The Centennial District Economic Development Strategy

Submitted to:

CITY OF PHILADELPHIA, Department of Commerce

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FINAL REPORT

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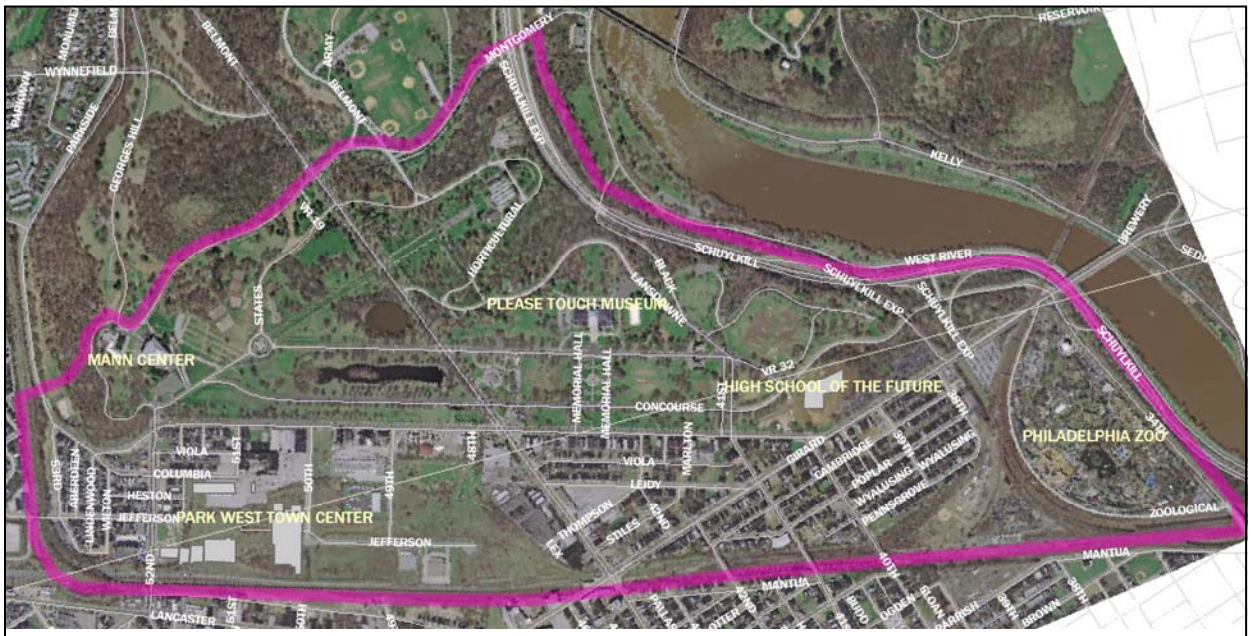
EXECUTIVE SUMMARY

PROJECT BACKGROUND

In 2004, as a response to the planned relocation of the Please Touch Museum to Memorial Hall, development of the School of the Future, and planned capital expansions by the Philadelphia Zoo and the Mann Center for the Performing Arts, the Fairmount Park Commission collaborated with the cultural institutions and local stakeholders to develop the Centennial District Master Plan. As a 20-year development vision for the District, the Master Plan calls for the enhancement of the historic and natural assets in the Park, development of new cultural venues, significant reconfiguration of roads, improved parking public transit access, and strengthened connections to adjacent neighborhoods.

In support of the Master Plan and various revitalization efforts undertaken by the City and local stakeholders, the Commerce Department of the City of Philadelphia commissioned this study to develop the *Centennial District Economic Development Strategy*. The purpose of this effort was to develop a strategy that complements the Master Plan, furthers its implementation, offers economic opportunities to the surrounding neighborhoods, and improves access to—and connectivity between—the District and nearby neighborhoods via new and planned improved public transit.

This study was funded by the Transportation and Community Development Initiatives (TCDI) program of the Delaware Valley Regional Planning Commission (DVRPC). For the purpose of facilitating the planning process, the consultant team of Urban Partners, Brown and Keener, and Baker & Company was retained.



***Map of the Study Area**: bounded by the Amtrak/SEPTA rail lines on the south and by Montgomery Drive and the Schuylkill Expressway on the north. On the east, the area is anchored by the Philadelphia Zoo at 34th Street and continues west beyond 52nd Street at the Mann Center for the Performing Arts to S. Georges Hill Road.*

DEVELOPMENT OBJECTIVES

Over a six month period, the consultant team met regularly with the Commerce Department of the City of Philadelphia and with the Steering Committee for the project which was comprised of representatives from various city agencies, businesses, civic groups, and the cultural institutions. Additionally, more than 50 one-on-one interviews were conducted with key stakeholders in the community. Lastly, the consultant team facilitated two community meetings that were well publicized and held at convenient locations within the study area. With the guidance of the Commerce Department staff and the members of the Steering Committee, the following development objectives were synthesized from comments heard in various meetings and interviews. These objectives are sorted into three major categories:

Economic Development

- Expand activity in the Centennial District portions of Fairmount Park to capture additional use of these facilities by younger family visitors drawn by the Zoo and Please Touch Museum, other active recreation visitors, and neighborhood residents.
- Capture a portion of dining and retail purchases by these visitors for community businesses; add lodging services if feasible.
- Add visitor services in the Centennial District portions of Fairmount Park; assure that community-based businesses participate in the operation of these services.
- Add needed community-serving retail services beyond those programmed for the Park West Town Center.
- Where possible, develop mixed-use buildings along Parkside from Belmont to 49th Street to create a positive edge to the Park.
- Recruit additional light industrial and general commercial businesses to the West Parkside Industrial Park.
- Capture employment opportunities from all Centennial District businesses and institutions for neighborhood residents.

Community & Housing Development

- Rehabilitate existing deteriorated and vacant housing units, especially those fronting key economic development projects.
- Produce in-fill housing development on vacant lots in residential blocks.
- Provide needed repairs to owner-occupied housing.
- Assure long-term housing affordability for long-term residents—both owners and renters.
- Attract market rate housing development to new construction and substantially rehabilitated properties where units are not required to meet other housing objectives.
- Enhance use of Fairmount Park facilities by neighbors.

Transportation and Neighborhood Connectivity

- Improve access to the Zoo and Please Touch Museum and circulation within the Centennial District.
- Improve rail connections to the community and to the employment zones within the community.
- Advocate for the shortening the timeline to rebuild the 40th and 41st Street bridges.
- Improve the streetscape to make the District more pedestrian friendly.

DEVELOPMENT STRATEGIES

Based on an examination of existing conditions and the likely potential to capture the excess commercial demands that are being generated by the residents and the visitors of the cultural institutions, the following development strategies are recommended. They are organized into six major categories/development nodes: 1) *Girard Avenue Gateway*; 2) *West Parkside Mixed-Use Development*; 3) *Housing Investment Strategies*; 4) *Mini-Nodes*; 5) *Activity/Service Expansion for Park Visitors and Residents*; and 6) *Neighborhood Connectivity Improvements*

1. GIRARD AVENUE GATEWAY

The area between the Please Touch Museum and the Philadelphia Zoo will be the focal point of economic activity in the Centennial District. In order to capture the maximum amount of the commercial demand generated by the park visitors and the residents, an aggressive development scheme is recommended near the intersection where Parkside Avenue, Girard Avenue and 40th Street converge.

3900 BLOCK OF GIRARD AVENUE

4000 BLOCK OF GIRARD AVENUE

3400 BLOCK OF GIRARD AVENUE

Proposed Developments (3900-4000 Girard)	Preferred Development Site
- Free standing family oriented restaurant (5,500 SF).	- As close as possible to the Schuylkill Exp. and the Zoo's front entrance.
- Medium size diner (3,000 SF) and a small parking lot to service a portion of the customers.	- At a high-profile site for visitors traveling on Parkside Avenue.
- Two 4-story mixed-use buildings with commercial on the ground floor and condominiums on the upper floors.	- One on each block.
- 4-story mixed-use building with retail on the ground floor and either professional office space or supportive service residences on the upper floors.	- Central location in the Gateway to serve as the anchor development. Must be accessible from multiple directions.
- 2-story mixed-use buildings with commercial on the ground floor and condominiums on the upper floors.	- In the middle of the Gateway as an infill development.
- Surface parking lot to accommodate various commercial needs.	- In close proximity to developments that generate the highest customer parking demands.
- 4-story condominium building.	- A larger parcel to accommodate a critical mass of residential units.

Proposed Developments (3400 Girard)	Preferred Development Site
- Hotel development in conjunction with expanded Zoo parking facility. The hotel is expected to have 120-150 rooms with limited services and built above the parking garage. A shared parking agreement should be arranged with the Zoo.	- Zoo parking lot at 34th and Girard (currently owned by the Fairmount Park Commission).

2. West Parkside Mixed-Use Development

The 4800 block of Parkside Avenue is envisioned as a mixed-use zone this is designed to add commercial and residential activity at the southern edge of the Park in West Parkside. With the proposed relocation of the Streets Department facility and Southeastern Pennsylvania Transportation Authority's (SEPTA's) Parkside Bus Loop, there is an opportunity to develop a large scale project that will transform this block.

Stacked townhomes on top of ground floor retail/office space is the proposed development strategy for this block. Each of the townhomes must have its own private entrance from the street. The commercial space will be programmed for office use and convenience retail. The image below is a photo simulation of the streetscape in a mixed-use development along Parkside Avenue.

3. HOUSING INVESTMENT STRATEGIES

The Steering Committee for this study identified balanced residential development as a key development objective for the Centennial District. There are two high priority target zones for this initiative: a section of **East Parkside** that is south of Girard Avenue and East of 41st Street, and the 5100 block of **Columbia Avenue** (in West Parkside).

A. East Parkside Targeted Housing Investment Zone

- *Homeowner support programs* – including homeowner counseling; grants/loans to repair problems with electrical, plumbing, heating and structural systems; façade improvement funds for all residential properties.
- *Code enforcement of investor owned properties* – monitor properties in the target zone that are distressed and blighted.
- *New housing developments*
  - A limited number of new condominiums. A prime location for condos would be 3810-16 Girard Avenue which is a 6,700 SF vacant lot.
  - New infill construction units are appropriate on larger vacant lots.
  - Larger developments for blocks with substantial amounts of contiguous vacant lots.
- *Substantial rehab of vacant homes* – utilize funds from the Homeownership Rehabilitation Program (HRP), which is administered by Philadelphia Housing Development Corporation. The HRP provides gap financing for eligible projects that are sold to families earning less than 80% of the Area Median Income who are first time homeowners. The proposed blocks for the HRP must have less than 10% vacancy.
- *Side yard beautification program* – for small vacant lots that are too small for infill new construction.

Once substantial progress has been made on the high priority target zone, the program can be expanded to the rest of East Parkside.

B. Columbia Avenue Targeted Housing Investment Zone

Despite the major investment in the Park West Town Center which is immediately adjacent, the 5100 block of Columbia Avenue continues to suffer from high vacancy and deteriorating housing stock. Targeted investment on this block must entail a combination of four different programs: homeowner support, substantial rehabilitation for sale, new construction, and vacant lot beautification.

- *Homeowner support programs* – basic systems repair, façade improvement, and homeowner counseling.
- *New construction* – proposed for 5143 and 5145 which are contiguous lots.
- *Substantial rehabilitation* – proposed for vacant and blighted properties.
- *Vacant lot beautification program* – for lots that are too small to accommodate an infill new construction project.

4. MINI-NODES

In addition to the major development nodes, there are five Mini-Nodes that will round out the development in the Centennial District.

A. *Girard & Belmont* – this is the best location for a new 12,000 to 14,000 SF pharmacy that will capture the demand originating from within the study area and from the neighborhoods to the south.
B. *52nd & Parkside* – full service restaurant and bar at the Parkside Inn and the adjacent vacant lot on 52nd Street. This is a visible intersection adjoining the Mann Center and Fairmount Park. Two proposed developments would transform this high vacancy area and draw traffic to the Park West Town Center and function as a gateway to the Parkside community. On the southwest corner of 52nd and Parkside, the Parkside Association and a non-profit developer are proposing to develop a 4-story mixed-use building. The ground floor would be devoted to retail and office use. The floors above would be affordable and accessible one-bedroom apartments targeted to senior citizens and the physically disabled.
C. *53rd & Jefferson* – market rate homes on the western side of 53rd Street between Columbia Avenue and Jefferson Street.
D. *51st & Parkside* – new homes on the southwest corner of this intersection. This parcel is the only vacant lot in an otherwise intact residential block.
E. *50th & Parkside* – determine the highest and best use of the vacant lot on the southeast corner to facilitate expansions of current businesses. A consensus development strategy must be agreed by various stakeholders including Philadelphia Industrial Development Corporation, the Business Association of West Parkside, Philadelphia Business Technology Center, Parkside Association, Rockland Capital, and Consolidated Drake Press.

5. ACTIVITY/SERVICE EXPANSION FOR PARK VISITORS & RESIDENTS

The family friendly theme of the Centennial District is the economic engine that can be further expanded to generate the maximum benefit for the District. First, new activities and attractions are proposed to further increase the District's appeal to younger families and other active visitors:

- Baseball-related activities, such as batting cages, near the Negro League Memorial.
- Potential activities at Centennial Lake & Concourse Lake: environmental education center; paddleboats; and model boats.
- Other outdoor activities: miniature golf; ice skating; and jogging loop. A 5K trail is currently under development.
- Horse/carriage rides.
- Miniature train ride – this attraction can generate a substantial net operating income (see photograph of similar attraction in San Antonio, TX, as well as the preliminary financial analysis below).

- Preliminary Capital Costs

Trains:	$700,000
Rail Installation:	$1.1 million
Other Costs:	$1.32 million
Contingency:	$780,000
Total:	$3.9 million

- Preliminary Operating Pro Forma

Gross Revenue:	$750,000
Staffing:	$175,000
Other Costs:	$110,000
Net Operating Income:	$465,000

The total capital costs for the miniature train ride is $3.9 million and the operation is projected to yield a significant net operating income of $465,000 per year. The revenue generated from this attraction can help defray the costs of maintenance and promotions for the Centennial District.

Second, enhancements are proposed in the park to accommodate the residents of the surrounding neighborhoods. New park amenities include playgrounds, picnic areas, dog-walks, community gardens, basketball courts and other smaller scale uses that can directly serve the needs of those who live in the adjacent neighborhoods.

Lastly, retail service kiosks are proposed in the park to offer park users snacks and refreshments. Specifically, two kiosks are proposed near attractions and miniature train stops: one next to the proposed batting cages near the Negro League Memorial and the other located farther east.

6. Neighborhood Connectivity Improvements

New commercial and residential developments proposed in this report will result in increased vehicular traffic to an already popular entertainment district. Additional transit services must be created to accommodate new and existing residents, as well as the 1.3 million visitors to the cultural institutions.

Short-Term Strategies:

- Commission a transportation study that integrates and updates all studies done for the area.
- Implement key recommendations from DVRPC's *Taming Traffic* study.
- 52nd & Lancaster – support the following initiatives: a) streetscape improvements along 52nd Street; b) installation of murals on the trusses on the Amtrak bridge; and c) cleaning up excessive undergrowth in various locations.
- 40th and 41st Street Bridges – a) advocate shortening the timeline to rebuild the bridges; and b) ask the Streets Department to address the dumping problem on the closed bridges;
- Reroute SEPTA bus routes to increase connectivity for residents and visitors to the area.
- Review the traffic plan conducted by the Philadelphia Zoo.

- Investigate PHLASH and Philadelphia Trolley Works as possible methods to decrease congestion in the area.
- Have conversations with the Philadelphia Parking Authority about a taxi stand and implementing strategies to decrease traffic congestion in the area.

LONG-TERM STRATEGIES:

- Support the opening of a SEPTA Regional Rail stop near the Zoo.
- Support the re-opening of a SEPTA Regional Rail stop near 52nd & Lancaster.
- Improve the connections from the District to Martin Luther King Drive.
- Support a new trolley line that connects the Zoo to 30th Street Station and City Hall using existing trolley tracks.

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INTRODUCTION

PROJECT BACKGROUND

The *Centennial District Economic Development Strategy* is the product of a planning process commissioned by the Commerce Department of the City of Philadelphia and funded by the Transportation and Community Development Initiatives (TCDI) program of the Delaware Valley Regional Planning Commission (DVRPC). This strategy complements the Centennial District Master Plan by furthering its implementation, offering economic opportunities to the surrounding neighborhoods in West Philadelphia, and improves access to—and connectivity between—the District and nearby neighborhoods via new and planned improved public transit.

Initiated in 2005, the Centennial District Master Plan is a 20-year development vision for a unified cultural and park district that stretches westward from the Philadelphia Museum of Art across the Schuylkill River all the way to the Mann Center for the Performing Arts at 52nd Street and Parkside Avenue. The Master Plan calls for enhancement of the historic and natural assets in the Park, as well as for development of new cultural venues, significant reconfiguration of roads, improved parking, public transit access, and strengthened connections to adjacent neighborhoods.

The Centennial District Master Plan is the most recent of several efforts to address the revitalization of the area of West Philadelphia that includes the grounds of the former Centennial Exhibition. In 2004, the Fairmount Park Commission completed its own strategic plan for the future of the 9,200 acre park system, which called for "leverag[ing] existing park properties to enhance economic development." One of the recommendations of that strategic plan was the creation of a "family entertainment zone" incorporating the Zoo, the Please Touch Museum and the Mann Center.

Since 1994, the West Parkside neighborhood, west of Belmont Avenue and abutting the Park's southern boundary, has been part of the City's Empowerment Zone, while the East Parkside neighborhood was included in the City's Renewal Community in 2002. Both of these federally designated areas offer tax credits to local businesses that hire local residents, as well as other tax incentives.

West Parkside was one of four Philadelphia neighborhoods that benefited in the past from the Pennsylvania Enterprise Zone Program, a set of state tax incentives and business support programs for distressed urban industrial areas. As part of the close of the Enterprise Zone Program, the Parkside Association developed *West Parkside NOW: An Exit Strategic for the West Parkside Enterprise Zone*, which is guiding a number of current economic development initiatives in the area.

The Philadelphia Empowerment Zone (EZ) has invested over $19 million in community revitalization activities, including education, housing, economic development, landscaping and street cleaning. The EZ is the primary investor in the West Philadelphia Financial Services Institution (WPFSI), which is one of the three lending institutions created in the Philadelphia Empowerment Zones.

With the assistance of the Empowerment Zone and others, the Business Association of West Parkside recently developed the Philadelphia Stars Negro League Memorial Park at the Belmont & Parkside Gateway to Fairmount Park as a monument to the former Negro League Team that played in the 1930s, 40s and 50s. The Master Plan recommends building a nearby ball field in the Park as an enhancement to this memorial.

The Philadelphia Industrial Development Corporation (PIDC) owns and manages the 60-acre West Parkside Industrial Park (WPIP) that lies at the southern boundary of the Park in West Parkside. Recently, the Park West Town Center has absorbed a major portion of WPIP's acreage and PIDC has several prospective buyers who have plans to develop a variety of commercial and light industrial uses there. For example, PIDC recently signed several new tenants including CINTAS, a cleaner of business uniforms, to fill some of the vacant parcels. As part of the so-called West Parkside Village, the Centennial District Master Plan recommends a mixed-use development at this site.

The Parkside Historic Preservation Corporation (PHPC) has preserved and restored many historic houses on Parkside Avenue facing Fairmount Park. The PHPC sought the National Register of Historic Places designation in order to encourage further preservation of the area's historic assets.

In September 2006, Southeastern Pennsylvania Transit Agency (SEPTA) replaced bus service on the new Route 15 with light rail on Girard Avenue. This $84 million project restored trolleys to Girard Avenue after a thirteen-year absence. Refurbished historic Philadelphia Transit Corporation trolleys connect neighborhoods as far east as Fishtown with the Zoo and points west. SEPTA is currently conducting an analysis of additional transit improvements. Transit modes under consideration include buses, bus rapid transit and trolleys. Starting in 2007, the LUCY buses provided tourists and Philadelphia residents another transportation option to the Zoo.

In 2007, the Delaware Valley Regional Planning Commission published "*Taming Traffic: Context-Sensitive Solutions in the DVRPC Region (2007)* which outlines traffic and streetscape improvements on Parkside Avenue. The study area of Parkside Avenue is just over one mile in length, spanning from the intersection of 40th Street and Girard Avenue on the southeast, to 52nd at the northwest. The Study builds on recommendations in the Master Plan to: 1) visually mark the trolley right-of-way to discourage automobile access in the right-of-way; 2) close the right-turn channel from Girard Avenue onto Parkside Avenue and replace it with a traditional, signalized right-turn-only lane at the intersection; and 3) transform the existing triangular concrete island into a landscaped gateway, and connect it to the curb line.

The City Planning Commission has completed or is well underway in preparing community plans for several neighborhoods adjacent to or near the Centennial District including Mantua, Strawberry Mansion, Wynnefield, Fairmount, West Parkside, and Brewerytown.

The newest development effort arriving on the landscape is the Park West Town Center, a development project resulting from a partnership between the West Philadelphia Financial Services Institution (WPFSI) and the Goldenberg Group. The Empowerment Zone is an investor

in WPFSI and the retail center. The new retail establishments in the Park West Town Center include Lowe's, ShopRite, Wachovia Bank, and McDonald's, combining to create 420 construction and 640 permanent jobs. The center opened in the first and second quarters of 2008.

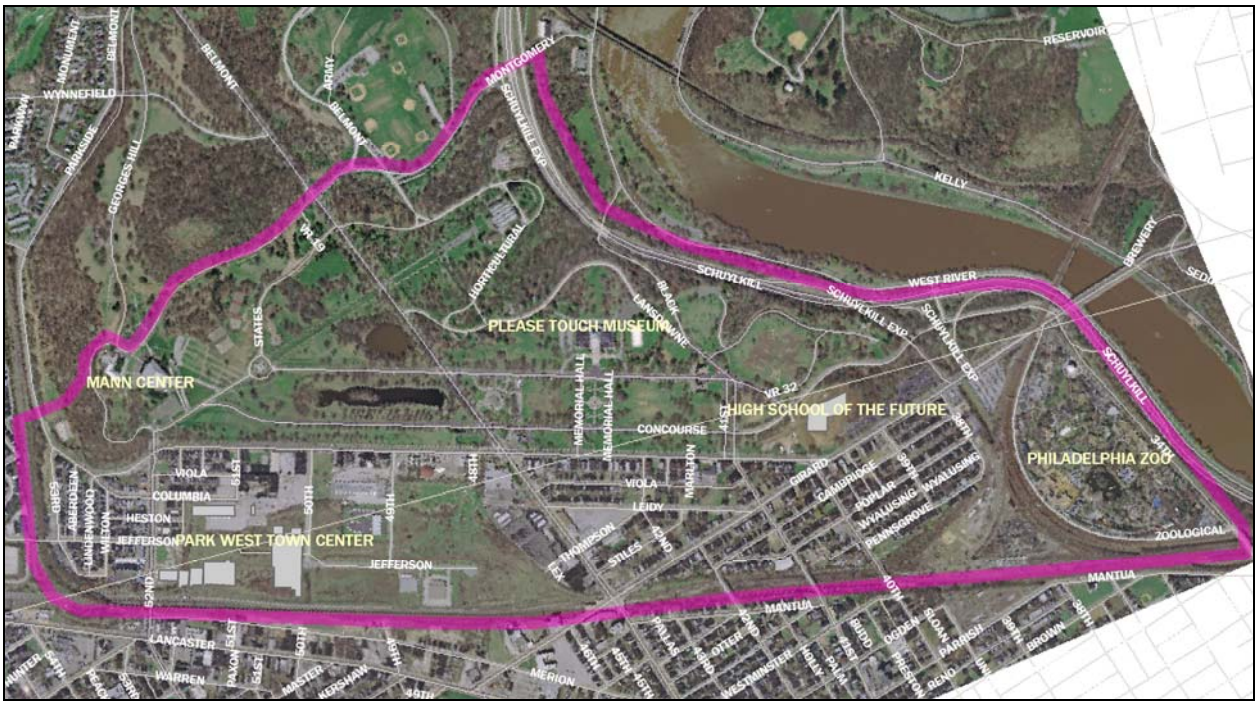
PROJECT PURPOSE

The purpose of this project is to develop a *Centennial District Economic Development Strategy* that complements the Centennial District Master Plan, furthers its implementation, offers economic opportunities to the surrounding neighborhoods in West Philadelphia, and improves access to—and connectivity between—the District and nearby neighborhoods via new and planned improved public transit. This *Strategy* will serve as a guide for new development and investment that leverages and complements the current and planned investments by District cultural institutions. Moreover, this Economic Development Strategy is consistent with the Centennial District Master Plan, the Fairmount Park Strategic Plan, and the Exit Strategy for the West Parkside Enterprise Zone, and any neighborhood plans for surrounding communities.

STUDY AREA

The study area for the *Centennial District Economic Development Strategy* is bounded by the Amtrak/SEPTA rail lines on the south and by Montgomery Drive and the Schuylkill Expressway on the north. On the east, the area is anchored by the Philadelphia Zoo at 34th Street and continues west beyond 52nd Street at the Mann Center for the Performing Arts to S. Georges Hill Road (see **Map 1**).

MAP 1: CENTENNIAL DISTRICT PROJECT BOUNDARY



Anchored by three major cultural institutions, the Centennial District is one of the premier entertainment destinations within the City that attracts approximately 1.3 million visitors each

year. It is an historically significant area that served as the grounds for the Centennial Exhibition of 1876 which drew 10 million visitors from all over the world in a span of six months. Much of the exhibition was demolished by the following year and only a few buildings and structures were left intact. Memorial Hall, a handsome building that over the years has become the iconic symbol of the exhibition, is now home of the Please Touch Museum. The Centennial District also boasts the Philadelphia Zoo, the nation's oldest zoo which has been operating at its current location since 1874, and the Mann Center for the Performing Arts.

Located south of the Fairmount Park section of the Centennial District are important residential, commercial, and industrial zones. Nearly 4,500 residents currently live in East Parkside and West Parkside, and both neighborhoods are represented by strong civic associations that have concrete visions for community revitalization. Situated west of Belmont Avenue are the Philadelphia Business Technology Center (BTC) that houses 43 businesses, the 60-acre West Parkside Industrial Park which is managed by the Philadelphia Industrial Development Corporation, and the newly developed Park West Town Center which is a 341,000 square foot, $55 million retail shopping plaza.

STEERING COMMITTEE AND CONSULTANT TEAM

For the purpose of facilitating the planning process, the Commerce Department of the City of Philadelphia retained the consultant team of Urban Partners, Brown and Keener, and Baker & Company. Over a six month period, the consultant team met regularly with the Steering Committee which was comprised of representatives from various city agencies, businesses, civic groups, and cultural institutions. The following is a list of community stakeholders, city agencies, and organizations that comprised the Steering Committee:

- Business of Association of West Parkside
- Delaware Valley Regional Planning Commission
- East Parkside Community Association
- East Parkside Community Revitalization Corporation
- Fairmount Park Commission
- Mann Center for the Performing Arts
- Parkside Association
- Parkside Historic Preservation Corporation
- Pennrose Properties
- Philadelphia Business & Technology Center
- Philadelphia City Planning Commission
- Philadelphia Commerce Department
- Philadelphia Commerce Department—Office of Business Services
- Philadelphia Commercial Development Corporation
- Philadelphia Empowerment Zone
- Philadelphia Industrial Development Corporation
- Philadelphia Streets Department
- Philadelphia Zoo
- Please Touch Museum
- Redevelopment Authority of the City of Philadelphia
- High School of the Future
- Southeastern Pennsylvania Transportation Authority

- West Philadelphia Financial Services Institution

Additionally, more than 50 one-on-one interviews were conducted with key stakeholders in the community. Lastly, the consultant team facilitated two community meetings that were well publicized and held at convenient locations within the study area. At these community meetings, members of the community were invited to listen to the draft recommendations and were given a chance to ask questions and provide input. The comments and suggestions originating from the steering committee, the key stakeholders, and the general public were incorporated into various parts of this strategy.

DEVELOPMENT OBJECTIVES

The following are the development objectives for the Centennial District that were synthesized from Steering Committee meetings, community forums, and one-on-one interviews. These objectives are sorted into three major categories:

Economic Development

- Expand activity in the Centennial District portions of Fairmount Park to capture additional use of these facilities by younger family visitors drawn by the Zoo and Please Touch Museum, other active recreation visitors, and neighborhood residents.
- Capture a portion of dining and retail purchases by these visitors for community businesses; add lodging services if feasible.
- Add visitor services in the Centennial District portions of Fairmount Park; assure that community-based businesses participate in the operation of these services.
- Add needed community-serving retail services beyond those programmed for the Park West Town Center.
- Where possible, develop mixed-use buildings along Parkside from Belmont to 49th Street to create a positive edge to the Park.
- Recruit additional light industrial and general commercial businesses to the West Parkside Industrial Park.
- Capture employment opportunities from all Centennial District businesses and institutions for neighborhood residents.

Community & Housing Development

- Rehabilitate existing deteriorated and vacant housing units, especially those fronting key economic development projects.
- Produce in-fill housing development on vacant lots in residential blocks.
- Provide needed repairs to owner-occupied housing.
- Assure long-term housing affordability for long-term residents—both owners and renters.
- Attract market rate housing development to new construction and substantially rehabilitated properties where units are not required to meet other housing objectives.
- Enhance use of Fairmount Park facilities by neighbors.

Transportation and Neighborhood Connectivity

- Improve access to the Zoo and Please Touch Museum and circulation within the Centennial District.
- Improve rail connections to the community and to the employment zones within the community.
- Advocate for the shortening the timeline to rebuild the 40th and 41st Street bridges.
- Improve the streetscape to make the District more pedestrian friendly.

***

This report is organized in these following nine sections:

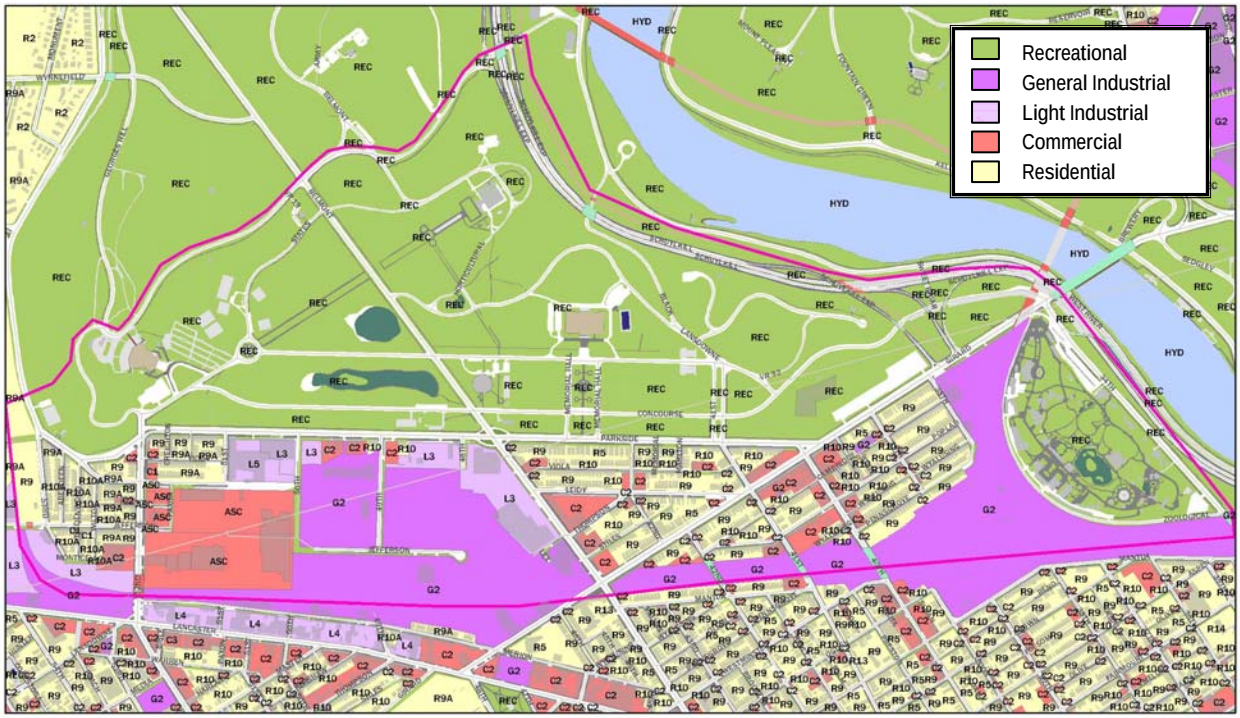
- *Introduction*
- *Existing Conditions*
- *Market Analysis*
- *Key Issues and Opportunities for the District*
- *Development Strategies*
- *Activity/Service Expansion for Park Visitors*
- *Neighborhood Connectivity Improvements*
- *Action Items and Responsibilities*
- *Appendices*

EXISTING CONDITIONS

LAND USE AND ZONING

There are five different land use zones within the Centennial District: recreational, residential, commercial, general industrial, and light industrial. Recreational uses are located to the north of Girard Avenue and Parkside Avenue, with the exception of the Zoo. The residential zones are located in two neighborhoods—East Parkside and West Parkside. The major commercial area within the study area is the Park West Town Center, which is located in the southwest section of the District. A small number of commercial uses are located along Girard Avenue between 39th Street and 41st Street, along 40th Street between Wyalusing Avenue and Girard Avenue, along Belmont Avenue north of Girard Avenue, and along 52nd Street north of the Park West Town Center. The most significant industrial zones are in the West Parkside Industrial Park and the Philadelphia Business Technology Center. The parcels near the southern most section of the study area are also zoned industrial.

Map 2: Land Use and Zoning



KEY PUBLICLY OWNED PROPERTIES

- Fairmount Park – this portion of the Centennial District represents approximately half of the study area. Enhancements made in the Park can improve the quality of life for the residents and encourage spillover economic activity in the District's commercial zones.
- SEPTA's Parkside Loop – located at the southeast corner of 49th and Parkside, this property serves as the bus turn-around for SEPTA. Although it serves a vital function in the public transit system, it unnecessarily takes up a prime development location in the District. A more suitable location for the loop may closer to the Park West Town Center.

- Streets Department facility – located on the 4800 block of Parkside Avenue, the relocation of this facility has been recommended by the Centennial District Master Plan and the *West Parkside NOW* plan. The property has 103 feet of frontage on Parkside Avenue and has a depth of 248 feet.
- West Parkside Industrial Park – 60-acre business park managed by the Philadelphia Industrial Development Corporation. Currently, there are 25 remaining acres that are available.
- Zoo Parking Lot at 34th and Girard – this property is owned by the Fairmount Park Commission and is leased to the Zoo to be utilized for parking. The close proximity to the I-76 on-ramp and off-ramp makes this a prime development location.

CURRENT REVITALIZATION INITIATIVES AND DEVELOPMENT PROPOSALS

The Centennial District Master Plan is the unifying vision for the District which calls for enhancement of the historic and natural assets in the Park, as well as for development of new cultural venues, significant reconfiguration of roads, improved parking, public transit access, and strengthened connections to adjacent neighborhoods. Complementing the Master Plan, the following is a list of current revitalization initiatives and development proposals that address the revitalization of the Centennial District:

- *Fairmount Park Strategic Plan* – recognized the Park as a premier asset of Philadelphia and recommended leveraging it "to the greatest extent possible to enhance the economic vitality of the City for retaining and attracting residents and visitors to spend time and enjoy everything Philadelphia has to offer." One of the specific recommendations of the plan was the creation of a "family entertainment zone" incorporating the Zoo, the Please Touch Museum, and the Mann Center.
- *Taming Traffic: Context-Sensitive Solutions in the DVRPC Region (2007)* – this study published by the Delaware Valley Regional Planning Commission recommended specific traffic calming techniques along Parkside Avenue from 40th Street to 52nd Street. The Study builds on recommendations in the Centennial District Master Plan to close South Concourse Drive and proposes conceptual improvements including a planted median along the length of Parkside Avenue, tighter turning radii, and a roundabout at 50th Street.
- *Park West Town Center* – is a 341,000 square foot, $55 million retail shopping plaza that opened in West Parkside in the summer of 2008. This shopping center was a joint venture between the West Philadelphia Financial Services Institution (WPFSI) and the Goldenberg Group. The Empowerment Zone is an investor in WPFSI and the shopping center. The retail establishments include Lowe's, ShopRite, Wachovia Bank, McDonald's, and other smaller retailers. The development created 420 construction and 640 permanent jobs.
- *Centennial District Circuit* – is a 5-kilometer trail that the Fairmount Park Commission is constructing in the District. As recommended in the Centennial District Master Plan, this trail is designed for both casual and serious park trail users. In addition to regular uses, the trail can also make it possible for the District to host many charity and civic events that use a 5K length and now predominantly use the Benjamin Franklin Parkway.

- *Cintas Corporation* – is the latest large scale tenant for the Philadelphia Industrial Development Corporation (PIDC) in the West Parkside Industrial Park. Cintas is in the final stages of constructing a 66,000 SF facility to support its uniform cleaning services for the Philadelphia area market.
- *East Parkside Community Revitalization Plan* – was published by the East Parkside Community Revitalization Corporation in 2007. This plan called for the development of new or rehabbed rowhomes, key commercial/mixed-use projects, and various community service facilities to be located in East Parkside.
- *West Parkside NOW: An Exit Strategy for the West Parkside Enterprise Zone* – was published by the Parkside Association of Philadelphia in 2003 to guide the West Parkside community in discontinuing its participation in the state Enterprise Zone Program. This report is serving as the roadmap for a number of community economic development initiatives, such as the Park West Town Center and improvements along the 52nd Street corridor.

SPECIAL DISTRICTS AND PROGRAMMATIC ZONES

There are several special districts and programmatic zones that are designed to encourage focused investment in the Centennial District. The following is a description of these incentive zones:

- HUD's Community Renewal Initiative (Empowerment Zone and Renewal Community): Since 1994, the West Parkside neighborhood has been part of the "Philadelphia/Camden Empowerment Zone" while the East Parkside neighborhood was included in the "Philadelphia Renewal Community" in 2002. The Empowerment Zone incentives include employment credits, low-interest loans through EZ facility bonds, reduced taxation on capital gains, and other incentives. The financial incentives for the Renewal Community program includes employment credits, a 0% tax on capital gains, accelerated depreciation through Commercial Revitalization Deductions, and other incentives.
- Keystone Opportunity Zone:
  West Parkside Industrial Park has KOZ designation, which are specifically designated areas where property owners and businesses that meet capital investment or new employment targets are required to pay little or no tax through 2010, 2013 or 2018. These taxes include Business Privilege Tax, Use and Occupancy Tax, Real Estate Tax, Net Profit Tax, State Business Tax, and State sales tax on items consumed at the KOZ site.
- Parkside National Register Historic District:
  Since 1983, the area bounded by the Amtrak/SEPTA railroad line, 38th Street, Girard Avenue & Parkside Avenue, and Belmont Avenue has been listed on the National Register of Historic Places. This designation allows qualified development projects to apply for federal Historic Preservation Tax Credits that are administered by the Internal Revenue Service. In 2000, the Philadelphia City Planning Commission designated the Parkside National Register Historic District as a Redevelopment Area in order to facilitate property redevelopment and rehabilitation in the district. There are four organizations that are actively involved with the preservation of the district: the Parkside Historic Preservation Corporation, the Parkside

Historic District Coalition, the East Parkside Residents' Association, and the Philadelphia Health Management Corporation.

- West Parkside Industrial Park:
  Managed by the Philadelphia Industrial Development Corporation (PIDC), the West Parkside Industrial Park (WPIP) is a 60-acre business park located south of Parkside Avenue in West Parkside. The WPIP is included in the Philadelphia/Camden Empowerment Zone and the Keystone Opportunity Zone. Recently, the Park West Town Center has absorbed a major portion of WPIP's acreage and Cintas Corporation is occupying another large parcel. As a result of these developments, PIDC is now left with 25 remaining acres in the business park. Aggressive marketing is being conducted by PIDC to recruit major employers to locate in the WPIP.

NEIGHBORHOOD CONNECTIVITY

The major roads and highways that service the Centennial District are the Schuylkill Expressway (I-76), Martin Luther King, Jr. Drive (formerly known as West River Drive), Girard Avenue, Parkside Avenue, Lancaster Avenue, Belmont Avenue, 34th Street, 40th Street, and 52nd Street. Traffic congestion during the Zoo's peak visitor season has been a major concern for the area, particularly near the Girard Avenue and Montgomery Avenue exits of the Schuylkill Expressway. With the Please Touch Museum beginning to attract hundreds of thousands of additional visitors to the Centennial District each year, alleviating road congestion in this area must be an important priority for the City.

There is great potential for transit improvements in the Centennial District. Currently, SEPTA operates the Route 15 trolley (which runs between Haddington to Port Richmond) via Girard Avenue and Route 10 trolley runs along Lancaster Avenue just south of the Centennial District. Additionally, the 38, 40, 43, 52, and 64 buses service the area. Since the 52nd Street Regional Rail Station was closed in 1980, none of the R5, R6, and R7 lines currently have stations in or near the Centennial District even though all three lines run through the District. Lastly, during the peak season between June and August, the Zoo operates a private trolley line that runs between the Independence Visitor Center and the Zoo's front entrance. This trolley service also makes a stop at 30th Street Station and costs $2 per ride.

Creating additional transit services will be an essential element of improving the quality of life for the residents and enhancing the visitor experience for the District's cultural institutions. Due to the presence of existing infrastructure for rail and trolley lines, creating additional services will be relatively inexpensive.

DEMOGRAPHICS

Approximately half of the Centennial District lies within Fairmount Park and has virtually no population. According to the 2000 U.S. Census, the total population in the project study area is 5,495. **Table 1** on the following page shows population by neighborhood:

Table 1: Population by Neighborhood

	Population 2000		Population 2000		Population 2000
East Parkside		**West Parkside**		**Fairmount Park**	
Tract 110		Tract 111		Tract 123	
- Block Group 1	690	- Block Group 1	608	- Block Group 1	13
- Block Group 2	853	Tract 119		Tract 124	
- Block Group 3	916	- Block Group 6	1,074	- Block Group 1	0
- Block Group 4	460				
- Block Group 5	881				
Subtotal	**3,800**	***Subtotal***	**1,682**	***Subtotal***	**13**
				TOTAL	**5,495**

Source: U.S. Census Bureau

Nearly 97% of the study area residents are African-American and 36% (1,980 out of 5,495) live below the poverty level. As shown on the following table, the reported median household incomes for all block groups are lower than that of the rest of the City:

Table 2: Median Household Income

	Median Household Income (1999)		Median Household Income (1999)		Median Household Income (1999)
East Parkside		**West Parkside**		**Philadelphia**	
Tract 110		Tract 111			
- Block Group 1	$29,327	- Block Group 1	$25,469	- Citywide	$30,746
- Block Group 2	$22,200	Tract 119			
- Block Group 3	$9,596	- Block Group 6	$17,330		
- Block Group 4	$14,286				
- Block Group 5	$22,917				

Source: U.S. Census Bureau

The 2000 Census indicates that the study area residents aged 25 and older are less educated than those of Philadelphia. Those who possess no more than a high school diploma represent the majority in the study area, and only 10.4% of the residents hold any type of college degree.

Table 3: Educational Attainment (25 Years of Age or Older)

	Centennial District	Philadelphia
Less than 9th grade	6%	8%
9th to 12th, no diploma	36%	21%
High school diploma	34%	33%
Some college, no degree	14%	16%
Associate degree	4%	4%
Bachelor's degree	5%	10%
Master's degree	1%	5%
Professional school degree	0.2%	2%
Doctorate degree	0.2%	1%

Source: U.S. Census Bureau

The following table shows that the unemployment rate for study area residents is also higher than the rest of the City.

Table 4: Employment Status for Population 16 Years and Over

	Centennial District	Centennial District (%)	Philadelphia (%)
In Labor Force	2,030	52%	56%
Employed	1,678	43%	50%
Unemployed	352	9%	6%
Not in Labor Force	1,905	48%	44%

Source: U.S. Census Bureau

The housing characteristics data from the 2000 Census reveal an aging community with signs of distress. The study area includes 2,714 housing units and a vacancy rate of 23%. Homeownership rate of 45% as reported by the 2000 Census is notably low when compared to the rest of the City (59%).

Table 5: Housing Units and Tenure

	Centennial District	Centennial District (%)	Philadelphia (%)
Housing units	2,714	–	–
Occupied units	2,097	77%	89%
Vacant units	617	23%	11%
Owner occupied	935	45%	59%
Renter occupied	1162	55%	41%

Source: U.S. Census Bureau

Regarding age, the housing stock in the study area is significantly older than that of the rest of the City. A vast majority (81%) of the homes in the study area were built before 1950, compared to 58% of the homes in Philadelphia (see **Table 6**). On one hand, the older housing stock represents an abundant supply of historically significant homes—as is evidenced by the beautiful mansions located along Parkside Avenue, for example. But on the other hand, physical deterioration and blight are common issues for communities that have aging housing stocks.

Table 6: Age of Housing Stock

	Centennial District (%)	Philadelphia (%)
Built Before 1950	81%	58%
Built 1950-1969	9%	29%
Built 1970-1989	5%	10%
Built 1990 and After	5%	2%

Source: U.S. Census Bureau

According to Win2Data, which is a comprehensive real estate database service that was utilized for this study, there were 94 real estate transactions in the study area for the period January 2007 to January 2009. Forty-eight (48) of those transactions were acquisitions for the Park West Town Center. A total of 37 residential properties were sold with an average price of $66,796 , or $37.75 per square foot, and a median sales price of $57,284. Six vacant lots were sold for an average price of $15,394, or $9.63 per square foot. And three additional mixed-use or commercial properties were sold during this period (See **Appendix A**).

The analysis of real estate transactions suggests a high level of real estate speculation in the study area. A rough estimate of this activity can be measured by examining the mailing address for the buyer and comparing it to the property address. Most investor owned properties will have mailing addresses that are different from property addresses. For the period January 2007 to January 2009, 61% of the properties transferring ownership listed new mailing addresses that were different from property addresses (excluding properties that were part of the Park West Town Center).

MARKET ANALYSIS

RETAIL MARKET

A retail market analysis was conducted by Urban Partners to describe the current performance of the District's retailers. This analysis is intended for use in identifying opportunities for the further development of retailing in the area based on the capture of retail purchases made by the area residents as well as the visitors to the cultural institutions. It should be noted that the retailers in the new Park West Town Center were included as part of this analysis even though some of those retailers have not opened for business at the conclusion of this study.

This study focuses chiefly on retail stores engaged in selling merchandise for personal and/or household consumption and on establishments that render services incidental to the sale of these goods. Selected service establishments are also included, especially those businesses primarily providing personal services to individuals and households, such as hair and nail salons and laundry and dry cleaning establishments.

All retail establishments in the area were classified by type of business according to the principal lines of merchandise sold, the usual trade designation, estimated square footage, and level of sales. Banks and other financial establishments are excluded from this assessment because banking activities – deposits, loans, etc. – cannot be added to sales volume data for other types of retail establishments.

The term "retail store sales" in this analysis includes sales by establishments that are normally found in pedestrian-oriented retail shopping areas. This definition excludes the sales of automobile dealerships and repair facilities, service stations, fuel oil dealers, and non-store retailing.

To identify and characterize shopping opportunities available to trade area residents, Urban Partners completed an inventory of all retail business establishments located within the Centennial District. The results of this inventory, described by retail type, and location, are listed below:

Table 7: Inventory of Retail Establishments

Name of Business	Location	Retail Category
Shop Rite	Park West Town Center	Supermarket
40th Street Market	1113 N. 40th Street	Grocery Store
J & J Supermarket	1127 N. 40th Street	Grocery Store
Neighborhood Food Market	4058 W. Girard Avenue	Grocery Store
Parkside Deli & Grocery	1602 N. 52nd Street	Convenience Store
Sunoco A Plus Mini Market	3750 W. Girard Avenue	Convenience Store
Girard Ave Amoco Inc	4708 W. Girard Avenue	Convenience Store
Rodriguez Grocery	5256 W. Jefferson Street	Convenience Store
J Beauty	Park West Town Center	Beauty Supplies
Poor Richard's Express	5070 Parkside Avenue	Limited Service Restaurant
Spiro's	3956 W. Girard Avenue	Limited Service Restaurant
Golden Dragon	4004 W. Girard Avenue	Limited Service Restaurant
McDonald's	Park West Town Center	Limited Service Restaurant

Twisters MC	1102 N. 40th Street	Bar/Lounge
Cafe Breezes	5131 W. Columbia Avenue	Bar/Lounge
Jake's Lounge	4002 W. Girard Avenue	Bar/Lounge
Family Dollar Store	4701 W. Girard Avenue	Dollar Store
America's Best Contacts	Park West Town Center	Optician
J S L's Haircutting	1124 N. 40th Street	Hair Salon
Bob's Coin Laundry	1106 N. 40th Street	Laundromat
Ashley Stewart	Park West Town Center	Women's Apparel
Dots	Park West Town Center	Women's Apparel
A.J. Wright	Park West Town Center	Men's & Women's Apparel
Eternity	Park West Town Center	Women's Apparel
Kicks	Park West Town Center	Shoes
Anna's Linens	Park West Town Center	Home Furnishings
Radio Shack	Park West Town Center	Electronics
Lowe's	Park West Town Center	Home Improvement Center
Pelzer's Stables & Pet Supplies	4802 Parkside Avenue	Pet Supplies
Monster Pets	Park West Town Center	Pets and Pet Supplies
New Girard Pharmacy	4000 W. Girard Avenue	Checking Cashing/Lottery Sales
T-Mobile	Park West Town Center	Cell Phones
Game Stop	Park West Town Center	Games

Source: Urban Partners

Table 7 describes the current range of stores available in the Centennial District study area. The community-serving store mix includes:

- 1 Supermarket
- 1 Home Improvement Center
- 4 Convenience Stores
- 4 Limited Service Restaurants
- 3 Grocery Stores
- 3 Bar/Lounges
- 3 Women's Apparel Stores
- 2 Pet/ Pet Supplies Stores

The area also includes a shoe store, an optical store, one men's & women's apparel store, one laundromat, one home furnishings store, one hair salon, one game store, one electronics store, one dollar store, one checking cashing/lottery sale establishment, one cell phone store, and one beauty supply store.

Trade Area Retail Demand: Residents

According to the 2000 U.S. Census, the Centennial District has a population of 5,495. We estimate that the total population in the study area has not changed significantly since 2000.

Table 8: Population and Income for the Centennial District Retail Trade Area

	2000 Population	2000 Per Capita Income	1999 TOTAL Income	2008 Per Capita Income**	2008 TOTAL Income**
Tract 110					
Block Group 1	690	$13,119	$9,052,110	$17,059	$11,770,568
Block Group 2	853	$12,837	$10,949,961	$16,692	$14,238,367
Block Group 3	916	$10,548	$9,661,968	$13,716	$12,563,574
Block Group 4	460	$7,461	$3,432,060	$9,702	$4,462,749
Block Group 5	881	$10,215	$8,999,415	$13,283	$11,702,048
Tract 111					
Block Group 1	608	$7,655	$4,654,240	$9,954	$6,051,965
Tract 119					
Block Group 6	1,074	$11,553	$12,407,922	$15,023	$16,134,171
Tract 123					
Block Group 1	13	$24,000	$312,000	$31,207	$405,697
Tract 124					
Block Group 1	0	$0	$0	$0	
TOTAL	**5,495**		**$59,469,676**		**$77,329,141**

Source: U.S. Census Bureau

** After Consumer Price Index adjustment of 1.300312125

Consumer shopping patterns vary depending on the types of goods being purchased. For convenience goods purchased frequently, such as groceries, drugs, and prepared foods, shoppers typically make purchases at stores close to their home or place of work. For larger-ticket, rarely purchased items – such as automobiles, electronics and large appliances – shoppers may travel anywhere within the metropolitan area or beyond to obtain the right item at the right price. For apparel, household furnishings, and other shopping goods, consumers generally establish shopping patterns between these two extremes, trading at a number of shopping areas within a 30 minute commute of their homes.

Using information about the retail spending behavior of Philadelphia metropolitan area residents as compiled by *Sales and Marketing Management*, we estimate that the trade area's population spends approximately $31.3 million on retail goods annually, of which:

- $18.5 million is spent on community-serving goods and services,
- $1.2 million at full-service restaurants,
- $2.2 million in department stores and warehouse clubs,
- $2.6 million on apparel,
- $3.5 million on home furnishings and improvement,
- $2.1 million on other specialty goods, and
- $1.2 million at "other retail stores" such as auto parts and pet supplies businesses.

A detailed breakdown of the estimated purchases is shown in **Appendix B.**

Retail Development Potential: Residents Demand

On **Tables B1** to **B3** in **Appendix B**, we have compared Centennial District residents demand for retail goods and services with the current level of retail establishments in the District. There are a total of 65 different types of community-serving retail goods and services. In the study area, 40 types of establishments have insufficient demand from residents alone. Of the rest, all but nine different types of retail establishments are already present as community-based stores or as tenants in the Park West Town Center.

New retail opportunities in servicing the resident demand are:

- A **Drug Store** that also services adjacent markets;
- An **Auto Parts Store** that also services adjacent markets;
- Two or three **Full-Service Restaurants** that are moderately priced; and
- Seven or eight other small stores in the following retail categories: **Dollar Store**, **Jewelry Store**, **Gift/Novelty/Souvenir Store**, **Hair Salon**, **Laundries/Dry Cleaning**, **Computer & Software Store**, and **Specialty Sporting Goods Store**.

Trade Area Retail Demand: Out of Facility Demand for Zoo & Please Touch Museum

The following section analyzes the out-of-facility retail demand generated by the Philadelphia Zoo and the Please Touch Museum. Even though the two institutions are equipped with dining and shopping amenities, a significant portion of the demand for goods and services will continue to go unmet within the confines of these institutions. This determination is extrapolated from Urban Partners' work with various Philadelphia cultural institutions in conducting economic impact analyses for their major art exhibitions.

The following table illustrates an estimated number of annual visitors for the two institutions in the third year of operations for the Please Touch Museum at Memorial Hall. Due to increased publicity and the novelty of a new facility, Please Touch anticipates an initial surge in attendance for the first year or two of operation at Memorial Hall. The 450,000 visitors shown on the following table represents the stabilized attendance potential after the initial surge.

Table 9: Projected Annual Visitors

Visitor Characteristics	Phila Zoo	Please Touch	Total
Regular Visitation (Stabilized)	900,000	450,000	1,350,000
School Groups	180,000	75,000	255,000
Individual & Non-School Groups	720,000	375,000	1,095,000
Philadelphia & Surrounding One-Hour	585,000	217,500	802,500
Out-of-Area	135,000	157,500	292,500
Non-Hotel Out-of-Area Visitors	99,000	115,500	214,500
Hotel-Occupying Visitors	36,000	42,000	78,000
Room-nights Occupied	12,000	14,000	26,000

Source: Philadelphia Zoo, Please Touch Museum, Urban Partners

Based on this projection of annual visitors, the following out-of-facility retail demand is calculated to be $22 million for total dining expenditures, $14 million for total merchandise expenditures, and 102 hotel room nights.

Table 10: Projected Out-of-Facility Retail Demand

Dining Expenditures	
Philadelphia & Surrounding One-Hour	$13,640,000
Non-Hotel Out-of-Area Visitors	$3,860,000
Hotel-Occupying Visitors	$4,680,000
Total Out-of-Facility Dining Expenditures	**$22,180,000**
Merchandise Expenditures	
Philadelphia & Surrounding One-Hour	$10,430,000
Non-Hotel Out-of-Area Visitors	$2,570,000
Hotel-Occupying Visitors	$1,950,000
Total Out-of-Facility Merchandise Expenditures	**$14,950,000**
Hotel Market	
Hotel Rooms Supported @ 70% Occupancy	102

Retail Development Potential: Out of Facility Demand

The market potentials for Centennial District retailers to capture this out-of-Facility retail demand are shown on the following table. A capture rate of 30% is used for dining expenditures and a rate of 15% is used for merchandise expenditures. Based on this set of assumptions pertaining to the out-of-facility retail demand, the Centennial District can support **9,000 SF of full-service restaurants**, **7,000 SF in limited-service restaurants**, and **8,000 SF of store space dedicated to merchandise sales**.

Table 11: Facility Visitor Market Potential for Centennial District Retailers

Dining	
Total Out-of-Facility Dining Expenditures	$22,180,000
Centennial District Potential Capture	30%
Total Centennial District Market Potential	$6,652,000
Supportable Store Space	
Full-Service Restaurants	9,000
Limited Service Restaurants	7,000
Merchandise	
Total Out-of-Facility Merchandise Expenditures	$14,950,000
Centennial District Potential Capture	15%
Total Centennial District Market Potential	$2,245,000
Supportable Store Space	8,000

As for the market potential for hotel rooms, the demand originating from the two institutions is insufficient in and of itself to attract new hotel development. In addition to meeting the out-of-facility demand from the Zoo and the Please Touch Museum, a successful new hotel in the Centennial District must capture the spillover demand from Center City, City Avenue, and University City areas. A detailed analysis of the hotel market potential is discussed in the next section.

HOTEL MARKET

Urban Partners obtained Smith Travel Research data on the eight upscale and mid-level hotel properties in the general vicinity of the Centennial District—which comprised of three hotels on City Avenue, three in University City, and two in the western portion of Center City. These eight hotels together include 1,746 rooms. Both supply and demand were somewhat larger prior to the closing of the Adam's Mark Hotel on City Avenue in early 2005.

Since the Adam's Mark closing, hotel room demand in this Centennial District hotel area has remained generally stable in the range of 430,000 to 450,000 roomnights annually (see **Table 12**). Between 2005 and 2007, the occupancy rate has grown modestly from 67.5% to 70.6%. This stable and slightly growing occupancy, however, has triggered significant average room rate increases from $117.26 in 2004 to $151.63 in 2007—a 29.3% increase that dramatically exceeded the 10% inflation during these three years. This suggests that underlying demand may be stronger than actual utilization on certain nights—driving up pricing.

Furthermore, approximately 10% of this roomnight supply is at the Best Western Center City which is scheduled to close at some point to make way for the Parkway 22 condominium development. Demand in this area will be further expanded due to the increase attraction of the Please Touch Museum, which forecasts in its stabilized year, an increase of 270,000 in visitation.

Table 12: Hotel Market Analysis–Centennial District Area

	Supply (Room Nights)	Demand (Room Nights)	% Occupancy	Average Room Rate
2002	920,839	554,119	60.2%	$112.61
2003	785,114	457,254	58.2%	$112.68
2004	780,735	478,351	61.3%	$117.26
2005	653,255	441,198	67.5%	$133.15
2006	637,290	429,447	67.4%	$138.43
2007	637,290	449,980	70.6%	$151.63
2008 - First 3 mos.	157,140	89,797	N/A	$151.20

Source: Smith Travel Research

Given these factors, it seems reasonable to conclude that a new family-oriented hotel could be added in the Centennial District. This hotel would be aimed in part at servicing the family groups attracted to the Zoo and Please Touch Museum, but would also capture spillover demand from City Avenue and University City, benefit from highway pass-by traffic on I-76, and capture price-sensitive spillover from Center City. The hotel would need to provide shuttle services to Center City and University City.

The most effective location for this new hotel would be along Girard Avenue near the eastbound I-76 off-ramp and the two I-76 on-ramps. We would expect a facility of approximately 120-150 rooms with limited services similar to a Comfort Inn and Suites, Holiday Inn Express, Hampton Inn, or Hilton Garden Inn. Detailed explanation of this hotel concept is in the Development Strategies section of the report.

HOUSING MARKET

As illustrated in the Existing Conditions section, the residential segment of the Centennial District is showing characteristics that are emblematic of a disinvested neighborhood on the verge of undergoing significant changes. Between January 2007 and January 2009, the median sale price for the 37 residential properties sold was $57,284, or $32 per square foot (see **Appendix A**). Despite the relative inactivity in the market and the exceptionally low property values, the housing market in the Centennial District is well positioned for a quick recovery. The District offer services and amenities that rival higher cost communities in the City. They include: i) the presence of large employment centers (i.e. the cultural institutions, West Parkside Industrial Park, Philadelphia Business Technology Center, and Park West Town Center); ii) easy access to open space and recreational amenities; iii) the availability of good transit services; and iv) close proximity to expressway on-ramps and off-ramps.

The private market has recognized these market potentials and speculators have been investing in the area in large numbers. Outside investments into the community can be positive in that they stimulate the real estate market so that redevelopment projects can proceed, but they must be counter-balanced with programs that empower the local residents lest the existing residents can be displaced by the rapidly increasing living costs. There are conspicuous signs of investor activity in the neighborhood as indicated by a high percentage of properties that list mailing addresses that are different from property addresses. For the period January 2007 to January 2009, 61% (or 28 out of 46) of the properties transferring ownership appear to be purchased by investors (see **Appendix A**).

A relevant case study for the housing market potential is the Brewerytown Square development on the other side of Schuylkill River, just north of Girard Avenue. This 144-unit project, which is the initial phase of a larger master plan community to be built in Brewerytown, is comprised of market-rate stacked townhomes with attached garages. The developer marketed these homes to the general public listing many of the neighborhood amenities that the Centennial District can also claim.

There are two variations in unit styles: the Amber (2 bedroom, 2 bath) and the Lager (3 bedroom, 2.5 bath). **Table 13** which is shown on the following page lists all 47 units that were sold between January 2007 and December 2008.

According to Win2Data, the average sale price for the Lager was $338,198 or $247 per SF, and the sale prices for the Amber averaged $283,979 or $231 per SF. As of January 2009, the developer reported that all 144 units in the Brewerytown Square project have been sold out. The success of the Brewerytown Square development provides reasonable assurance that market-rate residential developments of scale in the Centennial District can be feasible provided that the existing housing stock is stabilized through extensive rehabilitation and in-fill development and the various neighborhood amenities are continuously enhanced.

Table 13: Home Sales for Brewerytown Square, 2007-2008

The Lager: 3 bedroom, 2.5 bath

	Address	SF		Price
2	Brewerytown Ct.	1,367	$	400,356
3	Brewerytown Ct.	1,367	$	390,000
19	Brewerytown Ct.	1,367	$	385,990
18	Brewerytown Ct.	1,367	$	381,090
9	Brewerytown Ct.	1,367	$	354,990
14	Brewerytown Ct.	1,367	$	344,990
1329	N. 32nd St.	1,367	$	339,765
1311	N. 32nd St.	1,367	$	338,690
15	Brewerytown Ct.	1,367	$	338,659
3160	W. Master St.	1,367	$	329,900
1335	N. 32nd St.	1,367	$	320,000
1305	N. 32nd St.	1,367	$	319,990
1	Brewerytown Ct.	1,367	$	317,074
1303	N. 32nd St.	1,367	$	315,000
34	Brewerytown Ct.	1,367	$	292,990
29	Brewerytown Ct.	1,367	$	289,990
26	Brewerytown Ct.	1,367	$	289,900
	Average sale price		**$**	**338,198**
	Average sale price/SF		**$**	**247**

The Amber: 2 bedroom, 2 bath

	Address	SF		Price
4	Brewerytown Ct.	1,230	$	323,145
20	Brewerytown Ct.	1,230	$	322,380
17	Brewerytown Ct.	1,230	$	310,000
1339	N. 32nd St.	1,230	$	307,755
11	Brewerytown Ct.	1,230	$	299,990
16	Brewerytown Ct.	1,230	$	299,990
5	Brewerytown Ct.	1,230	$	289,900
13	Brewerytown Ct.	1,230	$	289,900
10	Brewerytown Ct.	1,230	$	284,990
3148	W. Master St.	1,230	$	280,250
30	Brewerytown Ct.	1,230	$	279,900
1307	N. 32nd St.	1,230	$	276,794
3140	W. Master St.	1,230	$	270,000
36	Brewerytown Ct.	1,230	$	269,990
1301	N. 32nd St.	1,230	$	264,990
1309	N. 32nd St.	1,230	$	263,690
1319	N. 32nd St.	1,230	$	263,690
1325	N. 32nd St.	1,230	$	262,240
1321	N. 32nd St.	1,230	$	259,990
1332	N. 32nd St.	1,230	$	259,990
	Average sale price		**$**	**283,979**
	Average sale price/SF		**$**	**231**

Source: Win2Data, Urban Partners

In addition to attracting market-rate residences, the Steering Committee has also identified long-term housing affordability as a high priority. Currently, the District's home prices are within reach of families earning far below the Area Median Income. As additional public and private investments are made in the Centennial District, the private housing market will begin to respond to developmental pressures and low– to moderate–income families can be priced out of even modest homes. In order to protect the interests of long-term residents and to promote the Centennial District as a mixed-income community, the City must implement a set of strategies that balance affordable housing preservation and market-rate development.

KEY ISSUES AND OPPORTUNITIES FOR THE DISTRICT

ISSUES

- Despite the wide recognition of the Centennial District as a major regional family entertainment zone, the District's shops and stores have largely been unsuccessful at capturing the excess retail demand being generated by the cultural institutions. The traditional commercial node located near the intersection of 40th Street and Girard Avenue has gone through decades of decline and disinvestment. What exists now are a bare minimum of retail shops and services that capture only a portion of the local trade area demand.
- The District suffers from a lack of connectivity, essentially isolating each cultural institution as independent venues. Currently, the only practical option for visitors to travel from one area of the District to another is to get back in their cars. This minimizes the synergistic relationships between the various institutions/venues and local business establishments that can be cultivated for mutual benefit.
- The opening of the Park West Town Center has dramatically changed the scene so that a majority of the excess retail demands from the neighborhoods are now seized by the new establishments in the shopping center. However, there's still a supply and demand mismatch between the cultural institution visitors' shopping patterns and the mix of shops and services that are currently operating in the District.
- According to the 2000 Census, 36% of the District's residents live below the poverty line, and the average educational attainment and the number of persons employed are far below the City average.
- In spite of the substantial residential rehabilitation work being undertaken by the non-profit and for-profit developers, the vacancy rate in the District is high and there are many distressed properties. The study area includes 2,714 housing units and a vacancy rate of 23%. Furthermore, the homeownership rate of 45% as reported by the 2000 Census is notably low when compared to the rest of the City (59%).
- The housing stock is significantly older than that of the rest of the City, which can be a positive as described in the Opportunities section below, but also presents itself as challenges in terms of physical deterioration and neighborhood blight. A vast majority (81%) of the homes in the study area were built before 1950, compared to 58% of the homes in Philadelphia.
- Home sales have been anemic with only 37 residential transactions between January 2007 and January 2009. The median sale price for those 37 homes was $57,284, or $32 per square foot.
- Due to poor roadway design and an insufficient number of pedestrian crosswalks, the park area of the District is disconnected from the neighborhoods. Currently, there are only six crosswalks across Parkside Avenue between 40th Street and 52nd Street, forcing pedestrians to either walk very long distances or to jaywalk.
- The Streets Department facility and SEPTA's Parkside Bus Loop serve important services to the residents of the District and the rest of the City, but their prominent locations along Parkside Avenue pose challenges to the redevelopment of the District.

- The closing of (and the subsequent delay in repairs to) the bridges on 40th Street and 41st Street have isolated the East Parkside neighborhood to the rest of West Philadelphia and contributed to the decline of the 40th and Girard commercial corridor.
- There are major concerns for traffic congestion during peak visitor season for the Zoo and the Please Touch Museum. Even prior to the Please Touch Museum's relocation to Memorial Hall, there have been long wait times and congestion at the eastbound and westbound Girard Avenue exits on I-76 (Schuylkill Expressway). A coordinated effort must be made to reduce the number of automobiles traveling into the District.
- Other than passive recreational fields, there are no activity zones or visitor services on the Fairmount Park portion of the District. The Centennial District Master Plan proposes various activities such as miniature golf, paddle boats, and a neighborhood park.
- The vacancy rate in the West Parkside Industrial Park has been reduced significantly with the development of the Park West Town Center and the Cintas Corporation's new facility, but 25 acres still remain vacant.

OPPORTUNITIES

- With key public and private investments, new and existing commercial establishments can capture up to $8.9 million worth of excess retail demand generated by the visitors of the Zoo and the Please Touch Museum. This translates into 9,000 SF of full-service restaurants, 7,000 SF of limited-service restaurants, and 8,000 SF of store space dedicated to merchandise sales. Additionally, the District can support a limited service hotel with 120 to 150 rooms.
- Despite the relative inactivity in the housing market and the exceptionally low property values, the housing market in the Centennial District is well positioned for a quick recovery. The District offer services and amenities that rival higher cost communities in the City. They include: i) the presence of large employment centers (i.e. the cultural institutions, West Parkside Industrial Park, Philadelphia Business Technology Center, and Park West Town Center); ii) the easy access to open space and recreational amenities; iii) the availability of good transit services; and iv) the close proximity to expressway on-ramps and off-ramps.
- The older housing stock in the Study Area represents an abundant supply of historically significant homes—as is evidenced by the mansions located along Parkside Avenue, for example. If preserved and renovated properly, the value of these historic homes can exceed even the newer residential properties.
- If the Streets Department facility and SEPTA's Parkside Bus Loop can be relocated, a mixed-use development on the 4800 block of Parkside Avenue can create a positive southern edge to the Park.
- There are strong civic organizations that are very active in advocating for quality of life improvements in their neighborhoods. Their on-going participation and involvement in the implementation stages of these economic development strategies will prove to be a critical asset.
- The existing incentive zones (the Empowerment Zone, the Renewal Community, and the Keystone Opportunity Zone) are effective tools in recruiting large scale employers to locate in the District, and particularly in the West Parkside Industrial Park.

- Adding a miniature train ride can serve the dual purpose of transporting visitors within the District and helping to create a critical mass of attractions within the District, and thereby increasing the potential for greater economic impact.
- Due to the presence of existing infrastructure for rail and trolley lines, creating additional services will be relatively inexpensive. New transit services will help alleviate road congestion in this area and benefit the whole City.
- Adding activities and visitor services in the Park can create economic opportunities for the community-based businesses and employment opportunities for the residents.

DEVELOPMENT STRATEGIES

1. GIRARD AVENUE GATEWAY

With the Please Touch Museum relocating to Memorial Hall and the Philadelphia Zoo continuing to draw close to a million annual visitors, the area between the two institutions will be the focal point of economic activity in the Centennial District. In order to capture as much of the commercial demand generated by the park visitors, as well as the residents of the area, an aggressive development scheme is recommended near the intersection where Parkside Avenue, Girard Avenue and 40th Street converge.

The Girard Avenue Gateway is envisioned as a classic transit-oriented development node that is designed to encourage growth along the existing trolley line as an extension of the plan being spearheaded by the Girard Coalition east of the Schuylkill River. Key development elements are described below:

3900 BLOCK OF GIRARD AVENUE

4000 BLOCK OF GIRARD AVENUE

3400 BLOCK OF GIRARD AVENUE

Proposed Developments (3900-4000 Girard)	Preferred Development Site
- Free standing family oriented restaurant (5,500 SF).	- As close as possible to the Schuylkill Exp. and the Zoo's front entrance.
- Medium size diner (3,000 SF) and a small parking lot to service a portion of the customers.	- At a high-profile site for visitors traveling on Parkside Avenue.
- Two 4-story mixed-use buildings with commercial on the ground floor and condominiums on the upper floors.	- One on each block.
- 4-story mixed-use building with retail on the ground floor and either professional office space or supportive service residences on the upper floors.	- Central location in the Gateway to serve as the anchor development. Must be accessible from multiple directions.
- 2-story mixed-use buildings with commercial on the ground floor and condominiums on the upper floors.	- In the middle of the Gateway as an infill development.
- Surface parking lot to accommodate various commercial needs.	- In close proximity to developments that generate the highest customer parking demands.
- 4-story condominium building.	- A larger parcel to accommodate a critical mass of residential units.

Proposed Developments (3400 Girard)	Preferred Development Site
- Hotel development in conjunction with expanded Zoo parking facility. The hotel is expected to have 120-150 rooms with limited services and built above the parking garage. A shared parking agreement should be arranged with the Zoo.	- Zoo parking lot at 34th and Girard (currently owned by the Fairmount Park Commission).

2. West Parkside Mixed-Use Development

The 4800 block of Parkside Avenue is envisioned as a mixed-use zone that is designed to add commercial and residential activity at the southern edge of the Park in West Parkside. With the proposed relocation of the Streets Department facility and SEPTA's Parkside Bus Loop, there's an opportunity to develop a large scale project that will transform this block.

Stacked townhomes on top of ground floor retail/office space is the proposed development strategy for this block. Each of the townhomes must have its own private entrance from the street. The commercial space will be programmed for office use and convenience retail. The image below is a photo simulation of the streetscape in a mixed-use development along Parkside Avenue.

3. HOUSING INVESTMENT STRATEGIES

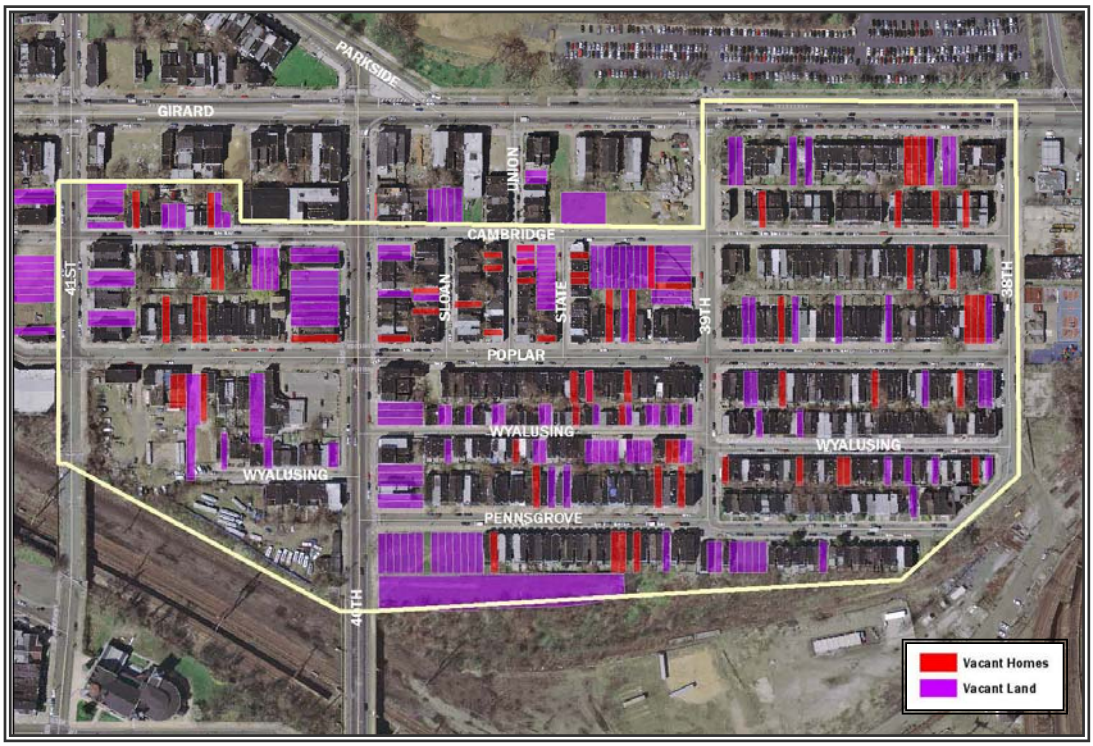
The Steering Committee for this study identified balanced residential development as a key development objective for the Centennial District. The goals of the Housing Investment Strategies are to: i) stabilize the existing housing stock by making repairs to owner-occupied homes and rehabilitating deteriorated/vacant housing units; ii) produce in-fill housing development on vacant lots in residential blocks; and iii) attract market rate housing development to new construction and substantially rehabilitated properties where units are not required to meet other housing objectives.

There are two high priority target zones for this initiative: a section of **East Parkside** that is south of Girard Avenue and East of 41st Street, and the 5100 block of **Columbia Avenue** (in West Parkside).

A. East Parkside Targeted Housing Investment Zone

The following blocks are targeted for the East Parkside Targeted Housing Investment Zone:

- 3800 blocks of: Girard Avenue, Cambridge Street, Poplar Street, Wyalusing Avenue, and Pennsgrove Street
- 3900 blocks of: Cambridge Street (southside), Poplar Street, Wyalusing Avenue, and Pennsgrove Street
- 4000 blocks of: Cambridge Street, Poplar Street, Wyalusing Avenue, and Pennsgrove Street
- 1000 blocks of: N. State Street, N. Union Street, and N. Sloan Street
- N. 39th Street between Pennsgrove Street and Cambridge Avenue
- N. 40th Street between the bridge and Cambridge Avenue
- N. 41st Street between the bridge and Cambridge Avenue



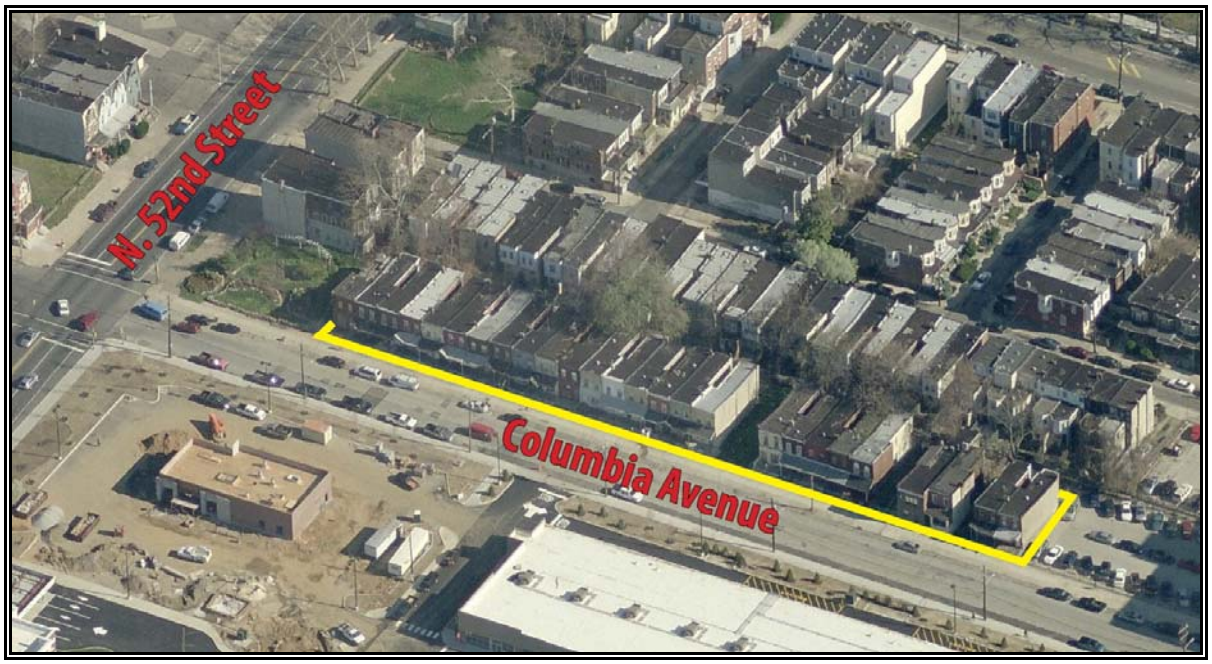
The following are various elements of the housing investment program:

- *Homeowner support program*
  - Homeowner counseling to protect residents from some investors and predatory lenders who may surreptitiously be trying to displace existing homeowners. A pre-purchase counseling program may also be offered for those families who are currently renting but would like to purchase a home.
  - Homeowner grants/loans to repair problems with electrical, plumbing, heating and structural systems.
  - Façade improvement for all residential properties. Eligible uses to be limited to exterior improvements such as lighting, porch repairs, landscaping, and exterior painting.
- *Code enforcement of investor owned properties*
  - Working in conjunction with code enforcement officers from the Department of License and Inspections, monitor properties in the target zone that are distressed and blighted. Aggressively pursue these properties with fines and penalties until the owner can prove that proper repairs have been made.
- *New housing developments*
  - A limited number of new condominiums. A prime location for condos would be 3810-16 Girard Avenue which is a 6,700 SF vacant lot.
  - New infill construction units are appropriate on vacant lots that have at least 30 feet of street frontage. Smaller lots should be improved as side yards or neighborhood gardens.
  - Larger new housing developments are appropriate for residential blocks with substantial amounts of contiguous vacant lots. Limited amounts of selected demolition of existing structures may be necessary to assemble the parcels.
- *Substantial rehab of vacant homes*
  - Utilize funds from the Homeownership Rehabilitation Program (HRP), which is administered by Philadelphia Housing Development Corporation. The HRP provides gap financing for eligible projects that are sold to families earning less than 80% of the Area Median Income who are first time homeowners. The proposed blocks for the HRP must have less than 10% vacancy.
- *Side yard beautification program*
  - This program is designed for small vacant lots that are too small for infill new construction. Ownership of vacant lots can be transferred to adjacent homeowners or neighborhood groups to be used as side yards and/or community gardens.

Once substantial progress has been made on the high priority target zone, the program can be expanded to the rest of East Parkside.

B. Columbia Avenue Targeted Housing Investment Zone

Despite the major investment in the Park West Town Center which is immediately adjacent, the 5100 block of Columbia Avenue continues to suffer from high vacancy and deteriorating housing stock. Out of a total of 29 properties on this block, there were four vacant lots and six vacant houses. 15 properties were recorded with off-site mailing addresses.



Targeted investment on this block must entail a combination of four different programs: homeowner support, substantial rehabilitation for sale, new construction, and vacant lot beautification.

- Homeowner support programs include basic systems repair, façade improvement, and homeowner counseling.
- New construction is proposed for 5143 and 5145 which are contiguous lots.
- Substantial rehabilitation is proposed for vacant and blighted properties. Developers can apply for funding through PHDC's Homeownership Rehabilitation Program that provides subsidies in the form of soft-second mortgages to the homebuyer.
- Vacant lot beautification program is proposed for lots that are too small to accommodate an infill new construction project. This program can be offered to vacant lot owners and adjacent property owners. Parkside Association may help organize joint management of the lots.

4. MINI-NODES

In addition to the major development nodes, there are five Mini-Nodes that will round out the development in the Centennial District.

A. Girard & Belmont

This is a highly visible and traveled intersection in the Centennial District. According to DVRPC, the traffic count for this intersection is 17,312 per day. This is the best location for a new 12,000 to 14,000 SF pharmacy that will capture the demand originating from within the study area and from the neighborhoods to the south.

B. 52nd & Parkside

Full service restaurant and bar at the Parkside Inn and the adjacent vacant lot on 52nd Street. The owner of Parkside Inn also owns the vacant lot and has expressed interest in developing the properties to complement the objectives of the Centennial District. This is a visible intersection adjoining the Mann Center and Fairmount Park. Two proposed developments would transform this high vacancy area and draw traffic to the Park West Town Center and function as a gateway to the Parkside community.

On the southwest corner of 52nd and Parkside, the Parkside Association and a non-profit developer are proposing to develop a 4-story mixed-use building. The ground floor would be devoted to retail and office use. The floors above would be affordable and accessible one-bedroom apartments targeted to senior citizens and the physically disabled.

C. 53rd & Jefferson

Market rate homes on the western side of 53rd Street between Columbia Avenue and Jefferson Street. The City Planning Commission has already reviewed a private developer's plan to build 27 units with parking in the rear.

D. 51st & Parkside

New homes on the southwest corner of this intersection. This parcel is the only vacant lot in an otherwise intact residential block.

E. 50th & Parkside

Determine the highest and best use of the vacant lot on the southeast corner to facilitate expansions of current businesses. A consensus development strategy must be agreed by various stakeholders including Philadelphia Industrial Development Corporation, the Business Association of West Parkside, Philadelphia Business Technology Center, Parkside Association, Rockland Capital, and Consolidated Drake Press.

ACTIVITY/SERVICE EXPANSION FOR PARK VISITORS & RESIDENTS

The family friendly theme of the Centennial District is the economic engine that can be further expanded to generate the maximum benefit for the District. Most of the following recommendations for activity/service expansion are taken directly from the Centennial District Master Plan, with the notable exception of the Miniature train ride concept. The proposed initiatives are programmed for the area that the Master Plan calls the "Centennial Commons" which extends from 40th Street to 52nd Street, between Parkside Avenue and North Concourse Drive (or Avenue of the Republic). This one mile long area is envisioned as the District's front yard.

First, new activities and attractions are proposed to further increase the District's appeal to younger families and other active visitors:

- Miniature train ride (a detailed description of this ride can be found in the following subsection).
- Baseball-related activities, such as batting cages, near the Negro League Memorial.
- Potential activities at Centennial Lake & Concourse Lake: environmental education center; paddleboats; and model boats.
- Other outdoor activities: miniature golf; ice skating; and jogging loop. A 5K trail is currently under development.
- Horse/carriage rides.

Second, enhancements are proposed in the park to accommodate the residents of the surrounding neighborhoods. New park amenities include playgrounds, picnic areas, dog-walks, community gardens, basketball courts and other smaller scale uses that can directly serve the needs of those who live in the adjacent neighborhoods.

Lastly, retail service kiosks are proposed in the park to offer park users snacks and refreshments. Specifically, two kiosks are proposed near attractions and miniature train stops: one next to the proposed batting cages near the Negro League Memorial and the other located farther east.

MINIATURE TRAIN RIDE

The underlying purposes for installing a miniature train attraction in the Centennial District are to reinforce the family friendly theme of the District and allow visitors to travel from one area of the park to another without having to get back in their cars. The Master Plan recognized the need to transport people within the District and recommended a system of trams to be put in place. Operating electric vehicles with rubberized tires on existing recreational paths may require the least amount of initial capital investment, but these trams are not attractions in and of themselves and thus do not produce any revenue for the operator.

Miniature trains, on the other hand, will add to the visitor experience as a legitimate park attraction that evokes the rich legacy of trains and train travel at the Centennial Exhibition. In addition, if a source of funds can be identified to pay for the initial capital expenses, this

attraction can yield a substantial net cashflow to the ownership entity. A detailed pro forma is shown later in this section.

Miniature Train Rides in Other Cities

Across the country, miniature trains are generally found in zoos and theme parks. Generally speaking, the cost of riding a theme park miniature train is included in park admission. The cost of riding trains operated by zoos, on the other hand, is generally not included in the cost of admission.

The following zoo train statistics were compiled from interviews with several zoos around the country:

- Hours of Operation: Trains run continuously eight hours a day generally between 9 a.m. and 5 p.m.
- Ticket Pricing: In most cases there were different prices for adults and children.
  - Children's tickets averaged $2.50 and ranged from $1.00 to $5.00.
  - Adult tickets averaged $2.87 and ranged from $2.00 to $5.00.
- Length of Ride: Ride times averaged 20-25 minutes and ride lengths averaged 2.4 miles
  - Length of rides ranged from 3 minutes to 35 minutes.
  - Length of rides ranged from 1 mile to 4 miles.
  - Trains have anywhere between 0 (closed circuit) to 2 stops.
- Number of Trains: Most parks have multiple trains (usually 2) and the average number of cars per train is 4. Some have a handicap accessible car.
  - Number of cars per train ranges from 3 to 7.
- Maximum Train Capacity: Train capacity varies depending on what percentage of passengers is comprised of children.
  - Maximum capacity ranged from 13-36 per car and 35-225 per train (depending on number of cars).
  - The average capacity for an entire train is 72.

Case Study: San Antonio Zoo Train

The Brackenridge Eagle Train at the San Antonio Zoo runs daily, every twenty minutes between the hours of 9:45 a.m. and 5:30 p.m. The cost of admission is $2.75 for adults and $2.25 for children, and infants under the age of 2 ride at no cost. The San Antonio Zoo manages the

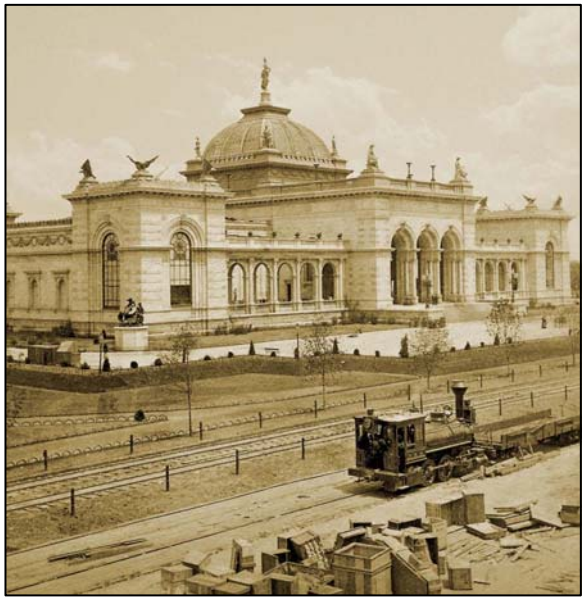
railway, which consists of 3 trains. The Brackenridge Eagle passes the zoo and travels 2.5 miles around the park. Besides its initial loading/unloading point at the Sunken Garden, the trains make one stop at the Witte Museum. The zoo runs all three trains on a daily basis unless one is in need of repairs. Each train is made up of 5 cars and has a total capacity of 70. Two trains were acquired in 1988 and one in 2007. The cost of "Lukey," the most recent train acquisition, was $338,920. All trains were manufactured by Chance Morgan Manufacturers (see **Appendix C** for specifications of the train).

Table 14: Fiscal Analysis of the Brackenridge Eagle Train, San Antonio Zoo

	2004	2005	2006	2007	2008*
Train Ticket Sales	$588,012	$611,533	$690,406	$741,667	$664,211
Operating Expense	$151,630	$150,593	$122,859	$122,237	$118,927
Net Profit	$436,382	$460,940	$567,547	$619,430	$545,284
Net Margin	74%	75%	82%	84%	82%

** The SA Zoo has a fiscal year ending Sept. 30. The 2008 numbers reflect sales for nine months ending June 30, 2008.*

Miniature Train Ride in the Centennial District

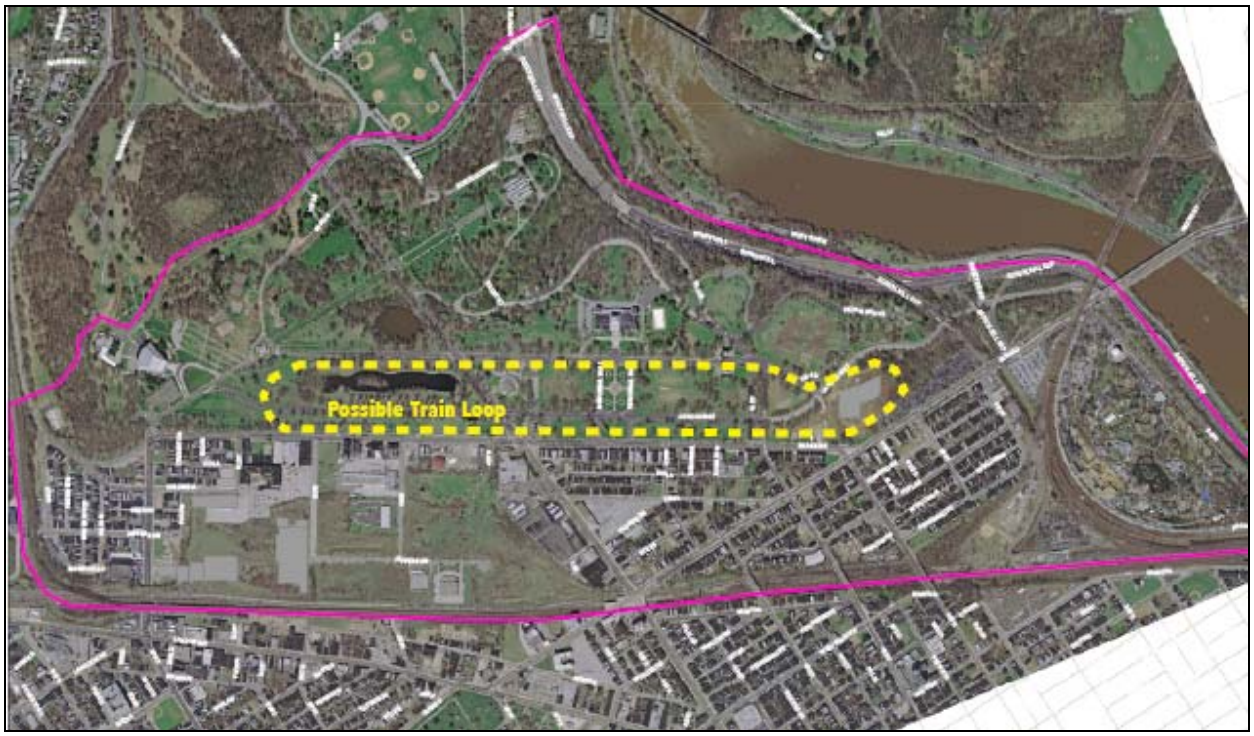


A train seen in front of Memorial Hall just before the opening of the Centennial Exhibition on May 10, 1876

The Centennial Exposition of 1876 was held only seven years after the completion of the nation's first Transcontinental Railroad. The railroads played a crucial role in enabling millions to travel to Philadelphia during the eight months the Exhibition was open. The Miniature Train in the Centennial District can incorporate this rich history of trains into a fun, family-friendly ride that will extend the average length of stay for the District's visitors.

The miniature train in the Centennial District would operate on tracks that run approximately 3.5 miles, transporting passengers between the three major attractions (i.e. the Philadelphia Zoo, Memorial Hall, and the Mann Center for the Performing Arts). The tracks are proposed to be installed in areas of the park that are not active recreation fields.

Map 3: Proposed Train Loop



The preliminary financial analyses for the Centennial Train were prepared from information gathered from interviews with operators of other zoo trains:

Table 15: Miniature Train Ride Preliminary Economic Analysis

Preliminary Capital Costs

Distance	3.5	Miles	
Ground Preparation & Finish	100,000	Square Feet	
Storage Shed	3,000	Square Feet	
Main Station	200	Square Feet	
Other Station/Stops (2)	200	Square Feet	Each
Ground Preparation & Finish	$6	Per SF	$600,000
Rail	$60	Per LF	$1,100,000
Trains (2)	$350,000	Each	$700,000
Storage Shed	$90	Per SF	$270,000
Crossing Signage/Lights/Etc.			$300,000
Main Station	$400	Per SF	$80,000
Other Station/Stops (2)	$150	Per SF	$60,000
Total			$3,110,000
Contingency/Escalation	25%		$780,000
Total			$3,890,000

Preliminary Operating Pro Forma

Weeks of Full Operation	28
Weeks of Weekends-Only Operation	4
Ticket Sales	250,000
Gross Revenue (@$3/Average)	$750,000
Full-Time Employees (2)	$120,000
Part-time Employees (Skilled--2000 hrs.)	$41,400
Part-time Employees (Other--1100 hrs.)	$13,600
Fuel	$25,000
Repairs	$10,000
Track & Station Maintenance	$35,000
Insurance	$25,000
Advertising	$15,000
Operating Expenses	$285,000
Net Operating Income	$465,000

The total capital costs for the miniature train ride is $3.89 million and the operation is projected to yield a significant net operating income of $465,000 per year. The revenue generated from this attraction can help defray the costs of maintenance and promotions for the Centennial District.

NEIGHBORHOOD CONNECTIVITY IMPROVEMENTS

New commercial and residential developments proposed in this report will result in increased vehicular traffic to an already popular entertainment district. Additional transit services must be created to accommodate new and existing residents, as well as the 1.3 million visitors to the cultural institutions.

There have been significant efforts that have addressed transportation and transit improvements in the District. First, the Delaware Valley Regional Planning Commission has published *Taming Traffic: Context-Sensitive Solutions in the DVRPC Region (2007)* that recommended specific traffic calming techniques and streetscape improvements along Parkside Avenue from 40th Street to 52nd Street.

Second, SEPTA has recently rerouted the Route 38 Bus to stop immediately in front of Memorial Hall. The Route 38 Bus now connects the Please Touch Museum with Independence Mall, the Ben Franklin Parkway, and the Philadelphia Museum of Art. Third, SEPTA is examining the possibility of relocating the Parkside Bus Loop, which is now located at the corner of 49th Street and Parkside Avenue, to a parcel closer to the newly built Park West Town Center. Lastly, the Zoo and other community stakeholders have been lobbying for a restoration of rail and trolley services to the District. The proposed services would utilize tracks that already exist.

In order to further investigate these and other transportation initiatives, to examine critical issues that pose challenges in transportation/transit services, and to propose a set of strategies for improving the District's connectivity, a transportation committee was created from within the Steering Committee. The following critical issues, short-term strategies, and long-term strategies were identified by the task force:

CRITICAL ISSUES

- Long wait times and congestion at the eastbound and westbound Girard Avenue exits on I-76 (Schuylkill Expressway).
- Although the area is relatively well served by SEPTA, there is still a lack of service to connect visitors and residents to the Centennial District.
- SEPTA Regional Rail routes R5, R6, R7, and R8 do not stop in the District even though they either pass by the Zoo or are in close proximity to the study area.
- Parking for the area is limited.
- Because the area is not pedestrian friendly, it's difficult to encourage people to leave their cars and utilize public transportation.
- The closing of the 40th & 41st Street bridges limits the connectivity to the area. The construction on the bridges will not begin until 2010 and entails the cooperation of AMTRAK, the Streets Department, PGW and PECO. This issue also undermines the Philadelphia Zoo's ability to encourage the development of transit service that may utilize the bridge on 40th Street.
- A comprehensive traffic study needs to be commissioned that compiles all of the current studies completed by the Philadelphia Zoo, the Delaware Valley Regional Planning Commission, and others.
- There's no designated area for taxis to convene to pick up and drop off passengers.

SHORT-TERM STRATEGIES:

- Commission a transportation study that integrates and updates all studies done for the area. The study needs to address parking, traffic congestion, how can the area be made pedestrian friendly, and how other modes of transportation can be best utilized (i.e. buses, trolleys, trains, etc.).
- Implement the following recommendations from DVRPC's *Taming Traffic* study: a) install a median on Parkside Avenue from 40th to 52nd; b) install pedestrian crosswalks on Parkside Avenue; c) remove the channelized turn lane for west bound traffic turning right onto Parkside Avenue from Girard Avenue and make the existing triangle into a landscaped gateway; and d) visually mark the trolley right-of-way (possibly with road paint) to discourage automobile access in the right-of-way.
- 52nd & Lancaster – recognizing this intersection of a major gateway, support the following initiatives: a) streetscape improvements along 52nd Street; b) installation of murals on the trusses on the Amtrak bridge; and c) cleaning up excessive undergrowth in various locations.
- 40th and 41st Street Bridges – a) advocate shortening the timeline to rebuild the bridges; and b) ask the Streets Department to address the dumping problem on the closed bridges;
- Reroute SEPTA bus routes to increase connectivity for residents and visitors to the area.
- Review the traffic plan conducted by the Philadelphia Zoo.

- Investigate PHLASH and Philadelphia Trolley Works as possible methods to decrease congestion in the area.
- Have conversations with the Philadelphia Parking Authority about a taxi stand and implementing strategies to decrease traffic congestion in the area.

LONG-TERM STRATEGIES:

- Support the opening of a SEPTA Regional Rail stop near the Zoo.
- Support the re-opening of a SEPTA Regional Rail stop near 52nd & Lancaster.
- Improve the connections from the District to Martin Luther King Drive.
- Support a new trolley line that connects the Zoo to 30th Street Station and City Hall using existing trolley tracks.

ACTION ITEMS AND RESPONSIBILITIES

This section describes the proposed action items for the development components organized by into phases. Wherever possible, an effort has been made to identify the entity responsible for coordinating the project as well as any supportive entities that may be involved.

Phase One

Development Component	Description	Coordinating Entity	Supportive Entities
Girard Gateway	- Facilitate site assembly of Girard between Union and 40th (all properties except for the church).		
Girard Gateway	- Facilitate site assembly of the diner site on the corner of Girard and Parkside.		
Girard Gateway	- Facilitate site assembly of the eastern half of the 4000 block of Girard (on the southside, 4000-4030 Girard).		
N/A	- Coordinate between various City agencies and departments.		
Park Activity Expansion	- Initiate detailed feasibility study and fundraising strategy for Miniature Train Ride.		

Phase Two

Development Component	Description	Coordinating Entity	Supportive Entities
W. Parkside Mixed Use	- Initiate the relocation of SEPTA bus turn around.		
W. Parkside Mixed Use	- Initiate the relocation of Streets Department facility.		
W. Parkside Mixed Use	- Seek funding for mixed-use development strategy on Parkside Avenue (48th to 49th Streets).		
Columbia Avenue	- Fund property-specific development strategy for 5100 block of Columbia. ▫ 10 units of homeowner support program. ▫ 6 units of substantial rehabs for sale. ▫ 4 unit of new construction. ▫ No side yards.		
E. Parkside Housing	- Initiate counseling services for existing homeowners in E. Parkside.		
E. Parkside Housing	- Acquire 31 properties for infill construction and substantial rehabilitation in initial E. Parkside target area (12 are currently owned by City of Philadelphia or by E. Parkside Residents Association).		
Girard Gateway	- Facilitate discussion of the availability Zoo parking lot for negotiations with a hotel developer.		
Girard Gateway	- Develop 3900 block of Girard between Union and 40th. - Develop diner on the corner of Girard and Parkside. - Develop Parking lot on the 4000 block of Girard.		
Park Activity Expansion	- Complete the 5K jogging loop (currently under construction).		
Park Activity Expansion	- Complete Miniature Train Ride attraction.		

Connectivity Improvements	- Implement recommendations from DVRPC's Taming Traffic study.		
Connectivity Improvements	- Support streetscape improvements at 52nd and Lancaster.		
Connectivity Improvements	- Advocate shortening the timeline to rebuild the bridges and address the dumping problem on the closed bridges.		
Connectivity Improvements	- Reroute SEPTA bus routes to increase connectivity for residents and visitors to the area.		
Connectivity Improvements	- Commission a transportation study that integrates and updates all studies done for the area.		
Connectivity Improvements	- Review the traffic plan conducted by the Philadelphia Zoo.		
Connectivity Improvements	- Investigate PHLASH and Philadelphia Trolley Works as possible methods to decrease congestion in the area.		
Connectivity Improvements	- Have conversations with the Philadelphia Parking Authority about a taxi stand and implementing strategies to decrease traffic congestion in the area.		
Mini Nodes	- Redevelop the former Parkside Inn and other properties located near 52nd and Parkside as complementary uses.		
Mini Nodes	- Support the development of market-rate homes at the western half of the 1700 block of N. 53rd.		
Mini Nodes	- Determine the highest and best use of the vacant lot on the southeast corner. Agree on a consensus development strategy among various stakeholders.		

Phase Three

Development Component	Description	Coordinating Entity	Supportive Entities
E. Parkside Housing	- Focus on the 3800 blocks of Girard, Cambridge, Poplar, Wyalusing, and Pennsgrove. ▫ Homeowner Support Program (façade and systems): 50% participation – 74 units. ▫ Code enforcement of investor owned properties: 111 units. ▫ New condos on Girard Avenue: 12,000 SF (~ 8 units). ▫ Infill new construction: 18 units. ▫ Substantial rehab of vacant homes: 17 units. ▫ Side yard beautification program: 14 parcels.		
E. Parkside Housing	- Site assembly of properties for major development [56 out of a total of 480 properties (12%) are in public ownership, which includes East Parkside Residents Association].		
E. Parkside Housing	- Expansion of homeowner support, code enforcement, side yard strategies to areas between 39th and 41st.		
Girard Gateway	- Develop 5,000 SF restaurant and the professional building at 40th and Girard. - Develop Hotel/parking improvements at Zoo.		
Girard Gateway	- Large condominium building on Girard between 39th and Union.		

W. Parkside Mixed Use	- Construct mixed-use and residential only structures on publicly owned land – 22 housing units, 5 commercial spaces.		
Park Activity Expansion	- Parkside neighborhood park and amenities: playground, basketball courts, picnic areas, neighborhood garden, etc.		
Park Activity Expansion	- Add miniature golf		
Mini Nodes	- Recruit a new full service pharmacy at the intersection of Girard and Belmont		
Mini Nodes	- New homes on the southwest corner of 51st and Parkside.		

Phase Four

Development Component	Description	Coordinating Entity	Supportive Entities
E. Parkside Housing	- Major new housing construction for homeownership.		
E. Parkside Housing	- Extended mixed-use development to remainder of 4000 block of Girard.		
Girard Gateway	- Other smaller condominium buildings.		
W. Parkside Mixed Use	- Expand mixed-use development to privately owned properties – 8 housing units, 4 commercial spaces.		
Park Activity Expansion	- Centennial & Concourse Lake use: environmental education; paddle boat rides or model boat racing. Outdoor activities: ice skating, and baseball-related activities at the Negro League Memorial (e.g. batting cages).		
Park Activity Expansion	- Horse/carriage rides.		
Park Activity Expansion	- Retail service kiosks vended by local entrepreneurs (two kiosks located near attractions and train stops).		
Connectivity Improvements	- Support the opening of a SEPTA Regional Rail stop near the Zoo.		
Connectivity Improvements	- Support the re-opening of a SEPTA Regional Rail stop near 52nd & Lancaster.		
Connectivity Improvements	- Improvement the connections from the District to Martin Luther King Drive.		
Connectivity Improvements	- Support a new trolley line that connects the Zoo to 30th Street Station and City Hall using existing trolley tracks.		

APPENDIX A – REAL ESTATE TRANSACTIONS (JAN 07 – JAN 09)

Does not include acquisitions for the Park West Town Center

Residential Transactions

Street #	Street Address	Mailing Address	Mailing City	Land Use	Living SF	Sale Price	Sale Date
3853	Cambridge St*	3838 Cambridge St	Philadelphia Pa 19104	Apartment	1776	$ 107,000	01/19/07
1115	N 40th St*	1844 Buttonwood Ln	Quakertown Pa 18951	Townhouse/rowhouse	1957	$ 14,224	01/24/07
4023	Poplar St*	1844 Buttonwood Ln	Quakertown Pa 18951	Townhouse/rowhouse	1506	$ 14,224	01/24/07
3912	Poplar St*	7901 Henry Ave #g111	Philadelphia Pa 19128	Townhouse/rowhouse	1344	$ 46,000	02/10/07
5247	W Jefferson St*	4703 Conshohocken Ave	Philadelphia Pa 19131	Apartment	1848	$ 51,000	02/27/07
3829	Pennsgrove St	3829 Pennsgrove St	Philadelphia Pa 19104	Townhouse/rowhouse	808	$ 61,000	02/28/07
4125	Poplar St*	306 Gleaves Rd	Springfield Pa 19064	Townhouse/rowhouse	1640	$ 57,284	03/09/07
5238	Parkside Ave*	Po Box 13094	Philadelphia Pa 19101	Apartment	2843	$ 145,000	03/12/07
4173	Leidy Ave*	942 N 48th St	Philadelphia Pa 19131	Apartment	2403	$ 43,000	03/21/07
5257	W Jefferson St*	819 Caledonia St	Philadelphia Pa 19128	Apartment	1656	$ 30,000	03/22/07
4183	Leidy Ave	4183 Leidy Ave	Philadelphia Pa 19104	Apartment	2403	$ 180,000	03/23/07
1112	N 42nd St	6 S 51st St	Philadelphia Pa 19139	Apartment	1818	$ 50,000	03/30/07
4251	Viola St*	513 N 55th St	Philadelphia Pa 19131	Townhouse/rowhouse	2010	$ 60,000	04/09/07
1771	N 53rd St*	2100 Washington Ave	Philadelphia Pa 19146	Townhouse/rowhouse	1132	$ 57,000	04/20/07
3906	Pennsgrove St	3906 Pennsgrove St	Philadelphia Pa 19104	Apartment	1415	$ 44,000	05/01/07
1501	Belmont Ave*	5106 Woodbine Ave	Philadelphia Pa 19131	Apartment	1854	$ 65,000	05/09/07
5250	W Jefferson St*	1857 N Willington St	Philadelphia Pa 19121	Townhouse/rowhouse	1672	$ 110,000	05/31/07
5276	Parkside Ave*	219 W Martin	Philadelphia Pa 19119	Apartment	928	$ 9,500	06/14/07
1735	N Lindenwood St	1735 N Lindenwood St	Philadelphia Pa 19131	Townhouse/rowhouse	1104	$ 42,500	06/18/07
4260	Parkside Ave	4260 Parkside Ave	Philadelphia Pa 19104	Townhouse/rowhouse	4380	$ 65,000	06/21/07
4156	Leidy Ave*	607 Norristown Rd	Horsham Pa 19044	Apartment	3002	$ 67,000	06/23/07
3860	Wyalusing Ave	3860 Wyalusing Ave	Philadelphia Pa 19104	Apartment	979	$ 60,000	06/28/07
4030	W Girard Ave*	Po Box 164	Collingswood Nj 08108	Apartment	3948	$ 224,000	06/28/07
3922	Cambridge St	3922 Cambridge St	Philadelphia Pa 19104	Townhouse/rowhouse	1278	$ 50,000	07/05/07
4025	Wyalusing Ave	4025 Wyalusing Ave	Philadelphia Pa 19104	Townhouse/rowhouse	870	$ 63,000	07/16/07
4166	Leidy Ave*	3738 Lankenau Rd	Philadelphia Pa 19131	Apartment	2736	$ 57,500	07/17/07
5219	W Columbia Ave	5219 W Columbia Ave	Philadelphia Pa 19131	Townhouse/rowhouse	1290	$ 76,320	07/31/07
4030	Cambridge St	4030 Cambridge St	Philadelphia Pa 19104	Townhouse/rowhouse	1100	$ 32,500	08/06/07
3873	Wyalusing Ave	3873 Wyalusing Ave	Philadelphia Pa 19104	Townhouse/rowhouse	1010	$ 50,000	08/20/07
5249	W Jefferson St	5249 W Jefferson St	Philadelphia Pa 19131	Apartment	1720	$ 38,000	08/24/07
5240	Parkside Ave	5240 Parkside Ave	Philadelphia Pa 19131	Apartment	2844	$ 99,000	09/27/07
3958	Poplar St*	52 Wildwood Ave	E. Lansdowne Pa 19050	Apartment	1344	$ 50,000	10/25/07
1670	N Lindenwood St	1670 N Lindenwood St	Philadelphia Pa 19131	Townhouse/rowhouse	1060	$ 60,000	11/06/07
4047	Poplar St*	2558 N Bouvier St	Philadelphia Pa 19132	Townhouse/rowhouse	1460	$ 39,900	11/20/07
5274	Parkside Ave*	224 Lewis Ave	E. Lansdowne Pa 19050	Apartment	1292	$ 90,000	11/21/07
3850	W Girard Ave*	720 Park Ave	Collingswood Nj 08108	Apartment	2280	$ 107,500	07/25/08
1103	N Union St	1103 Union St	Philadelphia Pa 19144	Townhouse/rowhouse	756	$ 55,000	08/05/08
		Average Sale price	**$66,796**				
		Average Sale price SF	**$37.75**				
		Median Sale price	**$57,284**				

Vacant Land Transactions

Street #	Street Address	Mailing Address	Mailing City	Land Use	Lot SF	Sale Price	Sale Date
4172	Poplar St*	1109 N 40th St	Philadelphia Pa 19104-1129	Vacant Land	1408	$ 3,000	01/17/07
4156	W Girard Ave	4156 W Girard Ave	Philadelphia Pa 19104	Vacant Land	1697	$ 34,000	01/25/07
4126	Poplar St*	1109 N 40th St	Philadelphia Pa 19104-1129	Vacant Land	1408	$ 3,200	02/24/07
3814	W Girard Ave*	1109 N 40th St	Philadelphia Pa 19104-1129	Vacant Land	1680	$ 40,000	03/29/07
1112	N 40th St*	1112 N 40th St	Philadelphia Pa 19104	Vacant Land	1700	$ 6,083	09/04/07
1116	N 40th St	1116 N 40th St	Philadelphia Pa 19104	Vacant Land	1700	$ 6,083	09/04/07
		Average Sale price	**$15,394**				
		Average Sale price SF	**$9.63**				

Mixed-Use Property Transactions

4014-4018	W Girard Ave*	1109 N 40th St	Philadelphia Pa 19104-1129	Religious	3508	$ 230,000	02/13/07
945	N 40th St*	661 Leslie Ln	Yardley Pa 19067-4470	Office & Residential	1914	$ 60,000	05/01/07
1101	N State St*	Po Box 9590	Philadelphia Pa 19124-0590	Stores & Offices	1015	$ 15,000	10/10/07
		Average Sale price	**$101,667**				
		Average Sale price SF	**$47.38**				

*** Properties with off-site mailing addresses.**

APPENDIX B – RESIDENT RETAIL DEMAND

Table B1: Estimated Retail Store Purchases, 2008

TOTAL POPULATION	**5,495**	**TOTAL INCOME ($000)**	**$77,329**
TOTAL RETAIL PURCHASES ($000)	**$31,259**		
COMMUNITY-SERVING GOODS & SERVICES	**$18,463**	**HOME FURNISHINGS & IMPROVEMENT**	**$3,477**
Supermarkets, Grocery Stores	$9,843	Furniture	$374
Convenience Stores	$1,791	Floor Coverings	$151
Meat Stores	$122	Window Treatments	$8
Fish Stores	$29	Other Home Furnishings	$122
Fruit & Vegetables	$59	Household Appliances	$92
Bakeries	$25	Radio/TV/Electronics	$294
Candy & Nuts	$34	Home Centers	$1,156
Other Speciality Foods	$34	Paint & Wallpaper Stores	$178
Liquor & Beer Distributors	$635	Retail Lumber Yards	$937
Drug Stores/Pharmacies	$2,209	Nursery & Garden Centers	$121
Cosmetics, Beauty Supplies, & Perfume	$99	Antique Stores	$42
Health Food Supplements	$78		
Limited-Service Restaurants	$1,181	**OTHER SPECIALTY GOODS**	**$2,104**
Bars and Lounges	$135	Luggage & Leatherwork	$32
Dollar Stores & Other General Merchandise Stores	$203	Computer & Software Stores	$220
Jewelry Stores	$415	Camera, Photo Supply	$21
Optical Stores	$144	General-Line Sporting Goods	$209
Newsstands	$19	Specialty Sporting Goods	$240
Video Stores	$15	Toys & Hobbies	$322
Gift, Novelty, Souvenir Stores	$325	Sewing, Needlework	$71
Hardware Stores	$305	Music Stores	$85
Florists	$147	Book Stores	$277
Hair Salons	$338	Record/CD/Tape Stores	$150
Laundries; Dry Cleaning	$279	Office Supply/Stationers	$382
		Art Dealers	$67
FULL-SERVICE RESTAURANTS	**$1,232**	Collectors' Items & Supplies	$28
DEPARTMENT STORES	**$2,185**	**OTHER RETAIL STORES**	**$1,189**
Full-Service Department Stores	$680	Auto Parts & Accessories Stores	$624
Discount Department Stores	$919	Pet Supply Stores	$123
Warehouse Clubs	$587	Tobacco Stores	$69
		Other Health & Personal Care	$106
APPAREL	**$2,608**	Other Used Merchandise	$93
Men's Clothing	$221	Other Miscellaneous Retail Stores	$175
Women's Clothing	$610		
Children's Clothing	$104		
Family Clothing	$1,003		
Clothing Accesories	$48		
Other Clothing	$162		
Shoe Stores	$460		

Source: Urban Partners

Table B2: Community-Serving Retail Store Opportunities, Part I

	Park West Town Center Stores	Current Community-Base Stores	Insufficent Demand	Possible New Community-Based Stores
COMMUNITY-SERVING GOODS & SERVICES				
Supermarkets, Grocery Stores	√√√			
Convenience Stores		√√√		
Meat Stores			√√√	
Fish Stores			√√√	
Fruit & Vegetables			√√√	
Bakeries			√√√	
Candy & Nuts			√√√	
Other Speciality Foods			√√√	
Liquor & Beer Distributors			√√√	
Drug Stores/Pharmacies				√√√
Cosmetics, Beauty Supplies, & Perfume	√√√			
Health Food Supplements			√√√	
Limited-Service Restaurants	√√√	√√√		
Bars and Lounges		√√√		
Dollar Stores & Other General Merchandise Stores				√√√
Jewelry Stores				√√√
Optical Stores	√√√			
Newsstands			√√√	
Video Stores			√√√	
Gift, Novelty, Souvenir Stores				√√√
Hardware Stores			√√√	
Florists			√√√	
Hair Salons		√√√		√√√
Laundries; Dry Cleaning		√√√		√√√

Source: Urban Partners

Table B3: Community-Serving Retail Store Opportunities, Part II

	Park West Town Center Stores	Current Community-Base Stores	Insuffcent Demand	Possible New Community-Based Stores
FULL-SERVICE RESTAURANTS				√√√
DEPARTMENT STORES				
Full-Service Department Stores			√√√	
Discount Department Stores			√√√	
Warehouse Clubs			√√√	
APPAREL				
Men's Clothing			√√√	
Women's Clothing	√√√			
Children's Clothing			√√√	
Family Clothing	√√√			
Clothing Accesories			√√√	
Other Clothing	√√√			
Shoe Stores	√√√			
HOME FURNISHINGS & IMPROVEMENT				
Furniture			√√√	
Floor Coverings			√√√	
Window Treatments			√√√	
Other Home Furnishings	√√√			
Household Appliances			√√√	
Radio/TV/Electronics	√√√			
Home Centers	√√√			
Paint & Wallpaper Stores			√√√	
Retail Lumber Yards			√√√	
Nursery & Garden Centers			√√√	
Antique Stores			√√√	
OTHER SPECIALTY GOODS				
Luggage & Leatherwork			√√√	
Computer & Software Stores				√√√
Camera, Photo Supply			√√√	
General-Line Sporting Goods			√√√	
Specialty Sporting Goods				√√√
Toys & Hobbies	√√√			
Sewing, Needlework			√√√	
Music Stores			√√√	
Book Stores			√√√	
Record/CD/Tape Stores			√√√	
Office Supply/Stationers			√√√	
Art Dealers			√√√	
Collectors' Items & Supplies			√√√	
OTHER RETAIL STORES				
Auto Parts & Accessories Stores				√√√
Pet Supply Stores	√√√			
Tobacco Stores			√√√	
Other Health & Personal Care			√√√	
Other Used Merchandise			√√√	
Other Miscellaneous Retail Stores			√√√	

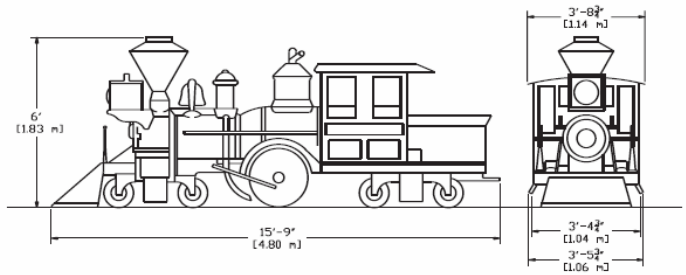
Source: Urban Partners

APPENDIX C – MINIATURE TRAIN SPECIFICATIONS

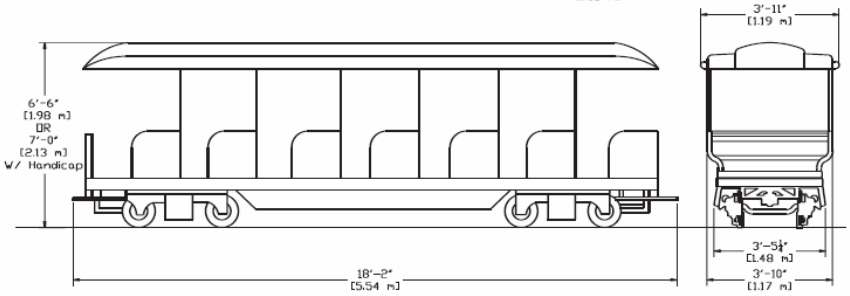
C. P. HUNTINGTON BY CHANCE MORGAN MANUFACTURERS

While several zoos across the country feature miniature trains, some are more applicable to the Centennial District. Zoos with older train systems (sometimes dating back decades) or steam locomotives have high operating costs and irrelevant capital costs. Newer trains require less maintenance and typically run on gasoline or propane fuel. From our research, we determined that the most common train model is the C. P. Huntington train developed by Chance Morgan Manufacturers. The C. P. Huntington model has a four-cylinder engine that runs on fuel or propane and requires a 24" track gauge. There is also the option of making one of the cars handicap accessible.

C.P. Huntington Train



- Scaled replica of an authentic 1863 locomotive
- Perfect for tours and shuttling guests
- Combined throttle and transmission control for easy operation
- Custom paint available
- Handcrafted detailing
- Your choice of brass or chrome trim
- Optional wheelchair ramp for handicap access



Train	Length	Capacity
1 locomotive & 2 coaches	51 ft., 4 in. (15.6 m)	28 adults & 14 children (or 56 children)
1 locomotive & 3 coaches	69 ft., 2 in. (21.1 m)	42 adults & 21 children (or 84 children)
1 locomotive & 4 coaches	87 ft. (26.5 m)	56 adults & 28 children (or 112 children)
1 locomotive & 5 coaches	104 ft., 10 in. (32 m)	70 adults & 35 children (or 140 children)
1 locomotive & 6 coaches	122 ft., 8 in. (37.4 m)	84 adults & 42 children (or 168 children)

APPENDIX D – WORKFORCE DEVELOPMENT COMMITTEE

Background: The Centennial District study area is undergoing tremendous development that has the potential to provide 400 job opportunities for area residents. The Centennial District Steering Committee convened a committee of steering committee participants and other interested stakeholders to discuss the issues and strategies to address workforce development in the area. Below are bulleted notes from the June 24, 2008 meeting.

In Attendance

- Lucinda Hudson, *Parkside Association*
- Robert Fulton, *Mayor's Business Action Team*
- Dawn Summerville, *Mayor's Business Action Team*
- James R Burnett, *Philadelphia Workforce Development Corporation*
- Dr. H. Ahada Stanford, *Commerce Department*
- Aiisha Herring-Miller, *Commerce Department*
- Basil Gordon, *Philadelphia Workforce Development Corporation*
- Bilal Qayyum, *Commerce Department*
- Melissa Velazquez, *Philadelphia Workforce Development Corporation*
- Tim Smith, *Philadelphia Workforce Development Corporation*
- Catherine Carroll, *Philadelphia Workforce Development Corporation*

Key Issues for Area Residents

- Lack of educational attainment
- Basic preparedness of residents (i.e., hygiene and life skills)
- Criminal histories
- Drug testing
- Lack of essential identification (i.e., social security cards, birth certificate, driving license, etc.)

Issues for Area Employers

- Demand of employees from the area
- Turnover
- Job readiness

Issues for Job-Readiness/Training Programs

- Lack of accessibility for area residents to obtain services
- Lack of comprehensive approach to address the needs of various populations (i.e. TANF, re-entry, elderly, etc.)
- Funding limitations that address multiple barriers (i.e., drug addiction, child care, intense life-skills training, etc.)

Discussion

- James Burnett, Executive Director of the West Philadelphia Financial Services Institution and co-developer of the Parkwest Town Shopping Center stated that many of the issues

listed above prevented many area residents from obtaining employment from employers in the Shopping Center.

- Bilal Qayyum from the Commerce Department discussed the lack of essential identification from formerly incarcerated individuals and how this is a barrier for obtaining employment.
- Lucinda Hudson, President of Parkside Association and Centennial District Steering Committee member discussed her agency's work with area residents in their workforce development needs. Many of the residents that are seeking assistance from her office not only need employment but need other supports to retain employment (i.e., child care, drug rehabilitation, housing, etc.)
- Staff form the Philadelphia Workforce Development Corporation (Basil Gordon, Tim Smith, Melissa Velazquez, and Catherine Carroll) outlined the services that are available for Temporary Assistance to Needy Families (TANF) clients, and Workforce Investment Act (WIA) clients. The services available to TANF clients have more restrictions; however, WIA services have a little more flexibility. Dr. Stanford stated to the group that we are not expected to have solutions to workforce development problems, but it is important to outline the issues and discuss possible short and long term strategies.
- Tim Smith from Philadelphia Workforce Development Corporation (PWDC) stated that targeted industries whereby training is being provided. The targeted industries are: Manufacturing; Hospitality; Healthcare; Education; Logistics; Transportation; and Business/Finance
  (It's important to note that PWDC's looking into the Retail sector as a targeted industry.)
- Some attendees of the meeting discussed the disconnect between individuals needing workforce development assistance and having the ability to find the necessary services to obtain employment. Some attendees felt that the CareerLink system does not have the capacity to assist and support individuals that need intense job/life skills training.

Short-Term Goals

- A listing of employers coming to the area and training needs will be provided to PWDC
- A meeting between PWDC, community groups, CINTAS and the Please Touch Museum to discuss their employment needs.
- The last community meeting for the shopping center will be held in July and PWDC will be invited to discuss workforce development programs.
- Entrepreneurial workshops will be provided for interested residents.
- West Philadelphia does not have a CareerLink center and the nearest CareerLink is located on Chelten Avenue in the City's Northwest section. As a short-term goal, a satellite CareerLink should be established in West Philadelphia.
- Have preliminary conversations with elected officials about the necessity of having a comprehensive employment center in West Philadelphia.

Long-Term Goals

- Establish a comprehensive job training facility in West Philadelphia that can address various target populations (i.e., TANF, re-entry, elderly, etc.)

APPENDIX E – RESTAURANT DEVELOPMENT COMMITTEE

Background: The Centennial District Steering Committee asked that a committee be developed to discuss the restaurant demand, restaurant clusters, and the value of national chains and local restaurants for the Centennial District study area. Below are the issues and discussion from the June 30, 2008 meeting.

Meeting Date: June 30, 2008

In Attendance

- Jim Hartling, Urban Partners
- Issac Kwon, Urban Partners
- Andy Toy, The Enterprise Center, Retail Resource Network
- Patricia Blakely, The Merchants Fund
- Dr. H. Ahada Stanford, City of Philadelphia, Commerce Department
- Aiisha Herring-Miller, City of Philadelphia, Commerce Department

Key Issues

- No full-service restaurant is located in the Centennial District Study area.
- Concerns about fast-food restaurants locating in the study area.
- The development nodes where restaurants could be developed need land assembly and strategies to eliminate blight.
- Many visitors to the area institutions do not have reasons to stay in the area after their visit.
- Strategies to engage local entrepreneurs need to be developed.

Discussion

- Jim Hartling reported that the Philadelphia Zoo and the Please Touch Museum has the potential of having 1.3 million visitors during a calendar year. 15% of current visitors that come to the Zoo travel outside a 1 hour radius. 20% of current Zoo visitors are school groups and a small percentage of the school groups travel more than an hour to visit the Zoo. 48,000 of Zoo visitors spend the night in a hotel. This indicates that there's a demand for restaurants in the area.
- The group discussed the necessity of rebuilding the node at 40th Street & Girard Avenue to accommodate a restaurant.
- Similar to the Philadelphia Zoo, the Please Touch Museum is a family oriented, early evening hours establishment.
- Jim Hartling acknowledged the concern about fast-food restaurants; but he stated the importance of families, individuals and other visitors to the Centennial District who may have preferences for familiar franchises.
- A free standing restaurant such as a diner should be enticed to locate on Girard Avenue. A diner has the ability to attract diverse populations because of the service and the cuisine offered.

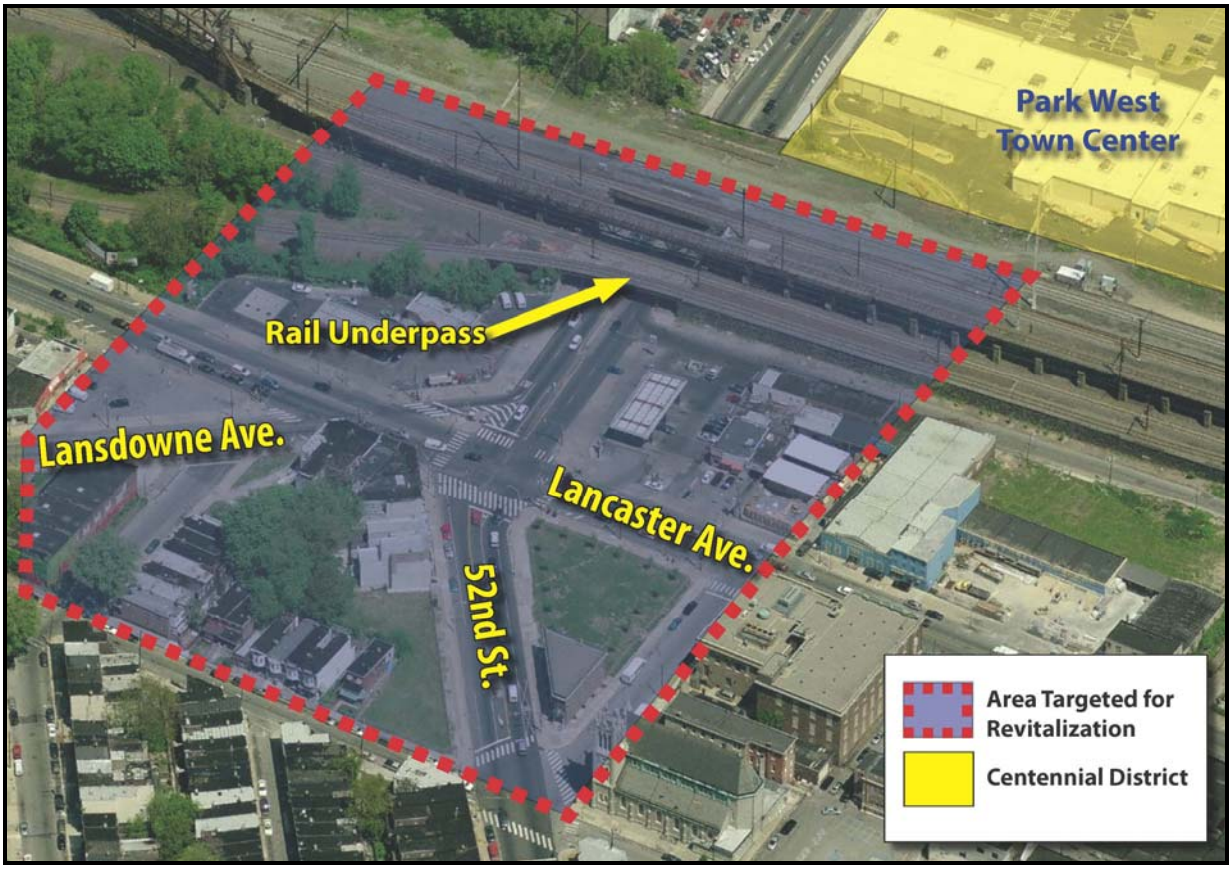
- The area needs to have a mix of local restaurants and franchises whereby the restaurants can utilize mixed-use development that is in the area.
- Patricia Blakely, Executive Director of the Merchants Fund stated that her agency has funding available to assist in planning efforts for the area businesses.
- Jim Hartling stated that for developers to come to the area the market has to be transformed. The area is in great need of land assembly and other interventions addressing blight surrounding 40th Street & Girard Avenue.
- A medical facility is being proposed on Girard Avenue on the southeast corner of 40th & Girard Avenue.
- 1260 Housing Corporation has the capacity and has expressed interest in doing housing rehabilitation work in the area.

Short-Term & Long-Term Goals

- Comprehensive redevelopment plan for Girard Avenue between 38th and 40th Streets.
- Seek funding to obtain site control of key parcels to revitalize the area.
- Develop a land assembly strategy for the area surrounding 40th & Girard.

APPENDIX F – 52ND AND LANCASTER

The revitalization of the intersection where 52nd Street, Lansdowne Avenue, and Lancaster Avenue converge—though technically outside the Centennial District as defined in this report—is critical to the District. The following map shows the area targeted for revitalization.



The following is a list of projects and initiatives that are being considered for this intersection:

- A gateway treatment for the intersection.
- Beautification of the rail underpass on 52nd Street. Federal funds will be used to transform this area into a pleasant thoroughfare for both automobiles and pedestrians.
- Streetscape improvements on 52nd Street extending southward.
- Potential housing developments on vacant lots, including a senior housing facility.