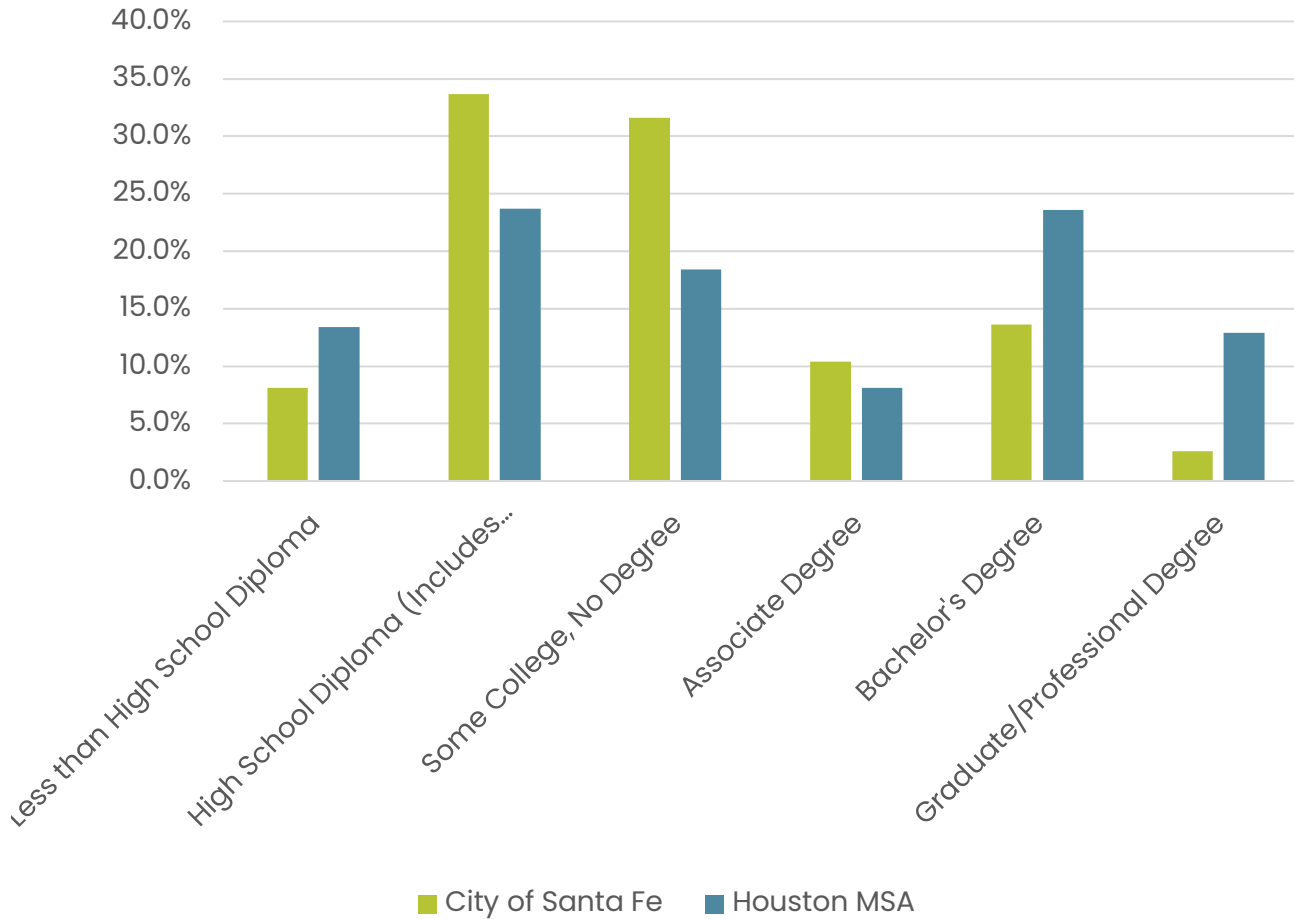
Source: ESRI BAO



# MARKET ANALYSIS: Population Characteristics

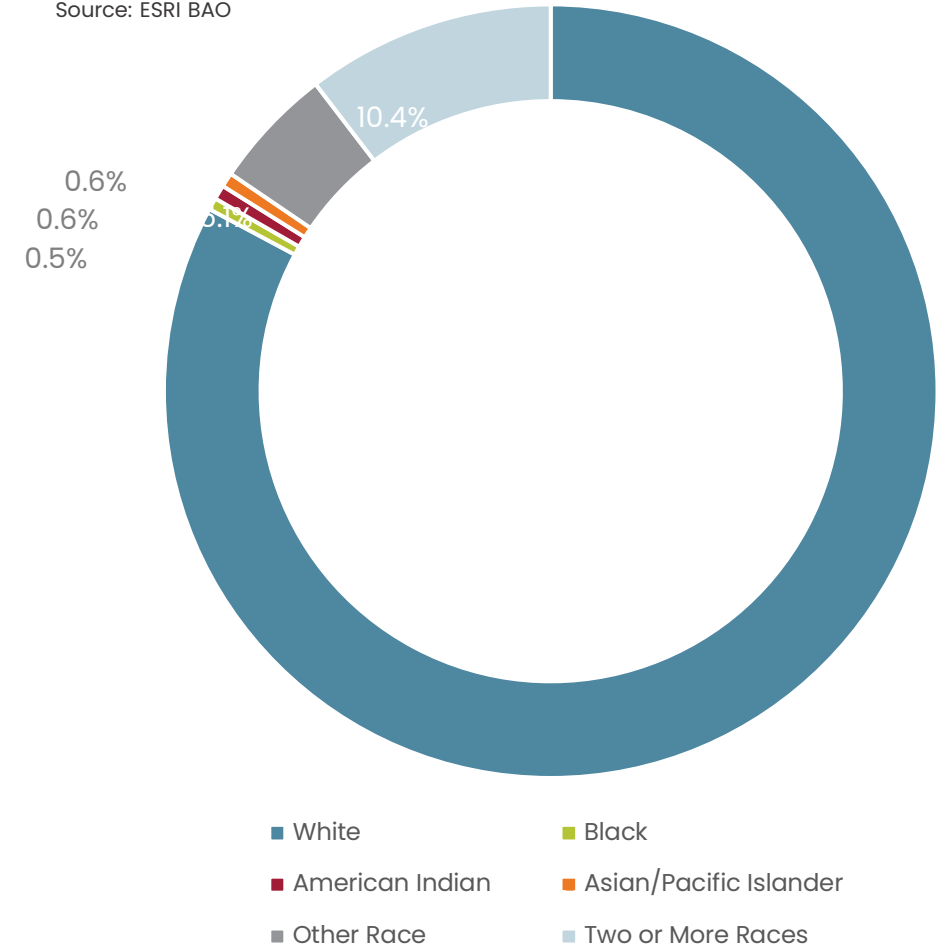
## Education Comparison for Santa Fe and Houston MSA

Source: ESRI BAO



## Santa Fe - Race

Source: ESRI BAO



# MARKET ANALYSIS: Tapestry Segmentation

## TAPESTRIES

- Puts a “face on the numbers”
- In addition to demographic information, include preferences on housing, spending, and labor force
- 67 segments across the US
- Used by developers and retailers to understand the character of a community

Tapestry	Share of Total in Trade Area
Middleburg	33.6%
Salt of the Earth	28.6%
Southern Satellites	15.6%
Green Acres	13.2%
Savvy Suburbanites	9.0%



# MARKET ANALYSIS: Tapestry Segmentation

## TAPESTRY SEGMENTATION

The Fabric of America's Neighborhoods



### UNITED STATES OF AMERICA

Total Population: 314,468,000  
 Total Households: 118,979,000  
 Median Age: 37.6  
 Median Income: \$51,000  
 Total Household Income: \$71,000  
 Diversity Index: 62.1  
 Home Ownership Rate: 64%  
 Average Household Size: 2.58  
 Home Value: \$172,000



- #### LIFEMODE SUMMARY GROUPS
- Affluent Estates: Established wealth—selected, well-travelled married couples
  - Upscale Avenues: Progressive, married couples in higher density neighborhoods
  - Uptown Individuals: Younger urban singles on the move
  - Family Landscapes: Successful younger families in lower housing
  - Gen X Urban: X in middle age, families with lower kids and a mortgage
  - Cozy Country Living: Empty nesters in beauty settings
  - Ethnic Enclaves: Established diversity in young, ethnic, transplants with families
  - Midtown Singles: Single city dwellers
  - Senior Styles: Senior lifestyles avoid the effects of aging, for retirement
  - Midtown Singles: Country life with older families, urban homes
  - Midtown Singles: Midtown living, young, diverse, and often
  - Midtown Singles: Country life and staying close to home, single professionals
  - Midtown Singles: Urban seniors, young, diverse, hand-to-mouth families
  - Scholars and Patriots: College campuses and military neighborhoods

- #### URBANIZATION SUMMARY GROUPS
- Principal Urban Centers: Young, mobile, diverse in metros of 2.5+ million people
  - Urban Periphery: City life for starting families with single-family homes
  - Metropolitan: Affluent city life, including inner metros, smaller cities
  - Suburban Periphery: Affluence in the suburbs, married couple-families, larger commutes
  - Exurbia: Small town living, families with affordable homes
  - Rural: Country living with older families, low density, and low diversity

#### DEFINITIONS IN THE SEGMENT DESCRIPTIONS

Household (HH) types: Family and nonfamily

- Family: Married couple
- Family: Married couple with children
- Family: Single parent
- Nonfamily: Single
- Nonfamily: Shared

#### SEGMENT LEGEND

Segment Name: Before the USMDS Summary Group

Segment Number: Each unique name for the segment

Segment Name: Each unique name for the segment

Family: Represents the typical number of people and type of household

Nonfamily: Represents the typical number of people and type of household

Median Age: Median age of the segment, converted to the US median

Median Income: Median household income of the segment, compared to the US median

Population: Total population of the segment

Household Size: Average household size of the segment

Home Value: Average home value of the segment

Home Ownership Rate: Percentage of the segment that owns their home

Home Value: Average home value of the segment

FOR MORE INFORMATION ABOUT TAPESTRY SEGMENTATION

Call 1-800-882-8771

Visit us online at [www.esri.com](http://www.esri.com)

Send an e-mail to [info@esri.com](mailto:info@esri.com)



# MARKET ANALYSIS: Tapestry Segmentation

## TAPESTRIES

Source: ESRI Business Analyst

# TAPESTRY SEGMENTATION

The Fabric of America's Neighborhoods

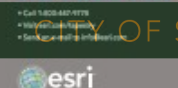


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FOR MORE INFORMATION ABOUT TAPESTRY SEGMENTATION



## CITY OF SANTA FE COMPREHENSIVE PLAN 2050



# MARKET ANALYSIS: Tapestry Segmentation

## TAPESTRIES

Source: ESRI Business Analyst

### MIDDLEBURG

33.6%  
of area  
households



- **Semirural subdivisions**
- **Young couples, many with children**
- **Traditional values – faith, country and family**
- **Low diversity index**

### SALT OF THE EARTH

28.6%  
of area  
households



- Around average incomes and household wealth totals
- Entrenched in their traditional, rural lifestyles
- Less educated and last to adopt new trends and technologies
- Very low diversity index

### SOUTHERN SATELLITES

15.6%  
of area  
households

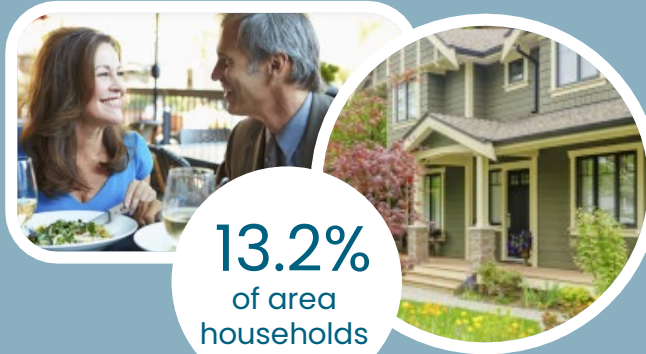


- Residents enjoy the country lifestyle
- Vast majority own their homes, which were usually built after 1970
- Lower labor force participation than average
- Primarily older, settled married couples with no children

# MARKET ANALYSIS: Tapestry Segmentation

## TAPESTRIES

### SAVVY SUBURBANITES



13.2%  
of area  
households

- Well educated, well read, well capitalized
- Empty nesters
- Suburban lifestyle
- Primarily single-family homes

### GREEN ACRES





















9.0%  
of area  
households

- Avid "do-it-yourself-ers"
- Well educated
- Suburban periphery of large metropolitan areas
- Homes valued at twice US average

# MARKET ANALYSIS: Peer Cities

- Santa Fe is an older, less diverse and more owner-dominant market than other peer cities
- Annual growth in Santa Fe is around average compared to peer cities in Texas, however far below Hutto in the Austin area

Santa Fe, TX	 2.58 Avg. HH Size	 75.1% % Owner Households	 37.0% Households with Children
Dennison, TX	 2.45 Avg. HH Size	 57.9% % Owner Households	 31.6% Households with Children
Hutto, TX	 2.45 Avg. HH Size	 80.9% % Owner Households	 56.8% Households with Children
Alvin, TX	 2.67 Avg. HH Size	 59.6% % Owner Households	 40.7% Households with Children
Friendswood, TX	 2.83 Avg. HH Size	 78.8% % Owner Households	 41.6% Households with Children
Angleton, TX	 2.69 Avg. HH Size	 56.1% % Owner Households	 39.9% Households with Children



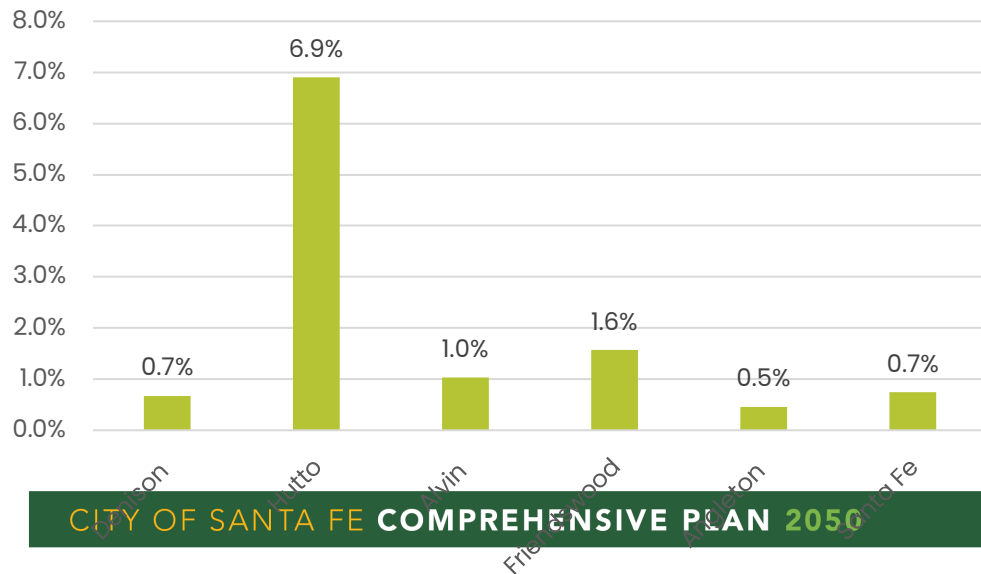
# MARKET ANALYSIS: Peer Cities

Area	Diversity Index	2022 Median Age
Santa Fe	50.0	41.9
Denison	59.1	42.8
Hutto	80.9	32.0
Alvin	77.0	34.3
Friendswood	60.3	41.4
Angleton	79.1	37.3

Source: ESRI Business Analyst

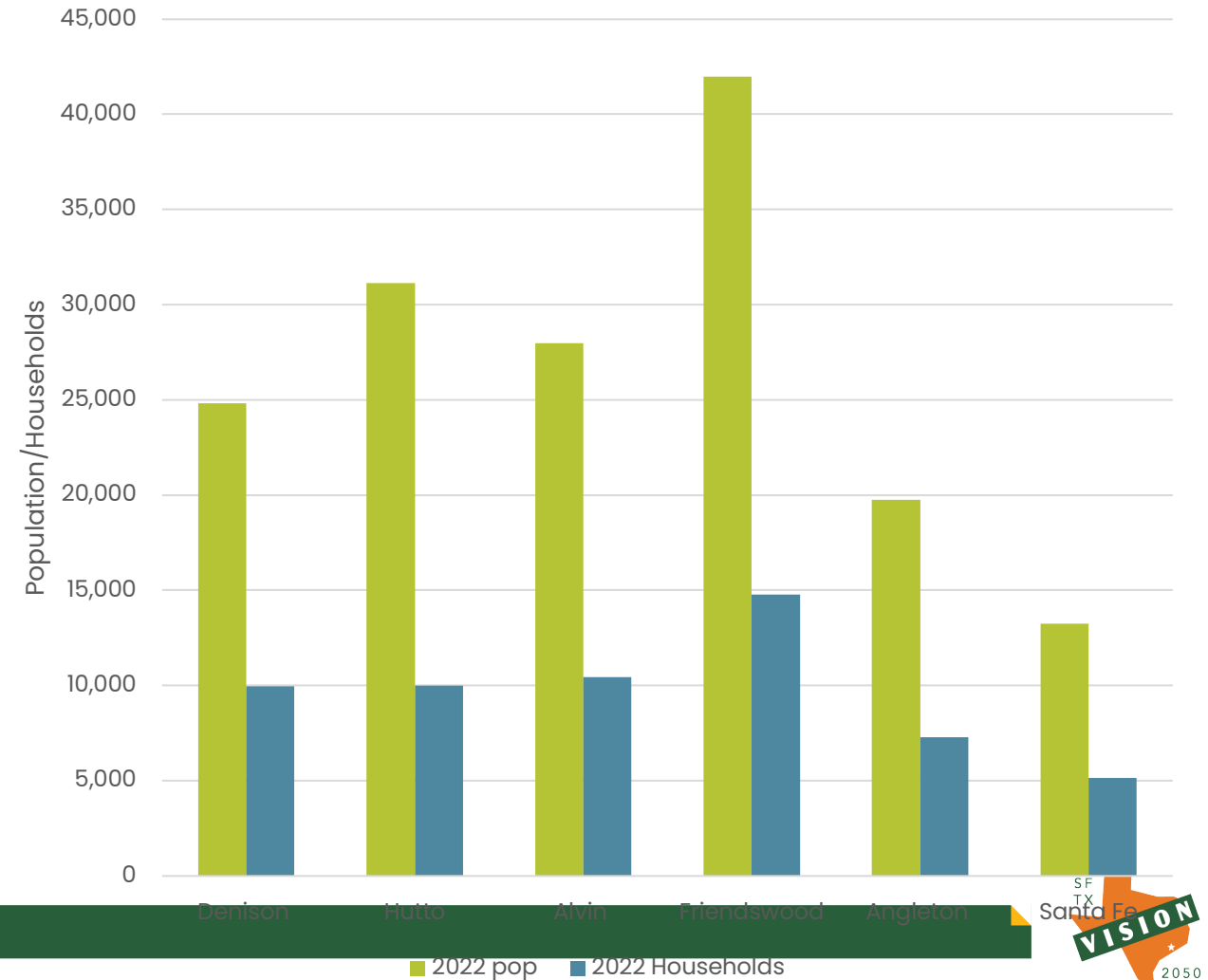
## Santa Fe and Peer City Annual Growth 2010–2022

Source: ESRI BAO



## Santa Fe and Peer City Population Analysis

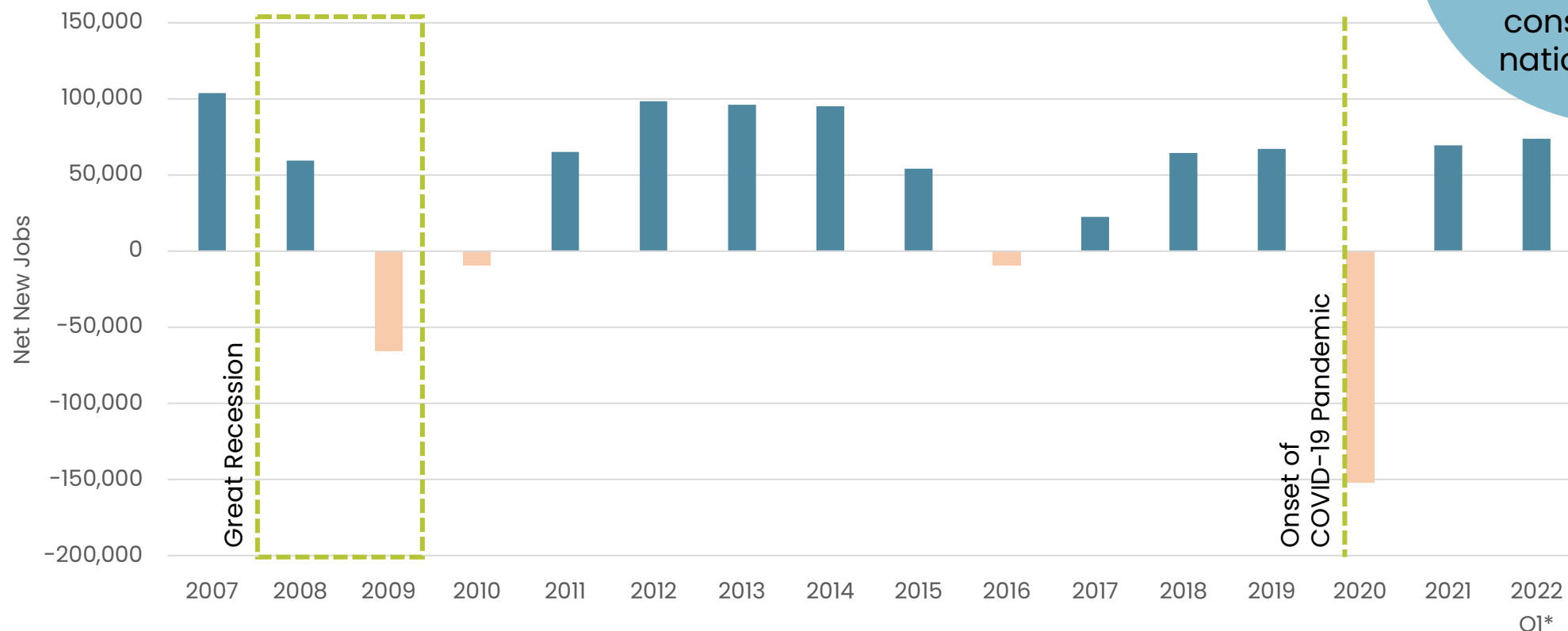
Source: ESRI BAO



# MARKET ANALYSIS: Regional Employment Growth

### Annualized Regional Job Growth, 2006–2022(Q1)

Source: US BLS

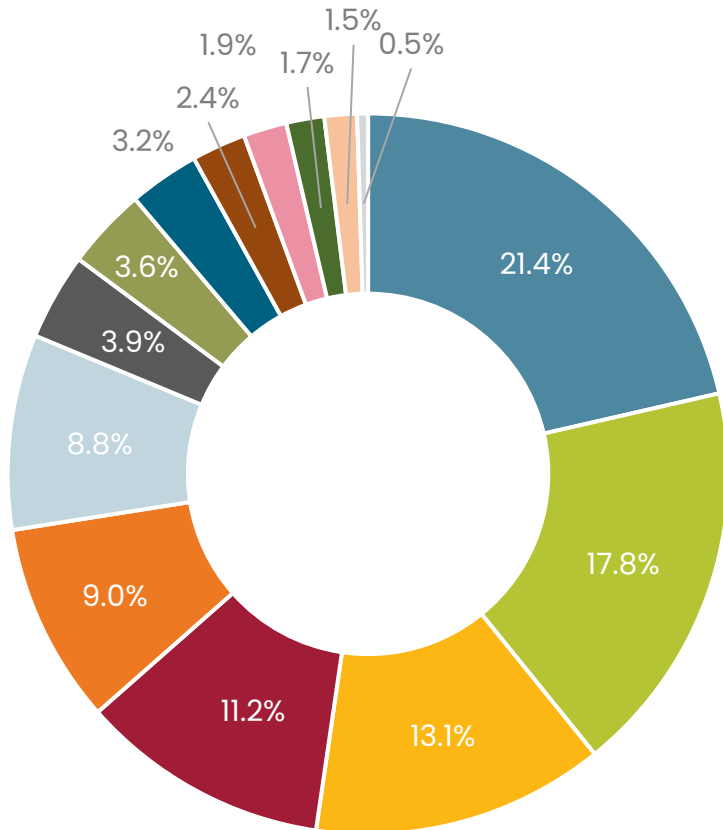


In years of positive job growth, net gains have averaged 65,000 new jobs. Disruptions were consistent with national trends.

# MARKET ANALYSIS: Employment Characteristics

## Trade Area Industry Classification, 2022

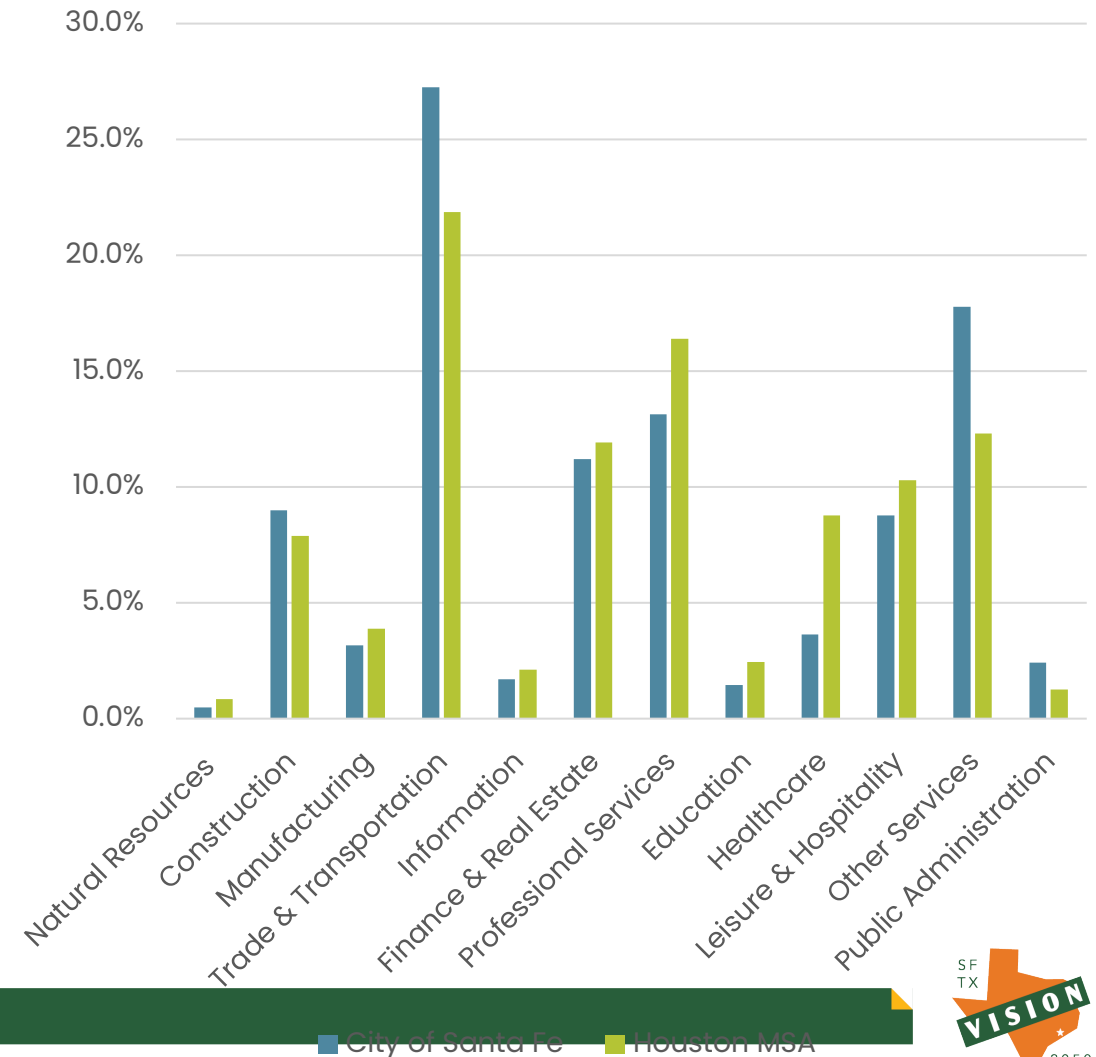
Source: ESRI Business Analyst



- Retail Trade (21.4%)
- Other Services (17.8%)
- Professional Services (13.1%)
- Finance & Real Estate (11.2%)
- Construction (9.0%)
- Leisure & Hospitality (8.8%)
- Wholesale Trade (3.9%)
- Healthcare (3.6%)
- Manufacturing (3.2%)
- Public Administration (2.4%)
- Transportation & Utilities (1.9%)
- Information (1.7%)
- Education (1.5%)
- Natural Resources (0.5%)

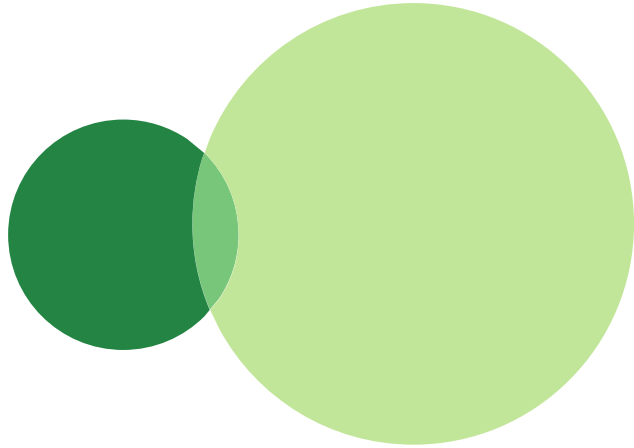
## Comparison of Jobs by Industry, 2022

Source: ESRI Business Analyst

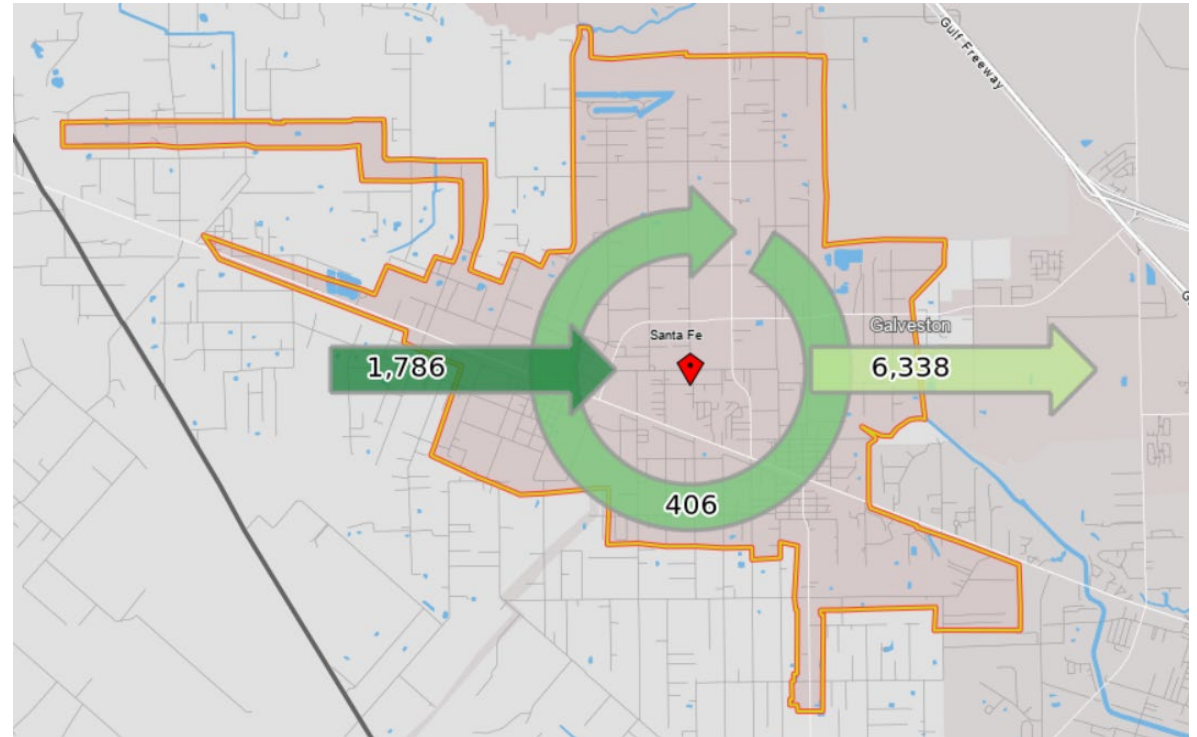


# MARKET ANALYSIS: Commuting Trends

## Inflow / Outflow Job Counts in 2019



- 1,786 – Employed in Selection Area, Live Outside
- 406 – Live in Selection Area, Employed Outside
- 6,338 – Employed and Live in Selection Area



- | Employed and Live in Selection Area
- | Employed in Selection Area, Live Outside
- | Live in Selection Area, Employed Outside

Note: Overlay arrows do not indicate directionality of worker flow between home and employment locations

# MARKET ANALYSIS: Peer Cities

- Santa Fe has a smaller local economy than some peer cities, with less businesses and a lower employee/resident ratio
- Despite the lowest percentage of residents with a bachelor's degree or higher, Santa Fe retains one of the highest median incomes of the peer group
- The percentage of people that work in 'white collar' professions is about average in Santa Fe, around 60%

Santa Fe, TX	 <b>441</b> Business Population	 <b>2,192</b> Full Time Job Population	 <b>20</b> Employee/ Resident Ratio
Dennison, TX	 <b>1,012</b> Business Population	 <b>11,672</b> Full Time Job Population	 <b>47</b> Employee/ Resident Ratio
Hutto, TX	 <b>412</b> Business Population	 <b>4,721</b> Full Time Job Population	 <b>15</b> Employee/ Resident Ratio
Alvin, TX	 <b>1,149</b> Business Population	 <b>14,063</b> Full Time Job Population	 <b>50</b> Employee/ Resident Ratio
Friendswood TX	 <b>1,461</b> Business Population	 <b>10,136</b> Full Time Job Population	 <b>24</b> Employee/ Resident Ratio
Angleton, TX	 <b>796</b> Business Population	 <b>8,319</b> Full Time Job Population	 <b>42</b> Employee/ Resident Ratio

# MARKET ANALYSIS: Housing Characteristics

## Housing Summary Facts

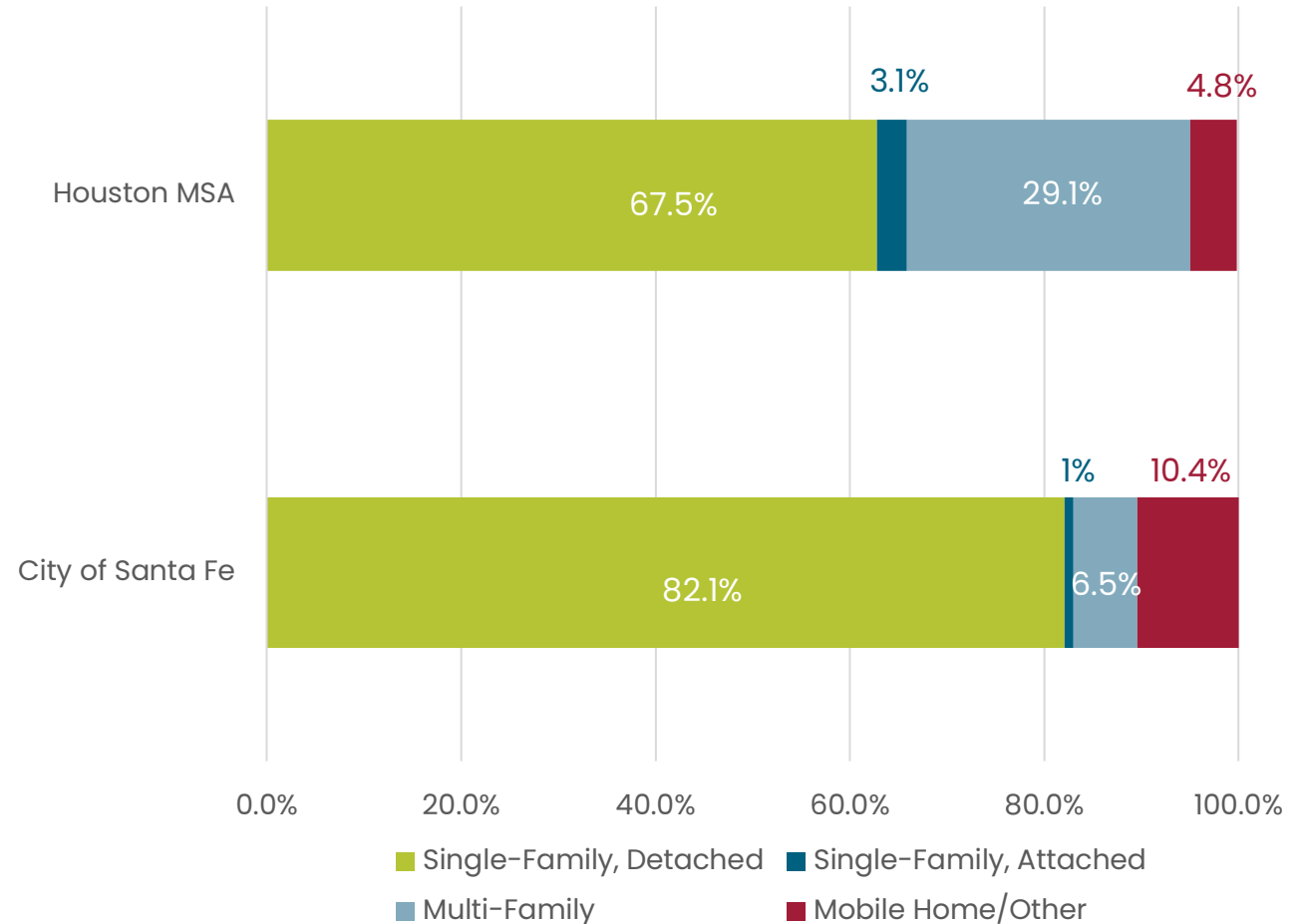
Source: ESRI Business Analyst

2022	City of Santa Fe	Houston MSA
Median Year Built	1987	1989
Median Home Value	\$191,600	\$362,872
Owner-Occupied	75.1%	56.1%
Renter-Occupied	18.0%	35.3%
Vacant	6.8%	8.6%

Santa Fe's median home-value remains significantly below the MSA median value, attributed to an older housing supply and peripheral location within the Metro area. Compared to the larger MSA, Santa Fe's housing supply is more dominated by single-family and owned housing.

## Housing Units By Type, 2022

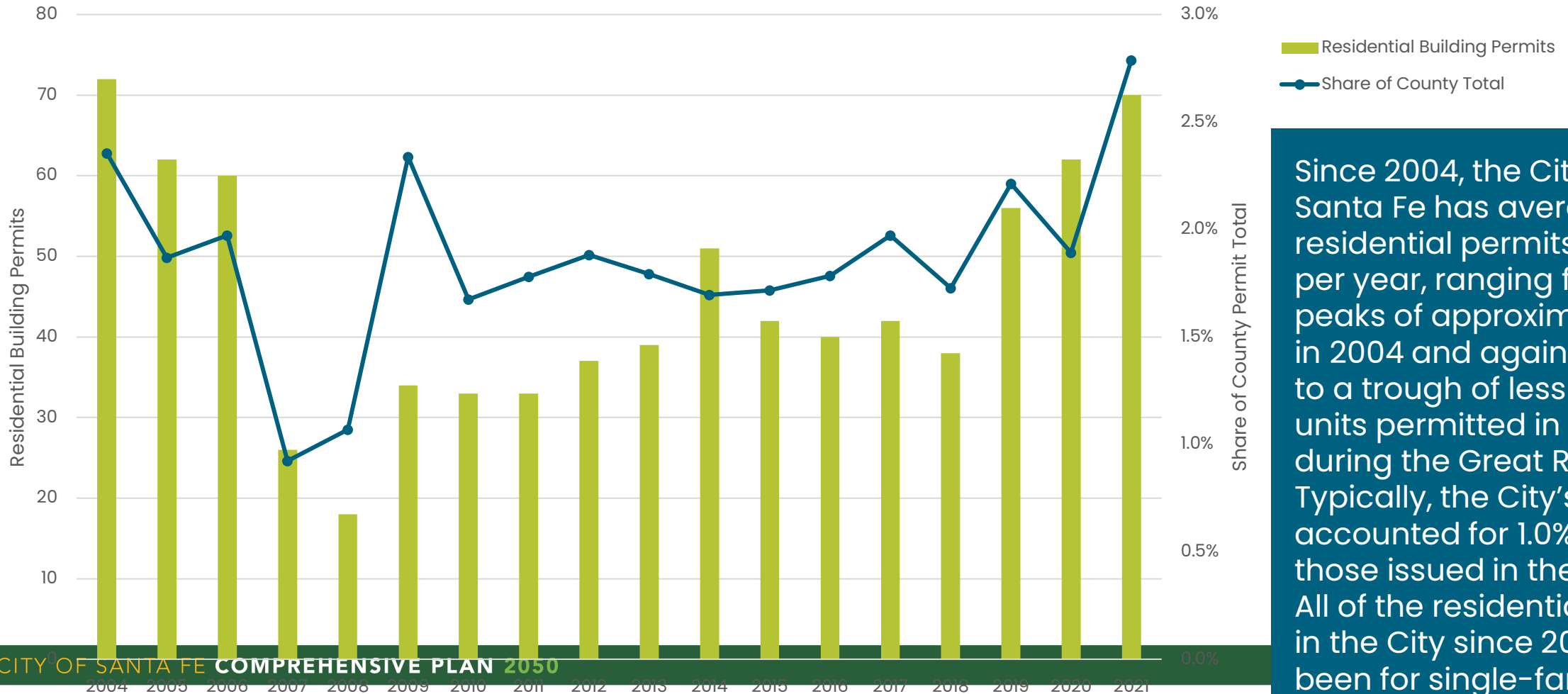
Source: ESRI Business Analyst



# MARKET ANALYSIS: Residential Permitting Trends

## Residential Permit Trends, City of Santa Fe, 2004-2021

Source: US Census

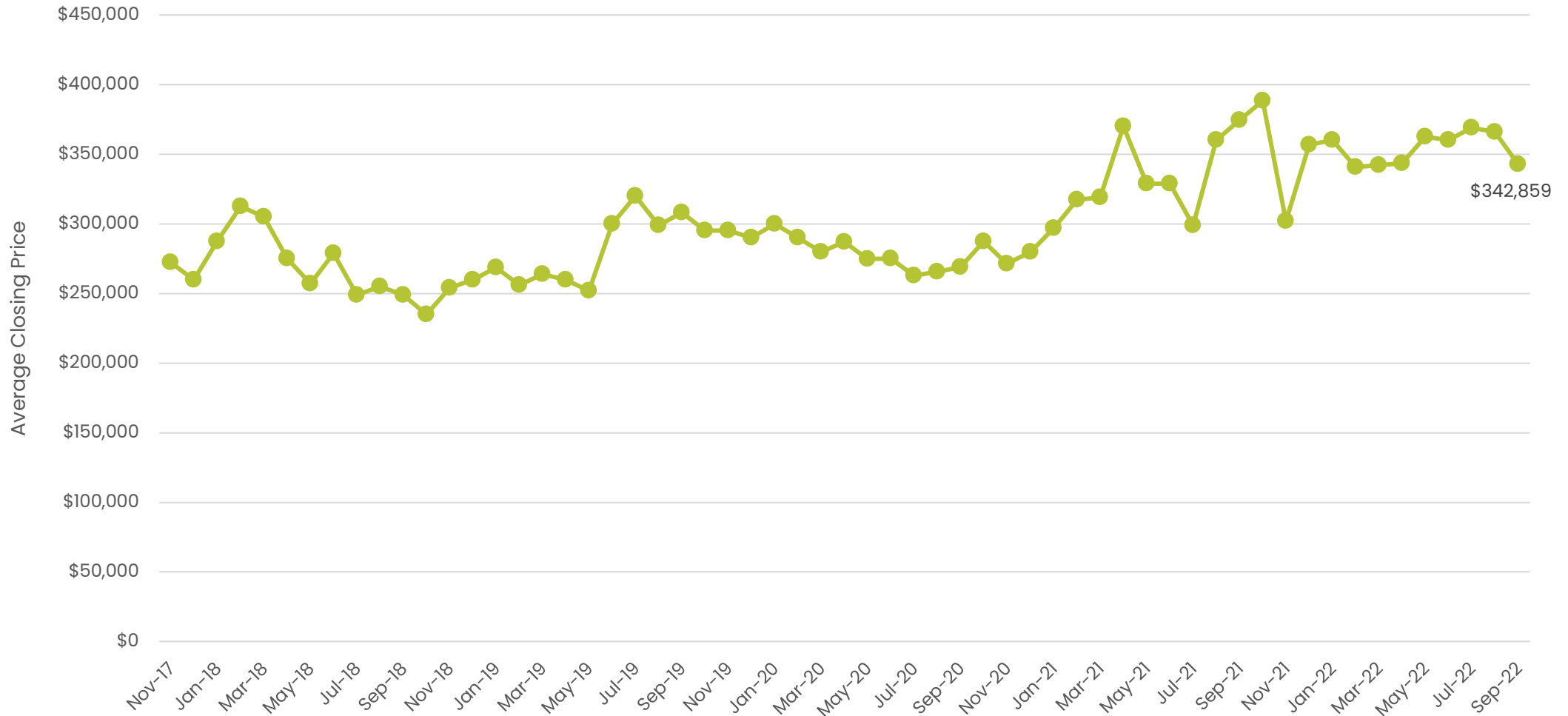


Since 2004, the City of Santa Fe has averaged 45 residential permits issued per year, ranging from peaks of approximately 70 in 2004 and again last year to a trough of less than 20 units permitted in 2008 during the Great Recession. Typically, the City's permits accounted for 1.0%-3.0% of those issued in the County. All of the residential permits in the City since 2004 have been for single-family units.

# MARKET ANALYSIS: For-Sale Residential Considerations

## Residential Unit Average Closing Price, City of Santa Fe, 2017-2022

Source: Houston Realtor Association; [www.movoto.com](http://www.movoto.com)



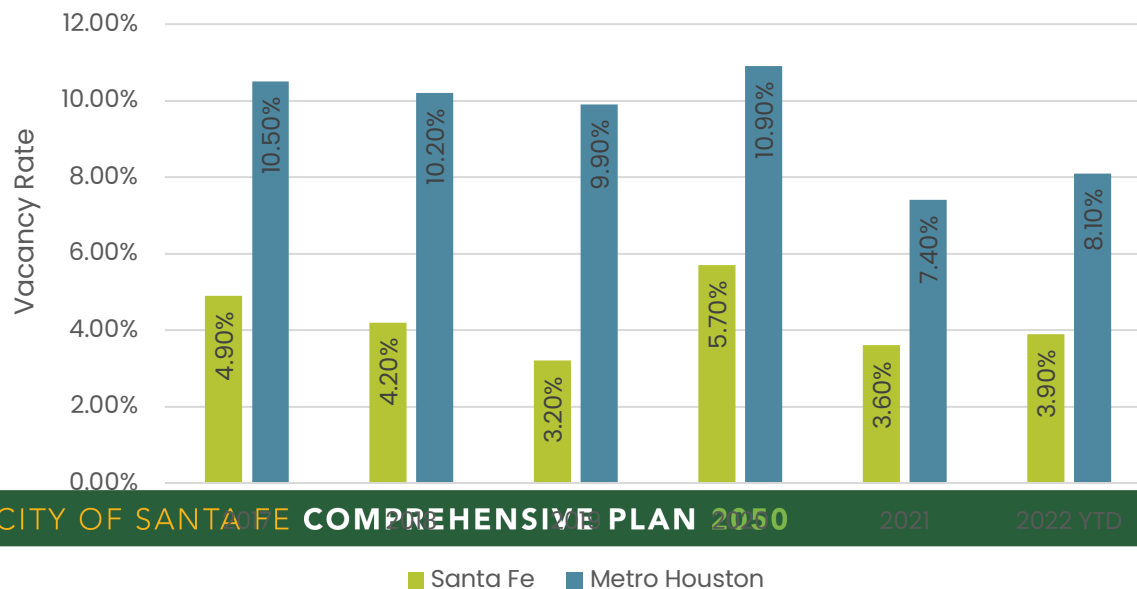


# MARKET ANALYSIS: Rental Housing Considerations

- There are 8 professionally managed apartment communities in Santa Fe with only two communities with more than 10 units
- Two of the communities target low-income residents, resulting in a total market-rate inventory of only 98 units
- Vacancy rates and rents are both notably lower than the region
- New deliveries have been non-existent within Santa Fe with little-to-no absorption in the last five years

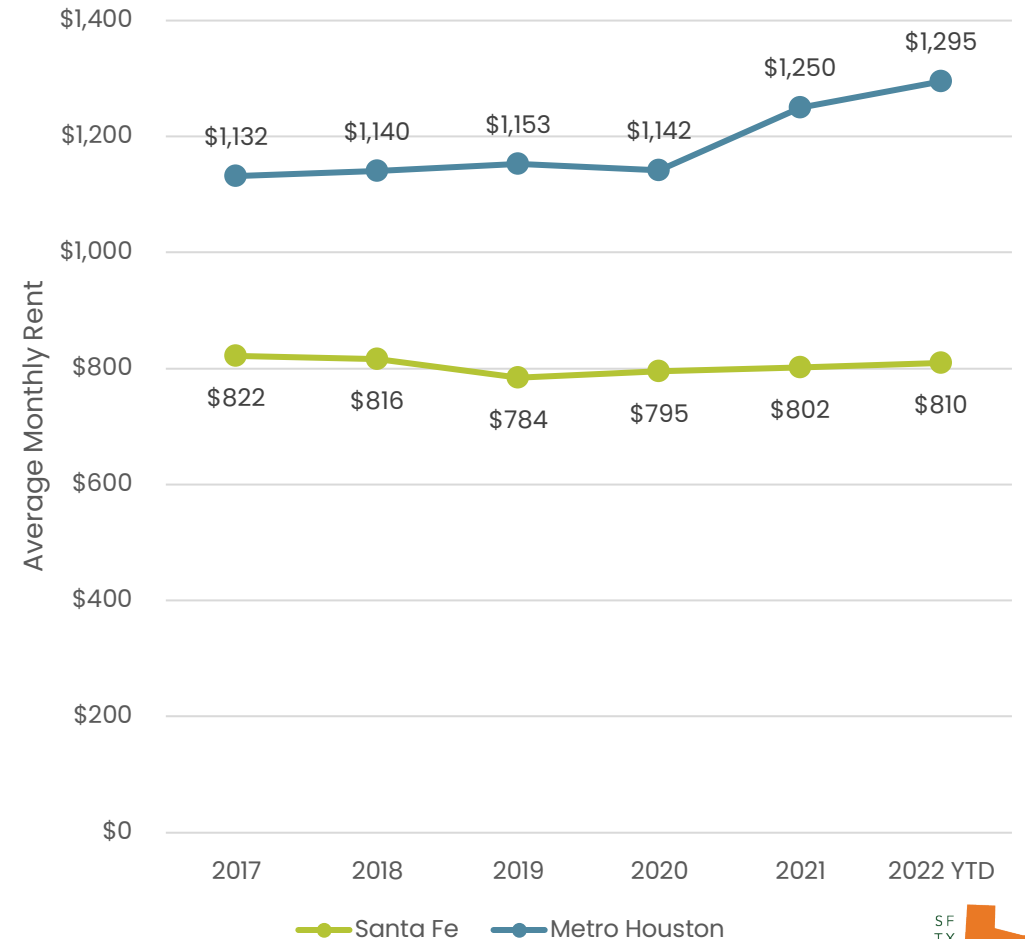
## Comparison of Rental Vacancy Rate Trends, 2017-2022 YTD

Source: CoStar



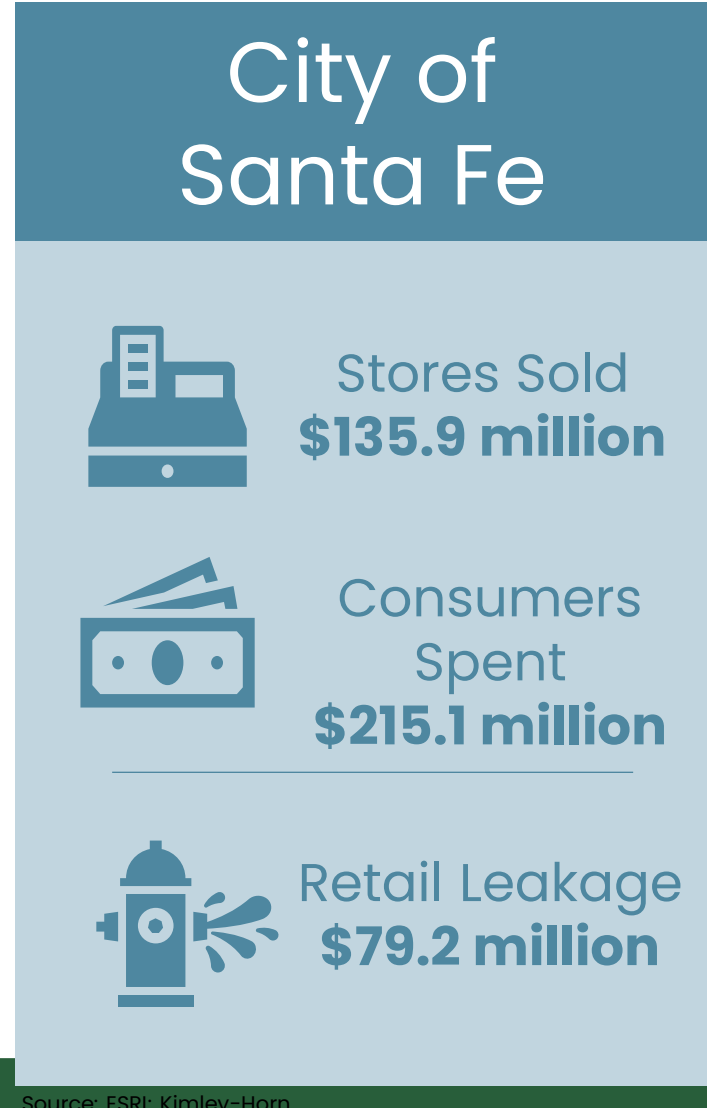
## Comparison of Monthly Rental Rate Trends, 2017-2022 YTD

Source: CoStar



# MARKET ANALYSIS: Retail Gap Analysis

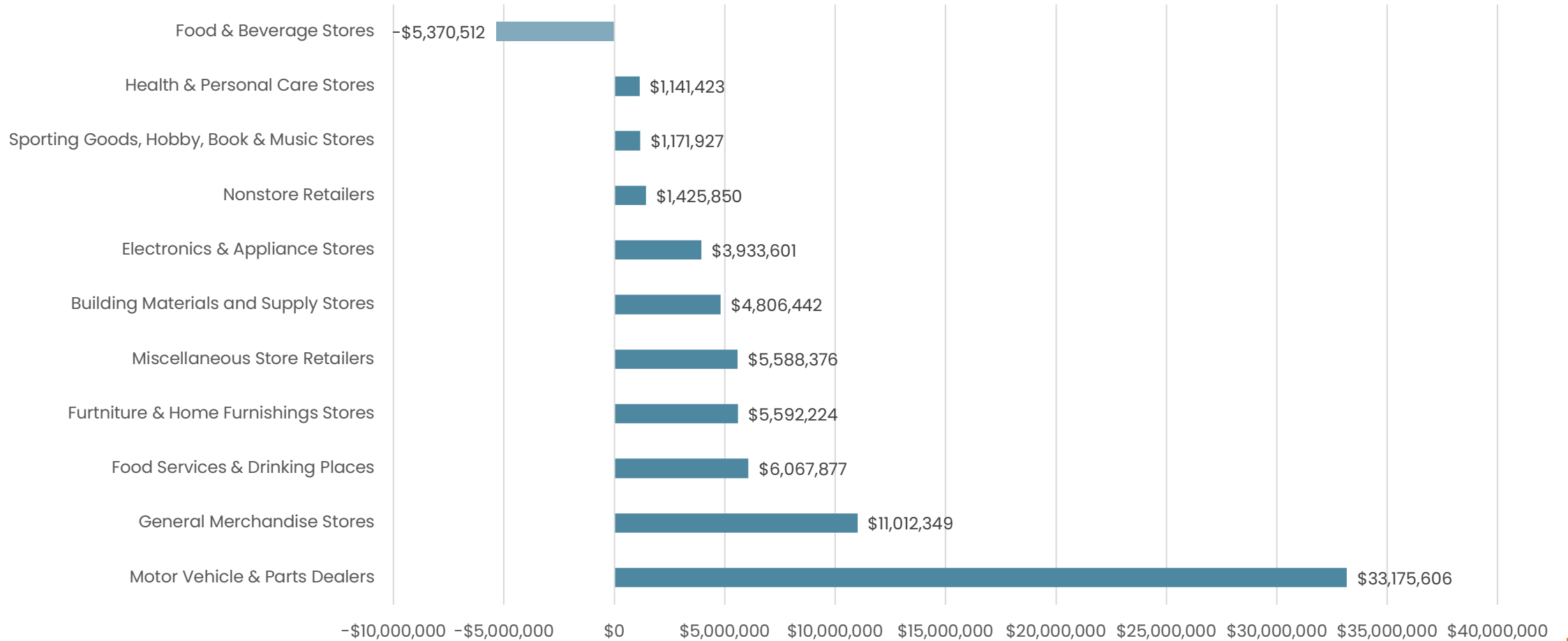
- **Retail gap refers to the difference between retail sales and retail purchases by residents within the same area**
- **Consumer spending in Santa Fe surpassed retail sales indicating that residents are spending their money outside the community to meet their retail services needs**
- **Proximity to major transportation thoroughfares and employment centers bolster sales from non-residents, including tourists traveling to the coast**



# MARKET ANALYSIS: Retail Gap Analysis

## Retail Leakage by Category, City of Santa Fe, 2021

Source: ESRI BAO

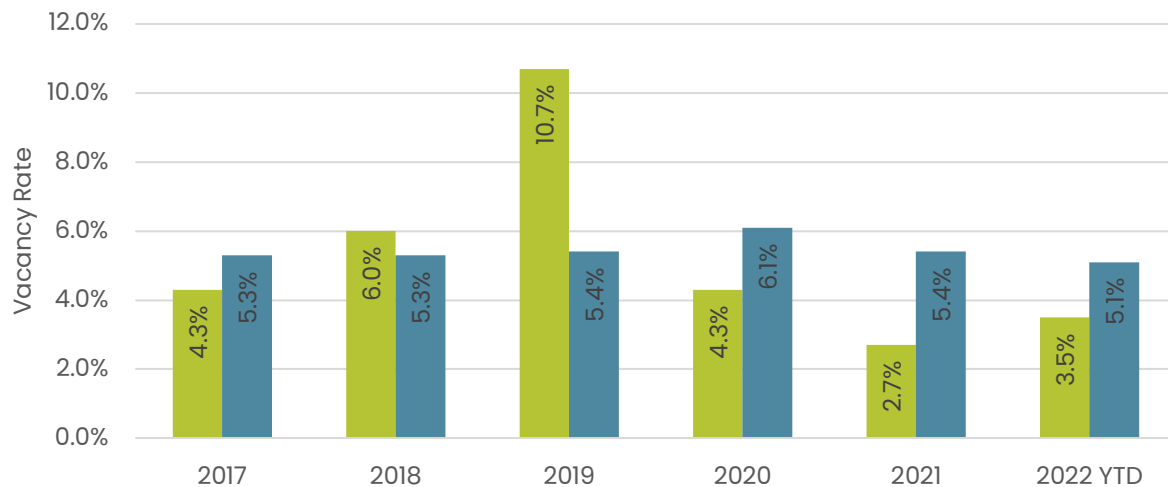


# MARKET ANALYSIS: Retail Considerations

- There is more than 550,000 square feet of retail space in Santa Fe, largely contained in free-standing buildings along major thoroughfares
- Less than 20,000 square feet of available space was identified, resulting in a tight 3.5% vacancy rate
- Rental rates for retail space are notably lower than the regional average and have remained relatively flat over the last five years

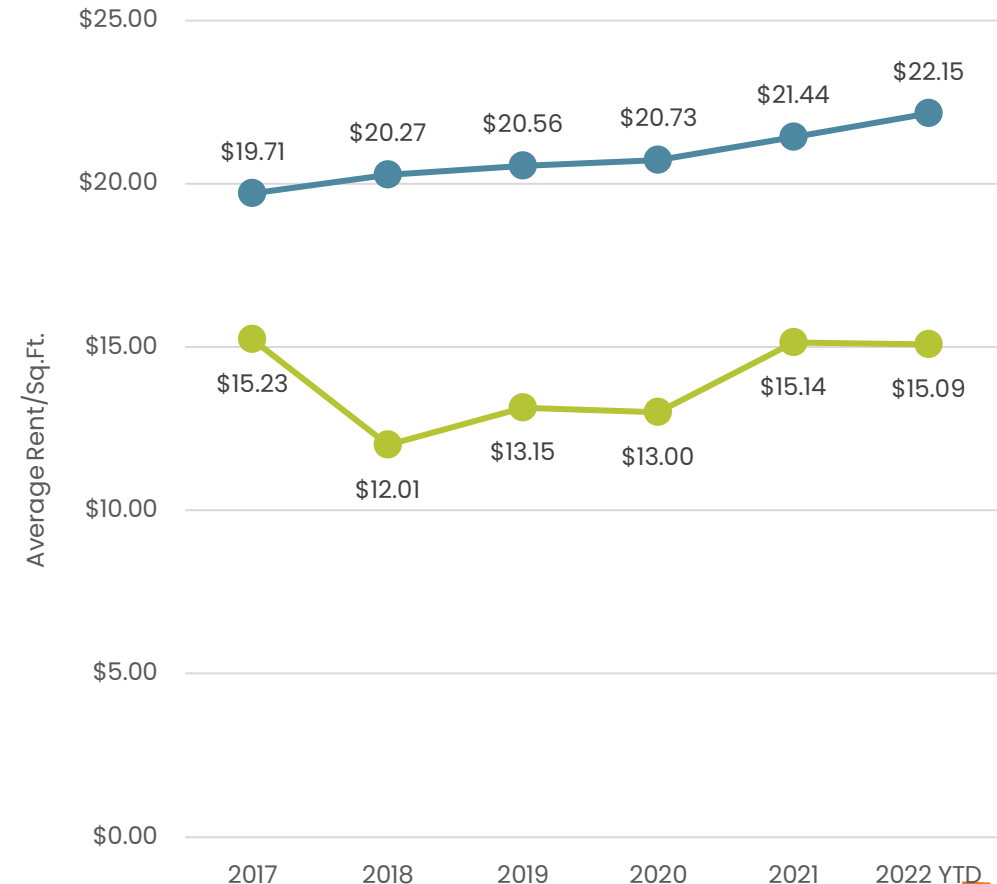
## Comparison of Retail Vacancy Rate Trends, 2017-2022

Source: CoStar



## Comparison of Retail Rent Trends, 2017-2022

Source: CoStar



# MARKET ANALYSIS: Retail Considerations

## Representative Retail Centers, City of Santa Fe, 2022

Source: CoStar



### Description

#### Santa Fe Plaza

- Neighborhood shopping center on Warpath Avenue
- Built in 1985
- Grocery-anchored center (HEB) with an adjoining Dollar General
- Classified as older Class C space

### Size

53,437 SF

### Avg. Rent

\$10.50-12.50/SF  
*\*Estimated as no space currently available*

### Vacancy

0.0%



### Description

#### Santa Fe Junction

- Neighborhood center located on Highway 6
- Built in 1983
- Grocery-anchored shopping center (Big Chief Food) with 13 other smaller retail spaces ranging from 500-2,750 SF

65,660 SF

\$11.00-14.00/SF  
*\*Estimated as no space currently available*

0.0%



### Description

#### Santa Fe Shopping Center

- Strip retail center located on FM 1764 Rd
- Built in 2004
- Unanchored strip center with spaces ranging from 1,200-5,400 square feet

14,400 SF

\$15.00/SF

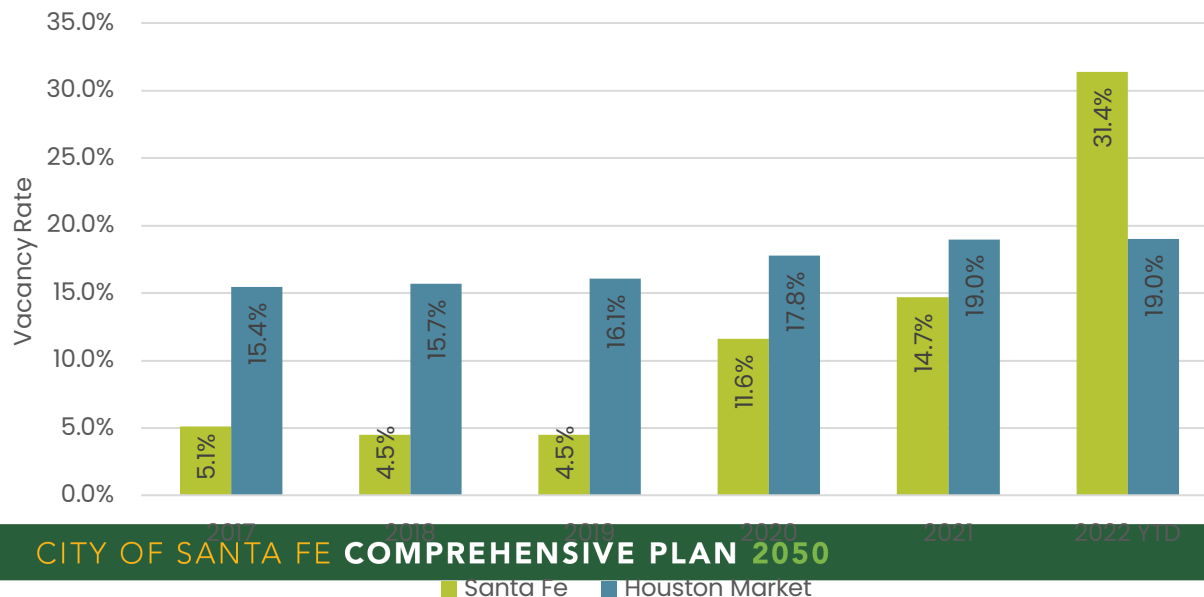
41.7%

# MARKET ANALYSIS: Office Considerations

- The Santa Fe office market has seen negative absorption since the onset of the pandemic, accelerating the vacancy rate from 4.5% pre-pandemic to 31.4% in 2022
- Rents are less than half of metro office rents PSF
- Rents and vacancy rates are more volatile compared to the larger Metro and submarket due to the limited inventory

## Comparison of Office Vacancy Rate Trends, 2017-2022 YTD

Source: CoStar



## Comparison of Office Rent Trends, 2017-2022 YTD

Source: CoStar



# MARKET ANALYSIS: Office Considerations

A new medical facility is planned to begin construction next year in Santa Fe. This project is expected to include a small hospital facility with in-patient and out-patient services, associated medical office space, retail, and a senior living center. This project would represent the newest office and retail space additions to Santa Fe and command rents significantly higher than current averages.



## MARKET ANALYSIS: Industrial Considerations

- Very small industrial market in Santa Fe, only making up 0.04% of the total regional inventory
- No deliveries within the last 5 years and negative 5-year net absorption (leasing activity)
- There are 20 industrial properties with an average building size of only 5,992 SF in Santa Fe
- Metro Houston, on the other hand, has seen industrial absorption triple in 2022, with lowering vacancy rates and increasing year-over-year rents
- Despite a healthy metro industrial pipeline, competition still remains relatively fierce for industrial space with developers removing concessions from new projects, new speculative project starts, and healthy rent increases

**Total Inventory:  
125,842 SF**

**Vacancy Rate:  
4% (2022 YTD)**

**5 Year Net Absorption:  
-3500 SF (-600 annual average)**



# Placetypes

# Placetype Activity

## BUSINESS PARK (BP)

Local Examples: Springwood Village

### Character and Intent

Business parks will provide a major employment base for Santa Fe and the region, and a higher level of in-town employment options for Santa Fe residents. Typical uses will include professional offices and limited supporting retail and restaurant uses to support a range of professional activities.



### Land Use Considerations

#### Primary Land Uses

Professional office, corporate office, supporting retail, restaurants

#### Secondary Land Uses

Retail, restaurants, civic & institutional uses, commercial, parks



## PROFESSIONAL SERVICES (PRO)

Local Examples: Baybrook Office Park, Lonza

### Character and Intent

Professional Services and Industrial will round out the employment-oriented place types. These developments will focus on light industrial uses, including clean manufacturing centers, technology / data centers and other uses that would typically occupy flex space in commercial buildings. These uses have a trucking component at the back, but the street frontage of the businesses are appealing and have an increased level of aesthetics and landscaping unlike typical industrial uses.



### Land Use Considerations

#### Primary Land Uses

Manufacturing centers, medical offices, technology / data centers and flex office

#### Secondary Land Uses

Civic & institutional uses, commercial (serving primarily industrial buildings), parks



# Placetype Activity

## TOWN CENTER (TC)

Local Examples: Pearland Town Center, Sugar Land Town Square

### Character and Intent

A Town Center serves as locally-serving economic, entertainment and community activity. It will be an employment center and shopping destination for surrounding mixed-use or urban neighborhoods and will provide a civic component where the community can “come together.” Buildings are typically one or more stories with urban residential units over storefronts. The development will encourage active living, with a network of walkable streets.

### Land Use Considerations

#### Primary Land Uses

Retail, townhomes, senior housing, restaurants, community-serving commercial, professional office, live / work / shop units

#### Secondary Land Uses

Civic & institutional uses, parks, community buildings



## MIXED-USE CENTER (MU)

Local Examples: City Centre, La Centerra

### Character and Intent

The Mixed-Use place type offers the ability to live, work, and play in a unified, interconnected area, with a higher intensity of uses and a mixture of housing options, employment and/or retail services in the same vertical structure. It may serve as an employment center and retail destination for the broader area. Vertical mixed-use buildings typically stand at least two-stories tall, with residences and offices on top of storefronts. The design and scale encourage active living through a network of complete, walkable streets.

### Land Use Considerations

#### Primary Land Uses

Retail, commercial, apartments and condominiums, senior housing, hotels, entertainment centers, service, office, live/work/shop units

#### Secondary Land Uses

Civic & institutional uses, schools, parks, community buildings



# Placetype Activity

## COMMERCIAL CENTER (COM)

**Local Examples:** Avenue M @ Highway 6, SH 35 @ Highway 6

### Character and Intent

Commercial Centers are characterized by single- or multi-tenant commercial centers located at major intersections. They are typically adjacent to Traditional Residential neighborhoods and provide for the everyday goods and service needed by the residents in these neighborhoods. While these centers are typically automobile-oriented, there will be a continued focus on providing street connections to / from the surrounding neighborhoods.



### Land Use Considerations

#### Primary Land Uses

Retail, restaurants, multi-tenant commercial, junior anchor commercial

#### Secondary Land Uses

Civic & institutional uses, parks

## NEIGHBORHOOD COMMERCIAL (NC)

**Local Examples:** Santa Fe Soap Factory

### Character and Intent

Community Commercial development is characterized by small, free-standing buildings containing one or more businesses. Unlike larger shopping centers that may attract regional customers, Community Commercial primarily provides services for the surrounding neighborhoods and city. Business types may include restaurants, local retail, medical offices, banks, and other retail and service uses.



### Land Use Considerations

#### Primary Land Uses

Retail, restaurant, commercial

#### Secondary Land Uses

Civic & institutional uses, schools, and churches



# Placetype Activity

## URBAN LIVING (UL)

Local Examples: Kolbe Farms

### Character and Intent

Urban Living provides a range of housing choices, including higher density options for young professionals attracted to the jobs created in the city's business parks and urban centers, as well as empty nesters who want to downsize while maintaining an attachment to the community where they have lived for many years. The design and scale of the development in these neighborhoods will encourage active living with a network of walkable streets and connections to open space.



### Land Use Considerations

#### Primary Land Uses

Townhomes, duplexes, patio homes, apartments, live / work / shop units

#### Secondary Land Uses

Civic & institutional uses, schools, parks, neighborhood-serving commercial

## COMPACT RESIDENTIAL (CR)

Local Examples: Oak Hollow Townhomes, Oakridge Townhomes

### Character and Intent

This place type can support a variety of housing types, including small-lot, single-family detached homes, patio homes, townhomes, and duplexes in a compact network of complete, walkable streets that are navigable by car, bicycle, or foot. It may contain a small number of commercial businesses to support the neighborhood. Compact Residential lots range in size but are typically less than 1/10 acre.

### Land Use Considerations

#### Primary Land Uses

Single-family detached homes, duplexes, townhomes

#### Secondary Land Uses

Civic & institutional uses, schools, parks, neighborhood-serving commercial



# Placetype Activity

## TRADITIONAL RESIDENTIAL (TR)

Local Examples: Castle Estates

### Character and Intent

Traditional residential neighborhoods are found near neighborhood commercial and commercial centers and provide rooftops necessary to support the commercial and professional office uses within the corridors. These neighborhoods are generally formed as subdivisions. Residential uses oriented interior to the site are typically buffered from surrounding development by transitional uses or landscaped areas. Traditional Neighborhood lots range in size by are typically less than 1/2 acre.

### Land Use Considerations

#### Primary Land Uses

Single-family detached homes, duplexes, townhomes

#### Secondary Land Uses

Civic & institutional uses, parks



## ESTATE LIVING & AGRICULTURE (ELA)

Local Examples: Angell Runge

### Character and Intent

Characterized by expansive views and a high degree of separation between buildings, Estate Living place types typically included minimal residential density. Home sites are located randomly throughout the countryside, which helps to maintain the estate character, scale, and scenic value of the surrounding area. Agricultural uses and local food production also occur within this place type. Estate Living lots are typically larger than 1/2 acre.

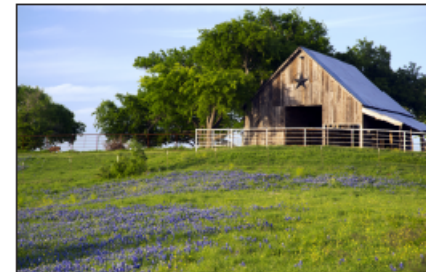
### Land Use Considerations

#### Primary Land Uses

Single-family detached homes

#### Secondary Land Uses

Civic & institutional uses, parks



# Placetype Activity

## PARKS AND OPEN SPACES (PRK)

Local Examples: Runge Park, Bob Briscoe Park

### Character and Intent

This category encompasses public open spaces and park sites. As Santa Fe continues to develop, regional, community, and neighborhood parks should be provided so that there is a park or open space located within a ½ mile of every residential unit.



### Land Use Considerations

Parks and Open Spaces place types are compatible with every use

## NATURAL AREAS & OUTDOOR TOURISM (NAT)

Local Examples: Camp Mohawk County Park, Pearland Nature Center

### Character and Intent

Natural Areas and Outdoor Tourism areas are characterized by very large tracts of undeveloped land primarily utilized for natural preservation / education, hiking, and general outdoor tourism. These tracts provide much of the environmental and open space character in the community and its border regions. Natural Areas and Outdoor Tourism includes opportunities for additional uses and low-intensity developments that support the character and economic viability of the broader, primary land use.



### Land Use Considerations

#### Primary Land Uses

Outdoor tourism, preservation, education

#### Secondary Land Uses

Civic & institutional uses, schools, parks, trail heads

# Placetype Activity

## PUBLIC USE (PUB)

Local Examples: City Hall, schools, libraries

### Character and Intent

These properties include civic and institutional uses such as schools, police and fire stations, libraries, college campus, and cemeteries.



### Land Use Considerations

Public Use place types are compatible with every use

## MANUFACTURING & WAREHOUSE (MW)

Local Examples: Amazon, Continental Warehouse

### Character and Intent

Manufacturing and Warehouse areas are characterized by free-standing structures that provide primarily service-oriented jobs. The employee-per-square-foot ratio is usually low due to the large buildings that are typically needed for storage and logistics. This place type is generally found near major transportation corridors (e.g., highways and railways), with high impact areas located behind lots adjacent to primary corridors and intersections. Buildings may be large or small but are typically set back from the road considerably and their uses do not serve a significant amount of pedestrian traffic. Uses in this place type may not be compatible with residential uses and may require screening or a transitional area from the surrounding community.



### Land Use Considerations

#### Primary Land Uses

Manufacturing centers, warehouses, logistics hub

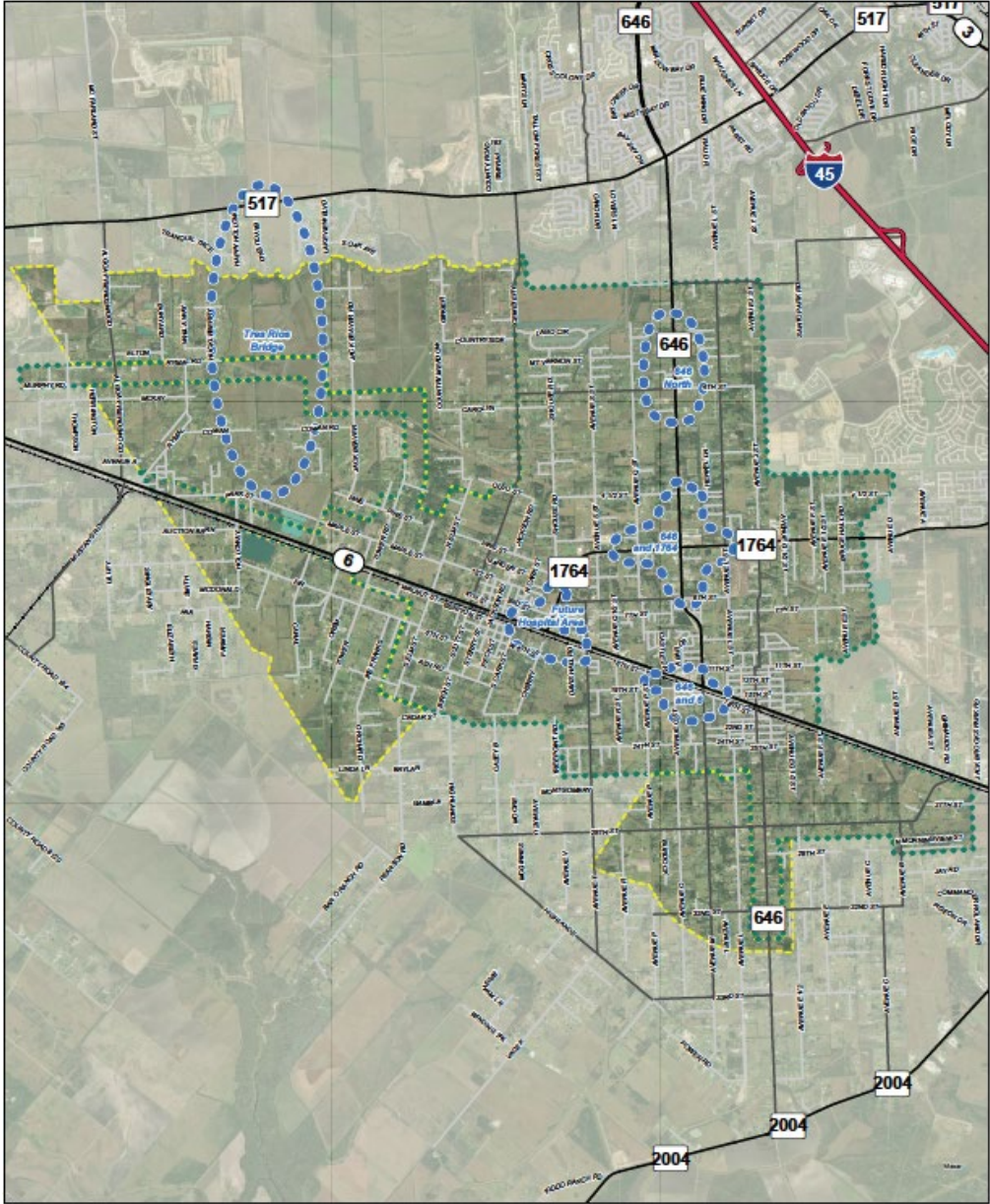
#### Secondary Land Uses

Supporting office and commercial, civic & institutional uses, parks



# Catalyst Sites

# Catalyst Sites



# Online Responses

This is the "historic" downtown of Alta Loma and small-lot as well as single-family detached home and patio homes would work well in this location

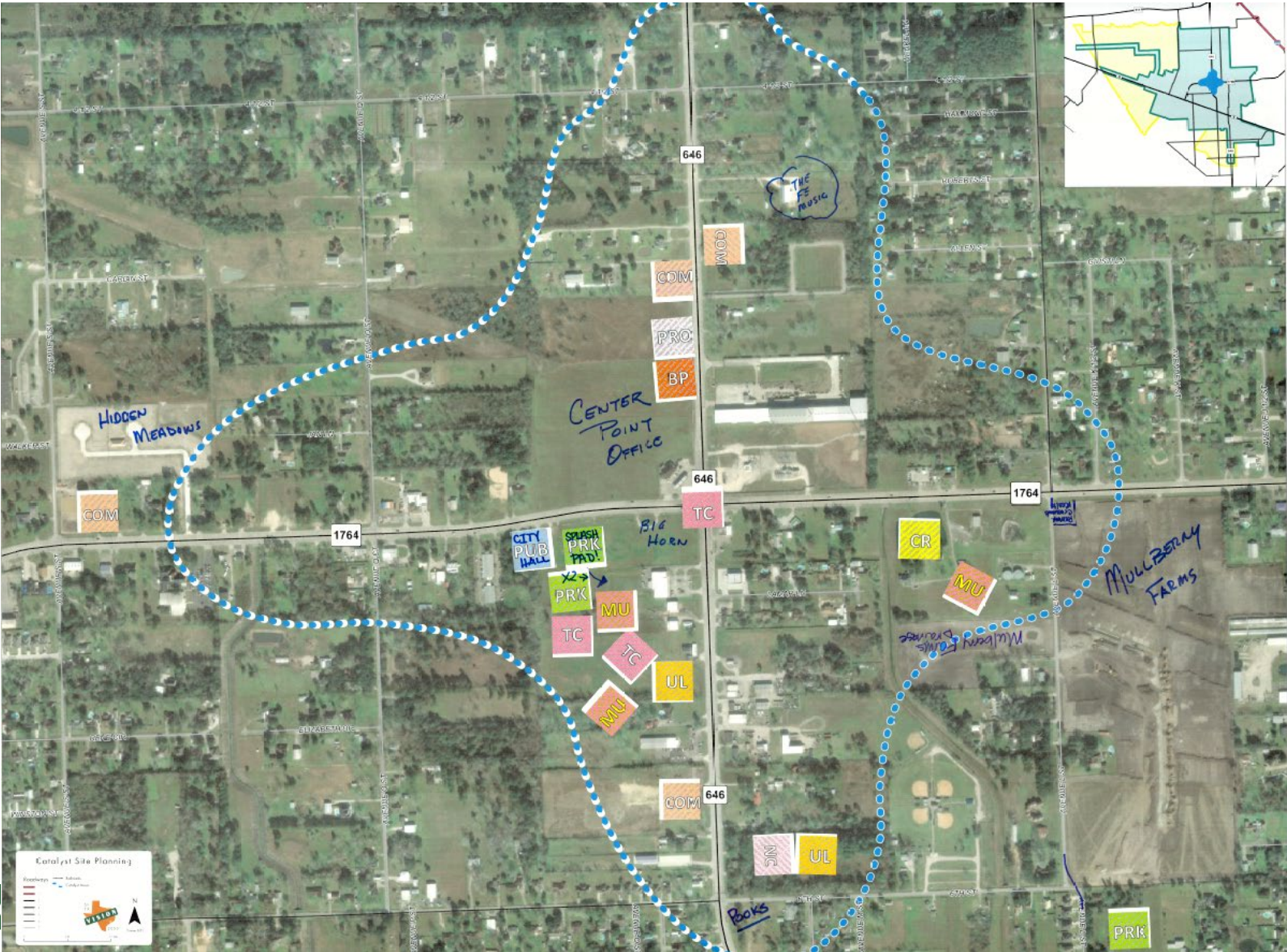
Add hike and bike trails on one side of the canal and horse trails on the other side of the canal for activities that city residents can enjoy

My land but I cannot build on it because I am land locked and the City refuses to grant me a variance on my 60' access easement because they allowed a house to be built over 30' of that easement. Need city services as well.

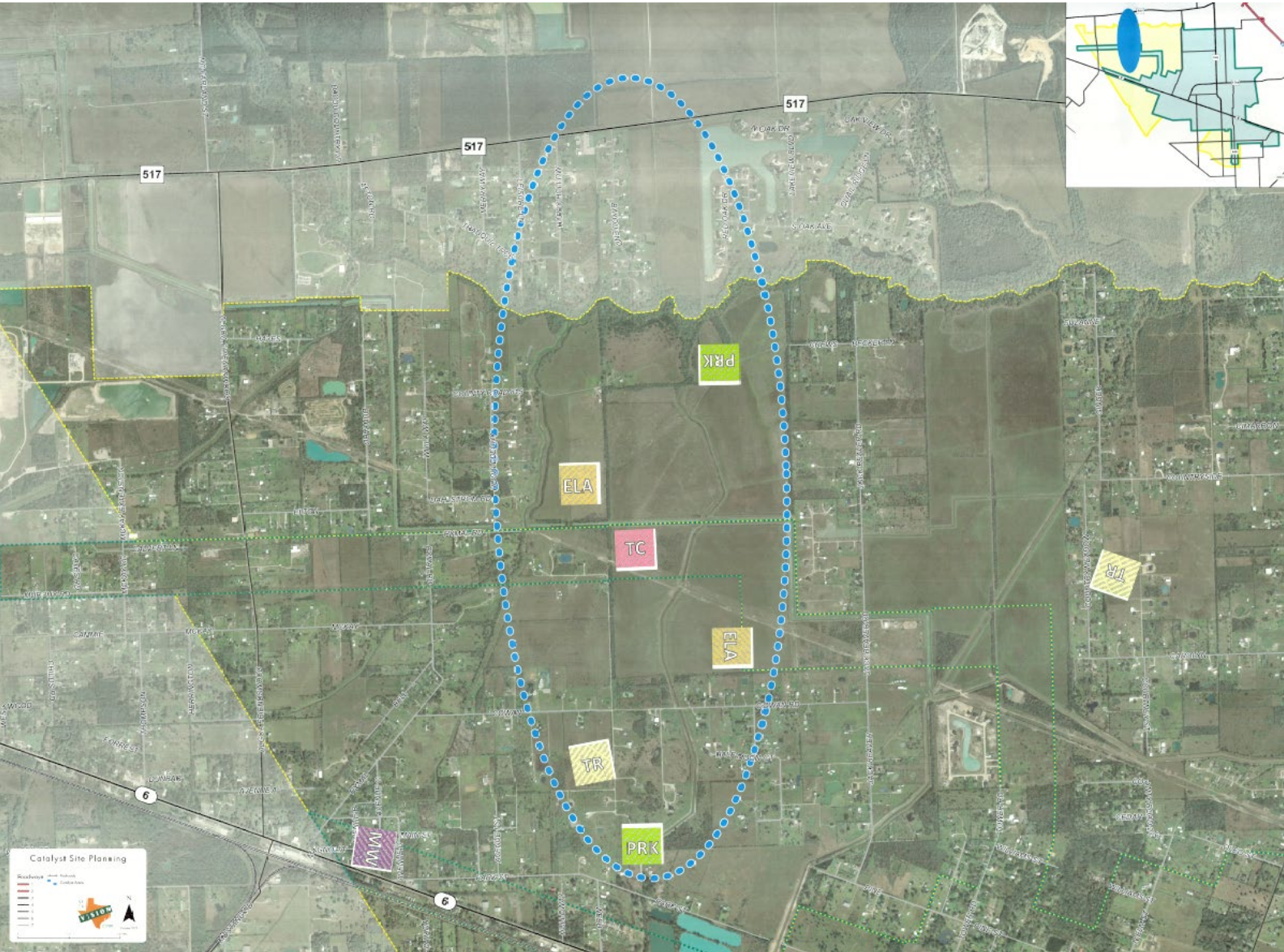
**Legend**

- Compact Residential
- Traditional Residential
- Natural Areas & Outdoor Tourism
- Catalyst Site Areas
- City Boundary
- Extraterritorial Jurisdiction

# Public Meeting Responses



# Public Meeting Responses



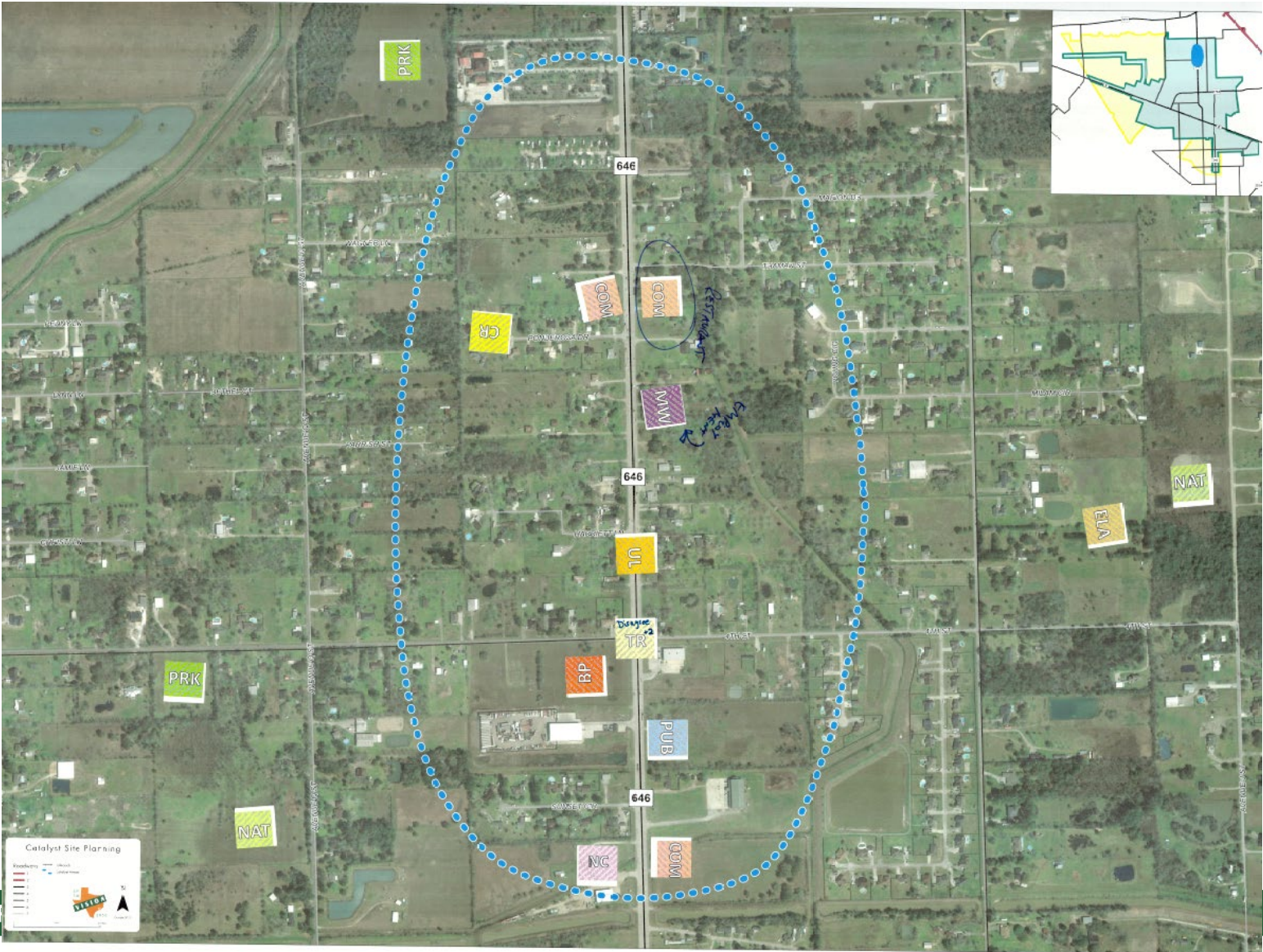
# Public Meeting Responses



# Public Meeting Responses

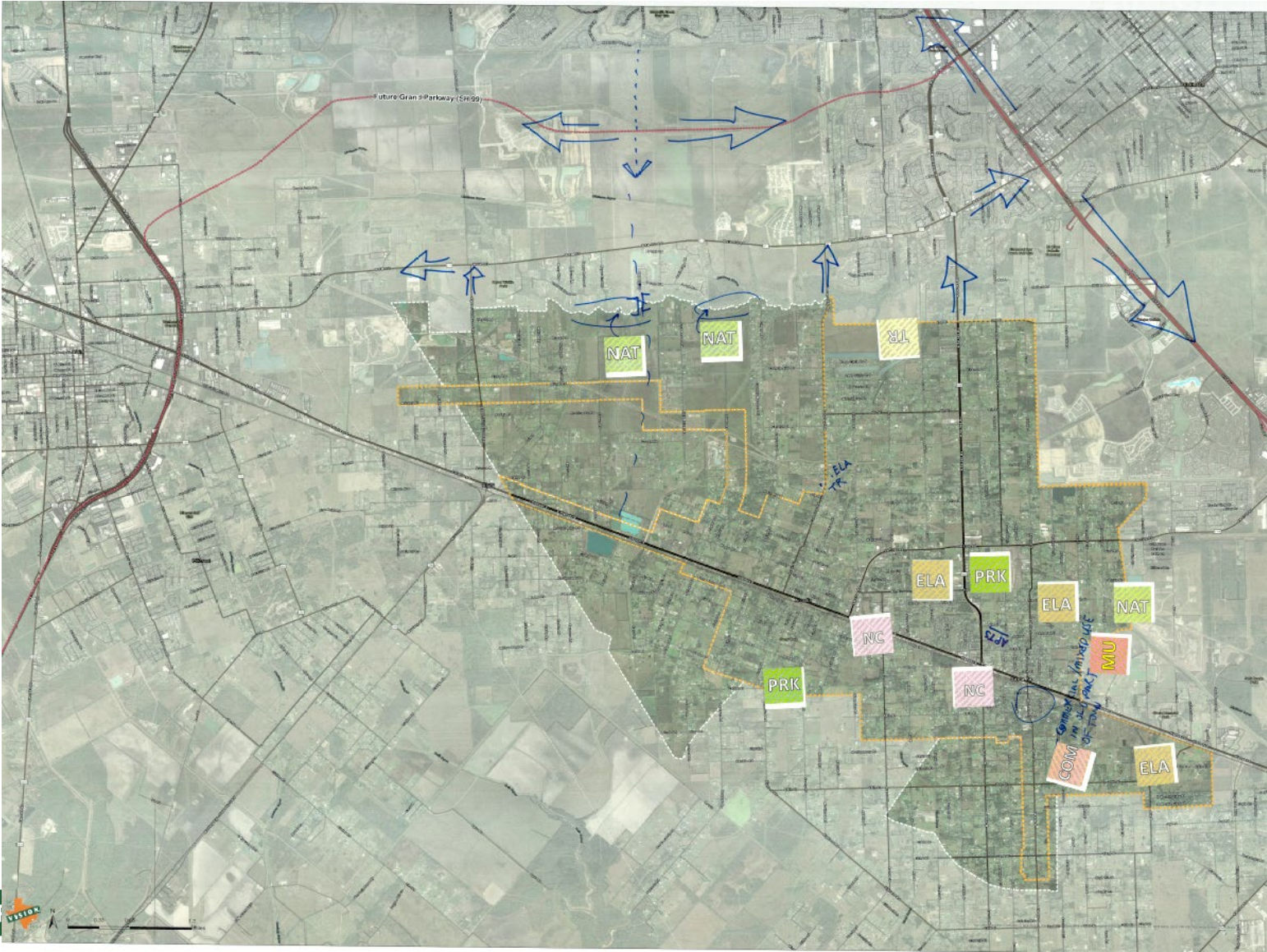


# Public Meeting Responses





# Public Meeting Responses





- ▶ Public Feedback
- ▶ Vision & Goals
- ▶ Peer City Selection
- ▶ Economic Development
- ▶ Placetypes
- ▶ Catalyst Sites
- ▶ **Next Steps**

1. Send & post public meeting #3 summary and meeting materials

2. Public meeting

Thursday, December 1

(Santa Fe Fire Training Center 13112 Highway 6)

3. CPAC #5

Tuesday, January 24

- Resulting land use scenario

# Upcoming Meetings

## ▶ CPAC / Steering Committee:

- #5 Tuesday, January 24, 6pm
- #6 Tuesday, February 21, 6pm

## ▶ Public Meetings:

- #4 Thursday, December 1, 6pm
- #5 Thursday, February 2, 6pm
- #6 Thursday, March 23, 6pm

# Contact Info

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CITY OF SANTA FE

# COMPREHENSIVE PLAN

# 2050



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**VISION**

2050

Kimley»Horn

Expect More. Experience Better.