



Urban Land
Institute

Arizona



Town of Carefree

ULI Arizona Technical Assistance Panel

Summary Report

January 2014



Special thanks and acknowledgements from the Urban Land Institute Arizona District Council

The Town of Carefree

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Photo opposite page: Town Sun Symbol

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All photos provided by PLAN-et unless otherwise noted.

ULI AzTAP 2013-2014 COMMITTEE LEADERSHIP

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The Town of Carefree AzTAP Panelists

What is the Arizona Technical Assistance Panel (AzTAP)?

The AzTAP program is a service offered by the Arizona District Council of the Urban Land Institute (ULI) to assist Arizona municipalities, counties, regions, and non-profits in the preliminary study of unique land use planning, development, and redevelopment issues. ULI has successfully assisted communities in identifying opportunities for economic diversification, development and redevelopment.

The ULI experts identified for the Town of Carefree Panel were selected based on their expertise and knowledge of strategies that could help the Town increase its existing efforts to be a vibrant community. The AzTAP is an extension of the national Urban Land Institute (ULI) Advisory Services Program. For additional information, please access: <http://arizona.uli.org/community/arizona-technical-assistance-panels-aztaps/>

Who is the Urban Land Institute (ULI)?

The Urban Land Institute is a 501(c) (3) nonprofit research and education organization supported by its members. Founded in 1936, the Institute now has members in 95 countries worldwide, representing the entire spectrum of land use and real estate development disciplines working in private enterprise and public service. As the preeminent multidisciplinary land use and real estate forum, ULI facilitates an open exchange of ideas, information, and experience among local, national, and international industry leaders and policy makers dedicated to creating better places. The mission of the Urban Land Institute is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. For additional information, please access: <http://www.arizona.uli.org>

The ULI Arizona District Council was formed in the early 1980s, as a direct response to the need for educational forums and events at a local level. ULI Arizona boasts over 800 members, and has one of the highest member participation rates of any ULI District Council.

Technical Assistance Panelists

The Town of Carefree AzTAP panelists are recognized experts in their field who were selected to participate on the AZTAP based on their ability to identify proven concepts which could enhance the Town of Carefree Town Center.

Panel Moderator:

David Roderique, President & Chief Executive Officer, Downtown Phoenix Partnership

Panelists:

David Scholl, Partner, Vintage Partners

Danny Little, President, DWL Company

Lorenzo Perez, Principal & Co-Founder, Venue Projects

JT Elbracht, President, Elbracht + Company

Frank Maguire, President, Frank Maguire and Associates

Nick Dodd, Director, RBC Capital Markets



Town of Carefree Town Center AzTAP Challenge

The Town of Carefree AzTAP was organized to develop a plan of action for creating a more robust and vital Town Center retail, entertainment, and service district, and to extend the current Town Center trade area. Specifically, the AzTAP was asked for ideas on how to:

- Position the Carefree Town Center public infrastructure to act as incubators to attract people/customers and subsequent businesses.
- Diversify and expand the number of sales tax generating businesses within the Town Center.
- Market the Town Center to become a destination for residents within a minimum five-mile radius.



The Carefree AzTAP was held at the Carefree Town Council Chambers on Easy Street.



Panelists responded to a list of questions selected by the Town.



Over 30 Carefree residents, staff, and administration attended the AzTAP.

Executive Summary and Planning Priorities

The Town of Carefree ULI Arizona Technical Assistance Panel (Carefree AzTAP) examined opportunities to enhance the quality of the Town Center to create additional energy, foot traffic and visibility to support businesses and contribute to a stronger and more sustainable economy.

The AzTAP process consisted a site tour, panel discussion and a public forum. The AzTAP participants began with a walking tour of the approximately 42-acre study area. (See [Map 1: Town Center Study Area](#)). After the tour, the panel reconvened at the Carefree Town Council Chambers. The AzTAP Panel discussion was guided by driving questions (listed on the page 11) that were focused on specific topics including:

- **Creating a shared community vision;**
- **Attracting new businesses;**
- **Developing creative financing mechanisms;**
- **Marketing the town center;**
- **Using creative parking solutions; and**
- **Encouraging local leadership.**



Town Staff led the panelists on a walking tour of the Town Center.

Over 30 people attended the AzTAP, including Town Council Members, the Mayor, Town Center Merchants and residents. Town staff, including members of the Planning Department and the Town Administrator were also in attendance. Audience members were provided an opportunity to ask questions at the conclusion of the AzTAP.

Planning Priorities

AzTAP panelists identified the top priorities for the Town Center and recommended the following actions be considered in evaluating and planning for future development:

Create a Shared Community Vision

- Create a document with graphics to communicate the vision.
- Be flexible, understand things change.
- Non-retail uses can help support the vision.
- Circulate the vision around town.
- Use collective engagement, involve stakeholders.
- Capitalize on Carefree's unique character.

Enhance the Physical Design

- Invest in wayfinding improvements.
- Adapt ordinance to reflect the desired development, such as allowing for taller buildings and additional residential developments without having to be mixed use.
- When making physical improvements, consider the urban form, iconic architecture, stores that animate the street, connectivity and transition between land uses, and circulation.
- Provide colors, lighting, and accents which catch one's attention ("jewelry").
- Create a land plan for the Town Center to help with the conversion of office to retail space.

Act Now

- Use vacant space as an opportunity to kick off the vision.
- Take a risk and make an investment.
- Start talking now. Add "Carefree Town Center" and "Sundial" into daily vocabulary.
- Make sure to act with PASSION!

To help the community move forward and address these priorities, the AzTAP panelists identified these strategies:

- Encourage property owners to work more cohesively, perhaps through the formation of a merchant's association or common leasing management.
- Private-public partnerships should be the basis for all operational and investment strategies - make sure everyone has "skin in the game".
- Explore various financing mechanisms (such as improvement districts) to help in the development of physical and operational improvements.
- Encourage mixed-use development throughout the Town Center (i.e., residential, hotel, office), which can support and enhance the viability of retail.

AzTAP Driving Questions

The following questions, developed by the ULI Arizona TAP Committee in concert with the Town of Carefree, were asked of the panelists during the Town of Carefree AzTAP and used to guide the discussion.

1. Visibility, Attraction, and Vision:

- What kind of anchors would work to stimulate foot traffic in the Town Center (i.e. restaurants, cultural facilities such as a museum, multiple-family, boutique resort, others)?
- What compels one to drive to an outdoor shopping center throughout the year?
- How could the inward focus of the Town Center be inverted to better alert passing traffic of its commercial spaces/opportunities?

2. Investment Strategies:

- Is the Town appropriately investing in its infrastructure with the specific goal to create an environment which attracts a diverse customer base throughout the year, and in return, attracts and retains businesses?
- How could the Town invest more?

3. Land Ownership:

The Town Center contains fractional ownership with parcels as small as 6,000 square feet and economically obsolete smaller buildings lacking visible retail space.

- How can the Town: (1) encourage assemblage and redevelopment, and (2) bring diverse interests together to market and reinvest in their properties?
- Are there funding mechanisms?

4. Parking Strategies:

- From a public/municipal investment standpoint, is structure parking a wise investment or should the Town pursue additional parallel parking along arterial streets (Cave Creek Rd. and Tom Darlington Dr.)?
- If a parking structure is a good investment, where should it be located?
- How can a parking structure be funded?

5. Incentive Strategies:

- What best practices can be used by the Town (without violating the constitutional gifting clause) to incentivize the private sector and stimulate the business environment?

6. Tenant Strategies:

- How can private property owners help to create a more viable Town Center?

7. Reaching the Target Market:

- What are best practices to reach the primary market area/target audience (customers) within and outside of Carefree?
- Should the Town continue to market itself?
- Should the Town re-evaluate the target market?
- If so, who should be included/excluded?

8. The Future:

- What is the potential in Carefree?
- Is Carefree moving in the right direction to reach that potential?
- What should the Town do differently?

9. Top Five Priorities:

- Identify the top five priorities for the Study Area and determine next steps that should be considered in evaluating and planning for future development.
- What is the priority of specific opportunities the Town should implement to support revitalizing the Town Center?

Background & Current Study Area Conditions

Introduction

The Study Area is the Carefree Town Center, as defined in the General Plan. A commercial development known as Mariachi Plaza, located across the street from the Town Center, has been added to the Study Area due to its retail-commercial uses and redevelopment potential.

History

The Carefree Town Center has served as the Town's economic engine since the 1960's when Carefree was designed as a new master planned community. After the Town incorporated in 1984, the Town Center continued to develop as the Town's central business district and primary source of revenue. More recently, the economic recession has negatively impacted local businesses.

The 2000 Town Center Specific Plan and the 2001 Town Center Parking Analysis were prepared in an effort to enhance the Town Center. These preceded the Town Center Improvement Plan in 2001, which involved construction of the Carefree Desert Gardens, on-street parking, roundabouts at Town Center entrances, a drainage system, lighting and other features. Gas Lamps were added a few years later. Recently, the Town funded new business directory signs along the arterial streets fronting the Town Center.

Between 2010 and 2012, the Town updated its 2002 General Plan. A new section entitled Economic Development was added, which outlines the Town's goal to refocus its efforts in the Town Center in a manner consistent with the Town's unique character. In 2013, the Town Council prepared the Economic Development Strategic Plan (EDSP) to specify and give direction to the Town's economic development objectives.



The Carefree Desert Gardens, located on Easy Street in the heart of the Town Center, is a public botanical garden offering a serene natural setting, unique plant varieties, and several special events.

Recognizing the Town Center's need for further economic stimulation, the Town of Carefree identified challenges and opportunities facing the Town Center. These challenges and opportunities were forwarded to the ULI Arizona Technical Assistance Panel and Committee.

Town-identified challenges to redevelopment include:

- Lack of Visibility: The Town Center faces inward, and its architecture, shops, and amenities are not visible to drivers passing by.
- Parking: New sites for additional surface parking are limited, public on-street parking along Easy Street is often closed-off during major special events, making it challenging for regular customers to access businesses, and parking structures are expensive to construct.
- Minimal Town Land Ownership: Town only owns 3.5+/- acres in the Town Center.
- Fractured Ownership: Individually-owned lots are as small as 6,000 sq. ft.. Consequently, many landowners must be coordinated to develop new projects requiring more than one site.
- Existing Stakeholders: Some property owners have not demonstrated the motivation, commitment or sophistication to create a positive environment for tenants and visitors, or an effective organization of local businesses.
- Funding: Carefree has a limited budget and opportunities for fundraising. The Town does not assess a property tax. Primary sources of Town revenue are retail sales, hospitality and construction taxes, and state-shared funds and grants.
- Land Use Patterns: Land uses and development standards impose constraints on the Town Center:
 - The General Plan and Zoning Map restrict commercial uses to the Town Center and two Town gateways. These restrictions, combined with the internally-facing Town Center, sends a message to potential developers that the Town Center serves the immediate area, and is not a region-wide shopping destination.
 - Neighborhoods with 70,000 sq.ft. lot single-family zoning are located along Bloody Basin Rd. adjacent to the south boundary of the Town Center and preventing high density development along the south frontage of the Town Center.
 - The Town Zoning Ordinance limits new mixed-use development to 1-acre sites on Easy Street which have no frontage on arterial streets. Mixed use development allows two stories of residential over commercial uses, with at least one-half of parking below the ground.
- Seasonality: Some businesses close for the summer months, are only open during limited hours, or less than six days a week. There are few significant anchor businesses in the Town Center.

Town-identified opportunities for redevelopment include:

- Widening the mixture of amenities in Carefree and the Town Center. This could increase visitors' length of stay and attract new visitors.
- Restaurant emphasis by promoting Town Center buildings, many of which have a unique character, to restaurants, sports grills, wine bars, cafes or perhaps a microbrewery featuring Carefree's trademark features. This would increase foot traffic and support local business growth.
- Enhancing parking through an improvement district or shared parking for Town businesses in association with the development of the Easy Street Project, located southeast of the post office on both sides of Easy Street.
- Creating a sense of entry by constructing a decorative arched entrance and/or enhancing the landscaping at one or more of the streets entering the Town Center.
- Messaging to market the Town Center as a unique center of cultural, recreational, entertainment and lifestyle amenities not available elsewhere in the region.

Photo Inventory



Descriptions of numbered areas identified above can be found on page 16.

Photo Inventory

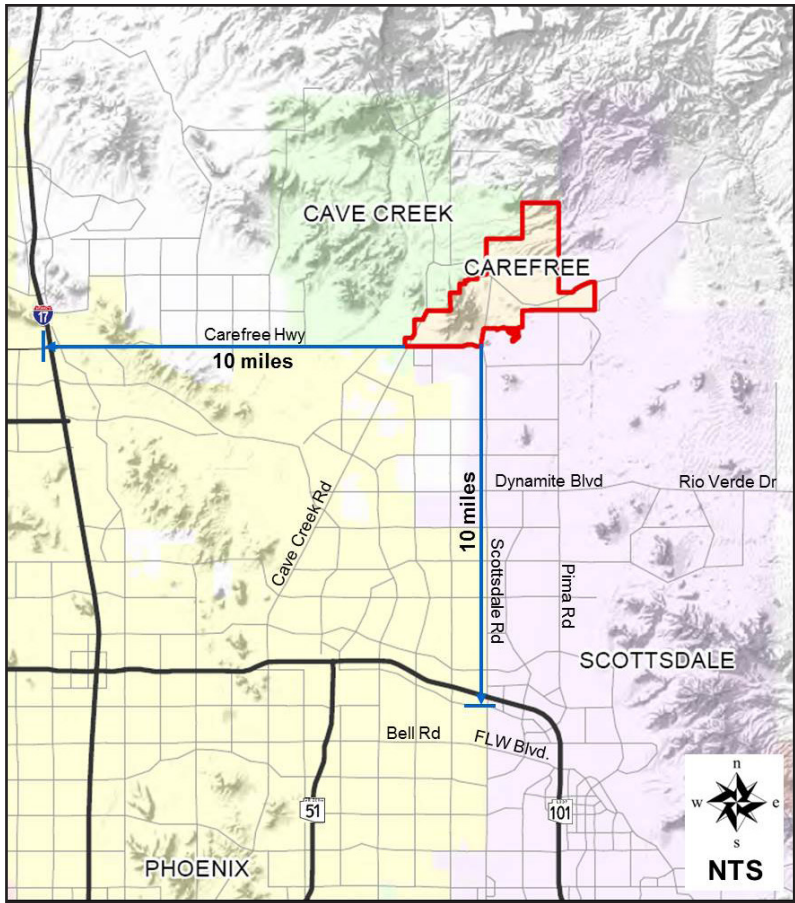


Design Considerations

1. Town Center plazas face away from the rest of the Town, limiting the Town Center's ability to attract visitors traveling along arterial streets.
2. The circular street network in the Town Center can be confusing for visitors.
3. Courtyard designs limit the visibility of businesses.
4. Unique spaces remain unoccupied.
5. Businesses, like the English Tea Room, that face the street and market effectively, succeed.
6. The Carefree Desert Gardens often go unnoticed due to the lack of wayfinding features.
7. The Town amphitheater hosts popular community events that can lead to parking problems.
8. The Carefree Sundial is one of the few iconic structures and is not visible enough to draw people into the Town Center.
9. Vacant land is available in the heart of the Town Center.

Photo opposite page: The Carefree Sundial





Map 2: Regional Context
 The study area in relation to Cave Creek, Scottsdale, Phoenix, Loop 101, and the I-17.

Source: Town of Carefree



Map 3: Local Context
 The study area in relation to N. Tom Darlington Dr. and N. Cave Creek Rd.

Study Area Features Overview

Access and Circulation

The Town Center is a triangle bounded by Cave Creek Road on the west, Bloody Basin Road to the south and Tom Darlington Drive on the east. The north end of the Town Center is at the intersection of two arterial streets, Tom Darlington Drive and Cave Creek Road. The Town Center has ingress and egress from eight locations along these roadways and includes:

- Primary access marked by traffic circles at Tom Darlington Drive at Wampum Way and Cave Creek Road at Carefree Drive.
- Secondary access at three locations on Tom Darlington at Carefree Drive, Lucky Lane and Ho Road.
- Secondary access at three locations on Cave Creek Road at Hum Rd., Sunshine Way and Elbow Bend.

Street Lanes and Design

Tom Darlington Drive and Cave Creek Road are median-divided arterial streets with two lanes in each direction. These streets narrow to one lane at the traffic circles. Deceleration lanes are provided on all streets accessing the Town Center except Carefree Drive, Elbow Bend and Bloody Basin Road. Bloody Basin Road is median-divided with one lane in each direction and two traffic calming roundabouts to discourage cut-through traffic fronting the low density homes on the south side of the street. Streets within the Town Center are local commercial streets with one lane in each direction and, in most cases, without a center line. On-street parking is located along Easy Street, Ho Road, and Hum Road.

Pedestrian/Bicycle Friendly Infrastructure

The 2001 improvements and overall design of the Town Center create an environment that is friendly to bicyclists and pedestrians. Pedestrian crossings are located on Tom Darlington Drive and Cave Creek Road. One of the crossings is lit and signalized. Five-foot sidewalks meander throughout the local commercial streets within the Town Center. Recently the Town joined with the Town of Cave Creek and was awarded a grant to design and implement bike lanes on Tom Darlington Drive and Cave Creek Road in FY 2014-2015. The Carefree Desert Gardens and other sections of the Town Center provide benches, shade, drinking fountains and other street furniture benefitting pedestrians and cyclists.

Demographics

The population within a five mile radius of Carefree is 53,311. The average income and housing values within a five mile radius of the Town limits is 74% and 149% higher (respectively) than that of Maricopa County. The median age and college degree educational attainment are 39% and 90% higher than County levels, respectively. There are 5.5% fewer children in the primary market area than in the County, and 6.2% more adults over 65 years old in the primary market area than in the County.

1. Information in the Study Area Features Overview was provided by the Town of Carefree with some supplemental research by PLAN-et.

Land Use and Development

The most common land uses within the Town Center are retail and office. The Town Center is designated as Town Center (TC) in the General Plan, with the exception of Mariachi Plaza, which is classified as Commercial (C). The TC designation allows a mix of uses suited to the principles defining Carefree, as outlined in the General Plan. With respect to the Town Center, these include “opportunities...which enhance the community’s sales tax base that provides additional security for the fiscal health of the Town” The “C” (commercial) land use category on Mariachi Plaza allows for a variety of commercial, office and service uses that complement the Town Center and provide a buffer to the multi-family and single-family uses, located to the south and west, respectively, of the Town center.

Approximately 80% of the total commercial building space (459,496 s.f.) is located in the Town Center (431,796 s.f.) and Mariachi Plaza (27,700 s.f.).

Vacancy Rates

The Town does not currently have sufficient data to estimate commercial vacancy rates, because several buildings existed before the Town was incorporated. Also, business license data accounts only for occupied spaces. While the majority of the buildings in the Town Center appear have very low to no vacancies, some buildings have moderate to high vacancy rates due to location, design, and/or lack of access.

Vacant Land and Future Build-out

Vacant lots in the Town Center and planned projects are highlighted on [Map 5: Zoning Districts and Vacant Land](#). Approximately 11.6 acres of the commercial property in the Town Center is undeveloped, including the Spirit in the Desert Lutheran Retreat’s 2 acres, and approximately 1.7 acres of residential property zoned R-3 (Multi-family, 7.26 du/acre). Planned developments on vacant lots include:

- Two office buildings totaling 21,000 s.f. on approximately .5 acres at the west corner of Elbow Bend and Nonchalant Ave.
- Easy Street mixed-use project with 78 residential units above 64,000 s.f. of commercial on approximately 1.5 acres and located adjacent to the 100 Easy Street building. It is unknown if phase one will materialize as planned. It is located north of phase two and is approximately one-half of the overall project area comprising both phases.

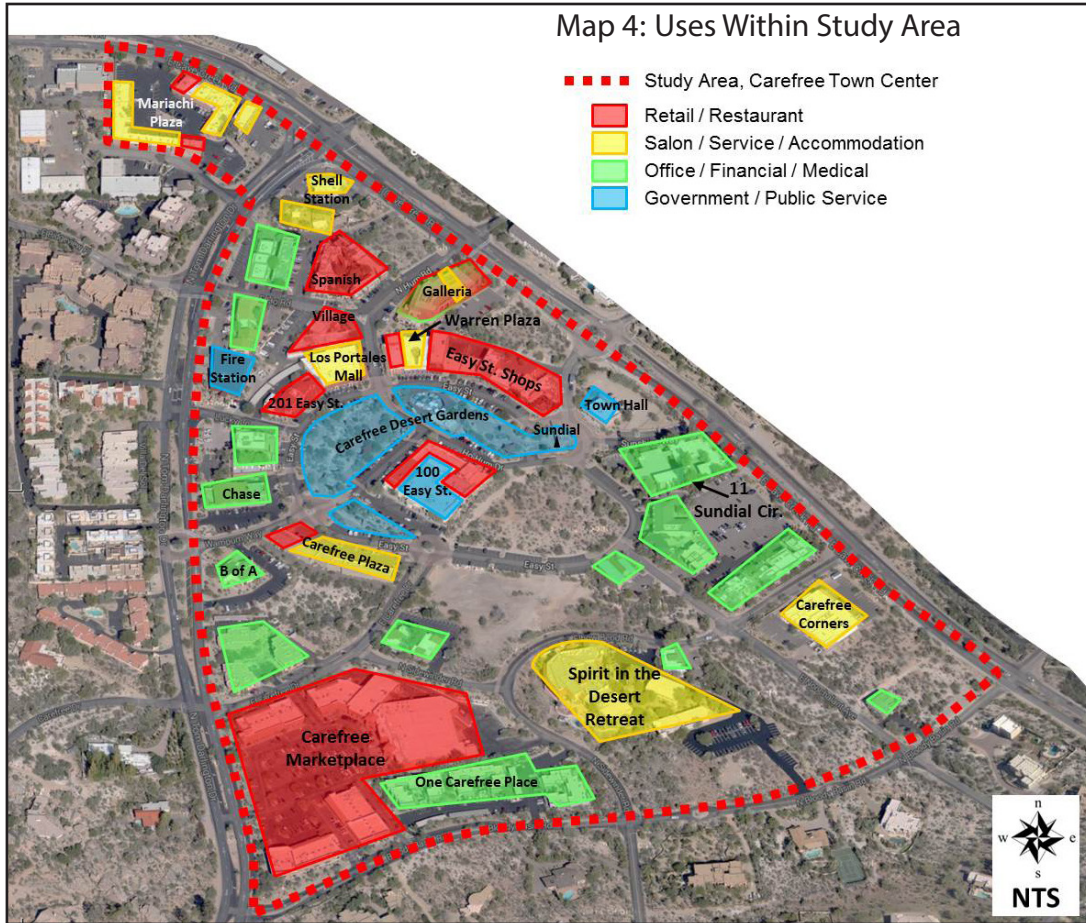
If these projects and the remaining 7.6 vacant acres were developed for commercial uses (not including the Lutheran Retreat’s 2 acres), an estimated 33% increase of future leasable commercial space could be added to the Town Center. In addition, other commercial space could be developed on the Spirit

of the Desert’s 2 acres or on other existing properties that have not achieved their maximum build-out potential.



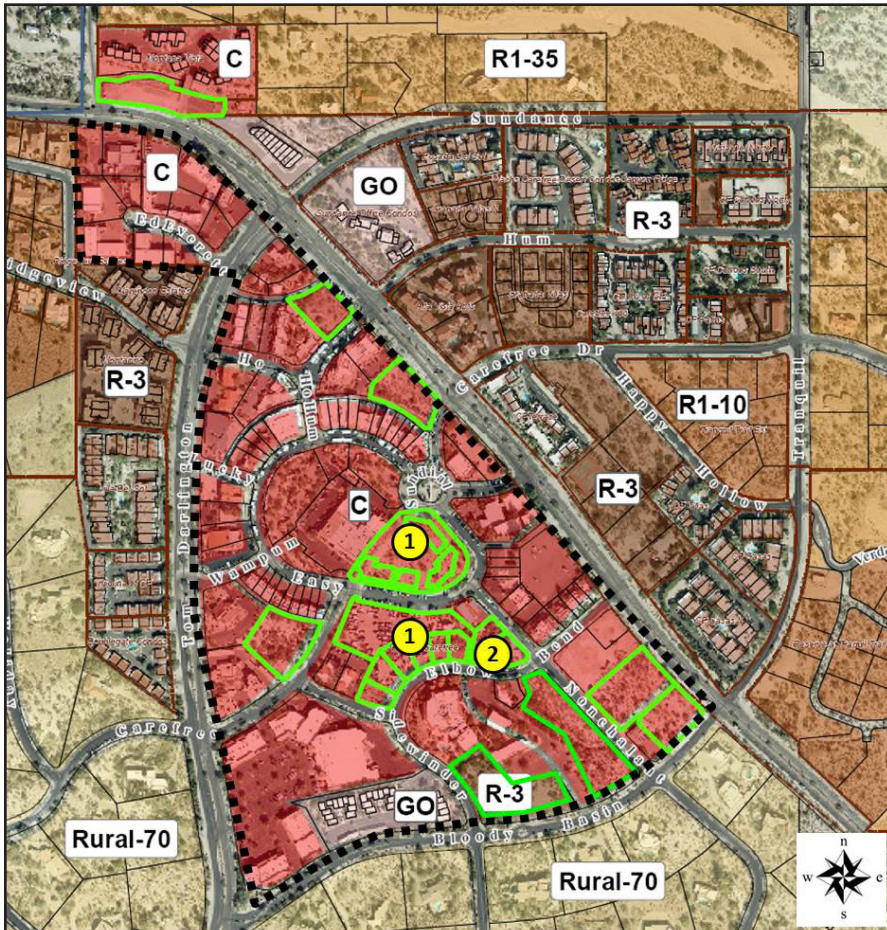
Public Art in Carefree Town Center celebrates the Town’s western heritage.

Map 4: Uses Within Study Area



Source: Town of Carefree

Map 5: Zoning Districts and Vacant Land



LEGEND

- ① Easy Street Mixed use
- ② Proposed Offices

- Study Area
- Undeveloped Property
- Subdivision Boundaries
- Tax Parcels

Zoning Districts

- C** Commercial
- GO** Garden Office
- L** Lodging/Resort
- OS-R** Open Space-Recreation
- RUPD** Residential Unit Planned Development
- R-3** MF Residential, min. 6,000 sq.ft./unit
- R1-10** SF Residential, min. 10,000 sq.ft./unit
- R1-18** SF Residential, min. 18,000 sq.ft./unit
- R1-35** SF Residential, min. 35,000 sq.ft./unit
- Rural-43** Rural, min. 43,560 sq.ft./SF unit
- Rural-70** Rural, min. 70,000 sq.ft./SF unit
- Rural-190** Rural, min. 190,000 sq.ft./SF unit

Source: Town of Carefree

Employment

The General Plan states that the ratio of office-to-retail uses within the Town Center should be evenly split. Currently, within the Town Center, 31% of the businesses are in the Retail/Restaurant/Accommodation/Food categories, whereas a much larger 69% represents the Office and Services categories. (Table 2: Distribution of

| INDUSTRY CLUSTER | # OF BUSINESSES | % OF BUSINESSES |
|--------------------------------------|-----------------|-----------------|
| Retail/Restaurant/Accommodation/Food | 71 | 31% |
| Office/Other Services | 160 | 69% |
| TOTAL | 231 | 100% |

Source: Town of Carefree

| INDUSTRY CLUSTER | # OF EMPLOYEES | # OF BUSINESSES |
|--|----------------|-----------------|
| Retail Trade | 286 | 52 |
| Health Care and Social Assistance | 147 | 27 |
| Real Estate % Leasing | 69 | 27 |
| Finance and Insurance | 81 | 22 |
| Other Services (except Public Administration) | 58 | 22 |
| Professional/Technical Services | 61 | 20 |
| Accommodation and Food Services | 325 | 17 |
| Construction | 101 | 13 |
| Administration, Support, Waste Management Services | 48 | 10 |
| Wholesale Trade | 14 | 4 |
| Educational Services | 8 | 4 |
| Government | 50 | 3 |
| Fitness/Recreation/Entertainment | 23 | 3 |
| Water/Sewer Utilities | 48 | 2 |
| Manufacturing | 8 | 2 |
| Information Services | 2 | 2 |
| Management of Companies | 2 | 1 |
| TOTAL | 1,331, | 231 |

Source: Town of Carefree

Retail and Office Within Town Center.)

Approximately 76 percent (176) of the 231 total businesses within the Town are located in the Town Center. Within the Town, retail accounts for 23 percent and is the largest business category. Real estate and health care service each account for 12 percent of the total businesses within the Town. Accommodation and food services (restaurants/grocery) combined represent 7.4% of the total businesses in Carefree.

According to the General Plan, there is a sufficient amount of employment for the local population. A total of 1,233 jobs are located within Carefree, creating a jobs to population ratio of 0.7 (.7 jobs per employable person). Based on the 2010 census, 56.5% of the population is the typical employment age (18-65 years old). More than one-third of the population is over 65 years old (34.5%), and at least 18.6% are seasonal residents, who are not included in the employable person count. Considering the Town's demographics, seasonal residents, and the high mean income, it is unlikely that a large percentage of jobs in Carefree's commercial areas are filled by local residents.



Easy Street Shops

Community Institutions

Several stakeholders and resources are available to support economic development and revitalization of the Town Center. Small business development resources include:

- Carefree/Cave Creek Chamber of Commerce
- Maricopa Community Colleges
- Small Business Development Center
- Desert Foothills Library
- Scottsdale Public Library
- SCORE – Service Corps for Retired Executives
- AAME – APS Academy for the Advancement of Small, Minority and Women-Owned Enterprises
- SBA – Small Business Administration

Going Forward: Strategies

Throughout the course of the day, the TAP panelists provided insights and recommendations for revitalization of the Town Center in response to driving questions developed by ULI in partnership with the Town of Carefree. The following strategies, actions, and examples summarize recurring themes from the discussion:

STRATEGY 1: CREATE A SHARED COMMUNITY VISION

- Perform an honest assessment of the state of the Town Center and its position in the economic life cycle.
- Identify and leverage sources of creativity, while creating and implementing the vision.
- Create a clear, succinct vision that has flexibility and can be easily communicated.
- Develop strategies (i.e., financing, design, policies) that support the vision.
- Engage all stakeholders, including residents, merchants, property owners, and community leaders.
- Define roles, responsibilities, and timelines to carry out the vision.
- Encourage existing landlords to hire a “master developer” that helps coordinate incoming businesses with the vision.

“Everyone has a role. Everybody has to contribute to the greater vision.”

*Lorenzo Perez,
Principal & Co-Founder,
Venue Projects*

STRATEGY 2: ATTRACT NEW BUSINESSES

- Pursue retailers that make Carefree a destination, particularly local and unique businesses, rather than national chains.
- Consider focusing on the arts as an anchor for the Town Center.
- Commission a market study to attract new businesses, especially restaurants.
- Increase business retention practices by maintaining a business friendly paradigm, providing professional services and educational resources, and establishing public-private partnerships.
- Advertise unique existing infrastructure to creative entrepreneurs (i.e. The Retreat Center, Firehouse).

“It’s about knowing your own heart and your objective and purpose.”

*Danny Little,
President, DWL
Company*



The Spanish Villa located on the corner of Ho Rd. and Ho Hum Dr.

- Consider using vacant space for retail incubators to give entrepreneurs an opportunity to jump-start their business.
- Identify local design consultants who are willing to provide services to the Town or local businesses.
- Encourage property owners with vacant spaces to offer free rent for a time if tenants cover other expenses (taxes, insurance).
- Waive or rebate fees on desired types of development.
- Consider a common brokerage house that can become emotionally invested in the Town Center.
- Consider partnering with a university to bring people to the Town.

STRATEGY 3: DEVELOP CREATIVE FINANCING MECHANISMS

- Create an improvement district through a collaborative process, in which property owners have an opportunity to buy in to the process. Lead the process by having the Town assess its own property.
- Identify banks or other institutions to provide low interest loans to businesses.
- Place a cap on sales tax and put the excess in a pool for infrastructure or service improvements.
- Use performance-based incentives to encourage local business owners to improve their properties (i.e. tax-rebate program that returns 50% of the sales tax revenue to the developer as long as the project performs).
- Consider using crowdfunding to fund new developments through community involvement.
- Consider developing a program that reimburses businesses a percentage of the cost of signs or façade improvements that are consistent with the design criteria.

“Leverage your resources to involve the private sector to be part of the solution.”

*David Roderique,
President & Chief
Executive Officer,
Downtown Phoenix
Partnership*

Revitalization Ideas & Examples

Joe's BBQ and Postino's were the start of the downtown Gilbert restaurant district that now includes an Oregano's, Joyride Taco House, Zin Burger, Lo Lo Market, the Farmhouse and Liberty Market. The restaurants include modern designs mixed with traditional architecture and historic buildings. In addition to the restaurants, visitors enjoy art festivals, a downtown park, and retail development.

Source: <http://arizona.newspaper.com/eastvalley/129587-114/gilberts-heritage-district-adds-new-eateries-offers-destination-activities>



Source: East Valley Tribune



Source: <http://bestof.eastvalleytribune.com/2011/winners/recreation>

Queen Creek Olive Mill is a family-owned company that produces olive oil from their own farm.

A small café was built inside of the Olive Mill, creating a unique atmosphere, which allows the Mill to become more of a destination and experience, rather than simply a store.

Source: <http://www.queencreekolivemill.com/our-story>. Access date: 1/31/2014.

The City of Phoenix Adaptive Reuse Program offers development guidance, streamlined processes, reduced time-frame, and cost savings to customers looking to adapt older buildings for new business uses. This economic development tool allows the municipality to encourage certain types of development and achieve its vision.

Source: <http://phoenix.gov/pdd/services/permitservices/arp.html>. Access date: 1/31/2014.



Source: <http://azremagazine.com/new-market/making-adaptive-re-use-trend-reenergizes-community>.

Revitalization Ideas & Examples

The Town of Queen Creek led downtown property owners in the establishment of an improvement district. Property owners taxed themselves to fund large public infrastructure improvements. The project is an outstanding success and the area is now a thriving shopping center.

Source: <http://www.queen creek.org/>. Access Date 1/31/2014.



Source: <http://www.queen creek.org/>



The Transfer Station in Philadelphia, PA is a co-working, retail, education, and event space that is being redeveloped through Fundrise. Source: <https://fundrise.com/>

Fundrise is a real estate model centered around crowdfunding. Fundrise is the only platform that allows everyone locally to buy equity shares of ownership in real estate. By using technology to increase efficiency, Fundrise lowers capital costs for developers while increasing average returns to investors.

Source: <https://fundrise.com/>. Access Date: 1/31/2014.

STRATEGY 4: MARKET THE TOWN CENTER

- Develop and publish a consistent message concerning the Town's brand and community vision. Center the marketing program on that message.
- Advertise what the Town has that is unique.
- Install signs that direct people who are driving on the arterial roads towards the Town Center. The existing signs can get lost in the landscape.
- Consider other improvements to the physical environment to increase visibility into the Town Center and create interest for those passing through the area.
- Encourage regional cooperation with Cave Creek and Scottsdale.
- Present a package of yearly entertainment activities. Have the Town take the lead using its venues, such as the amphitheater and public streets. Coordinate special events with local businesses and other activities in the surrounding areas.
- Animate the street by encouraging patio restaurants.
- Cross promote between tenants and consider a Cave Creek/Carefree map to celebrate what the region has to offer.
- Consider co-op advertising. Gather multiple businesses under one banner in an advertisement piece in a regional publication.
- Research the market area to better understand the unique characteristics and needs of households. Then, tailor the marketing strategy and business development program to effectively service the market area.
- Consider looking beyond the 5-mile radius for the primary, secondary, or other target markets.
- Create additional entertainment opportunities as an attraction and to encourage visitors to stay.
- Consider developing a building façade improvement program to clean-up and enhance storefronts and create consistency in design.

"There is a savvy, entrepreneurial opportunity out here."

*Lorenzo Perez,
Principal & Co-Founder,
Venue Projects*

"Somebody has to light the fire, I think it has to be the Town. Bring that passion and some money and it will get going."

*JT Elbracht,
President, Elbracht +
Company*

Revitalization Ideas & Examples

Downtown Chandler hosts an ongoing schedule of events, including a weekly farmers market, monthly art walks, and unique annual events. Active programming creates a constant buzz about the community, bringing people from around the region to shop, eat, and play in downtown Chandler.

Source: <http://downtownchandler.org/>. Access Date: 1/31/2014.



Chandler Classic Car & Hot Rod Show



Centerpoint on Mill, Source: <http://www.asu.edu/tour/tempe/ctrpt.html>

The Mill Avenue Retail Competition was developed by the Downtown Tempe Community to enhance business development in the Mill Avenue District. The competition invited retail entrepreneurs to submit business plans for a new business or expansion of an existing business. The winner received 1 year free rent, website development support, and 1 year free membership to the Tempe Chamber of Commerce. The launch reaped over 6.5 million media impressions and helped boost the area's image.

Source: <http://www.millavenue.com/business-development-program>. Access Date: 1/31/2014.



Carefree Desert Gardens

STRATEGY 5: USE CREATIVE PARKING SOLUTIONS

- Consider a shuttle parking service for special events.
- Consider parking management techniques (i.e., metered or time-restricted parking) and use new technology to enforce restricted parking zones.
- Avoid parking structures because of the high costs of construction and maintenance.
- Reimburse a portion of sales tax to those developers who build extra parking spaces.
- Support cross-parking relationships. Take advantage of mixed-use opportunities with mixed-peaks of parking demand.
- To avoid a potential reputation of being a “congested area”, do not locate parking on arterial streets.

STRATEGY 6: ENCOURAGE LOCAL LEADERSHIP

- Create a Merchants Association that can prioritize infrastructure and service improvements.
- Incentivize property owners to make improvements by:
 - Providing free design consulting services with an offer for reimbursement for improvements if they move forward.
 - Creating a fund for merchants to access cheaper money to buy buildings they currently occupy.
- Use existing merchants to attract others, whether actively or passively.

AzTAP Future Planning Priorities

Town of Carefree AzTAP panelists were asked to identify the top priorities for the Study Area and determine next steps that should be considered in evaluating and planning for future development.

Create a Shared Community Vision

- Create a document with graphics to communicate the vision.
- Be flexible, understand things change.
- Non-retail uses can help support the vision.
- Circulate the vision around town.
- Use collective engagement, involve stakeholders.
- Capitalize on Carefree's unique character.

Enhance the Physical Design

- Invest in wayfinding improvements.
- Adapt ordinance to reflect the desired development, such as allowing for taller buildings and additional residential developments without having to be mixed use.
- When making physical improvements, consider the urban form, iconic architecture, stores that animate the street, connectivity and transition between land uses, and circulation.
- Provide colors, lighting, and accents which catch one's attention ("jewelry").
- Create a land plan for the Town Center to help with the conversion of office to retail space.

Act Now

- Use vacant space as an opportunity to kick-off the vision.
- Take a risk and make an investment.
- Start talking now. Integrate "Carefree Town Center" and "Sundial" into daily vocabulary.
- Make sure to act with PASSION!

To help the community move forward and address these priorities, the ULI AzTAP panelists identified these strategic opportunities:

- Encourage property owners to work more cohesively, perhaps through the formation of a merchant's association or common leasing management.
- Private-public partnerships should be the basis for all operational and investment strategies - make sure everyone has "skin in the game".
- Explore various financing mechanisms (such as improvement districts to help in the development of physical and operational improvements.
- Encourage mixed-use development throughout the Town Center (i.e., residential, hotel, office), which can support and enhance the viability of the retail.

Appendix A: Panel Day Agenda



5090 North 40th Street
Suite 210
Phoenix, AZ 85018
(602) 449-7916
<http://arizona.uli.org>

Town of Carefree AzTAP Panel Day Schedule

January 16, 2014

8:00am to 5:00pm

Town of Carefree, Council Chambers, 8 Sundial Circle

“Positioning the Carefree Town Center for a Broader Market Area”

| | |
|---------------|--|
| 8:00 – 8:15am | Panelists Arrive/Coffee |
| 8:15-9:15am | Walking Tour of Town Center <i>(Panel Members and Staff only)</i> |
| 9:30am | Welcome and Introductions – Gary Neiss, Town Administrator |
| 9:40am | Town Presentation Regarding Issues Being Considered – Gary Neiss |
| 9:50am | ULI Overview – Deb Sydenham, FAICP, Executive Director, ULI Arizona |
| 9:55am | Panel Introduction and ULI AzTAP Process Review – Dave Roderique, ULI AzTAP Panel Moderator |
| 10:00am | Question 1 – Visibility, Attraction, and Vision What types of anchors would work to stimulate foot traffic in the Town Center (i.e. restaurants, cultural facilities such as a museum, multiple-family, boutique resort, others)? What compels one to drive to an outdoor shopping center throughout the year? How could the inward focus of the Town Center be inverted to better alert passing traffic of its commercial spaces/opportunities? |
| 10:45am | Question 2 – Investment Strategies Is the Town appropriately investing in its infrastructure with the specific goal to create an environment which attracts a diverse customer base throughout the year, and in return, attracts and retains businesses? How could the Town invest more? |
| 11:15am | Question 3 – Land Ownership The Town Center contains fractional ownership with parcels as small as 6,000 square feet with economically obsolete smaller buildings lacking visible retail space. How can the Town: 1) encourage assemblage and redevelopment, and 2) bring diverse interests together to market and reinvest in their properties? Are there funding mechanisms? |
| 12:00pm | Lunch <i>(Panel moves to separate room for lunch and review of morning; Attendees pursue lunch on their own)</i> |

- 1:00pm **Question 4 – Parking Strategies**
From a public/municipal investment standpoint, is structure parking a wise investment or additional parallel parking along arterial streets (Cave Creek Rd. and Tom Darlington Dr.)? If a parking structure is a good investment, where should it be placed? How can it be funded?
- 1:30pm **Question 5 – Incentive Strategies**
What are some best practices of the public sector (without violating the constitutional gifting clause to incentivize the private sector to help stimulate the business environment?
- 2:00pm **Question 6 – Tenant Strategies**
What are some best practices for private commercial property owners to fill their vacancies?
- 2:30pm **Question 7 – Reaching the Target Market**
What are the best practices to reach the primary market area/target audience (customers) within and outside of Carefree? Should the Town continue to market itself? Should we re-evaluate the target market? If so, who would you included/exclude?
- 3:00pm **Question 8 – The Future**
What is the potential you see in Carefree? Is Carefree moving in the right direction to reach that potential? What would you do differently?
- 3:30pm **Question 9 – The Top Five Priorities**
Identify the top five priorities for the Study Area and determine next steps that should be considered in evaluating and planning for the future development. What is the priority of specific opportunities the Town should implement to support revitalizing the Town Center?
- 4:00pm **Open Discussion**
Engage in open discussion and address any comments and questions received from the audience.
- 5:00pm **Adjourn**

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ULI Arizona Technical Assistance Panel

