



# **Vision 2020**

## **Strategic Vision for Friendswood, Texas**



**Beach  
Ramirez**

**November 1998**

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## *Section 1*

# **INTRODUCTION**

Kenneth Balk & Associates Inc. (KBA), in association with Beach Ramirez, submits this report at the conclusion of a study to develop a vision or strategy for the ultimate development of Friendswood, Texas. It is intended to summarize the work of the study, the conclusions reached, and provide a foundation for planning and implementation of future steps in Friendswood's community development process.

### **1.1 The Objective**

Friendswood is a rapidly developing city with fixed physical limits to expansion, having no remaining extra-territorial jurisdiction. The City is interlaced with natural drainage ways significant portion of land lie in the flood plane and flood way. Therefore; the amount of undeveloped land remaining is fixed. Its growth and development within these limits will be guided by the current master plan, land use controls, and any modifications to these land use controls which may be adopted in the future. It is clear that if present patterns continue the City will *build-out* sometime within the next 20 to 30 years. What will Friendswood be like when it reaches its maximum development? What are the strategic issues which must be addressed in order to maintain the economic and quality of life factors which sustain Friendswood as the unique community it is?

In any community, residents consume more city services than the taxes that they pay will support. This is typically offset by taxes collected from businesses and industries, who pay more in taxes than they consume. The non-residential land uses in Friendswood represent an unusually low proportion of the developed land. What are the implications of continuing this development trend on: municipal services, tax rates, and the quality of life that is so important to this unique community?

This study therefore has sought a vision for the future development of Friendswood. In developing the Vision, these primary issues were addressed.

- Change and Growth
- Preservation of Lifestyle
- Maintaining the Level of Community Services
- Maintaining Favorable Property Tax Rates

### **1.2 The Study**

The study was conducted in two basic steps. The first was an assessment of the community, its strengths and weaknesses, its goals, its characteristics and the business enterprises that are suitable for Friendswood. (summarized in section 3 of this report). The second was the construction and evaluation of alternate scenarios for Friendswood's build out (summarized in section 4.0 of this report) Based upon the outcome of this process certain conclusions and



recommendations were formulated (summarized in section 2.0 of this report). These conclusions regarding Friendswood's ultimate build out represent Vision 2020.

Throughout the study, the planning team utilized an open and interactive process whereby focused analytical work was combined with meaningful exchange with community stakeholders. The purpose of this process was the creation of a Vision with an informed consensus of the community.

**1.2.1 Research and Analysis**

A wide range of data was collected from a variety of sources. This data was analyzed to produce an overview of Friendswood and the trends that are most important in projecting the direction and impact of continued development in the community. The team estimated the amount of land remaining for development, dwelling unit and population density of residential development, and the market potential for development of additional commercial land uses. It modeled a variety of community development scenarios, projecting ultimate population and impact on critical factors that determine municipal tax rates.

**1.2.2 Community Workshops**

At critical points in the process, four community workshops were conducted. These publicly announced workshops solicited the attendance and participation of community stakeholders (40 to 60 persons attended each workshop) in the critical decisions of the visioning process. These workshops provided the best opportunity to inform and involve those members of the community most concerned about the issues at hand and most likely to play a continuing role in future community development actions of the City. The purpose of the workshops was to provide an opportunity for the planning team to pose issues, provide data, and solicit an informed response from among community stakeholders in order to create a Vision for the community. Thus, all critical decisions regarding the strategic vision were formed in the workshops based upon the input of the participants. The outcome is not the product of the planner but represents the informed and facilitated views of community stakeholders. The workshops (and their basic outcomes) are as follows:

Organizational Workshop .....	<i>Setting Goals and Objectives</i>
Analysis Workshop .....	<i>Reviewing Community Profile, Target Markets, and Discussing Build-Out Alternatives</i>
Alternatives Workshop .....	<i>Reviewing Alternative Build Out Models</i>
Vision Workshop .....	<i>Confirming and Refining the Selected Build Out Model</i>

Summaries of workshop material are included in the appendix to this report. In some cases information presented in the workshops has been updated or corrected to reflect analysis of additional data and refining of estimates.

### **1.2.3 Meeting the Objective**

A successful strategy for the development of a community must embody two important features. It must be well grounded in the realities of the marketplace. And it must represent a consensus among community stakeholders. Vision 2020 has sought to arrive at a plan for Friendswood that includes both these features..

Achieving consensus depends upon two basic factors. The first is the quality of work by the planning team in accurate analysis of data, focusing of issues, posing of options and preparation for and conduct of the workshop sessions. The second is the willingness of the community's stakeholders to work together to consent.

In Friendswood the planning process produced insight into the issues that will determine the future of the community. And the workshop participants voted in overwhelming majority for the results which form the recommendations of this study. The results are not ambiguous. A clear plan has emerged; one that will pass most tests for planning excellence. The consensus, however is not enthusiastic. The workshops were often marked with contention. Some of the most vocal participants at the workshops never entered into the spirit of the process. They seemed to believe, in spite of every effort at openness, that there was a hidden agenda. Their concerns and suspicions were apparently never allayed. Enthusiasm for the results of the process was a sub-theme of the workshops, generally expressed after the workshops were adjourned, but not by all that came.

Community Development is a team sport. It requires that the entire community work in harmony with one another. It requires that the legitimate concerns of all parties be sensitively entertained and addressed. No group can be marginalized, and no group can be allowed to dominate. Without a willingness to form consensus there can be no Vision. Perhaps Friendswood has so much going for it that the underlying contention within the community may not seem important. This is not so. Friendswood is sustaining loss due to lack of a common commitment to mutual goals. The results of the loss of opportunity to work together will be most clearly felt in the future. There is additional work needed in the area of consensus.

## **1.3 Use of Results**

This report contains a strategic Vision for the ultimate development of The City of Friendswood. This vision was developed from two sources; the analytical work of the planning team and the input of the community. The specific recommendations contained in section 2 are the results of the workshop sessions where community stakeholders, after being provided with options and information to evaluate them, voted regarding their preferences.

All of this must now be reviewed and evaluated. Ultimate responsibility for community development must remain with duly constituted authority. This means that the results of this effort should be viewed as recommendations for consideration by the Economic Development Committee and ultimately by City Council as these bodies discharge their constitutional and statutory responsibilities. Review, modification, and approval of the results of this study must legitimately remain with the bodies that truly represent the community as a whole.



**1.4 Expression of Appreciation**

The planning team thanks the City of Friendswood, its Economic Development Committee; Ron Cox, City Manager; Harold Whitaker, Mayor; Jerry Ericsson, Mayor Protem; Mickiel Hodge, Community Development Director; Bill Finger, Planning and Zoning Commission; Roger Roecker, Finance Director; Jared Stout, Police Chief; and many other City staff members who aided and assisted in the completion of the project. In addition, we acknowledge the Friendswood School District and the Galveston Central Appraisal District for invaluable contributions of data and guidance. Most of all, we thank the citizens and stakeholders of Friendswood who attended the workshops. The outcome of this study is the result of the investment of time and participation these individuals made in the future of their community.

## Section 2.0

# CONCLUSIONS AND RECOMMENDATIONS

This section summarizes Vision 2020. It presents the principal results of the study based upon outcome of the analytical work of the planning team, and the input of community stakeholders from the workshop sessions.

## 2.1 Inventory and Analysis

The first step in the vision process involved an inventory of Friendswood and the determination of the characteristics that will control its future growth. Section 3.0 contains a more detailed summary of this step which has three major parts. The first part consists of the views and objectives of the community. The second part is an independent inventory of the characteristics of the community as it is seen from outside. The third part is the identification of the target markets, those business enterprises that are most suitable for Friendswood as it grows.

### 2.1.1 Community Goals

In the initial Organizational Workshop the participants were asked to rank the community's strengths and weaknesses and to establish overall goals for Vision 2020. The top six goals are as follows:

- Develop Tax Base
- Improve Infrastructure
- Retain Values
- Maintain Quality of Schools
- Improve Drainage
- Maintain High Level of Public Services

Please see Section 3.0 and the Appendix for more detailed summary of community views and goals.

### 2.1.2 Community Inventory and Assessment

The planning team then collected and analyzed data to identify factors which typify Friendswood and impact its future development. This analysis was presented at the Analysis Workshop (See Appendix) and is more fully discussed in Section 3.0.

Analysis Workshop

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**POPULATION SUMMARY**

- Growth (4.8%)
- Affluence (\$78k avg HH inc)
- Narrowing of Age Distribution

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## Analysis Workshop

### VISION 2020

Strategic Vision for Friendswood, Texas

#### LAND USE SUMMARY

- SFR Dominate (84%)
- Land is available (est. 5473 acres)
- Zoning Plan Will Increase Non-Residential Land Uses
- Build Out Capacity Will Vary With Development Scenarios



## Analysis Workshop

### VISION 2020

Strategic Vision for Friendswood, Texas

#### HOUSING SUMMARY

- High Average Housing Values (ave \$150,000 sale in 97)
- High Development Rate
- Lack of Housing for Younger and Older Households



## Analysis Workshop

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#### WORK FORCE SUMMARY

- Fully Employed & Stable
- Highly Educated
- Professional, Executive, & Technical Occupations Lead
- Declines in Sales, Precision Production



## Analysis Workshop

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#### SALES SUMMARY

- Retail, Transportation, Services and Construction Growing
- Retail losing market share
- Lowest ratio of retail sales per person in area.
- Vacancy of retail space



## Analysis Workshop

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#### TRANSPORTATION SUMMARY

- Not directly on regional thoroughfares
- Multiple entry ways
- Friendswood Drive & major intersections congested



## Analysis Workshop

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#### QUALITY OF LIFE SUMMARY

- Excellent School Systems
- Low Crime Rate
- Historical Heritage
- Attractive Neighborhoods
- Family Orientation
- Lack of City center
- No sense of arrival





## 2.1.3 Target Markets

From an evaluation of the community, its goals and objectives and its capacity to attract and support businesses and industry, a marketplace assessment was performed. The following businesses and industries were determined to be suitable to play a role in the continued development of Friendswood.

- Selected Community and Neighborhood Retail
- Selected Light Industry
- Selected Professional Service Businesses

For a more detailed summary of Target Markets please see section 3.0 and the appendix.

## 2.2 Community Development Models

The second step (see 2.1 above) in selecting a strategy for the build out of Friendswood was the development and evaluation of alternate community development scenarios. Based upon the analytical work of the team and input from community stakeholders a total of eight scenarios were developed. Each scenario resulted in a community development model addressing the population at build out, and the impact on major factors contributing to property tax rates. These models were reviewed and discussed at the last two workshops. The following are the most important:

- **Maintain Current Pattern** - Assumes development will follow the existing pattern and proportion of residential, commercial and industrial uses will continue to build out. Only 16 % of developed land is currently devoted to non-residential uses and the probable outcome of this scenario is significant pressure to increase tax rates or to reduce services.
- **Follow Zoning Plan** - Assumes that development will follow the proportion of land uses for undeveloped land that is called for in Friendswood's current zoning plan. This scenario will greatly reduce pressure to increase property taxes or to reduce community services. However our market analysis indicates that current market conditions are not likely to support the absorption of the 27% of undeveloped land that is currently zoned for business and industrial uses. Several Market based modifications to this basic scenario were discussed.
- **City Purchases Vacant Land to Maintain Open Space**- This concept was introduced at the final workshop by a workshop participant. Land acquired and held vacant will reduce the demand on community services (most noticeably in the schools) while imposing the cost of purchase on the City budget and removing property from the tax rolls. The net result of this scenario is upward pressure on taxes. The amount of this pressure will vary significantly with the amount of land purchased.

For a more complete review of the community development models please see section 4.0 and the appendix.

## 2.3 Vision Summary

The results of the Vision 2020 is a strategy for guiding the future development of Friendswood. The following are the recommended points of that strategy

### 2.3.1 Land Use

Develop undeveloped land in Friendswood in general conformance to the existing zoning plan with regard to the split between residential and non-residential land.

- 73% Residential
- 27% Commercial and Light Industrial

### 2.3.2 Residential Density

Maintain the current development patterns and controls in the areas to be developed for residential purposes. This will produce the following:

Average density for single family .....	2.1 dwelling units per acre
Average density for all housing types .....	2.4 dwelling units per acre
Build Out Population .....	57,400

### 2.3.2 Community Services

Maintain a high level of community services and life style amenities including streets and roads, parks, utilities, drainage, public safety and schools. This will require a significant program of capital improvements and operational expenditures.

### 2.3.3 Target Markets

The tax base to support these expenses must come from increased retail, office, and light industrial land uses. Such a plan must be market responsive to succeed. It should focus on those businesses and industries that are most likely to do well and to be well accepted in Friendswood.

### 2.3.4 Zoning Adjustments

The zoning in non-residential categories must to be adjusted to respond to a more realistic market split.

	<i>Current</i> (acres)	<i>Adjusted</i> (acres)
Retail	453	728
Office	113	364
Light Industrial	<u>890</u>	<u>364</u>
Total	1,456	1,456

The zoning plan should also be revisited to provide attractive locations for targeted businesses. Retail uses also should be clustered to concentrate these uses so that they reinforce each other.

**2.3.5 Business Recruiting Program**

A well organized community and economic development program will be required to increase the non-residential land uses above current levels. Mounting an aggressive community marketing program could result in an increase of up to 100%, in the absorption of land for commercial light industrial uses.

	Estimated Current Demand (acres)	Estimated Demand with Marketing Program (acres)
Retail	337	500
Office	105	200
Light Industrial	<u>9</u>	<u>200</u>
Total	452	900

**2.3.6 Delayed Build Out of Commercial and Industrial Land**

However, even with a successful economic development program, when all residential land is developed, approximately 500 acres of land zoned commercial and industrial will remain to be developed. This land will ultimately be absorbed as further growth in the region (beyond the borders of Friendswood) supports additional commercial and industrial land use in Friendswood.



## Section 3.0

# INVENTORY AND ANALYSIS

Friendswood's future depends on several factors that interact with one another. The foundational factor is change. All communities change. People are born, move in and out, buy and sell, age and die. Change cannot be avoided. The second most important factor is the marketplace. Friendswood is growing because it is a highly attractive place to live in a region that is experiencing significant growth. This market pressure supports Friendswood's high housing values and brings new wealth into the community.

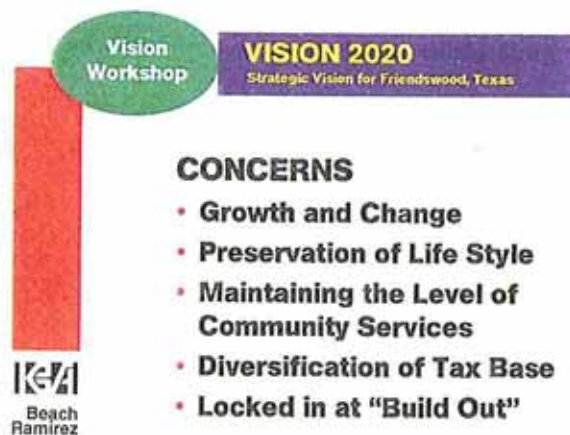
The external marketplace is generally outside the community's control. But the attractiveness of the community as a place to live within this regional market is (to some extent) within our control. Our attraction to the marketplace is, in turn, based upon two important aspects of the community that we will address in this section. They are the characteristics of the community as seen from the marketplace (*how outsiders see us*) and the goals and objectives of the community (*how we see ourselves*).

## 3.1 Background

Friendswood is a 100 year old community with a strong historic and cultural heritage. Originally founded by the Quakers, the community continues to place faith at the core of its values. The community began as an agricultural community in northern Galveston County. It is today a part of the greater Houston Metropolitan area. It's growth has been impacted at several points by major events. These include the development of the Friendswood oil field and the establishment of NASA in nearby Clear Lake. During the last half of this century its growth has been based upon its outstanding attraction to middle and upper middle income families as a place to live and bring up families.

The 1990's has brought continued growth. The community is now over 30,000. There is no remaining extra-territorial jurisdiction to absorb further expansion. Undeveloped land is therefore limited. While fluctuations in the rate of development are to be expected, it is likely that the community will reach its ultimate capacity in the early part of the new century.

The questions are: What will we be like when we grow up? What are the critical factors that will determine the future of this unique community? These are the concerns that have motivated the City to commission this study.



## 3.2 Community Perceptions

The study was initiated in an Organizational Workshop (see Appendix). After a general discussion regarding the continued development of Friendswood and the above concerns, Workshop participants were asked to identify the strengths and weaknesses of the community. The following summarizes their input, ranked according to order of importance.

Organizational  
Workshop

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### COMMUNITY STRENGTHS

- 1 - Schools - *quality of education, commitment to youth*
- 2 - Faith Based Community - *traditional values*
- Community Participation - *active and involved citizens*
- Safe Place to Live - *low crime, low sense of threat*

  
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Organizational  
Workshop

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### COMMUNITY STRENGTHS

- Family Orientation
- Affluence (high per capita income)
- Heritage
- Community Services (amenities)
- Natural Environment
- Stability
- Sense of Community

  
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Organizational  
Workshop

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### COMMUNITY WEAKNESSES

- 1 - Tax Base & Tax Income - *predominance of residential uses*
- Storm Sewer & Drainage - *flood threat and cost of solution*
- 3 - Lack of Business Develop - *lack of retail services*

  
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Organizational  
Workshop

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### COMMUNITY WEAKNESSES

- Limited Housing Opportunities (cost range)
- Visual Impact of Friendswood Dr.
- Lack of Water Pressure (infrastructure)
- Vacant Retail Buildings
- Multiple Jurisdictions

  
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Organizational  
Workshop

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### COMMUNITY WEAKNESSES

- Lack of Political Harmony (disaffection?)
- Lack of Involvement (apathy?)
- Lack of Communications (distrust?)

  
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## 3.3 Community Goals

Based upon the above the workshop, participants were asked to establish goals for the growth and development of Friendswood (ranked in order of preference with score in parenthesis).

Organizational  
Workshop

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**COMMUNITY GOALS**

- 1 - Develop Tax Base (40) - improve tax base mix
- 2 - Improve Infrastructure (25) - water, sewer
- 3 - Retain Values (17) - quality of life
- 4 - Maintain Quality of Schools (15)
- 5 - Improve Drainage ( 13)

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Organizational  
Workshop

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**COMMUNITY GOALS**

- 6 - Maintain High Level of Public Service (11)
- 7 - Be A Whole Life Community (8) - homes, jobs, amenities
- 8 - Incorporate Vision 2020 in Master Plan (6)
- 9 - Attract College / University (5)  
Develop Civic Center (5)

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Organizational  
Workshop

**VISION 2020**  
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**COMMUNITY GOALS**

- 11 Maintain Visual Image (3)
- Prevent Undesirable Land Uses (3)
- 13 Improve Transportation (2) - vehicles, bikes, pedestrian
- Develop Additional Parks and Recreational Areas (2)
- 15 Be Sensitive to the Environment (1)

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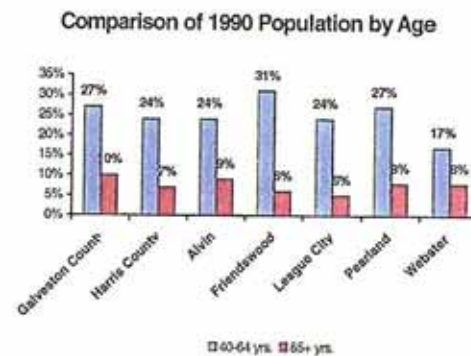
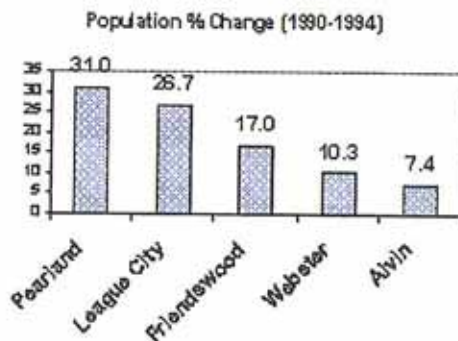
## 3.4 Community Inventory and Analysis

The planning team collected data from the City, County Appraisal District, State Comptroller's Office, TXDot, US Census, and a variety of other private and public data sources. From this data an analysis of Friendswood and the factors that typify the community and are important to it's future was completed.



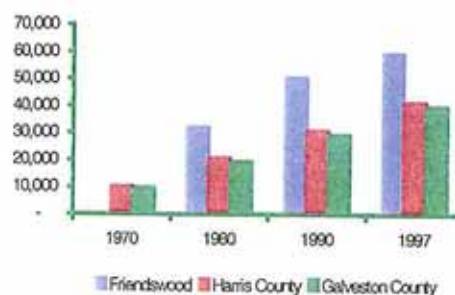
## 3.4.1 Population

Friendswood is part of a regional community that includes the cities of Pearland, League City, Webster and Alvin. Together these communities are experiencing significant growth as part of a rebounding area economy. Friendswood's growth rate falls in the middle of a range of percent change of population for these cities. From 1990 to 1994 Friendswood grew at an average rate of 17.0% with Pearland and League City having higher growth (31.0% and 26.7% respectively) and Webster and Alvin having slower growth (10.3 and 7.4 respectively).



Friendswood's growth was highly concentrated in the 40 to 64 year old category. Compared to Galveston and Harris Counties, Pearland, League City, Webster and Alvin, Friendswood has the highest percentage growth for this age group (31%) and the lowest for age 65 years and over (6.0%). The percentage of residents in the 40 to 64 age range has grown steadily since 1970 (see appendix). This data suggests that Friendswood is attracting fewer younger families than surrounding communities and is losing a greater proportion of its seniors. This is believed to be due to the relatively high cost of housing in Friendswood (see below).

## MEDIAN HOUSEHOLD INCOME

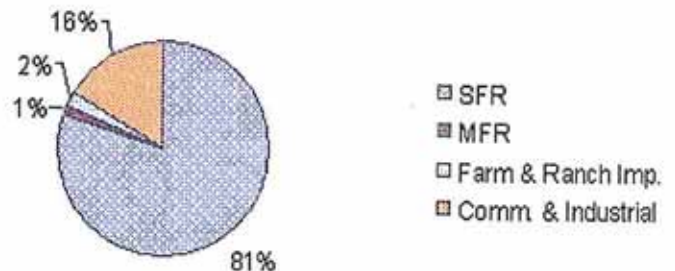


A comparison was made of Friendswood to Galveston and Harris County with regard to Median Household Income for the years 1970, '80, '90 and '97. The city has consistently enjoyed a significantly higher median income than the two counties of which it is a part. In fact, the estimated 1997 median income for Friendswood is approximately 50 percent higher (\$60,000 as compared to around \$40,000) than the two counties.

In summary, from 1990 to 1997, Friendswood has experienced a healthy 4.8% annual average population growth rate, has an affluent population with a \$78,000 average household income (estimated 1997), and has been experiencing a narrowing of the age distribution of its population.

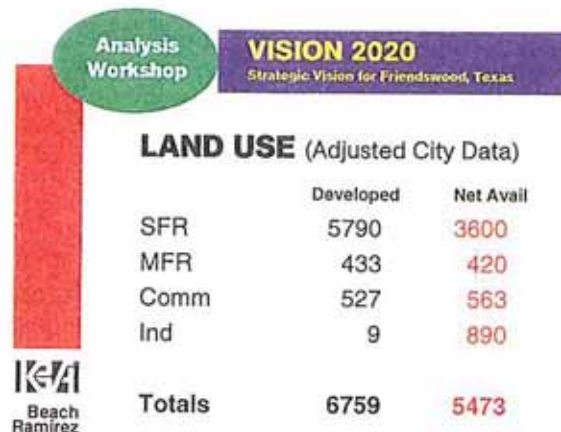
### 3.4.2 Land Use

Arriving at an estimate of the distribution of existing land uses and of the land area that is available for further developing proved to be a significant challenge. Estimates have changed throughout the study as data was reviewed and refined. The following estimates were derived from a variety of sources and were in some cases modified by additional investigations of the planning team.



Based upon data from the Galveston County Appraisal District, 81% of all improved land in 1997 was attributed to single-family residential while 16% was used for commercial and industrial improvements, 2% for improved farm and ranch, and 1% for multi-family. This clearly demonstrates that Friendswood is a bedroom or lifestyle community that primarily accommodates the single-family dwelling unit.

Based upon data provided by the City of Friendswood, (adjusted by comparison of City, County Appraisal District and recent FEMA maps), the city has approximately 6,759 acres of developed land and 5,473 acres of undeveloped land. When the approximately 1,184 acres of publicly owned land is added the total comes to 13,416 acres. The community is criss-crossed by multiple natural drainage ways and creeks. The floodway and flood plain areas associated with these features are a visual asset but reduce the land available for development and impact the density of development for land that lies adjacent to them. Of the developed land, 5,790 acres has been absorbed for single-family residential, 433 acres for multi-family residential, 527 acres for commercial and 9 acres for industrial.





Of the 5,473 net available acres, 3,600 acres are zoned for additional single-family residential use, 420 acres for multi-family use, 563 acres for commercial and 890 acres for industrial.

Since no zoning category has approached the limit of available land it may be assumed that market forces are the primary factor in producing the existing ratio of residential to commercial/industrial land uses (84% to 16% respectively). The land that remains to be developed assumes a significant shift in this ratio (73% to 27% respectively). While the community is zoned for a future that maintains a primarily single-family residential community the zoning plan anticipates a substantial and aggressive increase in land use for commercial and industrial purposes. The existing patterns of unconstrained development suggest that the market forces to support this increase in non-residential use (particularly industrial) may not exist.

In summary, single-family residential dominates the use of land in Friendswood. Land is still available for future growth, the zoning plan increased non-residential land uses, and the build out capacity will vary based on different development scenarios.

### 3.4.3 Housing

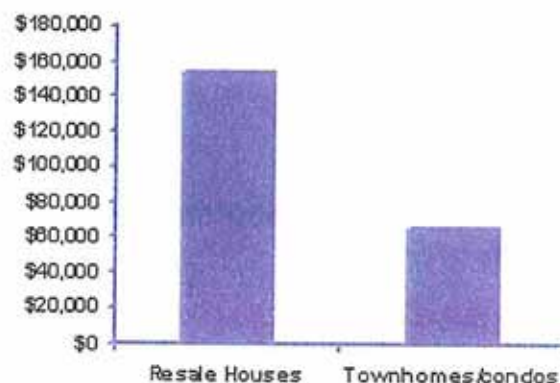
From July 1997 to July 1998, a total of 352 pre-owned homes were sold in Friendswood. Of the total, 341 were for single-family residences and only 11 were for townhomes or condominiums. The average sales price for the single-family unit was \$153,360 while the average price for the townhome or condo was \$66,282.

HOUSING UNITS SOLD 7/97-7/98



According to various data sources, the average new home sales price in 1998 has been around \$180,000. From 1990 to 1997, an annual average of approximately 200 single-family residential permits have been issued by the city. The single-family dwelling units per acre has been and is currently 2.4 which is significantly lower than the more common 3 to 4 units per acre. This indicates that overall, Friendswood is a very low-density single-family community.

AVERAGE SALES PRICE

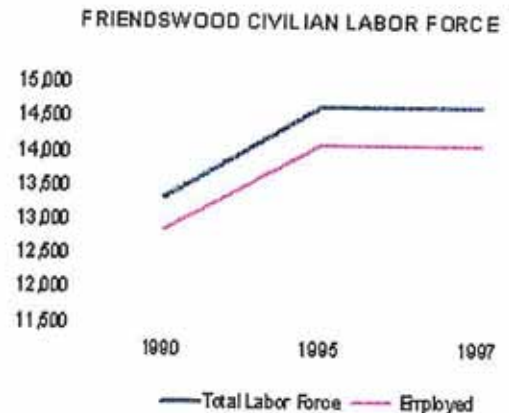




In summary, Friendswood has a high average housing value, a high development rate, is a low density residential community. When this view is combined with the shifts in population age (see population above) a proportionate lack of housing for younger and older households is indicated.

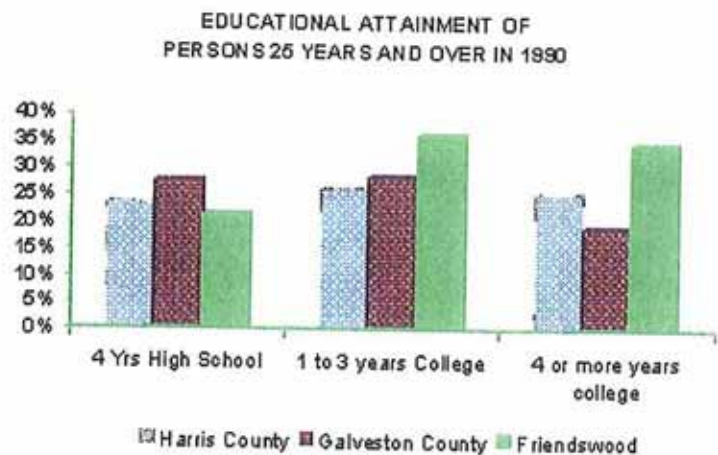
### 3.4.4 Work Force

Friendswood's civilian labor force grew significantly from 1990 to 1995 and has remained flat from 1995 to 1997. Since 1995, the city has maintained a total labor force of about 14,600 and an employed labor force of 14,400, which translate to an unemployment rate of about 3.8% for the time period.



Friendswood's population is principally employed in executive, professional, administrative and sales occupations. Comparing employment by occupation from 1980 to 1990 for the city, certain shifts are revealed. These include an increase in the percentage of persons occupied in the executive, administrative & managerial (from 16% to 20%), technician (3% to 6%), services (5% to 8%), and transportation and materials (1% to 2%).

Decreases have occurred in sales (16% to 12%) and precision production (13% to 8%). Areas that have not changed include professional specialty (22%) and administrative support (16%). As indicated by the combined executive and professional categories of 42% (1990), it is apparent that Friendswood has a highly educated and highly skilled workforce.

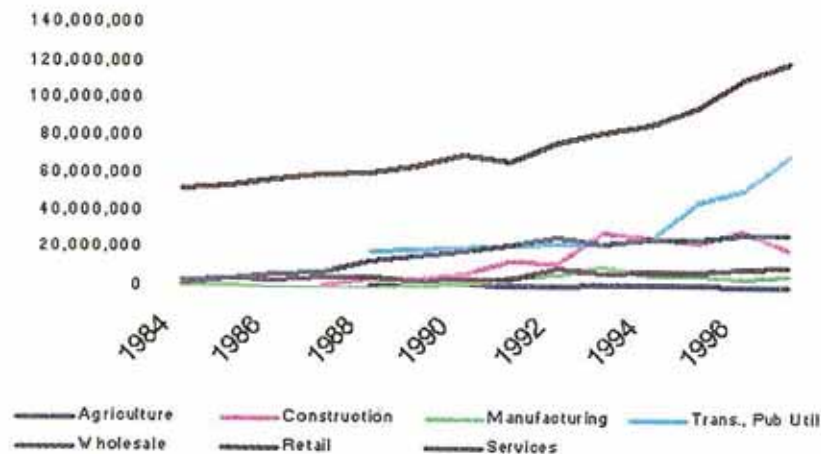


In summary, Friendswood has a fully employed and stable workforce that is highly educated. Its strengths are in the professional, executive and technical occupations and its declines have been in the sales and precision production occupations.

## 3.4.5 Sales

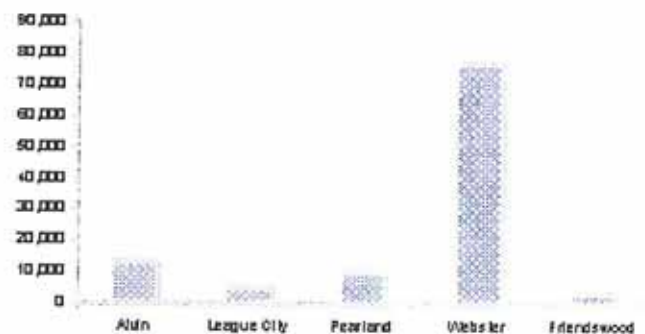
Sales data was gathered from the Office of the Comptroller for the City of Friendswood for the years 1984 to 1997. According to this data sales categories that have had aggressive growth include construction, manufacturing, and services, and those that have had moderate growth include transportation, wholesale and retail trade and service.

FRIENDSWOOD SALES BY INDUSTRY



The 1994 ratio of retail sales to population for the cities of Friendswood, Pearland, League City, Webster and Alvin indicates that Webster has by far the highest ratio (\$77,000 of sale per person) and that Friendswood has the lowest (\$3,288 of sales per person). The retail heart of these combined communities is located in Webster and the City of Houston (Baybrook Mall). However the ratio of retail sales in Friendswood as compared to Alvin, League City, and Pearland suggests that Friendswood loss of retail sales share is greater than it need be.

1994 RATIO OF RETAIL SALES TO POPULATION



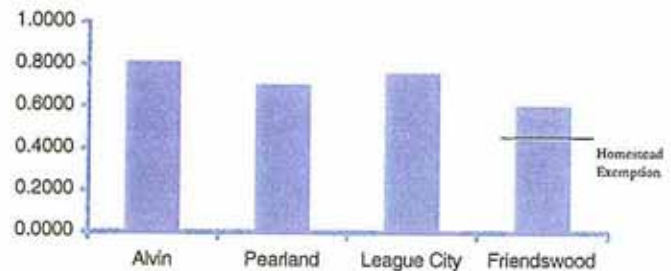
In summary, Friendswood's retail, transportation, services and construction sales are growing in absolute numbers yet, retail trade is losing market share. This is evident in the vacancy of retail space that can be seen throughout the city.



### 3.4.6 Services and Taxes

Since 1970, the City of Friendswood has maintained a tax rate of about \$.60 per \$100 valuation. In comparison to the cities surrounding Friendswood, it has the lowest rate. When the homestead exemption adapted by Friendswood is taken into account, the effective tax rate is lowered further.

1997 TAX RATE COMPARISON



In summary, the city's challenge will be to maintain the high standard of services and infrastructure while sustaining continued development. Unless there is an increase in non-residential land uses, significant pressure will be felt on the favorable tax rate enjoyed by the community.

### 3.4.7 Transportation

Friendswood is not directly served by interstate, or major regional arteries. However, it does have multiple entryways from these regional thoroughfares. Each of the entryways off Interstate 45 (FM's 2351, 518, and 528) have between 27,000 and 35,000 vehicles per day and have maintained an average annual growth rate of between 5 and 6.5% from 1990 to 1996.

The section of Friendswood Drive that passes through the heart of the city is congested with significant impact at stop lights and turning lanes, especially at peak hours.

The city is not served by rail or water.

### 3.4.8 Quality of Life

After all is said and done, quality of life is what Friendswood is all about. It is the reason for its continued growth and prosperity. It is the asset that citizens are concerned will be compromised by continuing development. And it is what must be preserved by plans for the future.

The primary focus is Friendswood's single family residential neighborhoods. They range in age, character, and density. But average densities are low (2.1 units per acre) and values are high (\$150,000 resale in 1997). The combination of open natural environment (drainage ways, parks, and open land), excellent schools, low crime rate and cultural heritage distinguish Friendswood among other local bedroom communities.

Several factors detract from this otherwise attractive picture. Friendswood's distinctive identity is threatened as urban sprawl continues in surrounding communities. It lacks a sense of arrival both at its boundaries and at its heart. The city lacks a strong retail and



business center. The scattered and generally weak retail areas do not reinforce one another. This contributes to the lack of the retail and business services that are appropriate to a community of the size and quality of Friendswood.

## 3.5 Target Markets

If non-residential land uses are to be increased it is necessary to identify those businesses and industries that are compatible with community goals and objectives that will do well in Friendswood. These are the business enterprises that the community can expect to successfully promote in order to improve its tax base and increase the retail services available to residents. The promoting of these businesses may include retaining and expanding existing, as well as attracting new businesses. Location, facilities, and business conditions required by each business type varies. By identifying those businesses most likely to succeed in Friendswood we can focus our promotional efforts on the factors most likely to produce results.

Target Markets were based on analysis of the community as seen from the marketplace (see 3.4 above). In addition, input gathered from the workshop process has been included in the process of identifying market targets appropriate to Friendswood. The areas include retail and business and light industry. Residential targets were not included. The single family residential market is thriving and needs no further encouragement. Other residential housing types were discussed during the study but discarded as the community desired to retain the housing patterns that are currently being developed. Other target market areas may immerge depending on the build-out direction the community takes. The primary target markets are described below.

### 3.5.1 Retail Targets

Friendswood's supply of existing retail businesses is significantly behind the ratio typical of bedroom communities. When the buying power of the community is considered, this becomes even more unusual. The concentration of retail around the mall (outside of Friendswood) is the principal factor producing this effect. The vacancy rate (as well as the rate of underutilized) of retail properties indicates that existing retail is struggling. Nevertheless there is room to improve Friendswood's share of the retail marketplace. The following summarizes these recommended target markets.

The graphic consists of a vertical red bar on the left. To its right, a green oval labeled 'Analysis Workshop' is connected by a line to a purple rectangle labeled 'VISION 2020 Strategic Vision for Friendswood, Texas'. Below the red bar is the logo for 'Beach Ramirez'.

**TARGET MARKETS**

- **RETAIL - *Recapture Segment of Retail Tax Base (ad valorem and sales)***
- **Community and Neighborhood Retail (*general merchandize, apparel, furniture, building materials*)**

Beach Ramirez

It is reasonable to believe that Friendswood can develop a plan to recapture a segment of the retail tax base (both ad valorem and sales) that it is currently losing to its immediate neighbors. This can be accomplished through focusing on community and neighborhood retail. These retail areas have been identified as under serving the community. In addition, we have observed that much of the existing inventory in the retail corridors is scattered, is obsolete, and has access and egress problems. Concentration of retail so that it generates and feeds off a concentration of customer traffic is critical.

### 3.5.2 Business and Light Industry Targets

The community assessment also indicated an opportunity to capture new business and light industry. Given the available land that has been designated for business and industry, its attractive locations (relative to the regional primary and heavy industries that are nearby), the skill and educational levels of the available workforce (both in Friendswood and in the area), and the role Friendswood can play in the regional economy, we have developed a list of target industries suitable to Friendswood.

**Analysis  
Workshop**

**VISION 2020**  
Strategic Vision for Friendswood, Texas

**TARGET MARKETS**

- **BUSINESS & LIGHT INDUSTRY -**  
*Increase in Community  
Employment Opportunities and  
Improve Tax Base Mix*
- **Attraction of Light Industry** (trucking,  
warehouse & distribution, small metal  
and wood fabrications, and precision  
fabrication)

**Beach  
Ramirez**

**Analysis  
Workshop**

**VISION 2020**  
Strategic Vision for Friendswood, Texas

**TARGET MARKETS**

- **BUSINESS & LIGHT INDUSTRY -**  
*Increase in Community  
Employment Opportunities and  
Improve Tax Base Mix*
- **Expand and Attract Professional  
Services** (health care, legal, financial,  
engineering and construction)

**Beach  
Ramirez**

Attracting these businesses and industries can increase the communities employment opportunities and improve the tax base mix. Light, clean industries, and professional service businesses should find Friendswood an attractive location and should be welcomed in a community sensitive to both life style quality and tax base issues.



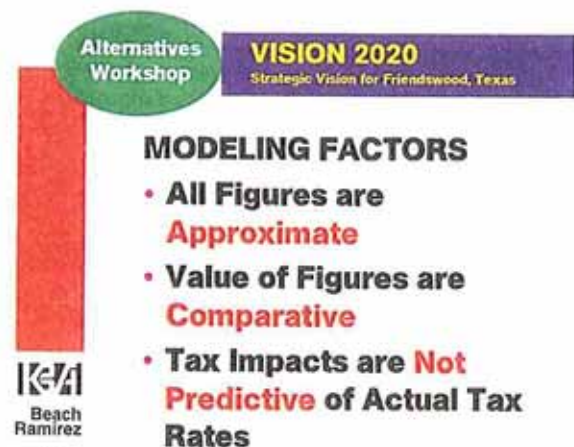
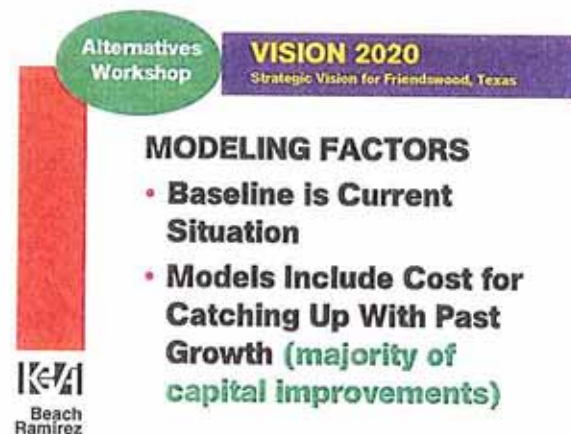
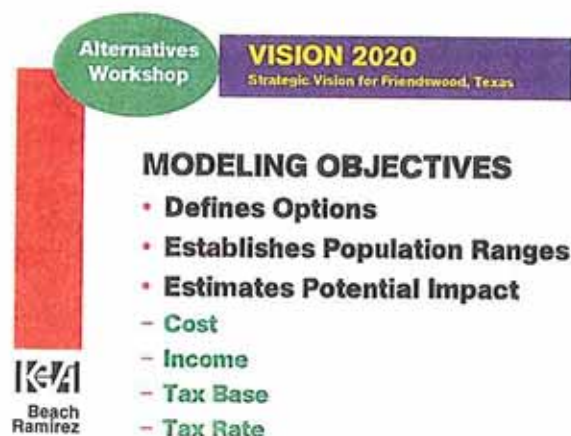
## Section 4.0

**COMMUNITY DEVELOPMENT ALTERNATIVES**

A significant feature of the study was the development and analysis of various build-out scenarios. These models provide an evaluation of alternate assumptions regarding the continued development of Friendswood.

**4.1 Community Development Models**

The process of developing and evaluating community development models involved three iterations and two workshops. The first set of models were developed and presented at the Alternatives Workshops (See Appendix) based upon the outcome of this workshop, a second set (focusing on the selected alternative) was developed and presented at the Vision Workshop. Here a new concept was injected. A final model set was then prepared for inclusion in this report.





The process of developing a Vision for the ultimate development of Friendswood began in the Analysis Workshop with the participants defining the most important elements to incorporate in Friendswood's continued growth.



The above was used to guide the development of five basic scenarios for the continued development of Friendswood. These alternatives were presented at the Alternatives Workshop (See Appendix). These scenarios compare the probable outcome of developing the remaining land in accordance with a range of assumptions. These assumptions are as follows;

**4.1.1 Maintain Current Pattern** – This model assumes that the ratio of residential to non-residential land uses (84% / 16%) will remain the same as existing development. (This is what the marketplace has produced).

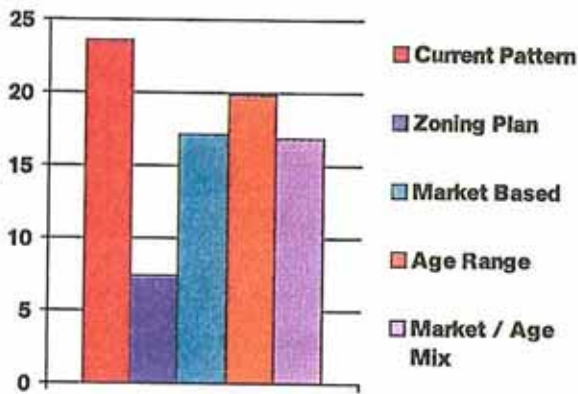
**4.1.2 Follow Zoning Plan** - This model assumes that remaining land will generally be developed in accordance with the Zoning Plan (which allocates undeveloped land on a 73% / 27% basis).

**4.1.3 Market Based** – This model responds to concerns that the marketplace will not support the non-residential uses scheduled in the zoning plan and assumes a 80% / 20% split.

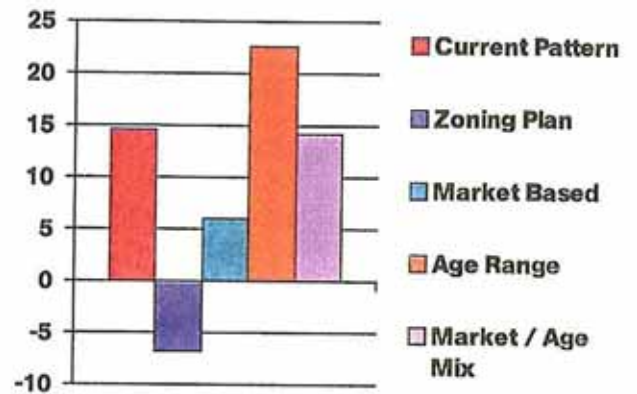
**4.1.4 Accommodate Age Range** – This model assumes that additional housing aimed at accommodating younger and older residences are to be factored into the mix. It allocates 80% of the residential land included in Maintain Current Pattern (4.1.1) to these higher density residential areas.

**4.1.5 Market and Age Range Mix** – This model is similar to Accommodate Age Range (4.1.4) except it uses the Market Based (4.1.3) model as it's base.

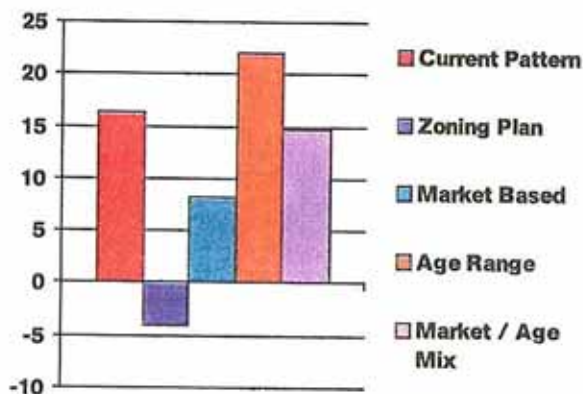
The following summarizes impact of these scenarios on the build out population and upon critical factors that impact property taxes. *These figures are not an estimate of tax increase or decrease but the degree of impact (compared with current conditions) on critical factors that contribute to the tax rate.*



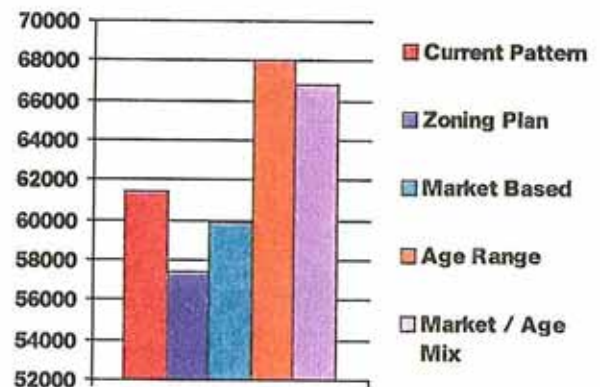
Relative City Tax Impact



Relative School Tax Impact



Relative Aggregate Tax Impact



Population at Build Out



The participants in the Alternatives Workshop selected the Zoning Plan(4.1.2) model over the Market Based (4.1.3) scenario by a three to one majority with only a few votes going to other alternatives.

Based upon the results of the Alternatives Workshop the planning team sought to reconcile the selected model with the realities of the marketplace. The result of adopting a plan that anticipates a significant increase in volume of non residential land uses is that if the marketplace will not support the plan the actual impact will be similar to the Maintain Existing Patterns (4.1.5) scenario.

The chart to the right (Vision Workshop –See Appendix) addresses the feasibility of potential non-residential land development. Increasing the land area committed to commercial purposes will require aggressive action by the community. Without taking some additional action it is likely that approximately 1,000 acres of the 1,456 acres zoned for commercial uses will remain undeveloped at the time the residential land builds out. We estimate that with a well organized economic development program the City may be able to attract up to 900 acres of retail, office, and light industrial development during the time that the land zoned residential is developed. This will leave approximately 556 acres of land vacant at the time that residential land is fully developed.



During the Vision Workshop a new concept was introduced by a participant. The concept involves the City acquiring vacant land to increase the amount of open space that is retained at build out. The participants of the workshop indicated an interest in seeing this concept explored further. The following charts compare the results of this evaluation. The alternatives are as follows:

See **4.1.1** *Maintain Current Pattern* on page 5 - 2

See **4.1.2** *Follow Zoning Plan* on page 5 - 2

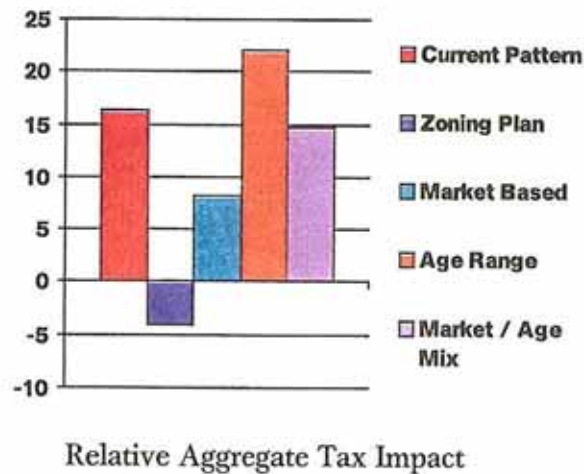
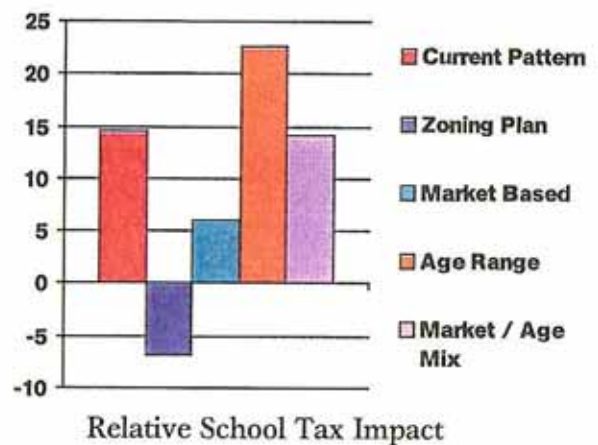
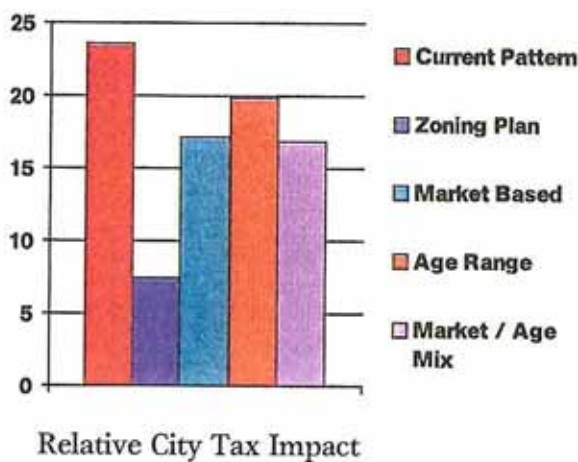
**4.1.6 Modified Zoning Plan.** Following the land use allocation in the zoning plan with an aggressive program to retain, expand and recruit new business and light industry to the community (See Target Markets) and with the understanding that approximately 556 acres zoned for commercial and industrial uses will not be absorbed during the time that the residential land is built out.



**4.1.7 Modified Zoning Plan with City Purchase of 556 Acres.** This scenario assesses the impact of the City acquiring enough land (taken entirely from the non-residential category) to bring the demand for residential and non residential land into balance.

**4.1.8 Modified Zoning Plan with City Purchase of 1000 Acres -** This scenario assess the impact of the City acquiring enough land (taken entirely from the non-residential category) to be supported by the current level of demand for commercial and industrial land.

The following charts estimate the relative impact related to these assumptions



## **4.2 Summary of Development Scenarios**

If Friendswood's growth continues with 84% of the land use devoted to residential development, there will be significant upward pressure on taxes or correspondingly pressure to reduce the level of services provided to the community.

The existing zoning calls for approximately 27% of the balance of the undeveloped land to support retail, office and light industrial uses. Achieving this level of non-residential uses would eliminate pressure on tax increases and service reduction. And the ultimate population will be about 57,400 persons. The problem is that the marketplace is not currently demanding land in Friendswood in proportion to the zoning distribution.

Ultimately land zoned for non-residential uses can be absorbed but the rate of development for commercial and industrial land will not keep pace with the continued development of housing. Unless other steps are taken, the residential land in Friendswood will be developed before the non-residential land. If this happens, at most points along the way to ultimate build out the scenario will more closely resemble the *Current Patterns* than the scenario that has been selected as the preferred model. Unless something changes, the build out of commercial and industrial land will be the last phase of Friendswood's development. As build out approaches there will be pressure upon the City to rezone land for residential purposes to meet the market demand. In addition, as land becomes scarce the value of land will rise and place pressure on the City to allow higher density residential development in order to support the higher land prices.

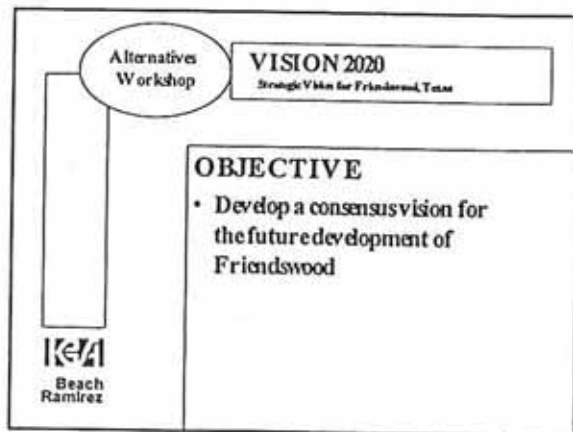
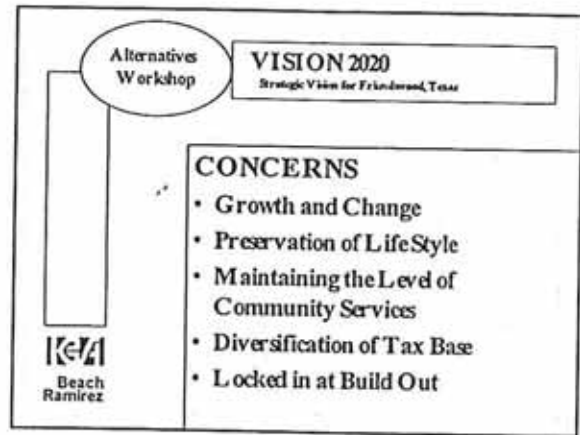
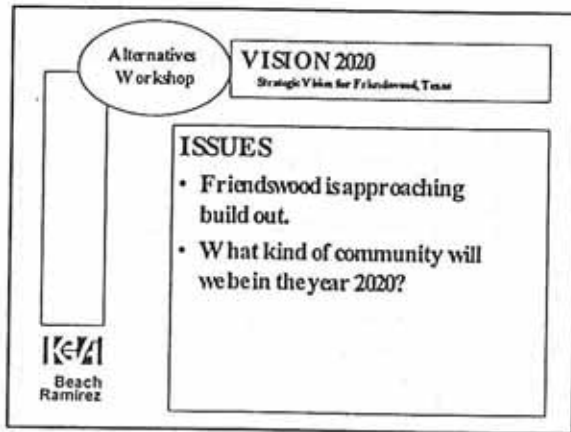
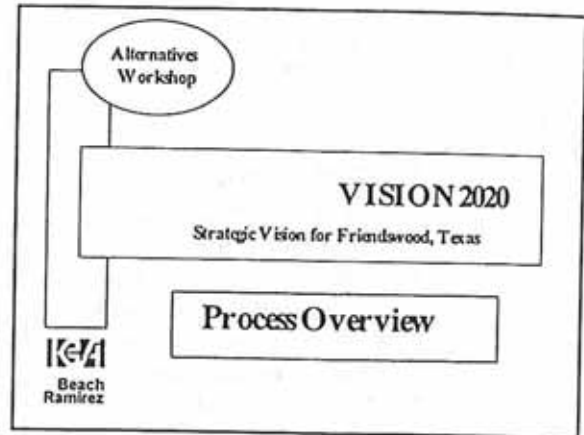
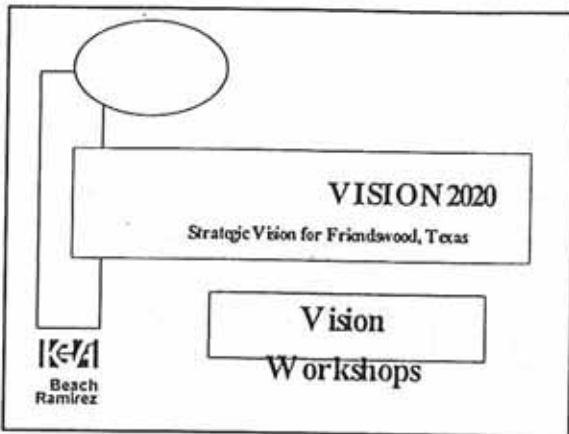
The solution to this dilemma is to aggressively recruit new business and industry to Friendswood. While there are both marketplace and community sensitivity limitations to the types of business enterprises that can be successfully recruited, a well focused but aggressive economic development program is critical to maintaining taxes and services at desirable levels.

The modified zoning plan assumes such a program and projects modest pressure on taxes and services as the city grows.

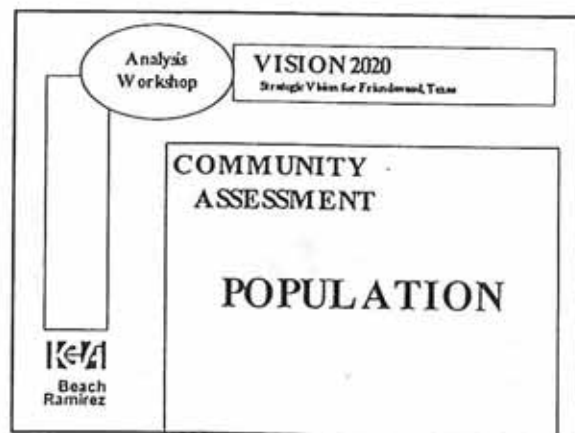
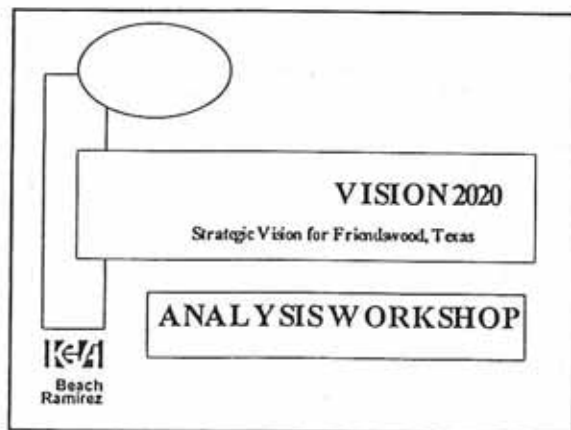
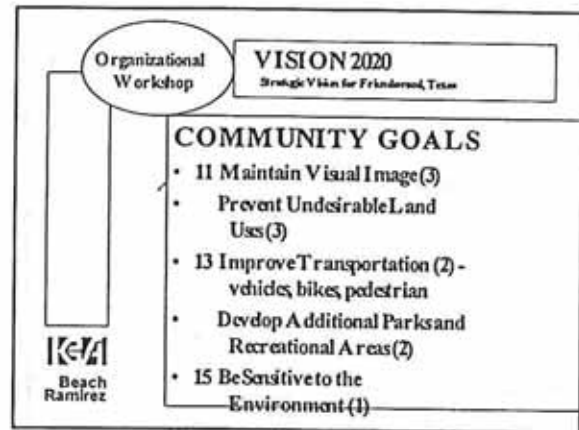
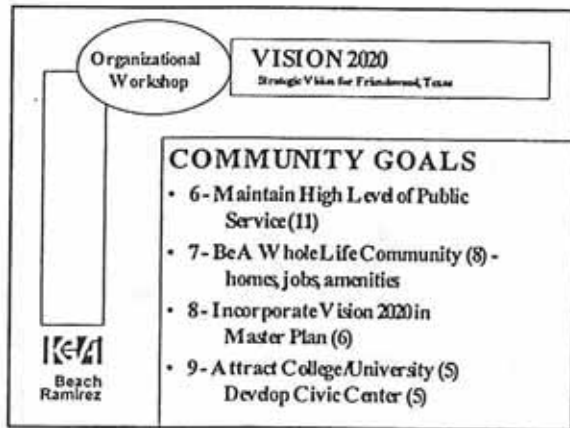
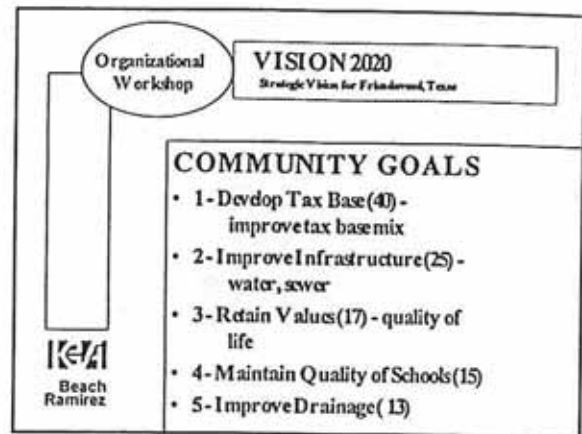
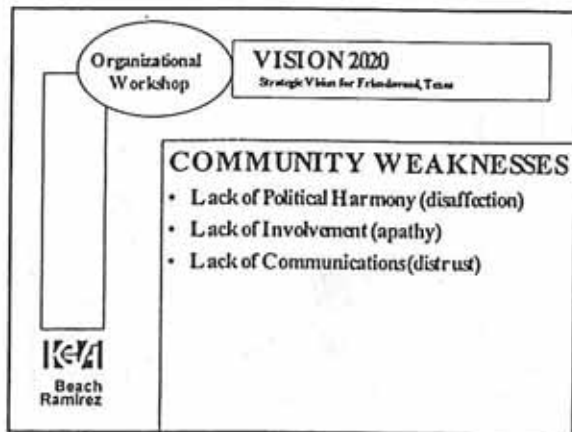
Finally, at the last workshop, a participant suggested that the city acquire vacant land (in addition to the land already committed to passive uses) in order to preserve open land and reduce the ultimate development of the community. This participant suggested that this might reduce costs by avoiding the construction and operation of new schools.

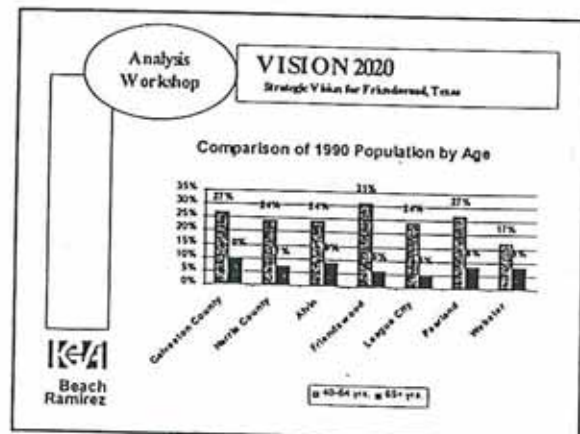
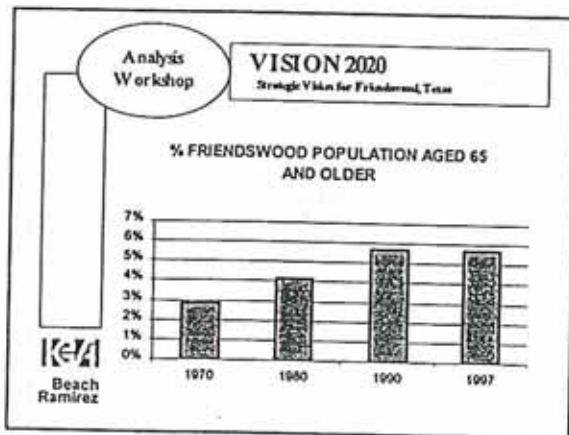
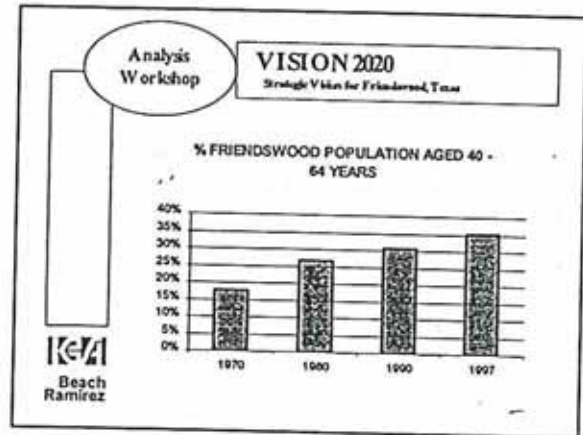
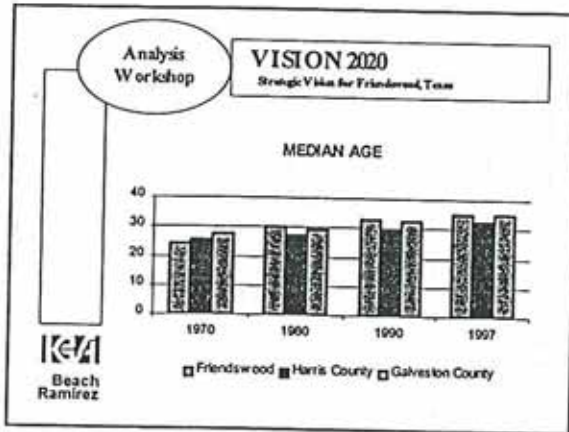
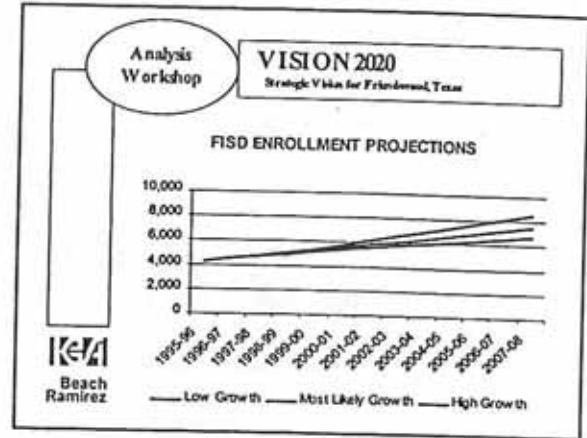
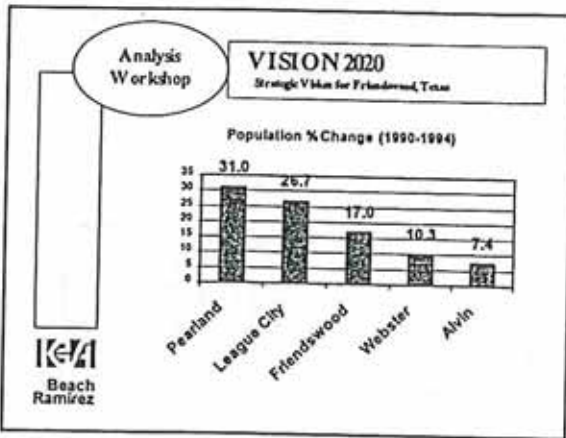
Such a plan has a double impact on city taxes. It adds the cost of land purchase to the cost side of the equation (we assumed an average of approximately \$35,000 per acre) and removes property from the tax rolls. In the case of the schools, it reduces the tax rolls while also reducing the number of students to be served.

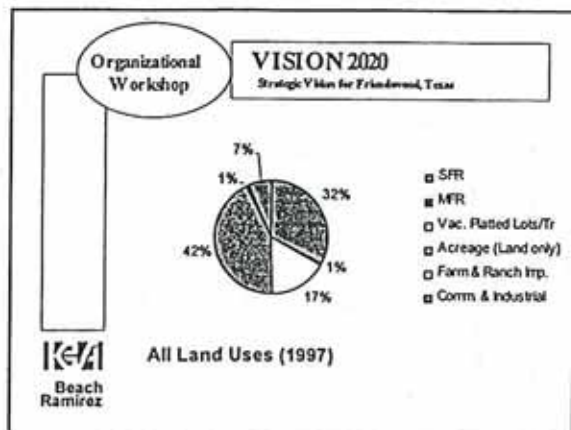
After evaluating the marketplace, it would appear the impact of reducing the land available for development will fall disproportionately on the non-residential side of the land use mix. The











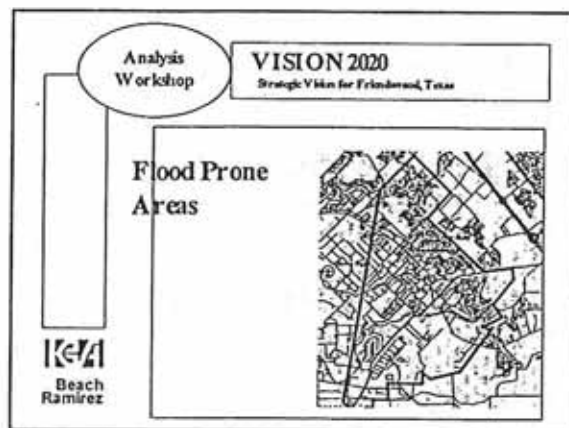
**Analysis Workshop**

**VISION 2020**  
Strategic Vision for Friendswood, Texas

**LAND USE (Adjusted City Data)**

	Developed	Net Avail
SFR	5790	3600
MFR	433	420
Comm	527	563
Ind	9	890
<b>Totals</b>	<b>6759</b>	<b>5473</b>

**Beach Ramirez**



- Analysis Workshop**
- VISION 2020**  
Strategic Vision for Friendswood, Texas
- LAND USE SUMMARY**
- SFR Dominate
  - Land is available
  - Zoning Increases Non-Residential Land Uses
  - Build Out Capacity Will Vary With Development Scenarios
- Beach Ramirez**

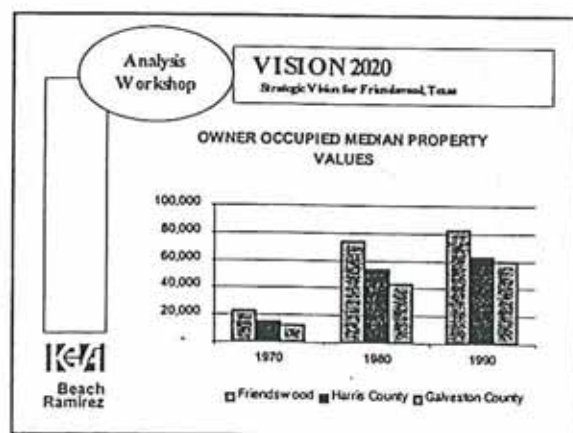
**Analysis Workshop**

**VISION 2020**  
Strategic Vision for Friendswood, Texas

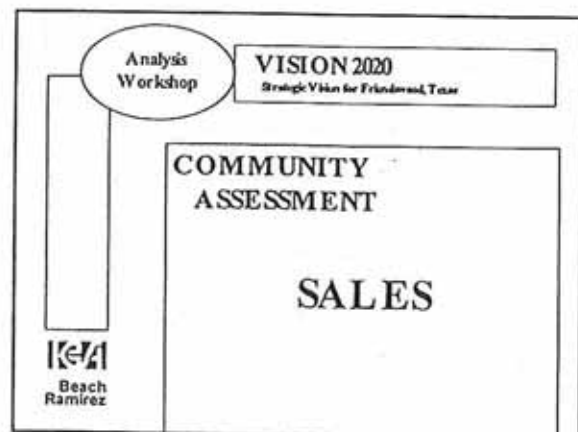
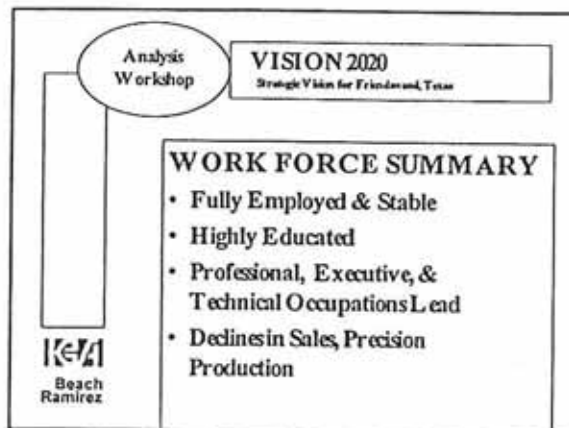
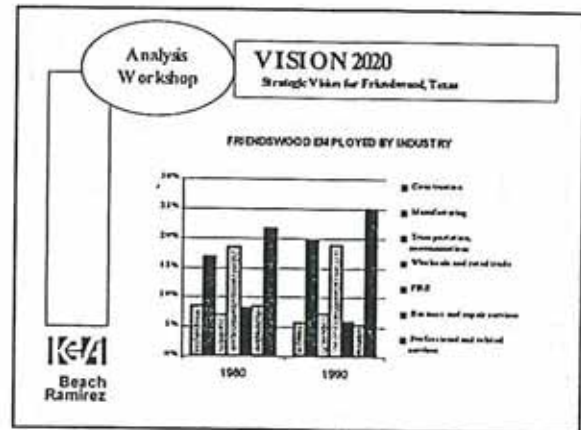
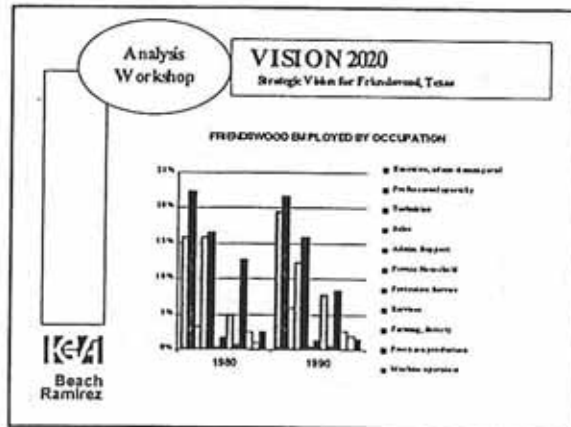
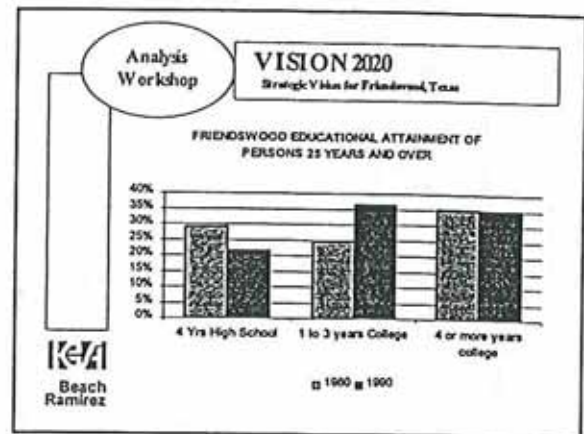
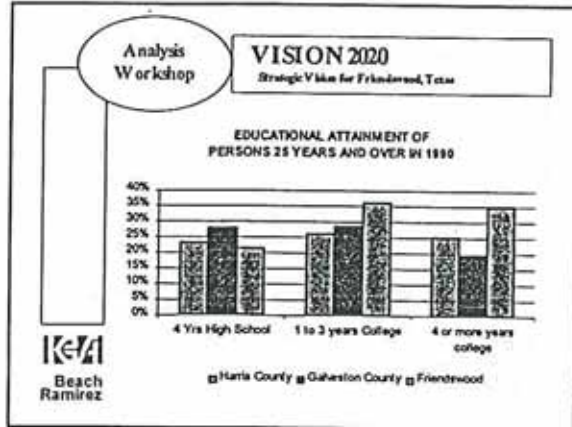
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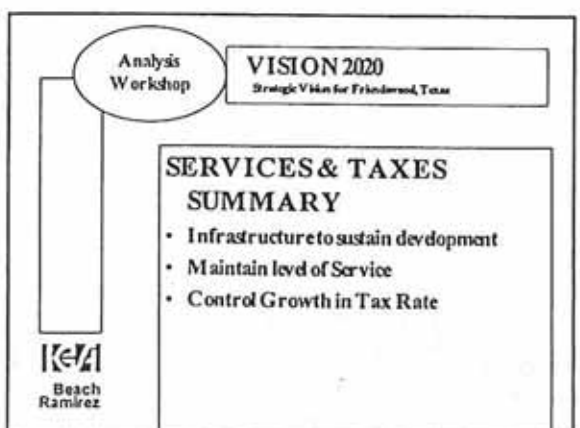
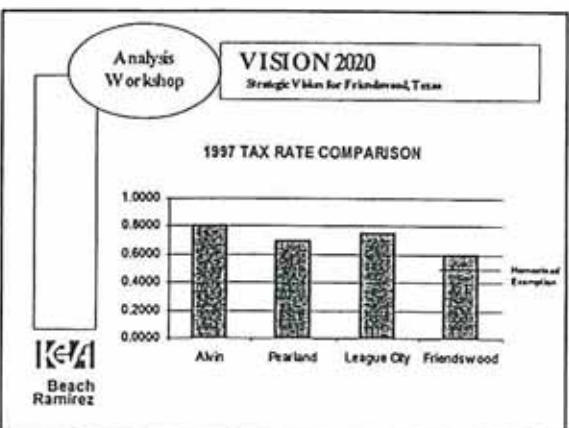
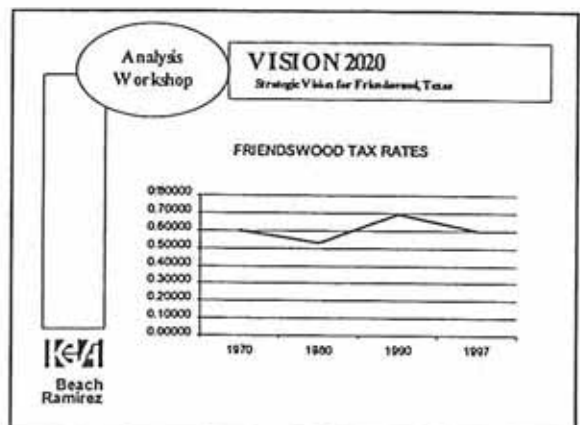
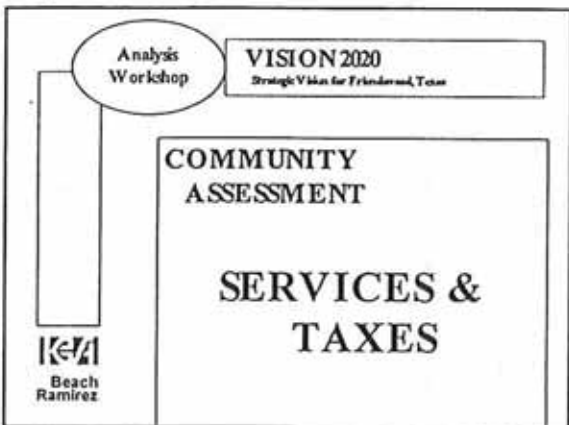
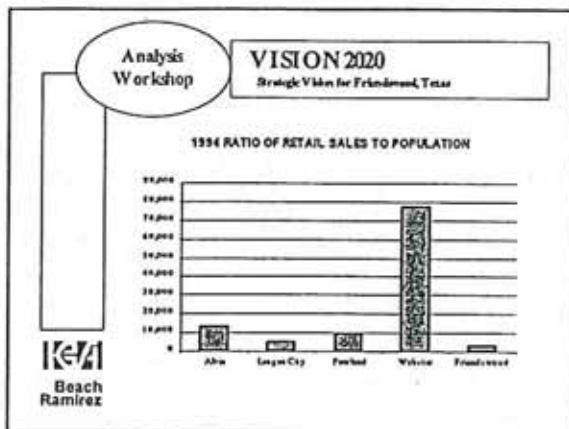
**HOUSING**

**Beach Ramirez**












Organizational Workshop

**VISION 2020**  
*Strategic Vision for Friendswood, Texas*


**FRIENDSWOOD IN CONTEXT**


- Part of 13 County HGAC
- Part of 8 County CMSA
- Located at Junction of 3 Counties
- Part of Harris and Galveston County Economies
- Part of 5 Community Cluster (with Alvin, Pearland, League City, Webster)

  
 Beach Ramirez

Analysis Workshop

**VISION 2020**  
*Strategic Vision for Friendswood, Texas*




  
 Beach Ramirez

Analysis Workshop

**VISION 2020**  
*Strategic Vision for Friendswood, Texas*

**FRIENDSWOOD IN SUMMARY**

- Growth Location
- 30,500 Residents (1997)
- Premier Lifestyle Community
- A Affluent Population
- Traditional Heritage
- Conservative Outlook
- 4.8% Annual Growth Rate (90-97)


  
 Beach Ramirez

Analysis Workshop

**VISION 2020**  
*Strategic Vision for Friendswood, Texas*

**FRIENDSWOOD ISSUES**


- Narrowing of Age Distribution
- Ultimate Capacity
- Maintaining Services
- Maintaining Favorable Tax Rate
- Retail Loss
- Tax Base Mix
- Changes to Friendswood Ave
- Community Disharmony

  
 Beach Ramirez

Analysis Workshop

**VISION 2020**  
*Strategic Vision for Friendswood, Texas*

**Target Markets**


  
 Beach Ramirez

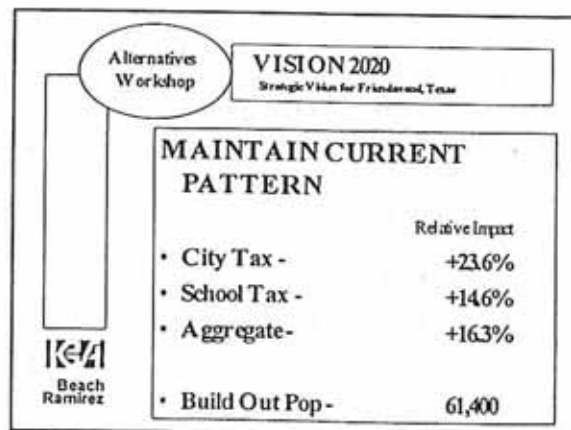
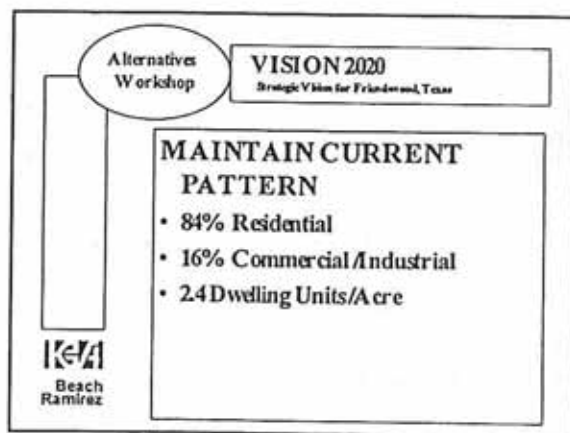
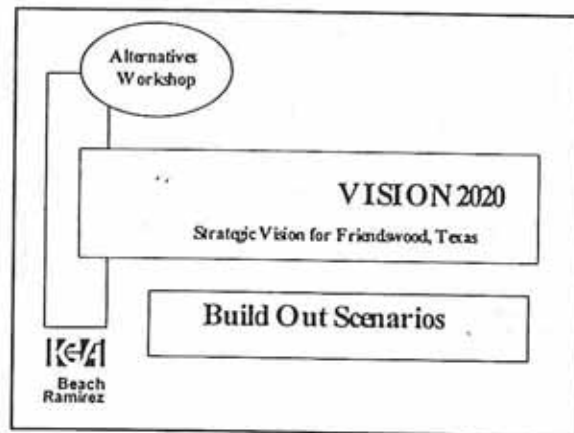
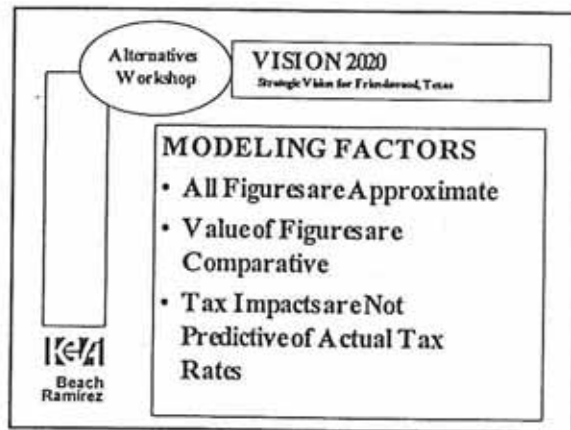
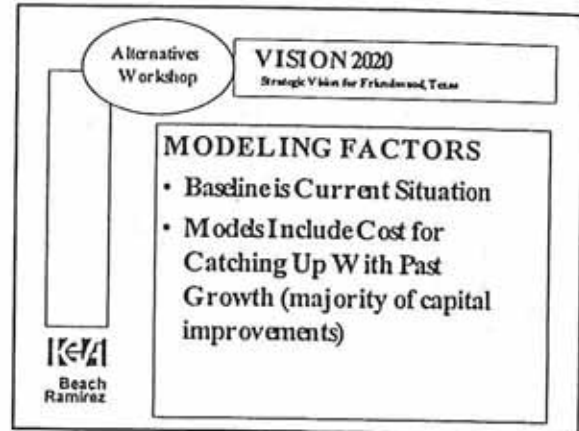
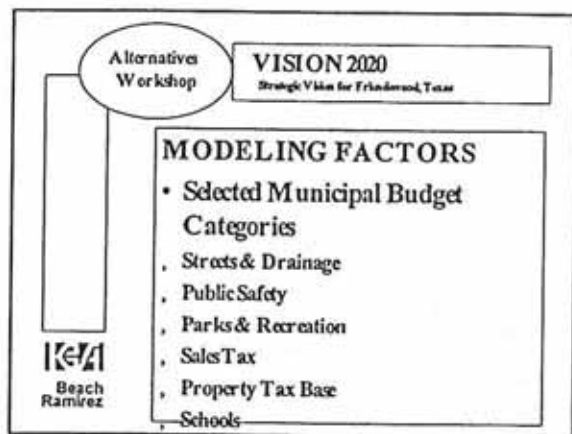
Analysis Workshop

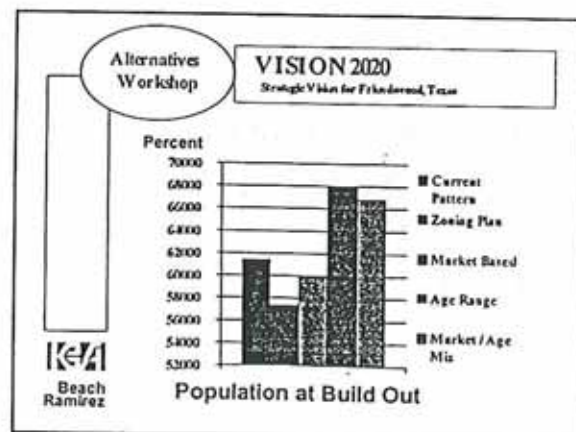
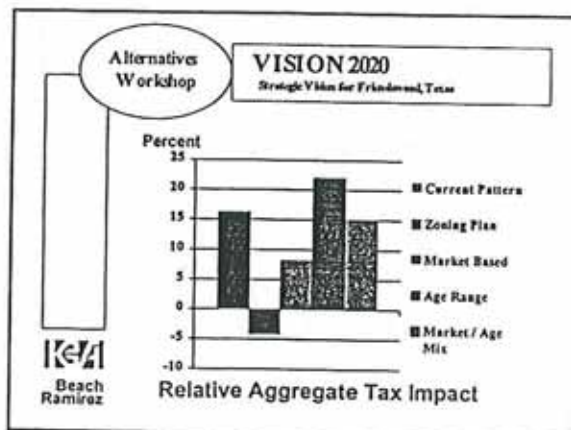
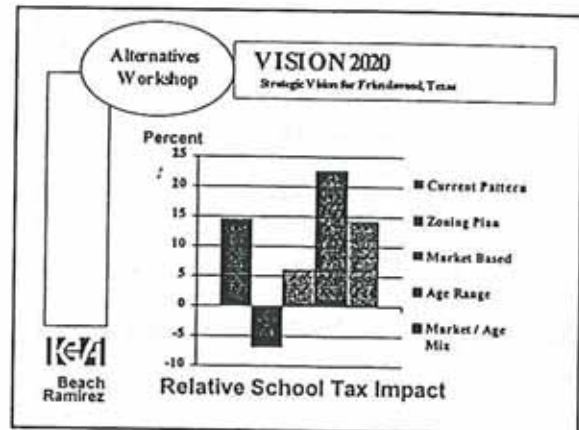
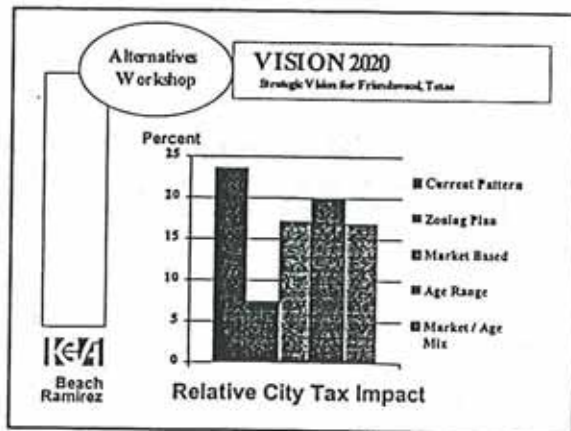
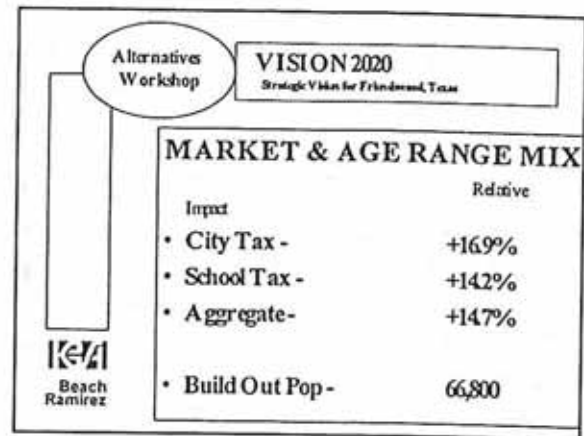
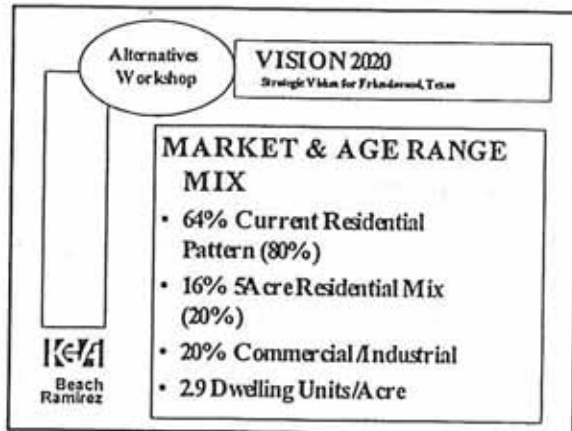
**VISION 2020**  
*Strategic Vision for Friendswood, Texas*

**TARGET MARKETS**

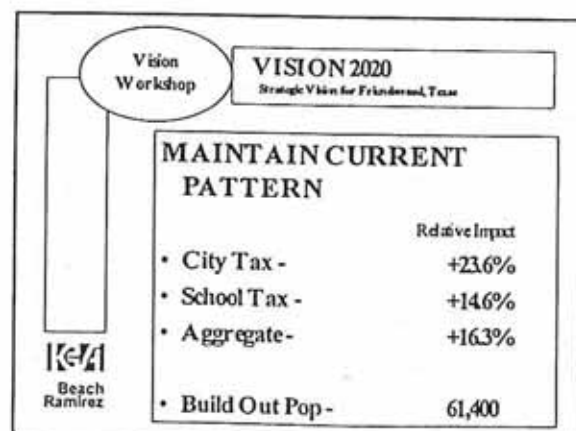
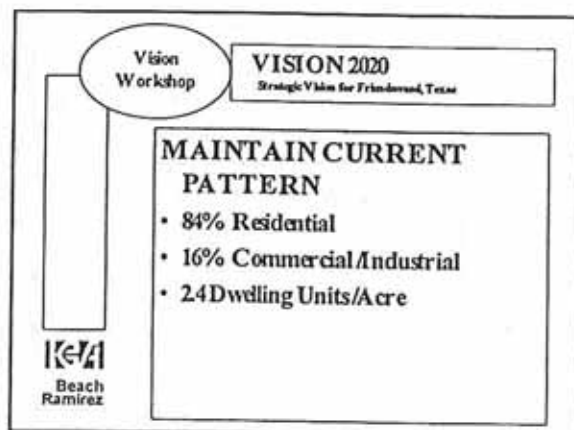
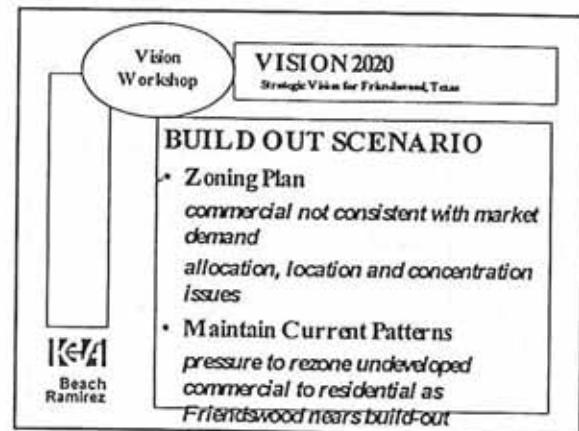
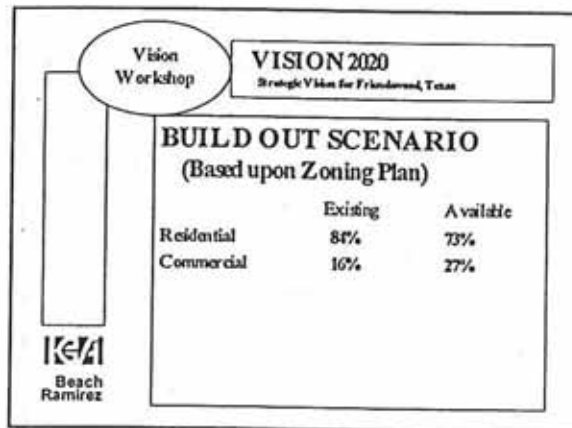
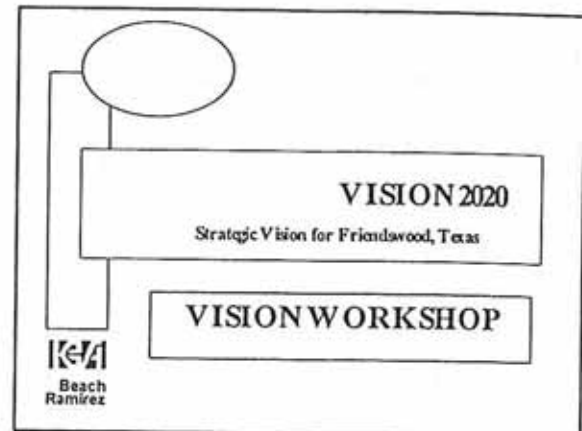
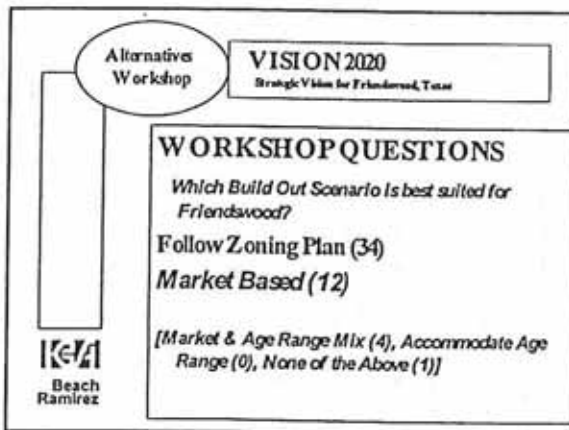
- RESIDENTIAL - Provide for wider age distribution in population
- A additional Higher Density SFR Development (\$100k - \$140k range)
- A additional Upscale Low Density MFR (up to 10 acre)

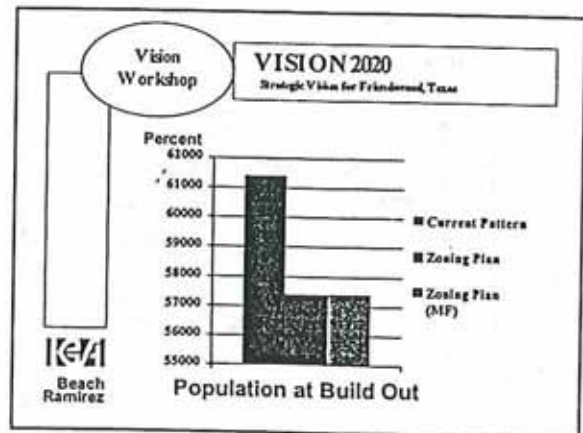
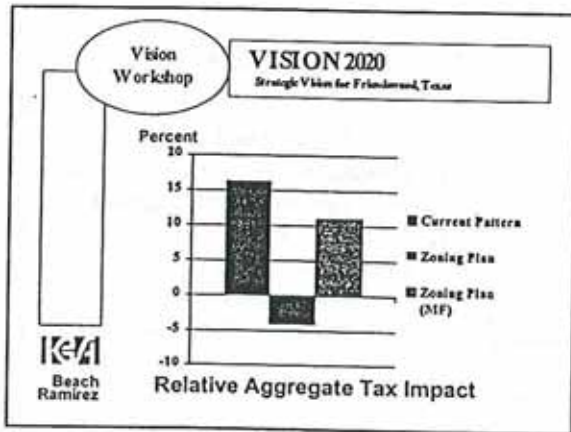
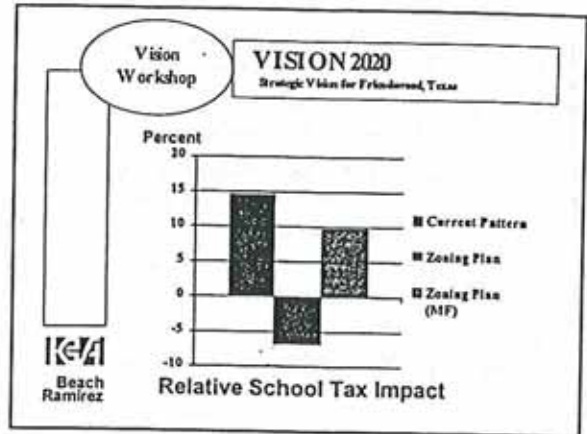
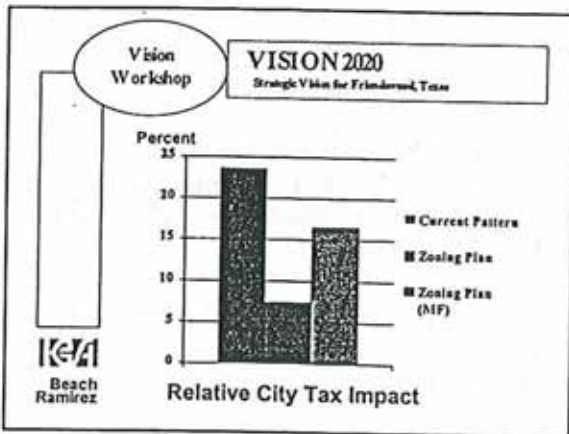
  
 Beach Ramirez











Vision Workshop

**VISION 2020**  
Strategic Vision for Frickland, Texas

**VISION 2020 (build out)**

- *Maintain High Level of Lifestyle Amenities and Services*
  - Open Space and Image
  - Parks and Recreation Areas
  - Thoroughfares
  - Infrastructure and Drainage
  - Public Safety
  - Schools

Beach Ramirez

Vision Workshop

**VISION 2020**  
Strategic Vision for Frickland, Texas

**VISION 2020 (build out)**

- *Maintain High Level of Lifestyle Amenities and Services*
- **IMPLICATIONS:**
  - Capital Improvements and Operational Expenditures (Infrastructure, Parks, Public Safety, Schools)
  - Interagency Coordination (Thoroughfares, Drainage)

Beach Ramirez