

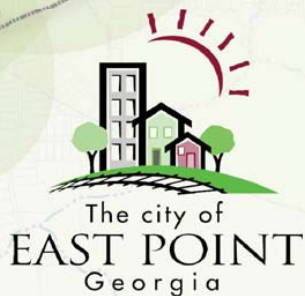


CITY OF EAST POINT: MISSION 2036

COMPREHENSIVE PLAN UPDATE

A map of East Point, Georgia, showing various parks, schools, and landmarks. Four circular callouts are overlaid on the map, each containing a photograph of a specific location:

- Top-left: Summer Park-Dick-Lake Velodrome
- Top-right: Jefferson Recreation Center
- Middle-left: Sykes Park
- Bottom: City Hall building

The map also labels several schools (Paul D. West Middle School, Conley Hills Elementary School, Christian Lutheran School, Tri-Cities High School, Parklane Elementary School, Pathway Christian School, East Point Library), parks (Rantin Park, Spring Street Park, Bryan Park, Blount Park, Center Park), and other landmarks like the East Point Church. The map includes street names and a yellow dashed line indicating a boundary or route.

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Mission 2036: City of East Point Comprehensive Plan Update Community Assessment

Prepared for the City of East Point, Georgia
Department of Planning & Zoning

by
POND & COMPANY
in association with
Huntley Partners & PEQ

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September 26, 2011

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COMMUNITY ASSESSMENT

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EXECUTIVE SUMMARY

The Mission 2036: City of East Point Comprehensive Plan will update prior work completed in 2006 (Comprehensive Plan 2026). The Comprehensive Plan serves as a guide for making decisions and setting policies for city officials and staff concerning the future development of the city. This effort will provide policies and an implementation program for the 2011-2036 planning period, and it is undertaken per the Rules of the Georgia Department of Community Affairs (DCA), O.C.G.A. Chapter 110-12-1, effective May 1, 2005. Like a business plan for a successful company, the Comprehensive Plan should look at real world constraints and **provide a “road map”** for officials and community members to manage incremental decisions and allocation of resources in the short term that ensure progress toward the city’s long term vision and goals.

Located in the southern portion of Fulton County, along the southern border of the City of Atlanta, the City of East Point lies within the Atlanta Regional Commission (ARC) Metropolitan Planning Organization and land use planning area. East Point covers 13.8 square miles of suburban and urban landscape. East Point arguably boasts the best access available in the region – minutes to the busiest international airport in the country, direct access to I-285 and I-85, a MARTA stop located in a downtown undergoing revitalization, and uncongested access to Atlanta amenities. Despite this great asset and the success of the recent Camp Creek development, the city still faces several economic challenges including vacancies and increasing poverty rates.

Prior and Recent Planning

To address the challenges, East Point has taken a very pro-active approach to planning, taking advantage of several regional and state tools over the past ten years. The current comprehensive plan process aims to respond to changing economic conditions and build on those efforts. The process will also re-evaluate or verify policies associated with the land use and zoning framework. Recent or pending planning efforts that the Comprehensive Plan will incorporate include: the Parks and Recreation Master Plan (2010), the Economic Development Plan (pending 2011-2012), the pursuit of an Opportunity Zone (submitted), the implementation of a Transit-Oriented-Development (TOD) master plan (pending 2011-2012), the update to the city Solid Waste Management Plan, and the Stormwater Management Plan. Prior work includes, among others, two Tax Allocation Districts (TAD), the 2004 Livable Centers Initiative (LCI) study, and the Main Street City designation the city achieved, among others.

Structure of the Comprehensive Plan

DCA rules structure the format of the Comprehensive Planning process such that three interlocking components comprise the final plan:

- **Community Assessment:** Summary of existing conditions with supporting data
- **Community Participation:** Program for providing public input opportunities
- **Community Agenda:** Vision, policy goals and strategies for plan implementation

The **Community Assessment** component of the Comprehensive Plan summarizes existing conditions for the community and identifies issues and opportunities that the City of East Point may desire to address during the 25-year Comprehensive Plan horizon. The Assessment contains a summary of key findings and a profile of the city in terms of land use, population, economic development, transportation, natural and cultural resources, community facilities, and intergovernmental coordination. A **Technical Appendix** contains the supporting data used in the Community Assessment and supplements information therein to include a complete analysis of existing conditions. As a base-line resource from which community members can draw during the development of that Community Agenda, the Community Assessment helps communicate the City's profile. A primary component of the Assessment is the **Character Area** map (categorizing areas of the City and their respective character type), from which a future development map will be derived during the creation of the Community Agenda. The Community Assessment should serve government officials and the public as a concise reference document.

The **Community Participation Program** details what measures a local government will undertake in order to ensure that community members can participate in the creation of an Agenda for future planning.

The Participation Plan and the Community Assessment serve as inputs to the Mission 2036 – East Point's **Community Agenda**, which is the heart of the Comprehensive Plan; it articulates the **community vision** for a 25-year planning period and provides the policy that guides land-use decision making. It presents the Future Development Map that represents city policy, and it also specifies the **strategies** by which the community intends to pursue its vision and policy goals. A five-year action plan, the **Short-Term Work Program**, helps implement the Community Agenda.

Review Process

Following a public hearing, the City of East Point will submit the **Community Assessment** and the **Participation Plan** to the Atlanta Regional Commission ("ARC") and to DCA for review and approval. Upon approval, the city may proceed with preparing the Community Agenda. The Community Agenda also must receive review and approval by the ARC and DCA before the city can adopt it as official policy.

PART ONE:

Analysis of Existing Development Patterns

Introduction

East Point was named for its original location as the eastern-most terminus of the Atlanta and West Point railroads. Although the City of East Point was chartered August 10, 1887, it was busy long before this date. From 1820 to 1930, the City grew from an Indian territory with few people to a manufacturing city that housed 10,000 people.

Early history shows that East Point was prosperous due to its location and ties to various transportation modes. From the railroad, to the horse and carriage, to the automobile, East Point has always been recognized for its location and accessibility. Even today, the commercial downtown area relies heavily on its attraction from the MARTA station located on Main Street.

After the depression, East Point experienced the same type of struggles as any southern city. Times were hard for everyone, and little development activity took place. In 1947, the City experienced the largest building boom since the pre-civil war movement. New structures began to align the streets again. Today these early roots are still an architectural asset for the city.

Like many cities in the 1970s, East Point recognized the need for urban renewal and adopted a redevelopment plan. In the 1990s the City undertook a master planning process and a variety of other planning efforts. More recent strategies by the city have been directed to supporting declining neighborhoods.

The purpose of this chapter is to analyze the current development patterns and growth opportunities in the City of East Point. An understanding of the existing character areas, land use inventory and location of areas requiring special attention will help guide quality growth in the future.

Existing Land Use Inventory

The City of East Point has approximately **8,048 acres**, or 12.6 square miles, of land that are subdivided and developed or available for development. The remaining 1.2 square miles is taken up by public rights-of-way. Each parcel of land is associated with a certain category of use, the functional dimension of land for human purposes or economic activities. Table 1 shows existing land use for the City of East Point. Acreage was calculated using a geographic information system (“GIS”) tool. This section discusses the composition of each land use category in more detail. Land use classification descriptions come from the Georgia Department of Community Affairs’ Standards and Procedures for Local Comprehensive Planning. Figure 1 shows the amount of each land use category as a percent of total acres.

Residential uses account for nearly **50%** of all land in East Point. Employment-generating non-residential uses, including public uses, make up 25%. **Vacant land, either undeveloped or abandoned, makes up 23% of the parcels.**

Quick Facts

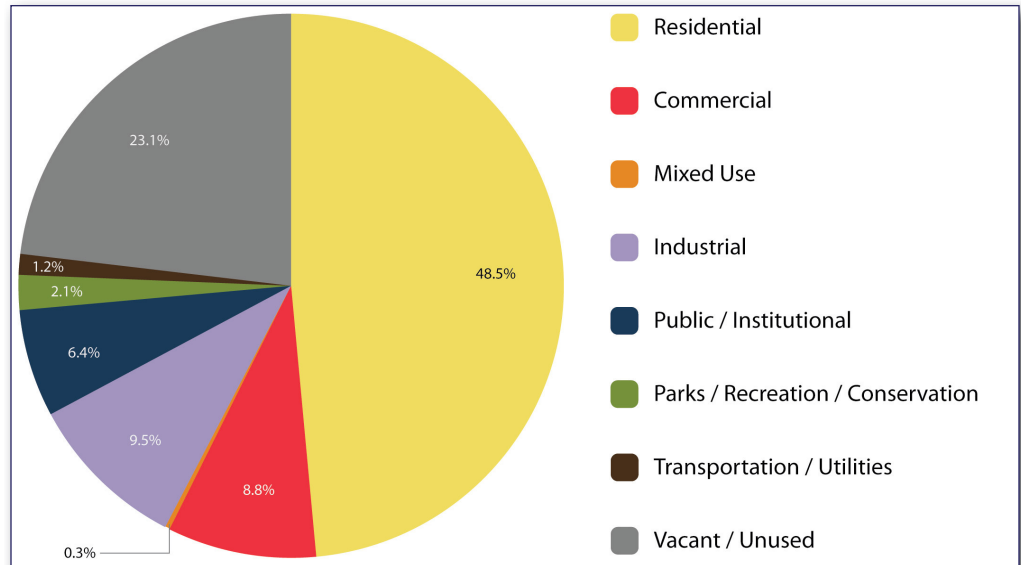
- 8,048 acres of land not in roads or public rights of way
- Half of land area is residential
- 8.8% commercial
- 9.6% industrial
- 166 acres of parks
- 23% vacant

Table 1 : Existing Land Use by Acre

Total Acreage by Existing Land Use			
Existing Land Use	Total Acres	% of Acres	# of Parcels
All Residential:	3,905	48.5%	10,185
High Density Residential	311	3.9%	277
Medium Density Residential	202	2.5%	772
Low Density Residential	3,393	42.2%	9,136
All Commercial:	720	8.9%	466
Commercial	551	6.8%	396
Office / Distribution	169	2.1%	70
All Mixed Use:	23	0.3%	64
All Industrial:	769	9.6%	211
Light Industrial	606	7.5%	177
Heavy Industrial	163	2.0%	34
All Public/Institutional:	514	6.4%	277
Parks/Recreation/Conservation:	169	2.1%	144
All Transportation/Utilities:	98	1.2%	58
All Vacant/Unused:	1,850	23.0%	1,449
Total:	8,048	100.0%	12,854

Source: Fulton County Tax Assessor 2010, City of East Point

Figure 1 : Existing Land Use by Acre



Source: Fulton County Tax Assessor 2010, City of East Point

Land Use Categories

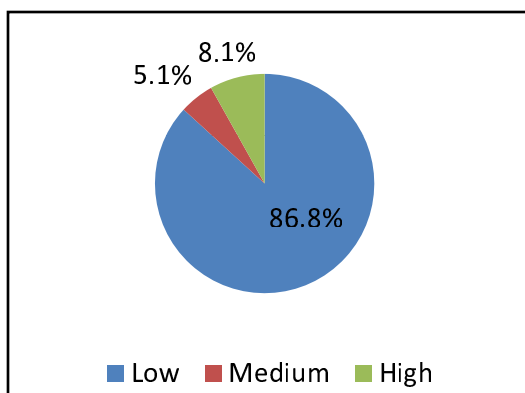
Residential

Residential uses make up **48.5%** of the parcel acreage in East Point. The primary two types of residential uses are single-family and multifamily dwelling units, typically organized into general categories of densities.

- **Low Density:** Low density residential generally implies single family use, usually with a significant mix of forested or agricultural land cover. These areas often occur on the periphery of urban expansion and are generally characterized by houses on larger lots. Examples include suburban neighborhoods, rural housing, estates, and linear residential developments along transportation routes. In East Point, low density residential makes up much of the land in the central part of the city. These parcels are typically in single-family neighborhoods in subdivisions or traditional urban neighborhoods. While every community's distribution of residential densities is different, East Point's low density residential lots are usually over a quarter-acre in size. The vast majority of residential properties in East Point, and **42.2% of the total acres**, are made up of low density residential uses.
- **Medium Density:** Medium density residential areas are also typically characterized by single family dwellings, with or without a forested or agricultural land cover. These areas usually occur in urban or suburban zones. Lots are smaller and homes might be closer together than in a low density residential area. In East Point, medium density residential areas also include duplexes, townhouses, and homes in central business district zones. There are 202 acres on 772 parcels of medium-density land use, representing **2.5%** of the total acreage.
- **High Density:** High density residential areas designate concentrated single-family or multifamily use. These areas occur in urban neighborhoods with streets on a grid network or in apartment buildings. Most multifamily uses occur in East Point in the southwestern segment and along Washington Road. 277 acres, or **3.9%** of the total amount of land, is allocated to high density residential uses in East Point.

Most residential land in East Point is low density.

Figure 2 : Residential Uses by Density



Source: City of East Point parcel database, zoning ordinance

Commercial

This category describes land dedicated to non-industrial business uses, including retail sales, office, service, and entertainment facilities. They may be located as a single use in one building or grouped together in a shopping center or office building. East Point identifies office and distribution uses as a unique type of commercial use, different from other commercial uses like retail or entertainment. Commercial areas sometimes include instances of institutional uses, such as churches and schools, that have moved into available space in commercial plazas.

- **Commercial:** The sale of goods occurs in commercial land use areas, including urban central business districts, shopping centers in suburban and outlying areas, commercial strip developments, and hotels. 539 acres, or 6.8% of the developed land in East Point, are dedicated to traditional commercial uses. These parcels are located primarily along the major transportation arteries, like Camp Creek Parkway, Main Street, Connally Drive, Washington Road, Cleveland Avenue, Virginia Avenue and the I-85 and I-285 exits that are in or near East Point. The scale of these uses include the large commercial center at Camp Creek Marketplace, small neighborhood-serving strip centers like the ones along Washington Road, traditional pedestrian-friendly downtown development, and a cluster of hotels on Virginia Avenue between I-85, Central Avenue and Norman Berry Drive/Bobby Brown Parkway.
- **Office/Distribution:** Office and distribution uses provide services and facilities for the shipment of goods. They differ from commercial uses in the types of structures typically needed, the amount of parking and square footage required, and the times of day and week that they are in use. 2.1% of East Point’s land is devoted to office or distribution uses. There are a few large distribution centers in East Point outside of I-285 and near the railroad tracks downtown that make up most of the 169 acres of office uses. Additionally, there are number of small parcels of office/distribution uses throughout the city, primarily on Washington Road and Cleveland Avenue.

Mixed Use

Mixed use development occurs when one or more different uses are permitted in one building or within one planned development. The types of uses that occur in a mixed use building may include offices, professional services, residential apartments or condominiums, and commercial uses like restaurants and shops. When permitted, the types of land uses allowed, the percentage distribution among the mix of uses, and the allowable density of each use is defined. Just **0.3%** of the land in East Point is currently occupied by a mix of uses. These could include apartment or condo buildings with ground floor retail or planned developments of single-family or multi-family homes with some limited commercial. East Point's mixed areas uses occur mainly near downtown, where a number of previously single-family homes may be used as apartments and offices or shops.

Only 0.3% of the land in East Point is currently occupied by mixed use development.

Most of East Point's zoning districts prohibit mixing uses. Many instances of mixed use development are non-conforming uses; they exist in zoning districts where they are not expressly permitted. Mixed use development is currently permitted in the Commercial Redevelopment and Mixed Use zoning districts, which make up less than **1%** of the land in East Point. In fact, there is no land currently zoned as Mixed Use. Medical Institutional zoning does allow single-family and multi-family homes in the district along with commercial and institutional uses.

Mixed use is only allowed on 1% of parcels (by acre).

Industrial

Industrial uses make up almost **10%** of the land in East Point. Land used for heavy industrial activity is usually isolated from residential and commercial activities that might be disturbed by the sounds, odors, and truck traffic often associated with industrial production. However, industry creates stable jobs and is an important element of a city's economy.

- **Light Industrial:** Light Industrial uses make up **7.5%** of total parcel acreage in East Point and include those that are not traditionally seen in commercial areas, but are less intensive than heavy industrial. Light industrial areas might also be places where consumers would visit. Examples of light industrial uses permitted in the East Point zoning ordinance include automobile service stations and storage warehouses. East Point's legacy as a railroad town and its prime location along major transportation corridors makes it well suited to distribution and warehousing industries.
- **Heavy Industrial:** Heavy industrial activities represent only **2.0%** of all land use in the City and include processing, assembling, packaging and warehousing operations. They are not typically considered to be compatible with most other land uses and are often surrounded by buffers. Usually, heavy industrial uses are not places where consumers would need to visit. There are a number of manufacturing and production facilities in the eastern portion of East Point along the railroad. In addition, a large recycling facility is located on Central Avenue east of downtown.

Quick Facts

Largest Public Properties

Point University	49 acres
Connally Drive water treatment facility	26 acres
Tri-Cities High School	18 acres
Paul D. West Middle	15 acres

Analysis of Existing Development Patterns

1

Public/Institutional

The public and institutional land use category includes institutional, state, federal, and local government uses. Public uses include municipal buildings, such as city hall, police and fire stations, libraries, prisons, post offices, and public schools. Institutional uses include colleges, churches, and hospitals. **6.4%** of East Point’s land is used for public or institutional services. The largest public and institutional facilities in East Point include Point University (formerly Atlanta Christian College), the water facility on Headland Drive, Tri-Cities High School, and P.D. West Middle School. Many East Point government properties are located in the oldest part of East Point, near downtown. The Community Facilities section includes more information on the location of municipal services in East Point.

Parks/Recreation/Conservation

The City of East Point contains **169 acres** of park, recreation, or conservation land. Examples of land uses that fall into this category include playgrounds, public parks, neighborhood or private parks, nature preserves, golf courses, cemeteries, wildlife management areas, and national forests. This category includes both public land and private property, so it does not necessarily measure the total park space in the community. The section on Community Facilities includes more information on the location and size of public parks in East Point.

The City of East Point completed a 10-year update of its Parks and Recreation Master Plan in 2010. The plan included a needs assessment based on comparisons to national guidelines and benchmarks; a community-wide survey; an evaluation of connectivity and existing level of service; and an assessment of existing natural features, facilities, and amenities in the community. The plan recommended activating inactive parks, adding mini-parks and neighborhood greenspace, adding several larger parks, and establishing a multi-use trail system to address the identified shortage of 100 acres of park space.

Transportation/Utilities

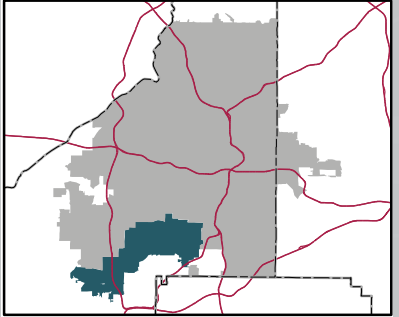
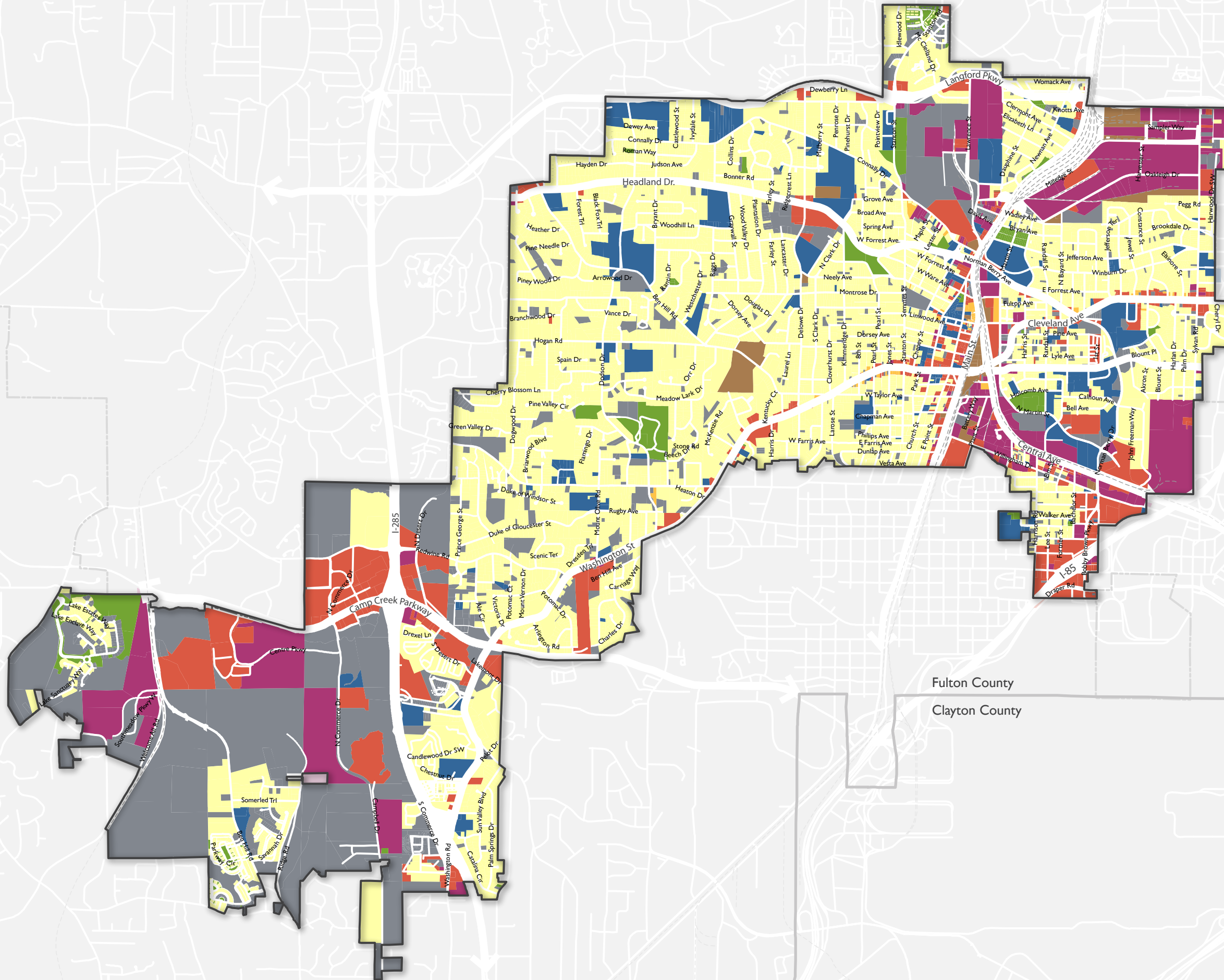
The transportation and utility land use category includes uses such as public transit stations, power plants, rail facilities, radio or television towers, and airports. Transportation routes, such as roads and railways, are also sometimes included in this category, but this land is not factored into the calculation of total acreage here. 100 acres in East Point are dedicated to transportation and utilities. A Georgia Power facility on Ben Hill Road and many freight rail and MARTA facilities fall into the Transportation / Utilities land use category and will be discussed more fully in the Community Facilities chapter.

Vacant/Unused

Vacant and unused land includes lots or tracts of land that are within the city limits and either have not been developed or have been developed but since abandoned. **23%** of the land in East Point is vacant. Many vacant parcels are in the new single-family developments in the far southwest portion of the city that have been subdivided but not yet built out or occupied. Other very large tracts of land in the southwest section have been zoned for medium-density residential, but construction on these neighborhoods has not begun. This type of vacant land differs from the scattered vacancies east of I-285, where many parcels have been developed but are left unoccupied, in both residential and commercial areas. A buffer of undeveloped land around the chemical plant on Lawrence Street that separates it from adjacent residential uses also makes up a large portion of the vacant land. The economic recession and the slow housing market have contributed to nationally high rates of residential and commercial vacancies.

23% of the land in East Point is currently vacant.

Figure 3: City of East Point Existing Land Use



**City of East Point
Comprehensive Plan**

Existing Land Use Map

- Residential
- Commercial
- Mixed Use
- Public / Institutional
- Industrial
- Transportation / Utilities
- Parks / Recreation / Conservation
- Vacant or Abandoned
- East Point City Limits
- Atlanta City Limits
- County Boundary
- Railroad

Atlanta
City Limits

Fulton County
Clayton County

Source: City of East Point,
Fulton County Tax Assessor 2010



Existing Zoning

An analysis of the existing zoning in East Point is important in that it helps identify what uses are legally permitted on each parcel. Zoning categories differ slightly from land use categories but help make it easier to compare what land use assets the city currently has to what is allowed. Figure 4 and Table 2 provide an inventory of the current zoning of all 12,796 zoned parcels within the city limits.

Community Unit Plan (CUP) was created as a zoning district in 2009. Prior to 2009, a CUP was treated as an overlay district. Currently no parcels are zoned CUP; however, there are a number of parcels that still retain a CUP overlay.

The city also maintains the following historical zoning maps: 1957 (no adoption date); May 2, 1960 (adopted); August 21, 1978 (adopted); 1988 (no adoption date, revision date of June 14, 1988); 1999/2000 (no adoption date); 2002 (no adoption date); October 4, 2004 (adopted); December 19, 2005 (adopted, revised January 18, 2006).

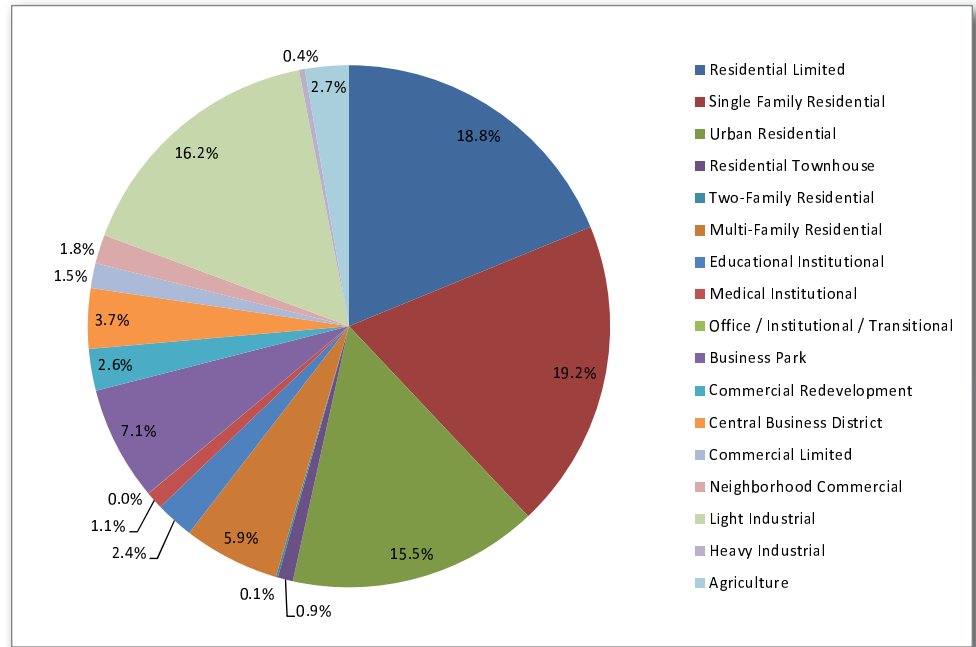
Table 2 : Existing Zoning by Acre

Total Acreage by Zoning				
Existing Zoning	District	Total Acres	% of Acres	# of Parcels
All Residential:		4,827	61.0%	10,849
Residential Limited	RL	1,465	18.5%	2,128
Single Family Residential	R1	1,493	18.9%	3,195
Urban Residential	R1A	1,208	15.3%	4,467
Residential Townhouse	RT	73	0.9%	557
Two-Family Residential	R2	10	0.1%	35
Multi-Family Residential	R3	464	5.9%	449
Multi-Family Residential	R4	116	1.5%	18
Mobile Home Park District	R5	-	0.0%	-
All Office / Institutional:		826	10.4%	155
Educational Institutional	EI	185	2.3%	5
Medical Institutional	MI	85	1.1%	119
Office / Institutional / Transitional	OIT	1	0.0%	4
Business Park	BP	551	7.0%	26
Planned Office Park	POP	3	0.0%	1
All Commercial:		751	9.5%	1,127
Commercial Redevelopment	CR	202	2.6%	605
Central Business District	C2	290	3.7%	272
Commercial Limited	CL	120	1.5%	72
Neighborhood Commercial	C1	139	1.8%	178
All Industrial:		1,294	16.4%	400
Light Industrial	I1	1,266	16.0%	394
Heavy Industrial	I2	28	0.4%	6
All Other Uses:		212	2.7%	265
Agriculture	AG	212	2.7%	265
Total:		7,910	100.0%	12,796

Note: Parks & Recreation account for 137 acres on 58 parcels with no zoning designation. They are therefore not included in the Total Acreage by Zoning table.

Source: City of East Point Official Zoning Map Adopted 3/2/2009

Figure 4 : Existing Zoning by Acre



Source: City of East Point



Residential Limited



Heavy Industrial



Business Park



Urban Residential



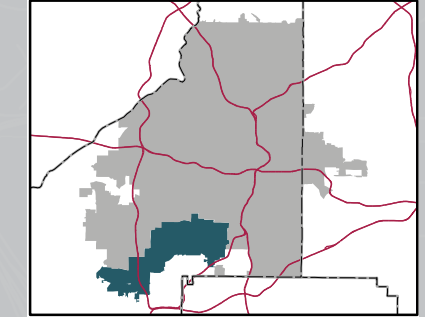
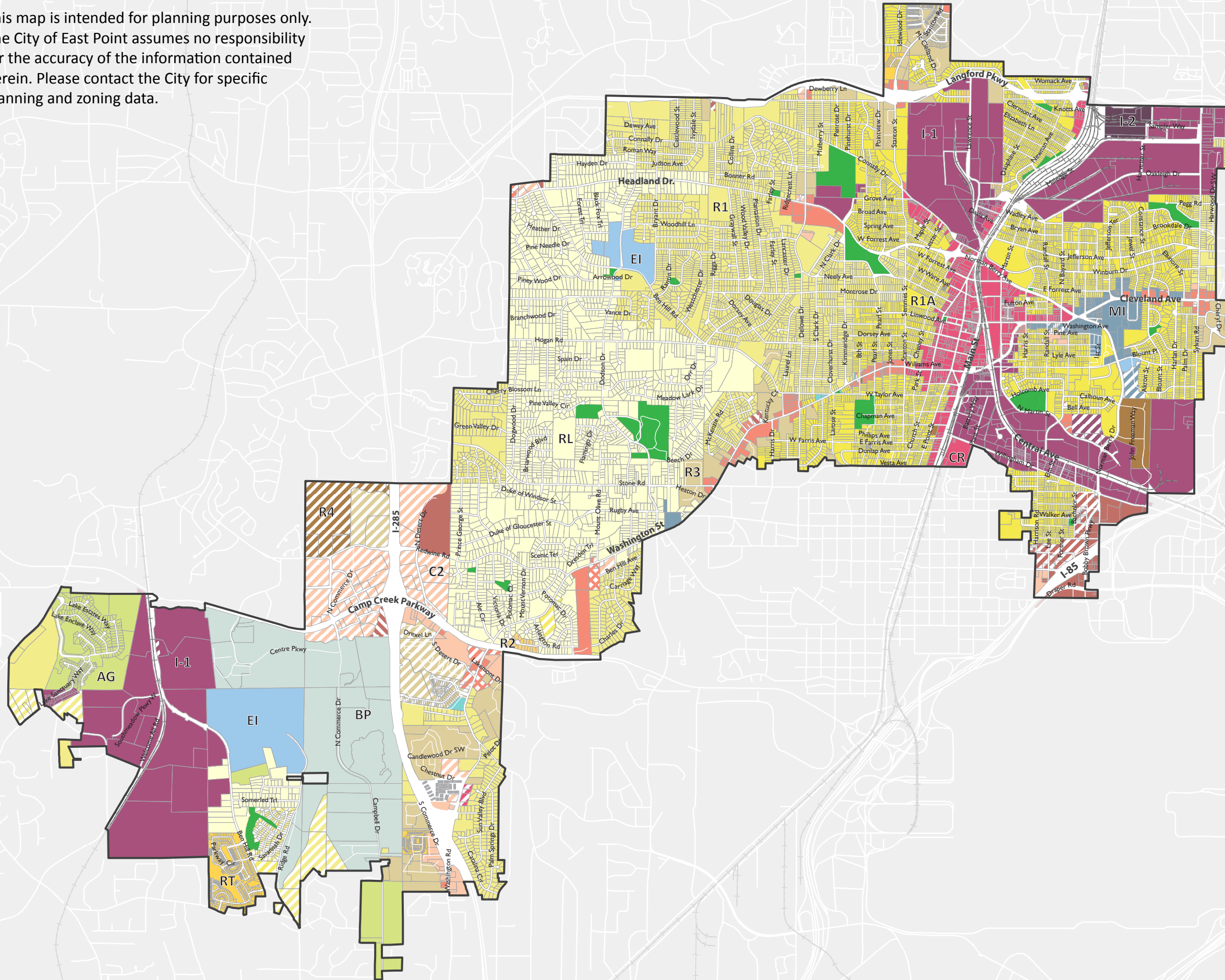
Medical Institutional



Central Business District

Figure 5: City of East Point Zoning Map

This map is intended for planning purposes only. The City of East Point assumes no responsibility for the accuracy of the information contained herein. Please contact the City for specific planning and zoning data.



**City of East Point
Comprehensive Plan**

Zoning Districts

	R1	Single Family Residential
	R1A	Urban Residential
	R2	Two-Family Residential
	R3	Multi-Family Residential
	R4	Mudlti-Family Residential
	R5	Mobile Home Park
	RL	Residential Limited
	RT	Residential Townhouse
	MIX	Mixed Use
	EI	Educational Institutional
	MI	Medical Institutional
	OIT	Office / Institutional / Transitional
	BP	Business Park
	C1	Neighborhood Commercial
	C2	Central Business District
	CR	Commercial Redevelopment
	CL	Commercial Limited
	I-1	Light Industrial
	I-2	Heavy Industrial
	AG	Agriculture
		With Conditions
		With Modifications
		East Point City Limits
		Parks and Greenspace
		Railroad

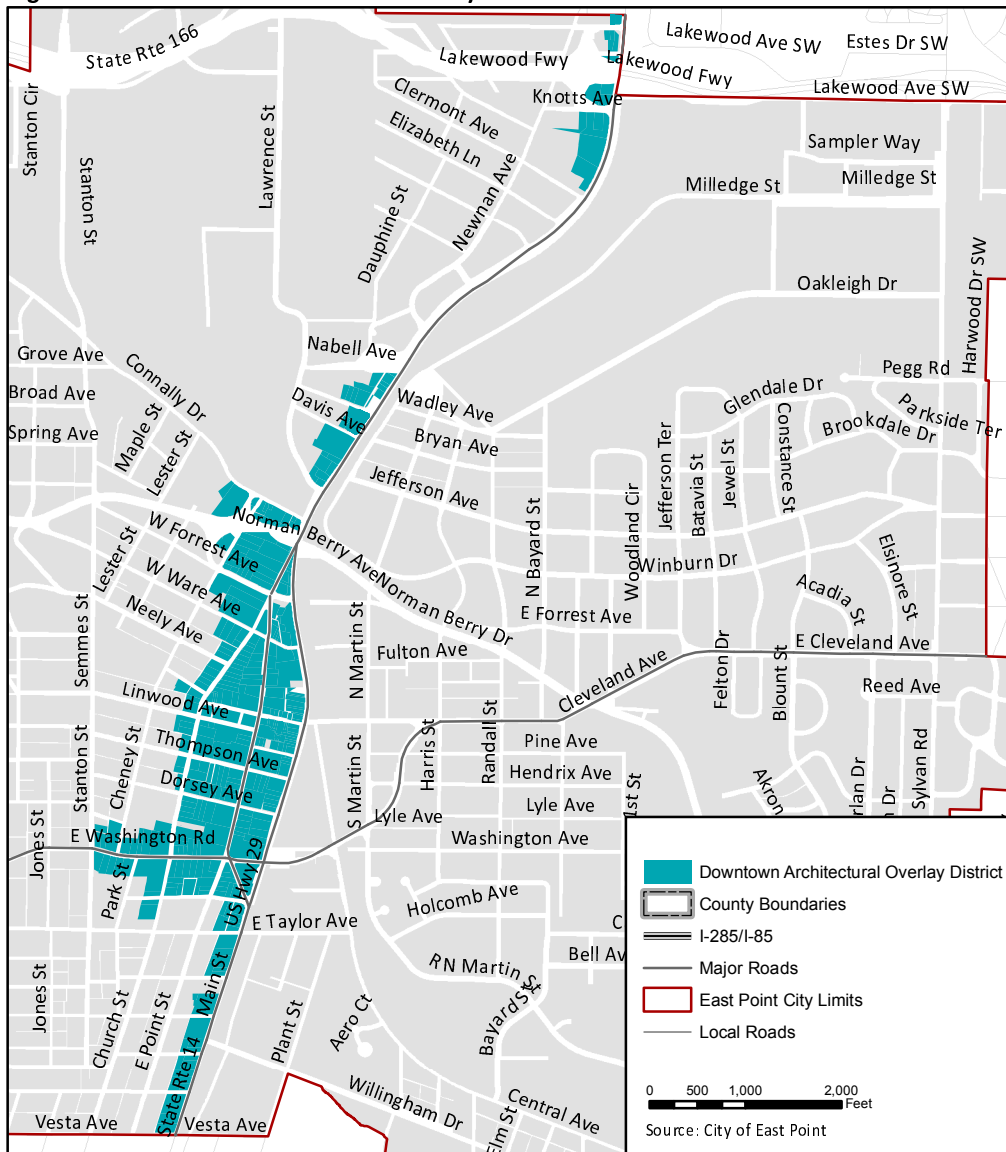
Source: City of East Point Zoning Map adopted 3/2/2009; modified 8/29/2011 based on Fulton County tax assessor parcel database



Overlay Districts are supplemental to the zoning district classifications established in the City of East Point’s Municipal Code. All development and building permits for lots located within any overlay district shall meet all of the requirements of the base zoning district in which they are located and, in addition, shall meet all of the requirements of the overlay district applicable to the particular parcel. Where there are conflicts between overlay district regulation and other regulations contained in this Code, the overlay regulation shall govern. Where the overlay district regulation is equally restrictive with other regulations in the Code, the overlay district regulation shall govern. These districts are created to protect natural cultural resources, promote safety, and protect health. East Point has established two Overlay Districts: The Downtown Overlay District and the Cleveland Avenue Overlay District.

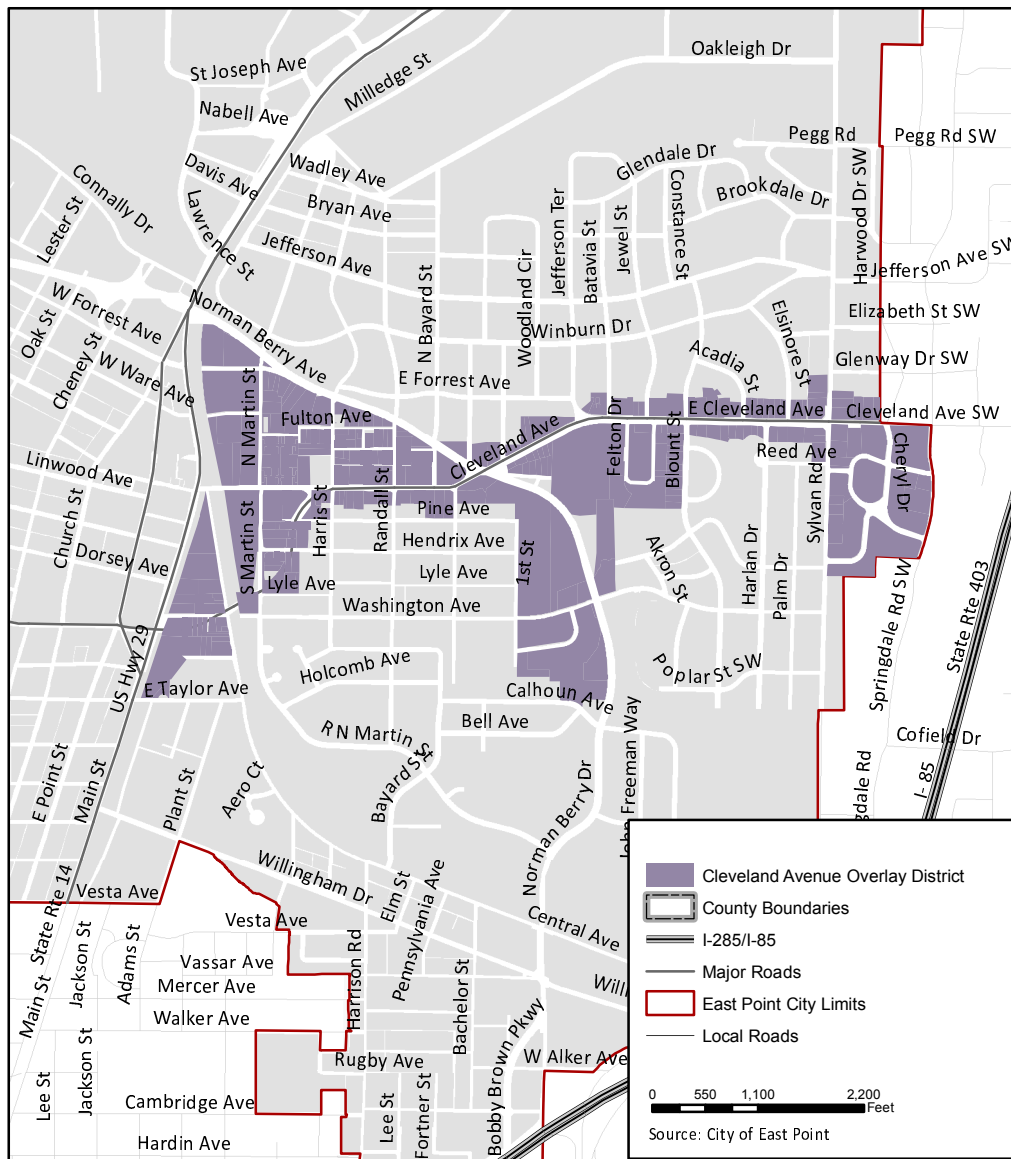
The Downtown Architectural Overlay District applies to all properties zoned “CR,” Commercial Redevelopment, as illustrated on Figure 6. Within the Downtown Architectural Overlay District (“the District”), land and structures shall be used in accordance with the standards underlying the district. The overlay district outlines: development standards; landscaping; screening; pedestrian safety; site lighting; building size, orientation, setback, height, scale and parking; building and other structure design.

Figure 6 : Downtown Architectural Overlay District



The Cleveland Avenue Overlay District was established to implement design guidelines to promote future development that is consistent with the Cleveland Avenue Corridor Masterplan. Figure 7 identifies the boundaries of the district. Generally, the design guidelines are intended to support local and regional development goals that promote alternative transportation, mix of uses, pedestrian environments, traffic calming, active living, and greenspace. Additionally, providing safe and comfortable environments for people involves incorporating CPTED (Crime Prevention Through Environmental Design) strategies designed to provide ‘eyes on the street’ and to remove opportunities for crime inherent in the building or site design.

Figure 7 : Cleveland Avenue Overlay District



According to the American Planning Association's *Planner's Dictionary*, a nonconforming use is a use that was valid when brought into existence but by subsequent regulation becomes no longer conforming. Thus, any use lawfully existing on any piece of property that is inconsistent with a new or amended general plan, and that in turn is a violation of a zoning ordinance amendment subsequently adopted in conformance with the general plan, will be a nonconforming use.

Although the City of East Point has enacted zoning changes over the years and throughout the entire city, the most apparent zoning changes in which non-conformities were created took place in the residential neighborhoods near downtown that are now zoned R1-A. Historically, many of the properties that are currently zoned R1-A were zoned R2-R4, which permitted two-family and multifamily housing. In 2002, the R2-R4 designations were re-zoned via government initiated rezoning to R1, a low-density residential area that permits single family uses. Two-family or multifamily units are not listed as a permitted use under R1 zoning, and any such units existing at the time of adoption would have been rendered non-conforming. The same area was re-zoned R1-A as shown on the April 18, 2005 zoning maps, which is a medium-density residential area that only permits single family uses. The attached list documents properties within this area that have a Fulton County Tax Assessor land use code ("LUC") of 102, 103, 104, and 107 (Residential 2 Family, Residential 3 Family, Residential 4 Family, or Single Family Residential Townhouse) that are present within this R1-A zoning district. There are 397 non-conforming two-family or multifamily residential uses listed within the R1-A single family zoning district.

Table 3 : Nonconforming Multifamily Uses in the R1-A Single Family Zoning District

Non-Conforming Multifamily Uses in R1-A Single Family Zoning District			
Address	Parcel ID	LUC	Acres
1009 CEDAR AVE	14 012500100140	102	0.189
1011 JEFFERSON AVE	14 012400150724	102	0.465
1015 CEDAR AVE	14 012500100157	102	0.198
1021 CEDAR AVE	14 012500100165	102	0.252
1056 BROOKDALE DR	14 012400150500	102	0.467
1062 BROOKDALE DR	14 012400150492	102	0.396
1064 JEFFERSON AVE	14 012400070328	102	0.203
1077 GLENDALE DR	14 012400010555	102	0.744
1111 GLENDALE DR	14 012400010209	102	0.223
1115 GLENDALE DR	14 012400010217	102	0.279
1118 WINBURN DR	14 012400090045	102	0.222
1121 GLENDALE DR	14 012400010589	103	0.179
1126 JEFFERSON AVE	14 012400060196	102	0.324
1129 GLENDALE DR	14 012400010571	102	0.200
1136 WINBURN DR	14 012400090011	102	0.260
1196 JEFFERSON AVE	14 012400060014	103	0.325
1214 CALHOUN AVE	14 013100060569	102	0.260
1238 EAST FORREST AVE	14 013300190331	102	0.222
1240 GUS THORNHILL JR DR	14 013200110322	102	0.311
1241 LYLE AVE	14 013200110330	102	0.288
1245 SPENCER AVE	14 013300080201	102	0.223
1249 LYLE AVE	14 013200110348	102	0.265
1250 HENDRIX AVE	14 013200110314	102	0.307
1257 PONDER'S WAY	14 013500040302	102	0.127
1260 HENDRIX AVE	14 013200110306	102	0.264
1261 PONDER'S WAY	14 013500040310	103	0.154
1263 LYLE AVE	14 013200110363	102	0.239
1263 WASHINGTON AVE	14 013200110892	102	0.201
1270 HENDRIX AVE	14 013200110298	102	0.321
1273 LYLE AVE	14 013200110371	102	0.311
1275 EAST WASHINGTON AVE	14 013200110827	102	0.187
1276 HENDRIX AVE	14 013200110280	102	0.219
1279 EUBANKS AVE	14 013100150063	102	0.212
1300 PINE AVE	14 013200070468	102	0.163
1301 CLERMONT AVE	14 013400050260	102	0.168
1305 CLERMONT AVE	14 013400050278	102	0.184
1306 PINE AVE	14 013200070450	102	0.166
1307 EAST WASHINGTON AVE	14 013200100638	103	0.308
1311 JEFFERSON AVE	14 013300090168	102	0.216
1312 EAST MERCER AVE	14 013000050462	102	0.208
1312 PINE AVE	14 013200070443	102	0.165
1313 CLERMONT AVE	14 013400050476	102	0.202
1314 WOMACK AVE	14 013500030261	102	0.113
1315 ELIZABETH LN	14 013400060517	102	0.199
1318 PINE AVE	14 013200070435	102	0.165
1318 WOMACK AVE	14 013500030253	102	0.101
1319 ELIZABETH LN	14 013400060525	102	0.173
1321 LYLE AVE	14 013200100166	102	0.127
1323 CLERMONT AVE	14 013400050310	102	0.159
1323 EAST WASHINGTON AVE	14 013200100612	102	0.177

Non-Conforming Multifamily Uses in R1-A Single Family Zoning District			
Address	Parcel ID	LUC	Acres
1323 ELIZABETH LN	14 013400060533	102	0.213
1325 BRYAN AVE	14 013300060112	102	0.167
1327 CLERMONT AVE	14 013400050468	102	0.364
1327 ELIZABETH LN	14 013400060541	102	0.128
1328 EUBANKS AVE	14 013000050090	102	0.200
1330 CLERMONT AVE	14 013400060079	102	0.149
1332 EUBANKS AVE	14 013000050082	102	0.191
1337 PINE AVE	14 013200070484	102	0.180
1338 EUBANKS AVE	14 013000050074	102	0.201
1339 WOMACK AVE	14 013500030063	102	0.127
1341 EAST WASHINGTON AVE	14 013200100513	102	0.207
1341 PINE AVE	14 013200070476	102	0.191
1343 ELIZABETH LN	14 013400060582	102	0.116
1345 WOMACK AVE	14 013500030055	102	0.120
1347 EAST WASHINGTON AVE	14 013200100521	102	0.207
1347 SAINT MICHAEL AVE	14 013400060335	103	0.223
1351 CLERMONT AVE	14 013400020693	102	0.169
1351 JEFFERSON AVE	14 013300060435	102	0.207
1354 CHAMBERS AVE	14 013400020040	102	0.129
1355 JEFFERSON AVE	14 013300060427	102	0.212
1356 WADLEY AVE	14 013300060047	102	0.165
1360 SAINT MICHAEL AVE	14 013400090126	102	0.184
1364 CARNEGIE AVE	14 013200020331	102	0.166
1365 WINBURN DR	14 013300120163	102	0.217
1366 PINE ST	14 013200060329	102	0.137
1367 MC CLELLAND AVE	14 013500030436	102	0.131
1369 BRYAN AVE	14 013300060203	102	0.168
1370 WOMACK AVE	14 013500030154	102	0.186
1371 JEFFERSON AVE	14 013300060393	102	0.186
1371 LYLE AVE	14 013200090151	102	0.155
1372 PINE ST	14 013200060311	102	0.154
1376 PINE AVE	14 013200060303	102	0.159
1377 CARNEGIE AVE	14 013200020141	102	0.216
1377 FULTON AVE	14 013200020471	102	0.245
1377 MC CLELLAND AVE	14 013500020197	102	0.131
1381 LYLE AVE	14 013200090169	102	0.128
1382 CARNEGIE AVE	14 013200020307	102	0.216
1384 LYLE AVE	14 013200090318	102	0.150
1385 PINE AVE	14 013200060501	102	0.162
1386 BRYAN AVE	14 013300050477	102	0.180
1391 JEFFERSON AVE	14 013300050204	102	0.204
1393 EAST VESTA AVE	14 013100170681	102	0.269
1394 EAST VESTA AVE	14 013100170509	102	0.247
1395 VESTA TER	14 013100170350	102	0.250
1400 BRYAN AVE	14 013300050113	102	0.168
1401 EAST VESTA AVE	14 013100170673	102	0.235
1401 MC CLELLAND AVE	14 013500020247	102	0.146
1402 EAST VESTA AVE	14 013100170491	102	0.199
1402 LYLE AVE	14 013200090276	102	0.151
1404 CLERMONT AVE	14 013400040048	102	0.162
1407 EAST VESTA AVE	14 013100170665	102	0.213

Analysis of Existing Development Patterns

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Non-Conforming Multifamily Uses in R1-A Single Family Zoning District			
Address	Parcel ID	LUC	Acres
1407 PINE AVE	14 0 13200060550	102	0.119
1408 EAST VESTA AVE	14 0 13100170483	102	0.195
1408 LYLE AVE	14 0 13200090268	102	0.141
1409 WINBURN DR	14 0 13300110156	102	0.254
1411 PINE AVE	14 0 13200060568	102	0.114
1415 EAST VESTA AVE	14 0 13100170657	102	0.215
1416 EAST VESTA AVE	14 0 13100170475	102	0.193
1417 VESTA TER	14 0 13100170384	102	0.193
1421 EAST VESTA AVE	14 0 13100170640	102	0.211
1422 EAST VESTA AVE	14 0 13100170467	102	0.190
1422 VESTA TER	14 0 13100170301	102	0.207
1423 VESTA TER	14 0 13100170392	102	0.190
1423 WOMACK AVE	14 0 13500020023	102	0.204
1424 ELIZABETH LN	14 0 13400040337	102	0.185
1425 HOLCOMB AVE	14 0 13200131617	102	0.261
1429 EAST VESTA AVE	14 0 13100170632	102	0.218
1430 CLERMONT AVE	14 0 13400010405	102	0.171
1432 ELIZABETH LN	14 0 13400070144	102	0.182
1436 ELIZABETH LN	14 0 13400070136	102	0.163
1437 EAST VESTA AVE	14 0 13100170624	102	0.241
1438 EAST VESTA AVE	14 0 13100170442	102	0.239
1438 GEORGIA AVE	14 0 13200131336	102	0.244
1440 FULTON AVE	14 0 13200010167	102	0.132
1440 HENDRIX AVE	14 0 13200080087	102	0.234
1441 EAST WASHINGTON AVE	14 0 13200080442	102	0.381
1442 ELIZABETH LN	14 0 13400070128	102	0.181
1443 EAST VESTA AVE	14 0 13100170616	102	0.261
1444 GEORGIA AVE	14 0 13200131344	102	0.228
1446 ELIZABETH LN	14 0 13400070532	102	0.169
1447 CLERMONT AVE	14 0 13400010215	102	0.217
1447 HAWTHORNE WAY	14 0 13500010719	102	0.219
1447 LYLE AVE	14 0 13200080376	102	0.606
1449 EAST VESTA AVE	14 0 13100170608	102	0.284
1452 CLERMONT AVE	14 0 13400010678	102	0.173
1455 BRYAN AVE	14 0 13300010141	102	0.210
1456 CLERMONT AVE	14 0 13400010686	102	0.172
1457 EAST VESTA AVE	14 0 13100170590	102	0.312
1460 SAINT MICHAEL AVE	14 0 13400070367	102	0.228
1462 CLERMONT AVE	14 0 13400010637	102	0.175
1462 MC CLELLAND AVE	14 0 13500010149	102	0.289
1467 BRYAN AVE	14 0 13300010166	102	0.201
1468 CLERMONT AVE	14 0 13400010645	102	0.160
1479 MC CLELLAND AVE	14 0 13500010693	102	0.170
1481 BRYAN AVE	14 0 13300010190	102	0.233
1487 MC CLELLAND AVE	14 0 13500010735	102	0.291
1488 CLERMONT AVE	14 0 13400010280	102	0.342
1638 WOODBERRY AVE	14 0 15400010293	102	0.272
1644 WOODBERRY AVE	14 0 15400010285	102	0.274
1669 NEELY AVE	14 0 15600110257	102	0.211
1670 NEELY AVE	14 0 15700020315	102	0.180
1678 NEELY AVE	14 0 15700020307	102	0.184
1684 NEELY AVE	14 0 15700020299	102	0.152

Non-Conforming Multifamily Uses in R1-A Single Family Zoning District			
Address	Parcel ID	LUC	Acres
1688 NEELY AVE	14 0 15700020281	102	0.168
1690 WARE AVE	14 0 15600100084	103	0.166
1707 TAYLOR AVE	14 0 15700150930	107	0.073
1707 THOMPSON AVE	14 0 15700070120	102	0.200
1709 TAYLOR AVE	14 0 15700150922	107	0.069
1710 LINWOOD AVE	14 0 15700070054	102	0.213
1710 THOMPSON AVE	14 0 15700070237	102	0.224
1711 TAYLOR AVE	14 0 15700150914	107	0.070
1713 TAYLOR AVE	14 0 15700150906	107	0.068
1715 TAYLOR AVE	14 0 15700150898	107	0.072
1717 MORRIS AVE	14 0 15800070095	102	0.301
1717 TAYLOR AVE	14 0 15700150880	107	0.113
1720 THOMPSON AVE	14 0 15700070211	102	0.205
1723 DORSEY AVE	14 0 15700070294	102	0.205
1726 LINWOOD AVE	14 0 15700070021	103	0.202
1727 WARE AVE	14 0 15600080526	103	0.213
1730 THOMPSON AVE	14 0 15700070203	102	0.409
1737 CENTER AVE	14 0 15800020272	102	0.401
1742 THOMPSON AVE	14 0 15700070187	102	0.212
1766 THOMPSON AVE	14 0 15700060394	102	0.198
1770 SPRING AVE	14 0 15600070444	102	0.188
1770 THOMPSON AVE	14 0 15700060402	102	0.199
1775 THOMPSON AVE	14 0 15700060170	102	0.283
1776 LINWOOD AVE	14 0 15700060048	102	0.203
1776 THOMPSON AVE	14 0 15700060246	102	0.188
1781 LINWOOD AVE	14 0 15700010100	103	0.221
1794 THOMPSON AVE	14 0 15700060212	102	0.229
1796 LINWOOD AVE	14 0 15700060014	103	0.218
1804 IDLEWOOD DR	14 0 16700030171	102	0.284
1809 WEST VESTA AVE	14 0 16300100242	102	0.221
1812 FARRIS AVE	14 0 16300130769	102	0.226
1813 IDLEWOOD DR	14 0 16700030544	102	0.607
1822 CENTER AVE	14 0 16300130702	102	0.161
1826 CENTER AVE	14 0 16300130710	102	0.167
1832 PHILLIPS AVE	14 0 16300130322	102	0.184
1835 WEST TAYLOR AVE	14 0 16400080823	102	0.137
1847 PHILLIPS AVE	14 0 16300130611	102	0.250
1848 CHAPMAN AVE	14 0 16300140487	102	0.143
1853 WEST VESTA AVE	14 0 16300100184	102	0.313
1853 WILLIAMS AVE	14 0 16300140933	102	0.173
1854 CENTER AVE	14 0 16300130066	102	0.184
1854 CHAPMAN AVE	14 0 16300140891	102	0.384
1854 WILLIAMS AVE	14 0 16300140263	102	0.315
1856 FARRIS AVE	14 0 16300130686	102	0.125
1859 WILLIAMS AVE	14 0 16300140925	102	0.164
1861 WEST TAYLOR AVE	14 0 16400080708	102	0.220
1870 FARRIS AVE	14 0 16300130744	102	0.169
1872 DUNLAP AVE	14 0 16300110183	102	0.297
1875 DUNLAP AVE	14 0 16300130561	102	0.133
1876 WEST TAYLOR AVE	14 0 16300140784	102	0.194
1877 CHAPMAN AVE	14 0 16300140354	102	0.157
1882 WEST TAYLOR AVE	14 0 16300140800	102	0.206

Non-Conforming Multifamily Uses in R1-A Single Family Zoning District			
Address	Parcel ID	LUC	Acres
1886 PHILLIPS AVE	14 016300130835	102	0.103
1887 FARRIS AVE	14 016300130827	102	0.097
1893 WEST VESTA AVE	14 016300110209	102	0.306
1895 DUNLAP AVE A	14 016300120653	107	0.020
1895 DUNLAP AVE B	14 016300120661	107	0.023
1895 DUNLAP AVE C	14 016300120679	107	0.023
1895 DUNLAP AVE E	14 016300120695	107	0.024
1895 DUNLAP AVE F	14 016300120703	107	0.019
1895 DUNLAP AVE G	14 016300120711	107	0.018
1895 DUNLAP AVE #D	14 016300120687	107	0.023
1895 DUNLAP AVE #H	14 016300120729	107	0.017
1896 BRYAN AVE	14 013300050121	102	0.199
1897 PHILLIPS AVE	14 016300120406	102	0.203
1901 DUNLAP AVE A	14 016300120737	107	0.019
1901 DUNLAP AVE B	14 016300120745	107	0.019
1901 DUNLAP AVE D	14 016300120760	107	0.022
1901 DUNLAP AVE F	14 016300120786	107	0.022
1901 DUNLAP AVE G	14 016300120794	107	0.022
1901 DUNLAP AVE H	14 016300120802	107	0.017
1901 DUNLAP AVE #C	14 016300120752	107	0.018
1901 DUNLAP AVE #E	14 016300120778	107	0.022
1903 PHILLIPS AVE	14 016300120398	102	0.212
1903 WESTWOOD AVE	14 016400030430	102	0.226
1905 FARRIS AVE	14 016300120240	103	0.121
1928 DUNLAP AVE	14 016300110043	102	0.202
1931 DUNLAP AVE	14 016300120638	102	0.124
1932 FARRIS AVE	14 016300120620	102	0.133
1936 FARRIS AVE	14 016300120588	102	0.127
1937 FARRIS AVE	14 016300120422	102	0.145
1937 WESTWOOD AVE	14 016400030539	102	0.228
1942 FARRIS AVE	14 016300120471	102	0.202
2036 MC PHERSON DR	14 013500040930	102	0.084
2074 FARRIS AVE	14 016300170450	102	0.590
2204 NEWNAN AVE	14 013400060012	102	0.178
2260 NEWNAN AVE	14 013400090076	102	0.192
2280 DAUPHINE ST	14 013400110361	103	0.250
2295 DAUPHINE ST	14 013400100156	102	0.183
2296 DAUPHINE ST	14 013400110338	102	0.228
2304 NEWNAN ST	14 013400120220	102	0.152
2318 NEWNAN AVE	14 013400120188	102	0.150
2324 NEWNAN ST	14 013400120170	102	0.185
2343 JEFFERSON TER	14 012400010126	102	0.361
2357 JEFFERSON TER	14 012400010100	102	0.351
2361 JEFFERSON TER	14 012400010092	102	0.270
2369 JEFFERSON TER	14 012400010084	102	0.158
2393 JEFFERSON TER	14 012400010043	102	0.169
2444 CONSTANCE ST	14 012400030272	102	0.159
2476 MAPLE ST	14 015600040280	102	0.218
2482 MAPLE ST	14 015600040272	102	0.215
2498 SEMMES ST	14 015600010184	102	0.346
2500 CONSTANCE ST	14 012400030371	103	0.150
2532 JEWEL ST	14 012400050494	102	0.351

Non-Conforming Multifamily Uses in R1-A Single Family Zoning District			
Address	Parcel ID	LUC	Acres
2558 EAST WOODLAND CIR	14 013300140377	102	0.156
2595 WOODLAND CIR	14 013300140351	102	0.078
2629 ACADIA ST	14 012400130346	102	0.224
2636 HARRIS ST	14 013300150236	102	0.264
2642 BAYARD ST	14 013300170341	102	0.196
2646 RANDALL ST	14 013300160201	102	0.234
2650 BAYARD ST	14 013300170333	102	0.221
2707 HARRIS ST	14 013200010431	102	0.129
2716 CHENEY ST	14 015700020240	102	0.243
2718 HARRIS ST	14 013200020489	102	0.204
2718 MILES CIR	14 012500030214	102	0.207
2718 PEARL ST	14 016400020654	102	0.294
2724 PEARL ST	14 016400020662	102	0.186
2726 MILES CIR	14 012500030206	102	0.209
2728 HARRIS ST	14 013200020620	102	0.200
2729 HARLAN DR	14 012500030073	102	0.764
2729 MILES CIR	14 012500030230	102	0.209
2730 PEARL ST	14 016400020563	102	0.169
2732 MILES CIR	14 012500030198	102	0.236
2737 MILES CIR	14 012500030248	102	0.187
2743 HARLAN DR	14 012500030099	102	0.283
2747 MILES CIR	14 012500030255	102	0.228
2750 HARRIS ST	14 013200020257	102	0.226
2752 MILES CIR	14 012500030172	102	0.386
2755 HARLAN DR	14 012500030107	102	0.313
2759 MILES CIR	14 012500030263	102	0.233
2762 PALM DR	14 012500050162	102	0.175
2769 MILES CIR	14 012500030271	102	0.233
2773 HARLAN DR	14 012500030123	103	0.323
2777 HARLAN DR	14 012500030131	103	0.284
2779 MILES CIR	14 012500030289	102	0.235
2783 HARLAN DR	14 012500030149	102	0.280
2789 HARLAN DR	14 012500100041	102	0.344
2789 MILES CIR	14 012500030297	102	0.192
2795 HARLAN DR	14 012500100058	102	0.312
2806 PALM DR	14 012500060153	102	0.162
2807 SYLVAN RD	14 012500060450	102	0.237
2811 PALM DR	14 012500060211	102	0.179
2813 SYLVAN RD	14 012500060443	102	0.238
2819 HARRIS ST	14 013200050312	102	0.147
2821 HARLAN DR	14 012500100090	102	0.201
2823 SYLVAN RD	14 012500060054	102	0.186
2825 HARRIS ST	14 013200050320	102	0.239
2829 SYLVAN RD	14 012500060062	102	0.194
2830 BAYARD ST	14 013200110033	102	0.171
2831 HARRIS ST	14 013200050338	102	0.249
2831 PALM DR	14 012500060252	102	0.163
2833 SYLVAN RD	14 012500060070	102	0.189
2836 PALM DR	14 012500060112	102	0.157
2837 PALM DR	14 012500060260	102	0.169
2846 HARRIS ST	14 013200090037	102	0.191
2848 AKRON ST	14 012500100546	102	0.191

Non-Conforming Multifamily Uses in R1-A Single Family Zoning District			
Address	Parcel ID	LUC	Acres
2851 AKRON ST	14 012500100835	102	0.284
2855 HARLAN DR	14 012500100918	102	0.512
2861 AKRON ST	14 012500100843	102	0.328
2862 SEMMES ST	14 015700110454	102	0.262
2865 AKRON ST	14 012500100850	102	0.276
2866 HARRIS ST	14 013200090227	102	0.205
2869 HARLAN DR	14 012500100991	102	0.408
2870 CHENEY ST	14 015700110546	102	0.190
2870 SYLVAN RD	14 010000030684	102	0.252
2871 PEARL ST	14 016400050602	102	0.156
2872 HARRIS ST	14 013200090235	102	0.204
2873 AKRON ST	14 012500100785	102	0.178
2873 PEARL ST	14 016400050594	102	0.156
2874 CHENEY ST	14 015700110579	102	0.173
2874 SEMMES ST	14 015700110736	103	0.086
2874 SYLVAN RD	14 010000030676	102	0.257
2881 SYLVAN RD	14 012500070061	103	0.186
2891 HARRIS ST	14 013200080269	102	0.263
2901 SYLVAN RD	14 012500080011	102	0.194
2904 EIGHTH ST	14 016400050248	102	0.477
2907 PALM DR	14 012500080250	102	0.157
2907 SYLVAN RD	14 012500080029	102	0.196
2908 HARLAN DR	14 012500080474	102	0.444
2911 PEARL ST	14 016400050537	102	0.233
2915 SYLVAN RD	14 012500080037	102	0.194
2920 HARLAN DR	14 012500080433	102	0.142
2922 HARLAN DR	14 012500080425	102	0.157
2928 HARLAN DR	14 012500080417	102	0.165
2932 HARLAN DR	14 012500080409	102	0.150
2936 HARLAN DR	14 012500080391	102	0.153
2940 HARLAN DR	14 012500080383	102	0.150
2940 SEMMES ST	14 015700140519	102	0.204
2943 SYLVAN RD	14 012500080086	102	0.192
2946 PARK ST	14 015700140311	102	0.173
2950 SEMMES ST	14 015700140493	103	0.354
2952 HARLAN DR	14 012500080367	102	0.153
2954 JONES ST 56	14 016400080799	102	0.247
2958 PEARL ST	14 016400080625	102	0.301
2960 JONES ST	14 016400080781	102	0.254
2966 JONES ST	14 016400080740	102	0.242
2966 SEMMES ST	14 015700140469	102	0.249
2967 JONES ST	14 016400080666	102	0.339
2974 JONES ST	14 016400080732	102	0.351
2975 JONES ST	14 016400080674	102	0.336
2977 PEARL ST	14 016400070170	102	0.223
2982 PARK ST	14 015700140253	102	0.190
2982 PEARL ST	14 016400080583	102	0.246
2985 PARK ST	14 015700140402	102	0.224
2986 CHURCH ST	14 015700150559	103	0.248
2988 EAST POINT ST	14 015700150294	102	0.134
2988 PEARL ST	14 016400080856	102	0.351
2991 CHURCH ST	14 015700140196	102	0.213

Non-Conforming Multifamily Uses in R1-A Single Family Zoning District			
Address	Parcel ID	LUC	Acres
2991 PARK ST	14 015700140410	102	0.183
2993 JONES ST	14 016400080690	102	0.364
3000 WASHINGTON RD	14 016300161442	102	0.201
3004 WASHINGTON RD	14 016300161434	102	0.325
3014 NORTH ST	14 013100060668	102	0.223
3016 LA ROSE ST	14 016300161335	102	0.290
3016 WASHINGTON RD	14 016300160220	102	0.249
3024 NORTH ST	14 013100060650	102	0.217
3034 PARK ST	14 015800010232	103	0.306
3037 NORTH AVE	14 013100030786	102	0.304
3038 NORTH AVE	14 013100060791	102	0.242
3041 BAYARD ST	14 013100030448	102	0.363
3045 NORTH ST	14 013100030794	102	0.337
3046 NORTH ST	14 013100060809	102	0.230
3058 CHURCH ST	14 015800020322	102	0.110
3058 MARTIN ST	14 013100030836	102	0.556
3079 CHURCH ST	14 015800010422	102	0.104
3093 JONES ST	14 016300140511	102	0.198
3117 CHURCH ST	14 015800060088	102	0.214
3185 EAST POINT ST	14 015800080052	102	0.174
3186 CLOVERHURST DR	14 016300170500	102	0.353
3193 CHURCH ST	14 016300100093	102	0.203
3194 CLOVERHURST DR	14 016300170294	102	0.352
3207 CLOVERHURST DR	14 016300170351	102	0.205
3228 ELM ST	14 013100170566	102	0.387
3238 ELM ST	14 013100170574	102	0.286
3246 ELM ST	14 013100170582	102	0.314
921 REED AVE	14 012500040064	102	0.230
927 REED AVE	14 012500040072	102	0.258
932 WINBURN DR	14 012400110280	102	0.398
961 REED AVE	14 012500040114	102	0.238
991 EAST WASHINGTON AVE	14 012500100371	102	0.201
CARNEGIE AVE	14 013200020703	102	0.185
DUNLAP AVE	14 016300120810	107	0.455
TAYLOR AVE	14 015700150948	107	0.196

Influences on Future Development

There are a few factors, both inside and outside of East Point’s city limits, which might influence future land use development patterns within the city. It is important that these issues are considered when zoning and land development decisions are made, along with the Areas of Special Attention in the subsequent section.

Fort McPherson

The September 2011 closure of Fort McPherson will likely have an impact on East Point’s economy. While Fort McPherson is located just outside the city limits, people who lived and worked at the base often came into East Point for shopping and dining. As the base closes, East Point’s business owners are losing this market. In addition there are a number of individuals working at the base and living in the City. The base closure could have significant impacts on housing vacancy rates. While the final development plan for the 488-acre site is still being finalized, it may include commercial uses that could draw shoppers away from East Point. However, likely plans for future development of the site include a large science and technology center, which would serve as a large employment center. The new site could potentially create jobs and bring in workers from outside the community. East Point is uniquely positioned to provide to this new market and attract them to businesses in the city.

Figure 8 : Fort McPherson Redevelopment Area



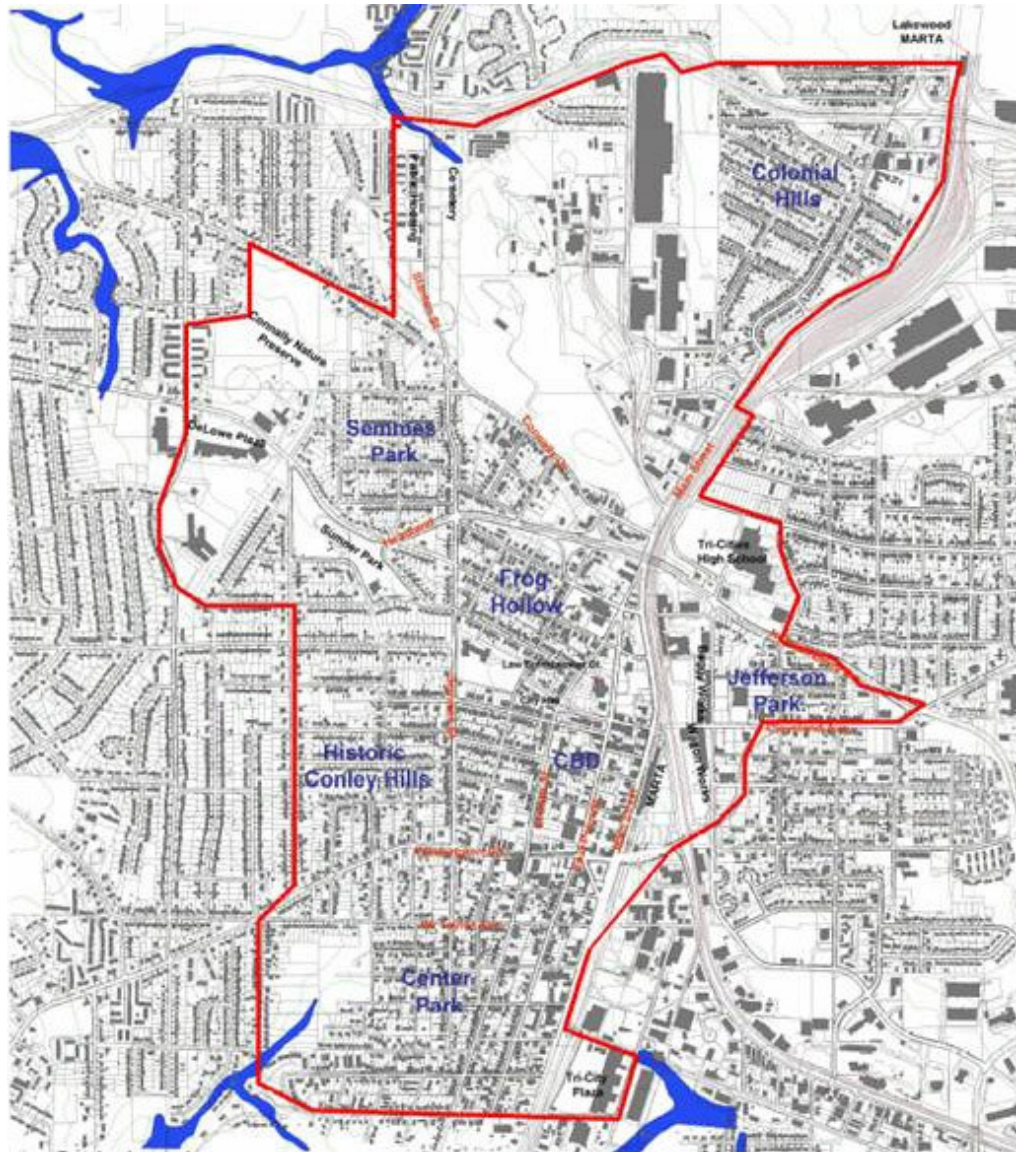
Source: Fort McPherson Research Park Master Plan and Development Districts Conceptual Plan, 2010

Livable Centers Initiative

The Atlanta Regional Commission funded a Livable Centers Initiative (LCI) master plan and study for the City of East Point in 2005. The area of the LCI included downtown, Tri-Cities Plaza and De Lowe Plaza, the Lawrence Street industrial area, and the residential neighborhoods of Colonial Hills, Semmes Park, Frog Hollow, Conley Hills, Jefferson Park, and Center Park. The intent of the study was to develop a plan that would capitalize on the existing sense of place and community and original compact street grid network to create a livelier downtown urban center, stimulating investment in the city's commercial core and historic neighborhoods. After a public participation process, the biggest goals identified by the community were redeveloping the Lawrence Street brownfield and industrial area, restoring Center Park, redeveloping a shuttered primary school, renovating De Lowe Plaza and Tri-Cities Plaza. The community desired retail along Main Street and in front of the MARTA station and a grocery store and drug store within the downtown area. The LCI identified a number of vacant properties in downtown prime for redevelopment.

The city has accomplished some of the objectives outlined by the LCI. Almost all parcels in the downtown area are currently zoned "Commercial Redevelopment," which "is intended to facilitate and encourage innovative, functional, aesthetically pleasing and creative design and development of the most compatible and desirable mixed-use pattern of retail, commercial service, institutional and residential land uses which are primarily pedestrian and public transit oriented." When these properties are substantially redeveloped, they must comply with the requirements of the zoning regulation. Additionally, there is a Downtown Architectural Overlay District that applies to all properties zoned Commercial Redevelopment within the overlay boundaries, which surround the downtown area. The architectural guidelines require pedestrian-friendly development with attractive landscaping, creating a unified and attractive downtown district. Future land use planning should continue to concentrate on bringing a mix of uses that will attract a variety of visitors, residents, and consumers to the central downtown district.

Figure 9 : East Point LCI Study Area Map



Source: City of East Point Livable Centers Initiative Report, 2005

Tax Allocation District

A Tax Allocation District, or “TAD,” is established for the purpose of catalyzing investment by financing certain redevelopment activities in underdeveloped or blighted areas using public dollars. Redevelopment costs are financed through the pledge of incremental increases in property taxes generated by the resulting new development. Financing incentives encourage development that fits within the plan and falls within the TAD boundaries. East Point has two TADs: one around Camp Creek Marketplace and another on major transportation corridors. The Areas of Special Attention Map (Figure 16) shows the TAD boundaries.

The City of East Point developed its **Camp Creek Redevelopment Plan & Tax Allocation District for Camp Creek & I-285** in 2001. Reacting to slower economic and demographic growth than in North Fulton, East Point worked with Fulton County to create a Tax Allocation District that would bring jobs, new shopping and entertainment opportunities, and enhanced sales tax revenue to the city. The TAD site is primarily south of Camp Creek Parkway between Ben Hill Road and I-285, with a smaller portion north of Camp Creek Parkway to Redwine Road. The “Camp Creek Gateway” was built on 814 acres of real estate that had been difficult to develop due to noise from the airport and its location in a floodplain; now, Camp Creek Marketplace has become a major regional shopping destination.

In response to the LCI, the 2006 comprehensive plan update, and a **2005 Cleveland Avenue Corridor Study Master Plan** (shown in Figure 10), the City of East Point developed a Corridors Tax Allocation District and Redevelopment Plan in 2006. The purpose of this plan is to “provide a financing mechanism to help facilitate recommended improvements,” including attracting private taxable redevelopment opportunities, improving underdeveloped urban areas, and creating employment opportunities. As East Point had tremendous success with the Camp Creek TAD, this plan implements TADs around Cleveland Avenue, Washington Road, and Main Street.

Figure 10 : Cleveland Avenue Corridor Study Masterplan



Source: *Cleveland Avenue Corridor Study: Masterplan, 2005*

Public redevelopment or improvement projects to be made with TAD-generated funds include new parks and open spaces; pathways and trails to link the area’s parks; roadway improvements; sidewalk and pedestrian-friendly streetscape improvements; land assemblage or site preparation for development; construction of new public facilities, including a community recreation center; and improvements to the area’s water, sewer, and transportation infrastructure. Anticipated private development projects that could be generated or supported by the TAD incentives are as follows:

- **Buggy Works** expansion
- **East Point Commons:** mixed-use development on the block between Ware Avenue, East Point Street, Cleveland Avenue, and Main Street
- **Tri-Cities Plaza:** redevelopment, potentially with townhouses
- **MARTA South Parking Lot MXD:** major mixed-use project, potentially with a new hotel in CBD
- **North Main District:** mid-size commercial or residential development and small-store retail and local office space located along Main Street north of Normal Berry Drive
- **North Main Mixed-Use Development:** assemblage of parcels to create a larger mixed-use development
- **Central Main District:** Town Center retail and services
- **South Main District:** similar development as in the North and Central Main Districts
- **SFMC Campus and King Building:** medical-related professional office development
- **Sylvan Road Mixed-Use:** large assemblage of land south of Cleveland Avenue between Sylvan Road and Springdale Road, potentially with “big-box” and supermarket retail
- **Wagon Works Mixed-Use Expansion:** loft condominiums with local-serving retail
- Unspecified redevelopment along **Washington Road**

Areas of Transitional Land Use

Founded in 1887, East Point is one of the older original railroad cities in the Atlanta area. The original residential and commercial areas surround downtown, along East Point Street and Main Street. The railroad tracks, which follow Main Street and Central Avenue, have attracted industrial development and distribution uses throughout the city’s history. The older residential neighborhoods, located east of downtown to the city limits and extending west of downtown to Delowe Drive, include a mix of housing types and a diverse residential population. Located close to MARTA and several local parks, these historic areas have always been a source of pride for East Point residents. As the economy improves and the housing vacancy in East Point decreases, these neighborhoods will likely continue to attract a variety of residents.

Unfortunately, some of the original residential neighborhoods have been suffering from years of disinvestment and high rates of vacancies. The current economic climate has contributed to the decline of some of these areas. In particular, the neighborhood east of downtown and south of Cleveland Avenue, the neighborhood south of Washington Road and west of Main Street within the city limits, and a small neighborhood immediately west of the Lawrence Street brownfield have been identified by the city as in need of investment. These areas have been identified on the **Areas of Special Attention map** as “Areas of Significant Disinvestment.”

New housing opportunities closer to the city limits have been identified and are beginning to be developed. The **Villages at East Point**, a new multi-family, high-density development, is conveniently located just off of Lakewood Freeway and adjacent to the Fort McPherson site. Several other new residential developments, including some conservation subdivisions and some multi-family housing, are currently under construction near the Camp Creek Marketplace, south of Camp Creek Parkway. These neighborhoods are also conveniently located to major transportation arteries and commercial attractions. However, connectivity from downtown East Point to these neighborhoods is lacking. To incorporate these new neighborhoods into East Point and to attract these new residents to downtown, the eastern and western centers should

be better connected. Enhancing commercial properties at nodes along Washington Road, the only route that connects east and west, will draw visitors towards downtown.

A few commercial properties have also been identified by the city as prime redevelopment opportunities. The intersection of Delowe Drive and Headland Drive is currently home to a gas station and several declining strip centers. Its location amidst a thriving residential neighborhood and adjacent to a large apartment complex makes it an excellent target for neighborhood commercial redevelopment. Another strip center, on Main Street between Vesta Avenue and Willingham Drive, has suffered from vacancies in recent years but is well situated to attract large supermarket or big-box retail opportunities. The **Areas of Special Attention map** highlights these prime redevelopment opportunities.

Incompatible Land Use Relationships

East Point has a significant industrial heritage, which has contributed much to the city's economy and early growth. However, industrial uses are typically considered to be incompatible with other land uses, particularly residential uses, due to externalities like noise, odor, and truck traffic. Sound planning principals including land development standards can help reduce or remove conflicts that arise with issues such as layout, buffers, and location. It is important that future land use plans and ordinances guard these important financial and economic resources while simultaneously protecting adjacent residents from any perceived negative effects. Natural vegetative buffers can be used to distance industrial properties from other uses. An alternative to using buffers is to gradually step down the intensity of use from industrial to residential. Heavy industrial uses can co-exist with light-industrial uses, which are usually compatible with some commercial uses. Commercial uses can be sited next to office buildings that are, in turn, good neighbors to residential uses. Careful land use planning can reduce any potential negative impacts of industrial use while preserving their important economic contributions.

Environmentally Sensitive Areas

Significant environmental resources should be protected from being harmed by development, and their location should be an important consideration in a city's land use plan. The section on Natural and Cultural Resources fully explores the location and quantity of a variety of environmentally sensitive areas within the city limits. East Point does not have a large amount of sensitive areas, but it does have some areas of steep slopes and floodplains where development must be controlled. The largest floodplain area occurs immediately south of Camp Creek Parkway, in an area that is not currently densely developed. Existing uses include warehouses on large tracts of land and residential subdivisions. This area will likely be developed at a low to medium density, since new construction within the floodplain is restricted. Areas of steep slopes are also located in already-developed residential neighborhoods, so will not prevent any significant challenges to future development.

See the chapter on Natural and Cultural Resources for an index of the parcels that are affected by environmentally sensitive areas.

Future Land Use

The future land use (“FLU”) map created by the city is the visual representation of the existing plans, policies, and goals, indicating the location of various land use categories. Figure 11 is East Point’s **current** future land use map, and Table 4 provides an inventory. In order to achieve the development that a FLU map depicts, existing zoning must allow for the amount of each type of development specified by the future land use plan.

With the economic decline exacerbated by a high rate of vacancy, the city faces a crisis. This update to the Comprehensive Plan is timely, since it offers an opportunity to objectively analyze policies and economic goals. Analysis and implications of current policy and regulations as they relate to existing land use conditions can help reveal the effectiveness of current policy. This assessment helps decision-makers determine whether the current regulations meet the needs and objectives of the city.

Table 4 : Future Land Use by Acre, Existing Policy 2006

Total Acreage by Future Land Use			
Future Land Use	Total Acres	% of Acres	# of Parcels
All Residential	4,930	61.3%	10,794
High Density Residential	679	8.4%	751
Medium Density Residential	1,881	23.4%	5,623
Low Density Residential	2,370	29.4%	4,420
All Mixed Use	728	9.0%	948
Mixed Use	593	7.4%	518
Mixed Use Town Center	134	1.7%	430
All Commercial	554	6.9%	561
Commercial	191	2.4%	47
Hospitality Commercial	210	2.6%	432
Neighborhood Commercial	153	1.9%	82
All Industrial	504	6.3%	232
Light Industrial	503	6.2%	231
Heavy Industrial	1	0.0%	1
All Other Uses	1,332	16.5%	319
Office Park	779	9.7%	111
Public/Institutional	268	3.3%	83
Parks/Recreation/Conservation	243	3.0%	80
Transportation/Utilities	42	0.5%	45
Total:	8,048	100.00%	12,854

Source: City of East Point



2026 Future Land Use Map

Residential

- Low Density Residential - up to 4 units per acre
- Medium Density Residential - up to 8 units per acre
- High Density Residential - up to 18 units per acre

Commercial

- Neighborhood Commercial
- Hospitality Commercial
- Commercial

Live, Work, Play

- Mixed Use
- Mixed Use Town Center
- Office Park

Institutional

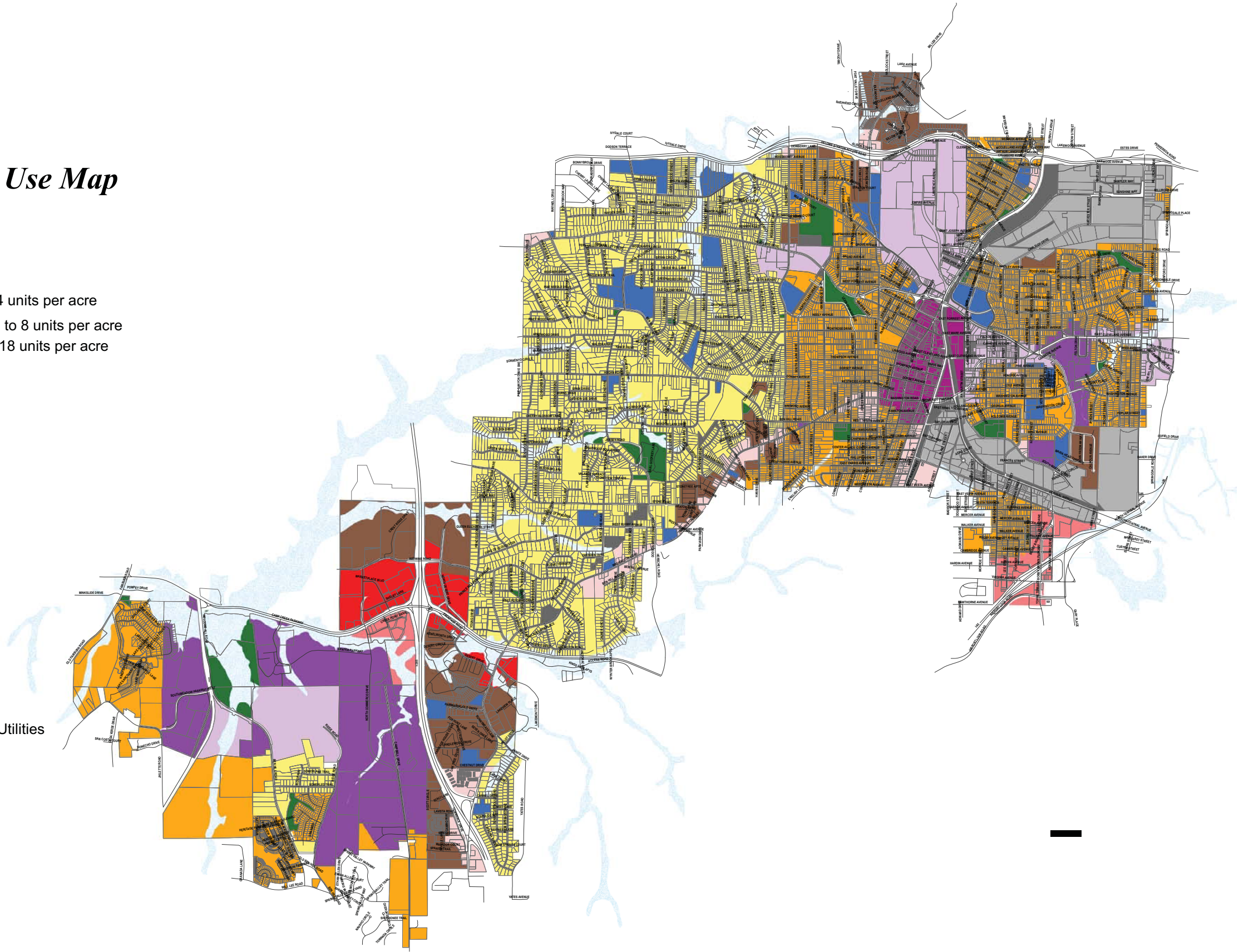
- Public/Institutional

Industrial

- Industrial
- Transportation, Communication, Utilities

Open Space

- ep_100yr_floodplain
- Parks, Recreation, Conservation



Land Use and Economic Development Patterns

How can decision makers measure or quantify the fiscal impact of the land development patterns? What is the appropriate mix of residential and commercial use for a healthy tax base? What employment activities should the city recruit or encourage expansion of? What are the strategic locations for city investment that will create the most stable and dynamic economic environment for the future? These are questions that elected officials, stakeholders, property owners and city staff ask themselves on a daily basis. The *East Point Market Assessment and Demand Trends* report begins to address these questions by assessing existing market conditions and economic trends and then projecting the demands of Office, Industrial, Retail and Housing Development in East Point over the next 25 years¹.

The Fiscal Impact assessment, herein, continues to help answer these questions. The fiscal impact assessments will then be used as a comparison for adjustments to future land use policies and map, along with community and stakeholder input, in the Mission 2036 Community Agenda.

Market Demand Summary

Net 10-year and 25-year demand trends for the City of East Point are summarized below. Taking into account excess inventory, the demand for Retail and Office space is significant and stays constant through both the 10 and 25 year periods. Industrial demand also shows steady demand over the 25-year period while Residential shows a negative need for units in the first 10 years but then projects demand emerging again during years 2011-2036. That said, the market may still be attracted to areas for new housing.

Table 5 : East Point Demand Net Current Excess Inventory

Total East Point Demand Net of Current Excess Inventory, 2011-2036		
	Years 1-10 2011-2021	Total 25 Years 2011-2036
Retail	690,302 sq ft	1,366,051 sq ft
Neighborhood Services (from household growth)	20,887 sq ft	64,430 sq ft
Office (from employment growth)	756,878 sq ft	1,871,498 sq ft
Industrial (from employment growth)	102,523 sq ft	404,425 sq ft
Residential: Single Family Detached Houses	(242) units	1,024 units
Residential: Townhouses/Condos	(1) units	222 units
Residential: Multi-family Rentals/Apartments	(289) units	1,125 units
Total Residential Units: All Types	(532) units	2,371 units

Source: Huntley Partners, 2011

¹ Full report attached to Technical Appendix, discussed in the Economic Development Technical Appendix and summarized within Community Profile Economic Section.

Although the demand trends provide the potential for *economic* development the city could capture, building various scenarios of potential tax base (using a zoning scenario and FLU scenario) based on the tax assessor’s existing tax base adds the *fiscal* dimension to the economic “story”, which will help decision makers consider the best balance to pursue for future land use. The city does not currently collect data on cost-of services; therefore, the fiscal analysis only measures impact in terms of revenue generation. Assessment of the viability of meeting demand projections given constraints of the current zoning and FLU (2006) will provide a more complete picture of the true trade-offs facing the city regarding land use decisions. This approach allows a rough magnitude-of-scale type comparison of potential value the city policy implies.

Fiscal Impact Assessment

The following tables and associated maps provide the fiscal impact associated with the current Land Use, Zoning, and FLU (2006). The method employed standardized categories across the three scenarios: the base scenario, which is the use according to **tax** records; uses allowed by **zoning**; and uses indicated by the 2006 future land use **policy** as appropriate, as shown in Table 6.

Table 6 : Land Use Category Descriptions

Standardized Land Use Category Descriptions	
Category	Description
A	Commercial
B	Industrial
C	Low Density Residential
D	Medium Density Residential
E	High Density Residential
F	Mixed Use
G	Office / Distribution
H	Public / Institutional
Other	Parks / Recreation / Conservation, Transportation / Utilities

The average assessed value per acre was then calculated based on the 2010 Fulton County Assessors values for all parcels within each category, which is shown in Table 7.

Table 7 : Average Assessed Value per Acre by Land Use Category

Average Assessed Value per Acre by Land Use Category		
Category	Description	Average Assessed Value per Acre
A	Commercial	\$ 290,425
B	Industrial	\$ 132,910
C	Low Density Residential	\$ 83,490
D	Medium Density Residential	\$ 180,719
E	High Density Residential	\$ 221,902
F	Mixed Use	\$ 274,002
G	Office / Distribution	\$ 144,696
H	Public / Institutional	\$ 20,735
Other	Parks / Recreation / Conservation, Transportation / Utilities	\$ 8,313

A scenario for potential fiscal impact was run using the tax assessor’s current values in order to show tax revenue implication if all city parcels were actually used as zoned. Similarly, if all parcels were used as the future policy indicates, this analysis shows the revenue implications in today’s dollars. Table 8 shows the results comparing all three scenarios.

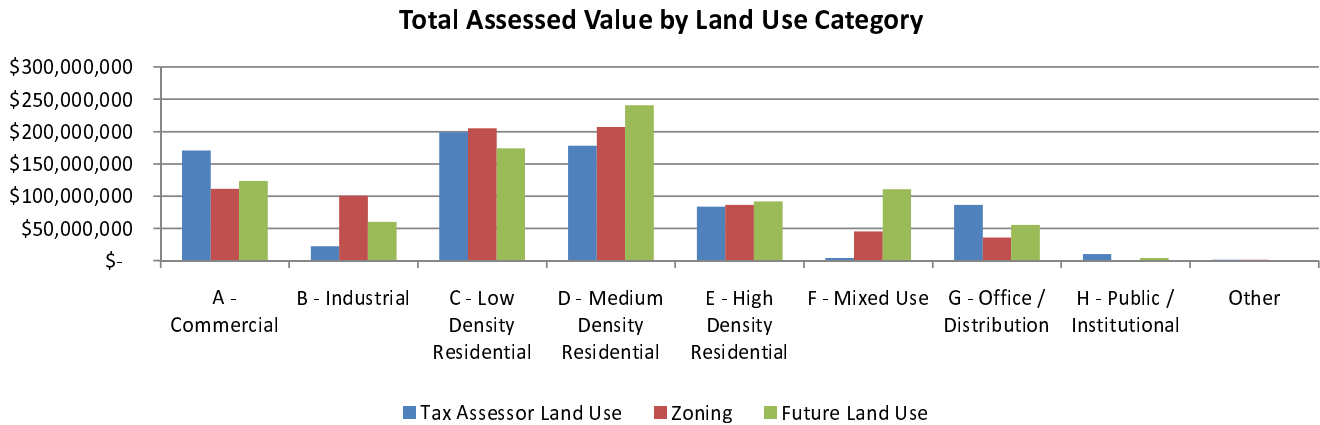
Table 8 : Comparison of Assessed Values

Comparison of Assessed Value: Existing Tax Base, Current Zoning, and Future Land Use Policy			
Category	Tax Assessor Land Use	Zoning	Future Land Use
A	\$ 170,448,080	\$ 111,496,709	\$ 123,696,567
B	\$ 22,553,920	\$ 100,660,502	\$ 60,382,901
C	\$ 198,847,580	\$ 205,161,357	\$ 173,855,020
D	\$ 178,225,170	\$ 207,406,722	\$ 240,804,532
E	\$ 84,031,510	\$ 86,590,794	\$ 92,170,810
F	\$ 4,180,120	\$ 45,741,889	\$ 110,526,297
G	\$ 86,715,400	\$ 35,736,272	\$ 55,668,549
H	\$ 10,244,720	\$ 1,158,658	\$ 4,180,399
Other	\$ 1,336,200	\$ 1,382,039	\$ 601,744
Total	\$ 756,582,700	\$ 795,334,943	\$ 861,886,820

The results detail that the total assessed value of the **existing land use** is **\$756,582,700**, **zoning** would be **\$795,334,943**, and **future land use** would be **\$861,886,820**. If all parcels were currently used as zoned then the potential fiscal impact would be \$38,752,243 greater than currently assessed. If the FLU was implemented, then the fiscal impact would be \$105,304,120 greater than what is currently assessed.

Further analysis of the total assessed value by land use category indicates that the fiscal impacts from implementing the zoning and FLU result primarily from increases in categories B (**Industrial**), D (**Medium Density Residential**) and F (**Mixed Use**). The increase in medium density residential and industrial is primarily driven by areas near downtown that are categorized as low density on the base scenario, but are categorized as medium density on the FLU scenario. Clearly the greatest difference in potential revenue in the zoning and FLU scenarios come from category F, “mixed use,” which demonstrates a 994% increase in the total value of land based on zoning and 2544% increase based on the FLU. This results from relatively high average assessed value per acre of the mixed use category in conjunction with current and future development goals as indicated on the zoning and FLU maps of large increases in the percentage of mixed use parcels in the city.

Figure 12 : Comparison of Assessed Values



Analysis of Existing Development Patterns

1

Given the market demand study and current zoning and FLU maps along with fiscal values associated with each, East Point appears well positioned to realize goals given market conditions. The fiscal impact indicates that there would be significant increase in tax revenue through implementation of the future land use map with increased values being driven primarily by the growth of mixed use parcels in the City. The market demand data supports that development can take place on these parcels to the degree that the city can capture the demand projected over the next ten years (690,302 square feet of retail and 756,878 square feet of office which are categories of uses supported within the mixed use district).

For the best economic performance, the city will want to optimize the uses that generate the greatest tax revenue so it can provide the quality of use and services it envisions.

In addition over the next 25 years the demand study projected 1,125 residential multifamily units that would be appropriate to be developed within these mixed use projects. Mixed use projects will most likely occur within the Commercial Redevelopment (CR) zoned parcels in or around downtown which is a prime location given the location of MARTA and availability of infill opportunities on undeveloped and underutilized parcels. A majority of the CR parcels lie within the quarter- and half-mile radii around the East Point MARTA Station. Proximity to public transportation often increases market values of properties and supports more compact mixed use projects often referred to as Transit Oriented Development (TOD). Thus the location of these CR parcels in relation to public transportation will further the chances of mixed use development patterns in this location.

Using tax revenues to test alternative scenarios helps provide quantitative measures for the land use policy that the city will ultimately adopt at the completion of the comprehensive plan update. It obviously only tells one part of the whole economic story for the city. Similarly, the positive results of the market demand study is a critical quantitative set of data to know; however, the city will still have the hard work of capturing the demand potential the study shows.

The following tables were used to prepare the comparison above.

Table 9 : Base Scenario: Tax Assessor Existing Land Use Value per Acre

Base Scenario: Tax Assessor Existing Land Use				
Category	# of Parcels	Total Acres	Average Assessed Value per Acre	Total Assessed
A	474	586.9	\$ 290,425	\$ 170,448,080
B	35	169.7	\$ 132,910	\$ 22,553,920
C	5,370	2,381.7	\$ 83,490	\$ 198,847,580
D	4,358	986.2	\$ 180,719	\$ 178,225,170
E	312	378.7	\$ 221,902	\$ 84,031,510
F	40	15.3	\$ 274,002	\$ 4,180,120
G	104	599.3	\$ 144,696	\$ 86,715,400
H	309	494.1	\$ 20,735	\$ 10,244,720
Other	97	161	\$ 8,313	\$ 1,336,200
Total	11,099	5,773	\$ 131,066	\$ 756,582,700

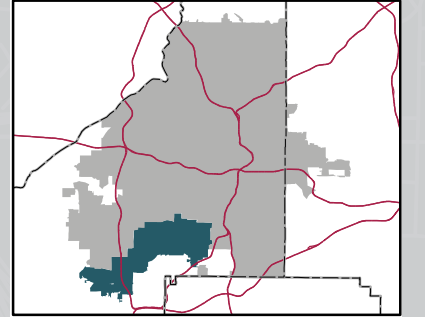
Table 10 : Zoning Scenario: Potential Value

Zoning Scenario				
Category	# of Parcels	Total Acres	Average Assessed Value per Acre	Total Potential Value
A	267	383.9	\$ 290,425	\$ 111,496,709
B	261	757.4	\$ 132,910	\$ 100,660,502
C	4,934	2,457.3	\$ 83,490	\$ 205,161,357
D	4,509	1,147.7	\$ 180,719	\$ 207,406,722
E	240	390.2	\$ 221,902	\$ 86,590,794
F	624	166.9	\$ 274,002	\$ 45,741,889
G	8	247.0	\$ 144,696	\$ 35,736,272
H	83	55.9	\$ 20,735	\$ 1,158,658
Other	173	166.2	\$ 8,313	\$ 1,382,039
Total	11,099	5,772.5	\$ 131,066	\$ 795,334,943

Table 11 : Future Land Use Scenario: Potential Value

Future Land Use Scenario				
Category	# of Parcels	Total Acres	Average Assessed Value per Acre	Total Potential Value
A	491	425.9	\$ 290,425	\$ 123,696,567
B	194	454.3	\$ 132,910	\$ 60,382,901
C	4,140	2,082.4	\$ 83,490	\$ 173,855,020
D	5,055	1,332.5	\$ 180,719	\$ 240,804,532
E	340	415.4	\$ 221,902	\$ 92,170,810
F	719	403.4	\$ 274,002	\$ 110,526,297
G	53	384.7	\$ 144,696	\$ 55,668,549
H	66	201.6	\$ 20,735	\$ 4,180,399
Other	41	72.4	\$ 8,313	\$ 601,744
Total	11,099	5,772.5	\$ 131,066	\$ 861,886,820

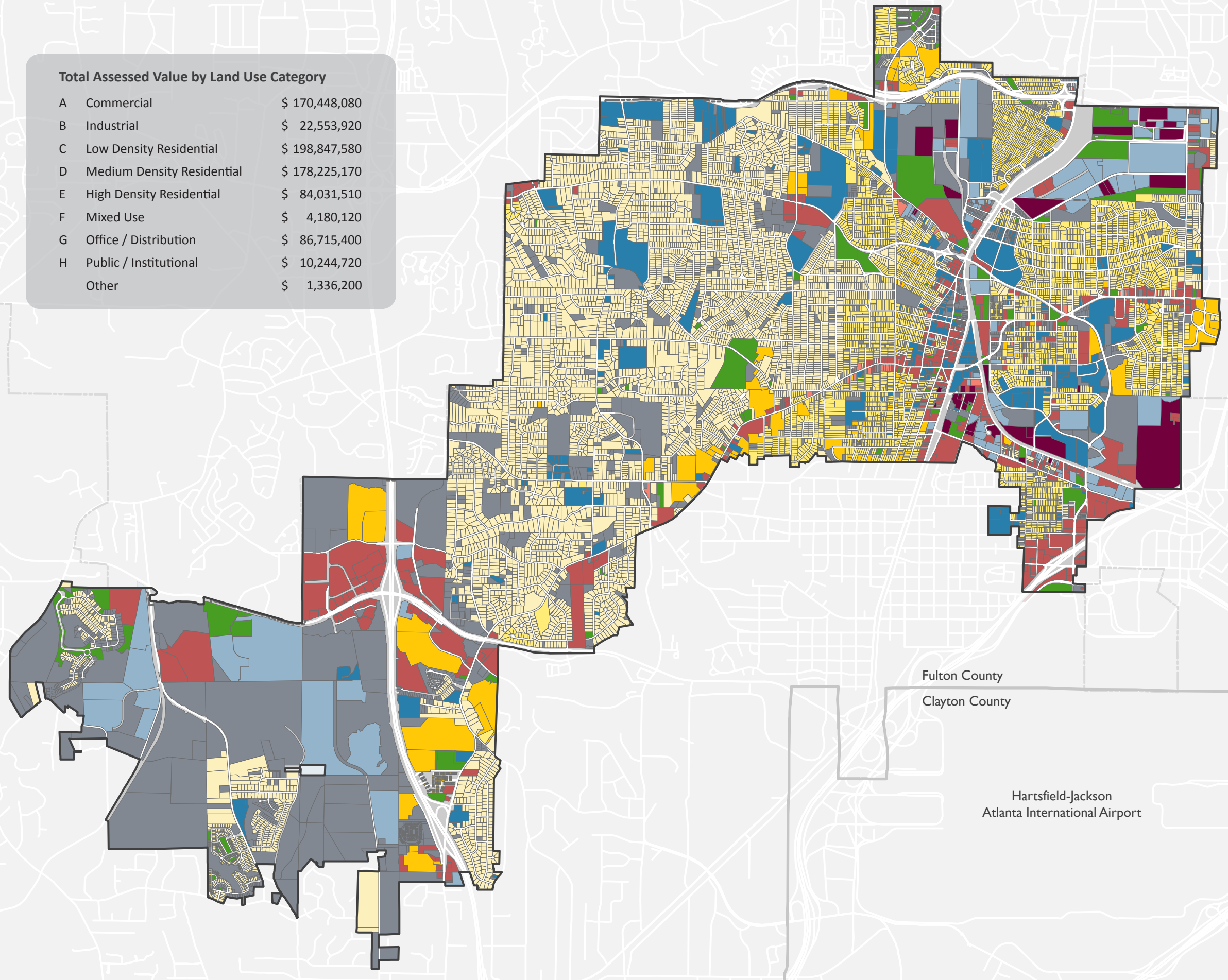
Figure 13: Base Scenario: Tax Assessor Land Use



**City of East Point
Comprehensive Plan**

Tax Assessor Land Use

Total Assessed Value by Land Use Category		
A	Commercial	\$ 170,448,080
B	Industrial	\$ 22,553,920
C	Low Density Residential	\$ 198,847,580
D	Medium Density Residential	\$ 178,225,170
E	High Density Residential	\$ 84,031,510
F	Mixed Use	\$ 4,180,120
G	Office / Distribution	\$ 86,715,400
H	Public / Institutional	\$ 10,244,720
	Other	\$ 1,336,200



- A Commercial
- B Industrial
- C Low Density Residential
- D Medium Density Residential
- E High Density Residential
- F Mixed Use
- G Office / Distribution
- H Public / Institutional
- Other
- Vacant
- East Point City Limits
- Atlanta City Limits
- County Boundary

Fulton County
Clayton County

Hartsfield-Jackson
Atlanta International Airport

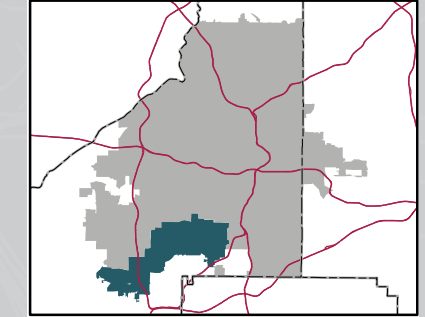
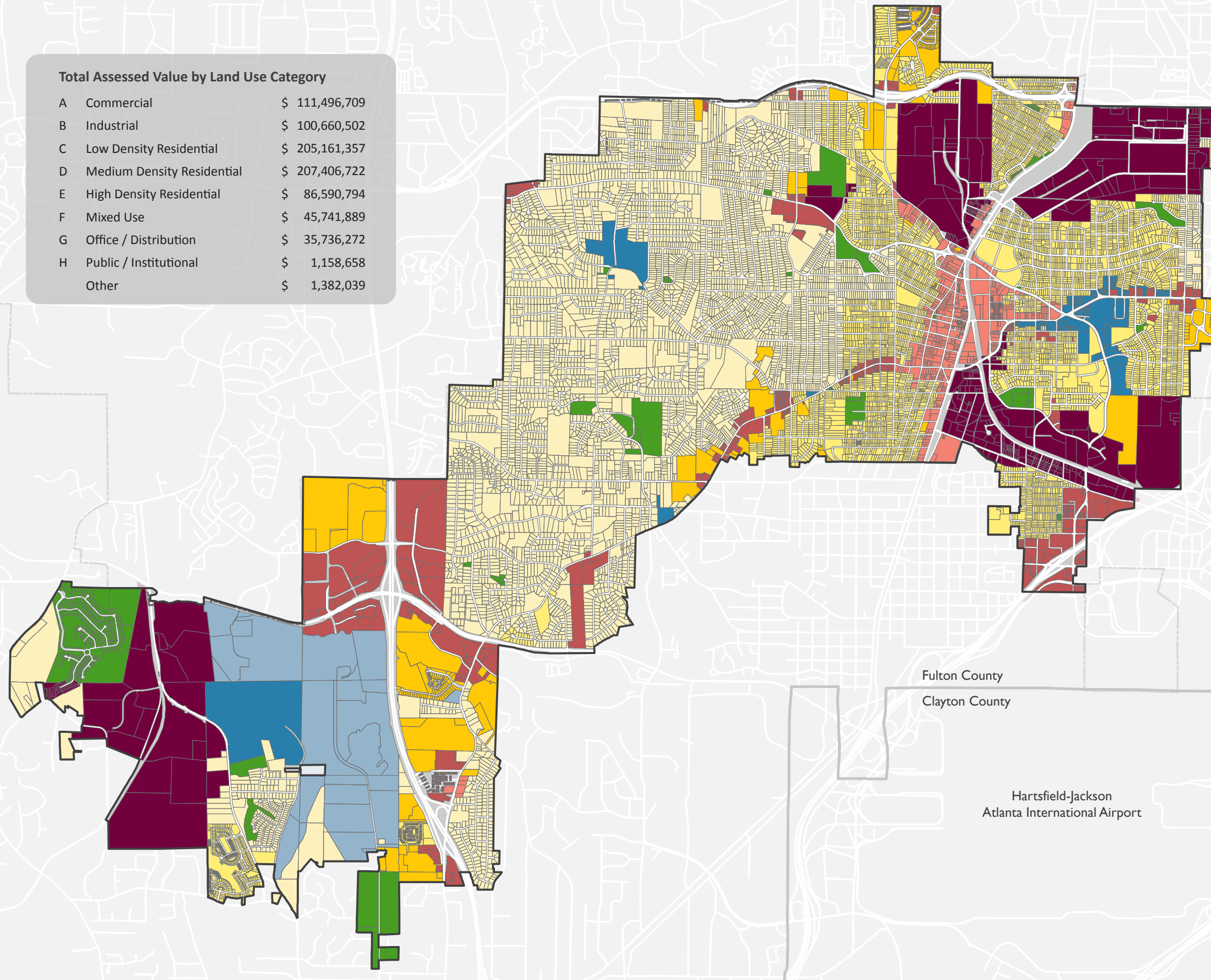
Source: Fulton County Tax Assessor 2010,
City of East Point



Figure 14: Zoning Scenario

Total Assessed Value by Land Use Category

A	Commercial	\$ 111,496,709
B	Industrial	\$ 100,660,502
C	Low Density Residential	\$ 205,161,357
D	Medium Density Residential	\$ 207,406,722
E	High Density Residential	\$ 86,590,794
F	Mixed Use	\$ 45,741,889
G	Office / Distribution	\$ 35,736,272
H	Public / Institutional	\$ 1,158,658
	Other	\$ 1,382,039



**City of East Point
Comprehensive Plan**

Zoning Scenario

- A Commercial
- B Industrial
- C Low Density Residential
- D Medium Density Residential
- E High Density Residential
- F Mixed Use
- G Office / Distribution
- H Public / Institutional
- Other
- East Point City Limits
- Atlanta City Limits
- County Boundary

Fulton County
Clayton County

Hartsfield-Jackson
Atlanta International Airport

Source: Fulton County Tax Assessor 2010,
City of East Point

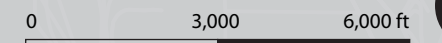
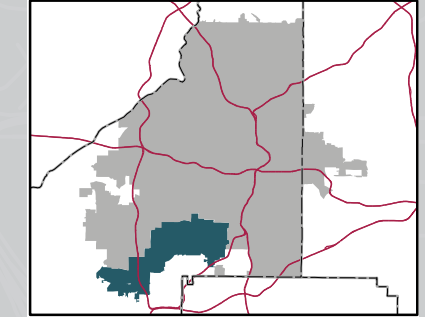
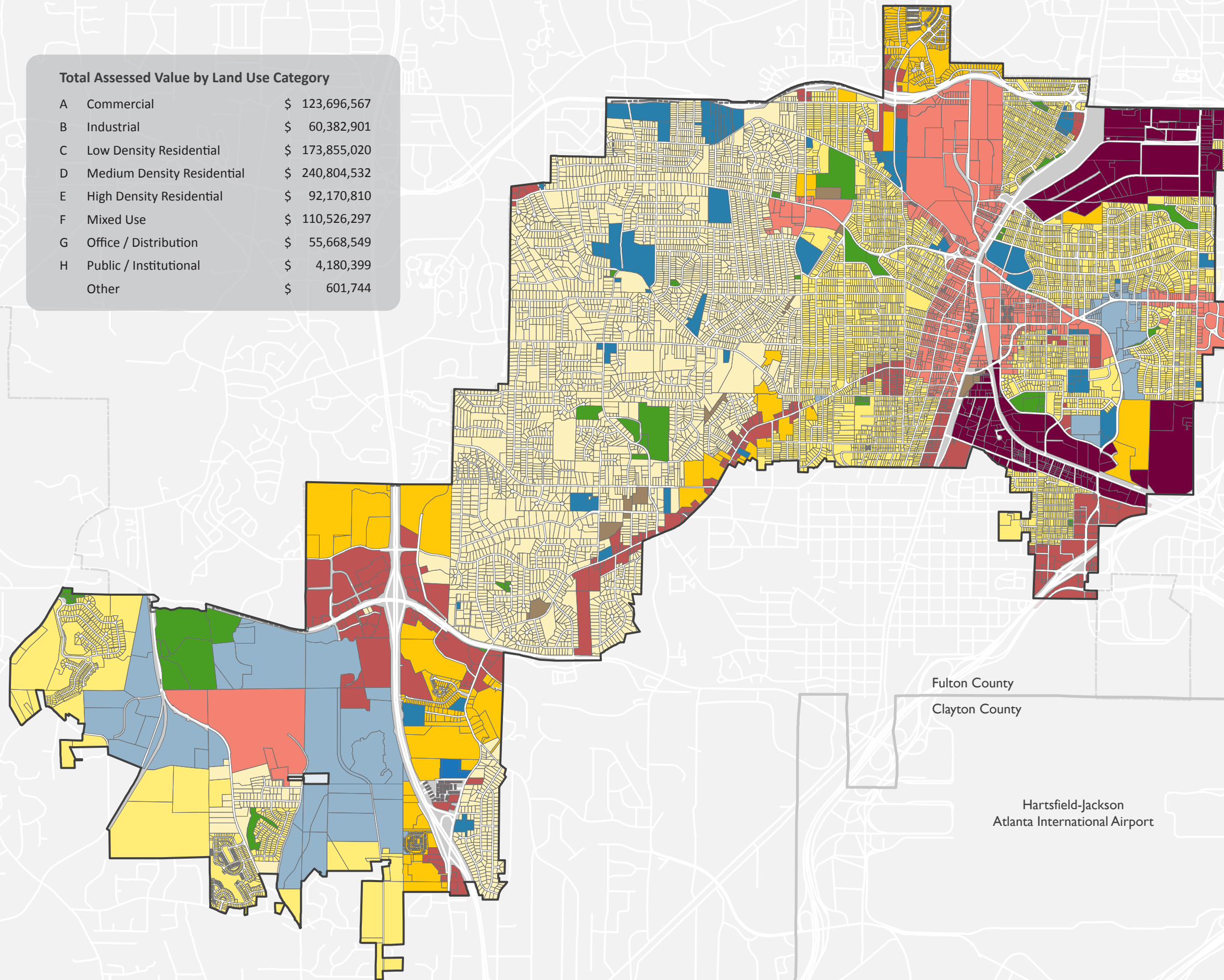


Figure 15: Future Land Use Scenario

Total Assessed Value by Land Use Category

A	Commercial	\$ 123,696,567
B	Industrial	\$ 60,382,901
C	Low Density Residential	\$ 173,855,020
D	Medium Density Residential	\$ 240,804,532
E	High Density Residential	\$ 92,170,810
F	Mixed Use	\$ 110,526,297
G	Office / Distribution	\$ 55,668,549
H	Public / Institutional	\$ 4,180,399
	Other	\$ 601,744



**City of East Point
Comprehensive Plan**

Future Land Use Scenario

- A Commercial
- B Industrial
- C Low Density Residential
- D Medium Density Residential
- E High Density Residential
- F Mixed Use
- G Office / Distribution
- H Public / Institutional
- Other
- East Point City Limits
- Atlanta City Limits
- County Boundary

Source: Fulton County Tax Assessor 2010, City of East Point

0 3,000 6,000 ft



Areas Requiring Special Attention

Introduction

The Georgia Department of Community Affairs requires that communities evaluate the existing land use patterns and trends to identify and map any areas requiring special attention:

- Natural or cultural resources, particularly where likely to be impacted by development;
- Areas where rapid development is likely to occur;
- Areas where the pace of development has and/or may outpace the availability of community facilities and services, including transportation;
- Areas in need of redevelopment and/or significant improvements to aesthetics or attractiveness;
- Large abandoned structures or sites;
- Areas with significant infill development opportunities; and
- Areas of significant disinvestment, levels of poverty, and/or unemployment higher than average levels for the community as a whole.

Areas of Special Attention are locations within the City of East Point with current or expected future conditions that warrant special planning interventions or targeting of incentives and resources. These areas include sections of the city with such characteristics as redevelopment potential, special service deficiencies, and areas of special resource value such as historic sites or local landmarks.

Areas Requiring Special Attention

The Areas Requiring Special Attention map, Figure 16, shows the location of each of these important resources in the city of East Point. Descriptions of each area follow below.

Natural or Cultural Resources

Areas that have been identified as having significant natural or cultural resources should be identified and protected as development occurs. The streams and rivers in East Point's city limits are identified on the map. Development adjacent to these areas is regulated by the Stream Buffer Ordinance and the Flood Damage Prevention Ordinance.

- Downtown
- Downtown Traditional Urban Neighborhoods
- Dick Lane Velodrome



Likely Land Use Change

This category signifies locations in the city that are likely to experience land use changes in the relative short term.

- City of East Point Livable Centers Initiative
- Camp Creek TAD
- Corridors TAD
- Future development area: Much of the land in the southwest region of East Point is currently vacant. However, it is zoned for light industrial use and residential use. Some of the land may already have plans in place for development. The city should make sure that adequate services are provided to the new residents.





Redevelopment ●

This category highlights areas that have been identified as sites in need of redevelopment and/or significant improvements to aesthetics or attractiveness. Redevelopment areas focus more on revitalization and reinvestment than Likely Land Use Change sites.

- DeLowe Plaza
- Tri-Cities Plaza
- Washington Road corridor
- Cleveland Avenue commercial
- Main Street commercial

Abandoned Structures or Sites ⓪

The areas mapped only identify the largest sites and structures, as these areas offer a unique opportunity for master planning. While the original use of the sites may no longer be viable, the structures and site conditions can be adaptively reused for possible residential or mixed-use development. There are multiple smaller abandoned and vacant sites throughout the city.

- Lawrence Street brownfield



Infill Opportunities ○

East Point has a number of vacant properties throughout the city. These consist of both abandoned, vacant buildings and undeveloped sites in otherwise built-out neighborhoods. One particularly large site located near downtown is identified on the map as an infill opportunity. Many additional infill opportunities exist within the “Areas of Significant Disinvestment”.

Areas of Significant Disinvestment ●

Areas identified as having experienced significant disinvestment experience higher levels of vacancy, poverty rates, and unemployment than the community as a whole are shown on the map.

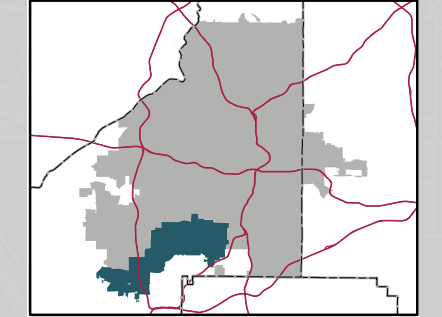
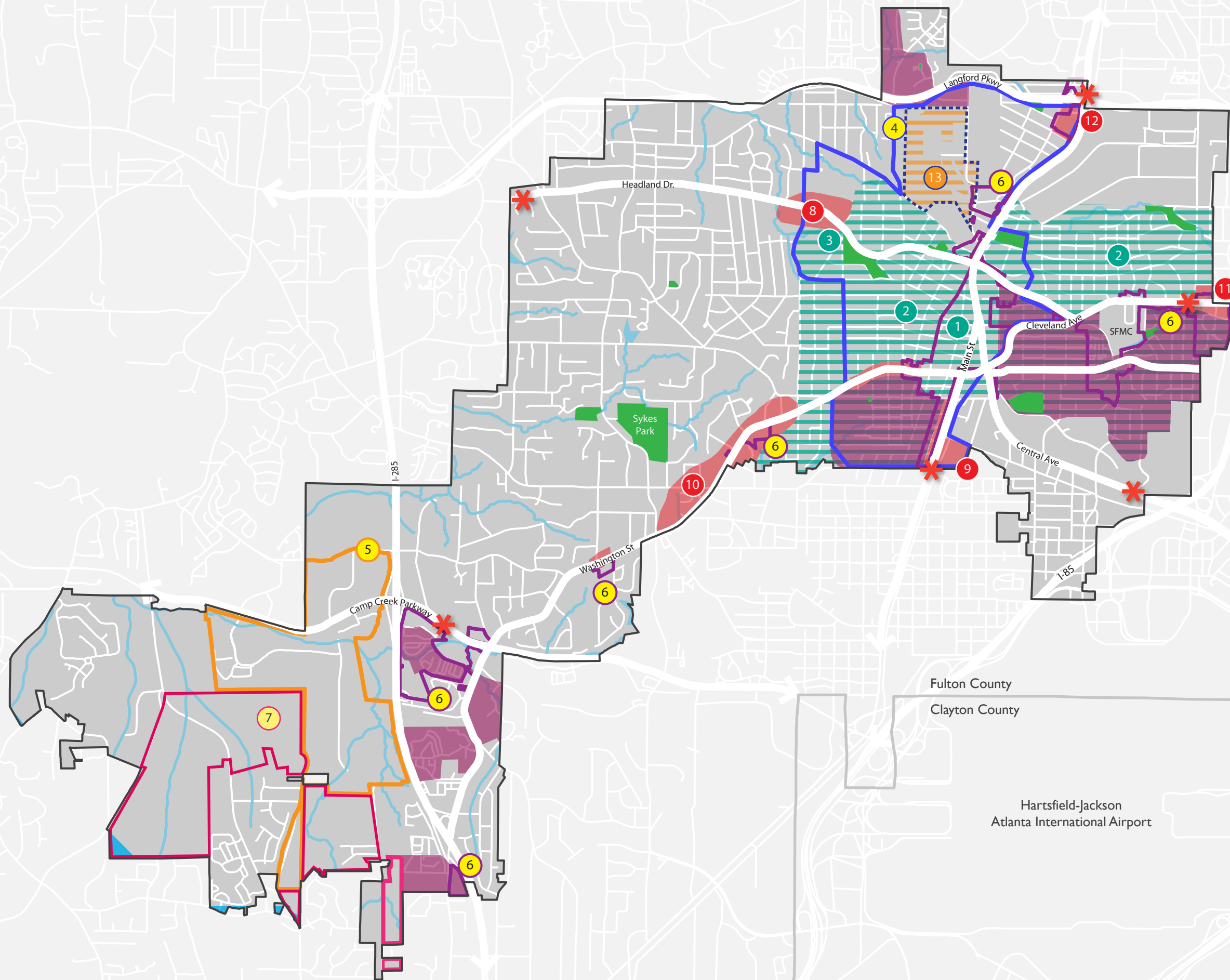


Gateways ✖

All major entrances to the city need to be evaluated. These include:

- Main Street southbound
- Cleveland Avenue
- Central Avenue
- Main Street northbound
- Camp Creek Parkway from I-285
- Headland Drive

Figure 16: Areas Requiring Special Attention Map



**City of East Point
Comprehensive Plan**

**Areas of
Special Attention Map**

- East Point City Limits
- Cultural Resources
 - 1. Town Center
 - 2. Downtown Traditional Urban Neighborhoods
 - 3. Dick Lane Velodrome
- Likely Land Use Change
 - LCI Study Area Boundary
 - Camp Creek TAD
 - Corridors TAD
 - Future development area
- Redevelopment Opportunity
 - 8. DeLowe Plaza
 - 9. Tri-Cities Plaza
 - 10. Washington Road commercial
 - 11. Cleveland Avenue commercial
 - 12. Main Street commercial
- Abandoned Structures or Sites
 - 13. Lawrence Street Brownfield
- Infill Opportunities
 - 13. Lawrence Street Brownfield Sites in and
- Areas of Significant Disinvestment
- Gateways
- Streams
- Lakes and Ponds
- Parks
- Groundwater Recharge

0 3,000 6,000 ft



Character Areas

Introduction

Character areas in East Point are identified based on the visible characteristics of existing development patterns. The locations and descriptions of many of the character areas draw upon the knowledge provided by the planning and zoning department of East Point and from the Georgia Department of Community Affairs' recommended character areas. The Comprehensive Plan Update completed in 2006 was also evaluated for reference.

Existing Character Areas

The included Character Area map shows the location of each character area type in the city of East Point. Descriptions of each character area and suggested future development strategies are laid out below.

Suburban Residential

The largest character area in East Point is Suburban Residential. This area is categorized by homes on medium-sized lots, minimal pedestrian facilities, a curvilinear street network, and many mature trees. The primary land use within this area is single-family residential, but there may be some instances of small neighborhood commercial nodes or institutional uses like churches and schools.



Traditional Urban Neighborhood

Another major residential character area in East Point is its Traditional Urban Neighborhoods. Located close to the downtown area, these neighborhoods are older than the ones in the Suburban Residential character area, but they are stable and thriving. Homes are located on somewhat smaller lots in a traditional urban neighborhood fashion, and the streets are generally laid out on a grid system. The city values the diversity of housing types represented in this neighborhood, from early twentieth-century bungalows to multi-family units. A number of the homes in these neighborhoods have had major renovations, but some maintain their original historic features.



Intown Residential

The Intown Residential character area falls between Suburban Residential and Traditional Urban Neighborhood. It is a newer neighborhood (characterized by post-World War II cottages and bungalows) than the Traditional Urban Neighborhood area, but older than the suburban-style development. Homes are on small- to medium-sized lots, and the streets are laid out on a grid, but the buildings are farther apart than in the Traditional Urban Neighborhood.



Growing Residential

Growing Residential neighborhoods are located near the East Point city limits. These are the newest homes in the city but are somewhat disconnected from downtown. Housing types include multi-family buildings, townhouse, and traditional single family subdivisions. Development patterns include conservation subdivision designs and planned unit developments. There are also a few small, low-intensity, neighborhood-serving commercial uses in these areas.





Redevelopment Neighborhood

While these neighborhoods are located near downtown and have traditional urban neighborhood attributes, such as a gridded street network and small housing lots, they are in need of investment. They have declined over the past several years, leaving bad housing conditions and large areas of vacant land. Many buildings are unoccupied. These neighborhoods include an assortment of housing types, such as single-family, multi-family, and public housing. They are situated close to downtown East Point and commercial nodes.



Neighborhood Commercial

East Point’s Neighborhood Commercial areas have a variety of activities such as general retail, service commercial, professional office, higher-density housing, and some public and open space in shopping centers with a large amount of parking. These locations are also identified on the Areas of Special attention map as “Redevelopment Opportunities.” There are a number of Neighborhood Commercial areas, located along major corridors and at transportation nodes. Most, if not all, of these commercial centers are in need of investment. These sites are primarily declining, unattractive, vacant or under-utilized shopping centers, which are characterized by a high degree of access by vehicular traffic, on-site parking, little open space, and moderate floor-area ratios. Developers can work to retrofit these sites to make them more aesthetically appealing, more marketable to prospective tenants, and more accessible to pedestrians and bicyclists. East Point lacks high-quality local or neighborhood commercial and retail, and all of these sites are in prime locations for redevelopment and could potentially fill that need.



Regional Center

There are two major Regional Centers in East Point: Camp Creek Marketplace and the Virginia Avenue hotel corridor in East Point at I-85. Regional Centers contain regionally-marketed commercial and retail uses, office and employment areas, higher-education facilities, sports and recreational complexes. These areas are characterized by a high degree of access by vehicular traffic, and high transit use, including stops, shelters, and transfer points; on-site parking; a low degree of internal open space; high floor-area ratios; and large tracts of land. These resources draw many visitors from outside of East Point. Future planning strategies for Regional Centers should include pedestrian-oriented designs, parking located in the rear of buildings, bicycle lanes, and improved connectivity.



Airport Amenity

A specific type of regional center, this type of character area is used almost entirely by airport travelers. East Point has three large park-and-ride lots, characterized by a high degree of vehicle traffic and large expanses of surface parking. People who use these services come from outside of East Point specifically to park here. Park-and-ride lots take up large amounts of land and generate revenue but only employ a few individuals.



Town Center

East Point’s historic downtown contains a mix of commercial, civic, institutional, and residential uses. The downtown area contains many of the landmarks and cultural resources that make East Point unique. Historic properties should be protected and rehabilitated when possible, and any new development should be of a scale and architectural design that would fit well into the historic fabric of the area. Compatible infill development should focus on providing high-density retail, office, services, and employment, and/or residential development targeted to a broad range of income

levels. Pedestrian access and open space are important to enhance citizens' enjoyment of downtown East Point.

Campus/Institutional

East Point has two areas with campus-type development, the Atlanta Christian College and the South Fulton Medical Center. Each of these areas is distinct from its surroundings, with a node of high-density commercial and institutional use within a residential neighborhood. They are distinct from Regional Centers in that they are somewhat more isolated and less accessible from outside of East Point, but users and employees may come from the broader region.



Industrial/Business Park

The Industrial / Business Park character areas are located in the southwestern part of the city on large tracts of low-intensity, suburban-scale land. East Point's convenient location near I-285, I-85, and the airport makes it a prime location for warehousing and shipping services, several of which have located here. These uses are characterized by large isolated parking lots and buildings that house office or light industrial facilities. Industrial parks depend on a high degree of vehicular traffic, especially tractor-trailers. As the land surrounding these zones continues to develop, planners must take care to manage any traffic or incompatibility issues that arise with new residential development.



Legacy Industrial

East Point has a rich industrial heritage, which has survived the decline in manufacturing experienced nationally. Its location at the end of the Atlanta & West Point Railroad made it a key location for industrial development. The original industrial areas are located near downtown on or near the rail line. Central Avenue is a major industrial corridor and a key road connecting East Point to Hapeville, Atlanta, and I-85. The industrial uses here include both light (including automotive repair shops and warehousing facilities) and heavy (such as manufacturing and recycling). These character areas might come with special zoning concerns but are major employment and economic providers for the city. As the nation emerges from a major recession, the city may choose to re-evaluate the economic asset that these employment centers represent.



Undeveloped

There are several large undeveloped tracts of land in the southwestern portion of East Point. Most of this land has been zoned for medium-density development, but the current economic climate has slowed construction and development. Plans may already exist for these areas. The City should ensure that adequate services are provided for these future residents.



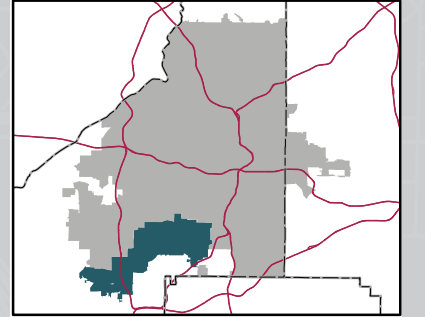
Intown Corridor

East Point's major in-town corridors are identified on the character area map. While they may fall into another character area, the parcels abutting these corridors have unique concerns. They may be developed or undeveloped, but they are likely to experience uncontrolled strip development if growth is not properly managed. Planning strategies include gradually converting these corridors to attractive boulevards, enhancing streetscapes, enacting design guidelines for new development, employing traffic-calming measures, and providing basic access for pedestrian and bicycles that is integrated into the public transit system.

Major Highway Corridor

This area covers the developed and undeveloped land on both sides of the high-volume transportation facilities in East Point, including I-285, I-85, Camp Creek Parkway, and the Lakewood Freeway. The DCA recommends maintaining a natural vegetation buffer along the corridor, behind which all new development should be located. Landscaped, raised medians can provide vehicular safety, aesthetics, and pedestrian crossing refuges; paved shoulders can be used by bicycles or as emergency lanes.

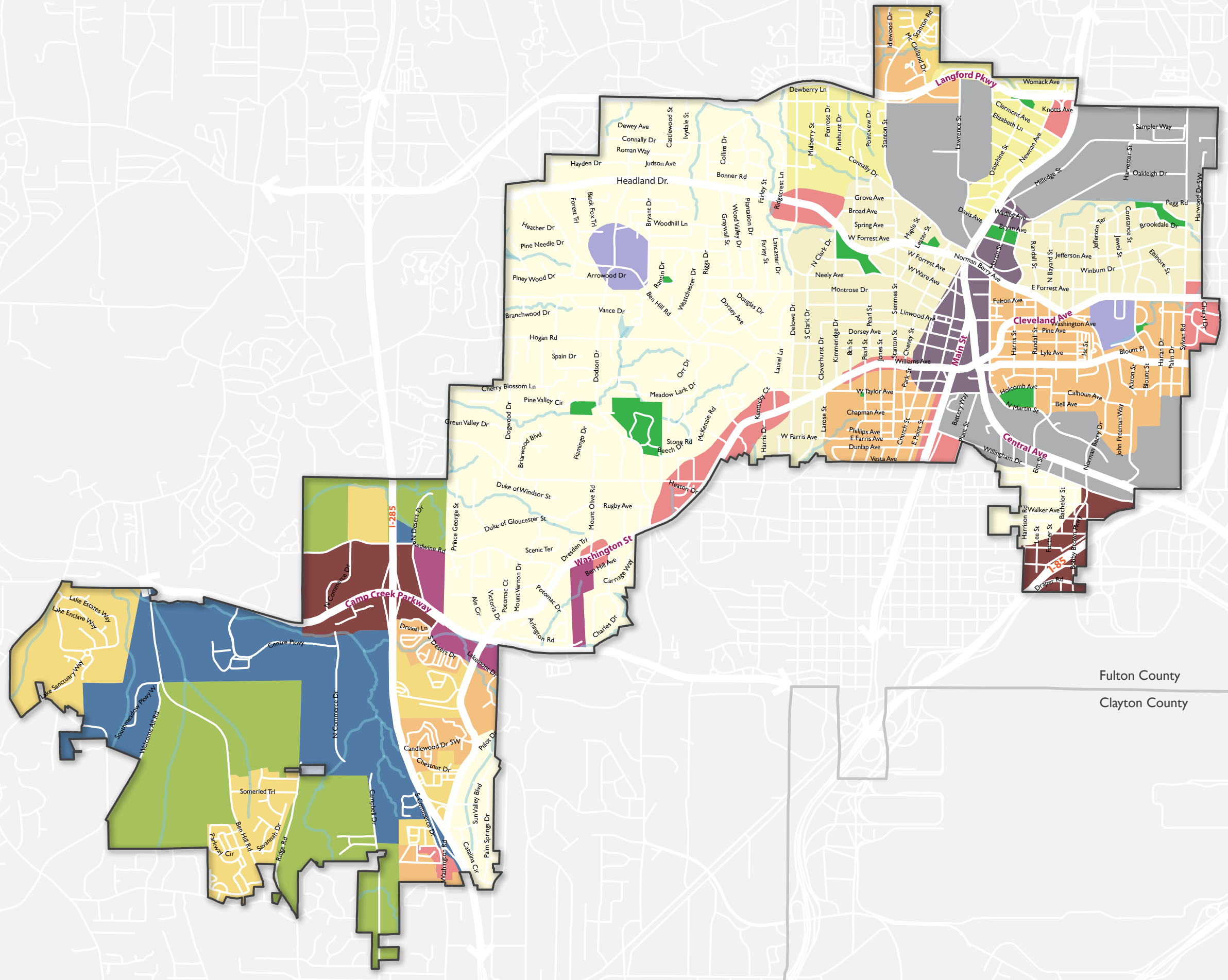
Figure 17: Character Areas Map



**City of East Point
Comprehensive Plan**

**Character Areas
Map**

- East Point City Limits
- Suburban Residential
- Traditional Urban Neighborhood
- Intown Residential
- Growing Residential
- Redevelopment Neighborhood
- Neighborhood Commercial
- Regional Center
- Airport Amenity
- Town Center
- Campus
- Industrial / Business Park
- Legacy Industrial
- Undeveloped Area
- Intown Corridor
- Major Highway Corridor
- Streams
- Lakes and Ponds
- Parks



Fulton County
Clayton County



PART TWO:

Issues and Opportunities

Overview and Purpose

This section identifies a series of issues and opportunities that can help frame and prioritize the city’s discussions when developing the Community Agenda. The Department of Community Affairs offers a list of topic areas to consider. Only those that are relevant to the city are included here. As they assess the list of Issues and Opportunities here, community members will benefit from Part Four, which reviews Georgia policy regarding “quality communities” and benchmarks items that local governments should use in pursuing improved quality of life for their residents. The assessment tool is known as the Quality Communities Objectives (QCO) survey.

Several of the items below were drawn from the QCO Survey and an analysis of the existing conditions in the East Point area, documented in both the Community Profile section as well as the Technical Appendix. These items provide a simplified list of assessment points to provide to the community for affirmation or revision. Below are issues and opportunities that emerge from the assessment process.

Land Use

Issues

- 23% of the developed or developable land in East Point is currently vacant, either abandoned or undeveloped.
- There is no land zoned for mixed-use development with the MIX zoning designation.
- Many small lots were created near downtown when parcels were subdivided in 2005.
- There are 396 non-conforming multifamily uses in the R1-A “Urban Residential” single family zoning district.
- Community Unit Plan (CUP) districts are auto-dependent and not located within walking distance of any neighborhood-serving commercial districts.
- The Neighborhood Commercial (C-1), Central Business Commercial (C-2), Commercial Limited (C-L), and Light Industrial (L-I) zoning districts do not allow residential uses and therefore prevent mixed-use projects from being built.
- The city could consider adding language from the Commercial Redevelopment (CR) zoning district to the C-1, C-2, CL, and LI districts to permit a more diverse mix of uses.
- There are some incompatible land use districts within the city limits; for example, heavy industrial districts abut residential uses without appropriate buffers.

Opportunities

- Infill development can occur on vacant and underutilized properties. Applying the Infill Development Ordinance will help to protect the existing character of East Point's neighborhoods.
- There is a good supply of Industrial land in the city, which is already developed with heavy rail infrastructure and represents an economic asset for the community.
- The city should strive to provide a diversified and balanced mix of residential, commercial, and industrial uses.
- The Housing Authority could acquire vacant and abandoned land.
- Recommendations from the 2010 Update to the Parks & Recreation Master Plan could be implemented to address the identified 100 acres of park space needed.
- Recommendations from the Livable Centers Initiative plan (2005) can be implemented.
- Recommendations from the Corridors Tax Allocation District plan and the Camp Creek/I-285 Tax Allocation District can be implemented to encourage development and re-development in these areas.
- A Residential Historic District could protect the valuable cultural resource that exists in the downtown neighborhoods.

Population

Issues

- Total population decrease of 5,883 or 15% since 2000.
- Based on historical trends, forecasted population for East Point is expected to remain flat over the next 30 years.
- The educational attainment for the city is behind that of the City of Atlanta, Fulton County, and the State. Only 29.4% of East Point graduates have a college degree, compared to about half of Atlanta and Fulton County residents.
- The per capita income levels for the city are approximately half of those for the City of Atlanta or Fulton County. East Point's income per capita is \$20,726, which is less than \$38,147 in Atlanta and \$36,486 in Fulton County.
- The population is aging, with an expected 20% increase of those 65 and older in the next 30 years.

Opportunities

- Abundance of vacant land to be used for neighborhood renewal and infill development projects to reverse trends of population decline.
- Promote young families to the city to build stable diversified community.
- Take advantage of aging in place residents and provide sufficient facilities.
- Promote and celebrate increased ethnic diversity in the city.

Economic Development

Issues

- East Point's unemployment rate is 13.7%.
- The central business district is not yet a true economic destination.
- There is an abundance of vacant land in the central business district.
- The Main Street businesses in the central business district need more diversity of retail goods and services.
- Reinvestment is needed on some industrial sites.
- There are underutilized footprints of shopping centers.
- There are unknown environmental hazards that complicate the redevelopment of sites.
- Fewer people living and working in place.
- Just 0.3% of the land in East Point is dedicated to mixed-use development.

Opportunities

- Capture a catalyst project to ignite infill mixed-used redevelopment of the Central Business District.
- Emphasize Architectural Overlay when Commercial Redevelopment occurs in order to help create a sense of place in commercial nodes along Washington Road and Headland Drive.
- Facilitate the acquisition of vacant property and or the temporary relocation of business in order to spur economic revitalization.
- Use the Parks and Recreation Master Plan to help facilitate the investment in public amenities such as parks, trails, public open space, and greenspace.
- Attract residents to fill East Point jobs reducing travel time and expenses, keeping earned dollars in the community, and building a sense of place.
- The proactive city established Enterprise and TAD zones to increase redevelopment opportunities in blighted or disadvantaged areas.
- Increase opportunities for market-driven residential and commercial development within the East Point Corridors area.
- Attract private, taxable redevelopment opportunities to the East Point Corridors sectors of the city.
- Implement the LCI Master Plan and capitalize on the 2011-2012 TOD study.
- Continue to capitalize on East Point's location near the airport.
- East Point's location with excellent access to several transportation modes is an enviable economic development asset.
- The success of Camp Creek Marketplace shows the area's market potential.
- Existing industrial provides an employment sector that few cities offer.
- The city hired the Atlanta Convention and Visitors Bureau in 2011 to attract more visitors and convention business.
- East Point will launch an Economic Development plan in 2011.
- Apply and enforce the Infill Development Ordinance as vacant lots and abandoned structures are redeveloped.

Housing

Issues

- Over 24% of the housing units in East Point are vacant.
- Almost half (44.2%) of households in East Point are cost burdened, or pay more than 30% of their household income towards housing costs.
- There are not enough housing units that are affordable to households at all levels of income.
- There is no historic district to protect the unique bungalows and housing mix in the downtown area.
- In East Point, there is less than 1 job per worker. The jobs-housing balance is low.
- There is a lack of special needs housing (mental and mobility handicapped) in East Point.
- Many non-conforming multifamily residential units exist in the urban residential, or R-1A, zoning district.
- The upcoming closure of Fort McPherson could potentially have an impact on housing vacancy rates, as many base employees live in East Point.

Opportunities

- A relatively high percentage of housing units are renter-occupied. The homeownership rate is 50.2%, which is lower than in Fulton County and Georgia. Since many of the vacant homes and apartments are rental units, there may be an opportunity for offering some of these properties for sale and encouraging home ownership.
- East Point is a Naturally-Occurring Retirement Community, with a significant proportion of households headed by seniors. The city can strive to become a model for aging in place.
- There are a number of strong neighborhood associations in East Point. These groups can be used to promote community development and build on East Point's identity and character.
- Mixed use development is permitted in several districts but is only sparsely represented in the community. Allowing for mixed use in more zoning districts could create more opportunities for individuals to live, work, and shop in one place.
- Accessory dwelling units are permitted in residential zones, providing additional housing options. "Granny flats" or garage apartments are typically more affordable and can make neighborhoods more diverse, opening them up to a wider portion of the population.
- The downtown district has many opportunities for mixed use or loft conversion of historic properties.

Natural and Cultural Resources

Issues

- There is no historic preservation district or ordinance in place to protect these valuable cultural resources.
- East Point does not participate in any land conservation programs, either at the state or national level or on its own.

Opportunities

- There are several large forested tracts of land in the city, which are currently unprotected but could become community amenities if preserved.
- Existing power transmission line buffers could be used as bicycle or pedestrian trails to connect neighborhoods in the city.
- Stream buffers and undeveloped flood zones, which are required in the city's development regulations, could be converted to accessible community greenspace.
- The Dick Lane Velodrome is a unique but underutilized community asset.
- The city positioned itself well to pursue grants and financing with its recently completed update to their Parks and Recreation Master Plan.
- Several structures have been accepted in to the National Trust of Historic Places registry (including seven historic manufacturing warehouse sites).
- There is an active historical society, the East Point Historical Society.

Community Facilities and Services

Issues

- The 2011-2020 Parks and Recreation Master Plan Update identified a deficit of approximately 100 acres of park space in the City of East Point, based on benchmark comparisons and National Recreation and Park Association Guidelines.
- The city west of I-285 is disconnected from the remainder of the city and is lacking community facilities.
- There appears to be a geographically-driven divide between new citizens and old citizens in the area.
- The city suffers from a perception of politics, staff turnover, instability of the development process, and financial problems.

Opportunities

- Recent land acquisition will create a new customer care center; there are plans for a new municipal complex.
- Potential new site within the city for new library (part of Atlanta-Fulton County Library System).
- Opportunity for brownfield conversion to park space.
- Potential for partnerships with neighborhood groups, non-profit organizations (including grant funding), and athletic associations.
- Interest in new civic plaza or greenspace facilities downtown.
- The city owns and runs key services such as water and power.

Intergovernmental Coordination

Issues

- The City of East Point appears to conduct little collaboration with Fulton County or adjacent cities for Comprehensive Planning purposes.
- Except for state notification requirements related to zoning and related changes, no formal mechanisms exist regarding border agreements.

Opportunities

- East Point could explore mechanisms to share services, such as parks and recreation, 911, police, water, or sewer, with other local governments.
- Since the government of East Point may not be adequately represented at local and regional group meetings, it can work to promote representation at metropolitan-area gatherings and meetings.
- The city coordinates with county, regional, and state agencies regarding infrastructure, environmental issues, and water management.

Transportation

Issues

- Regional reliance on the roadway system has shifted business away from downtown toward locations along major interstates.
- Major corridors through East Point suffer from congestion, including Camp Creek Parkway/SR 6, Main Street/US 29, Washington Road and Cleveland Avenue, due to heavy peak period traffic volumes.
- There is a conflict of scale between the city's competitive advantage in hosting industrial uses with freight truck activity and its goal of compact, pedestrian-friendly infill development.
- A lack of wayfinding signage contributes to the lack of identity in the city and increases the difficulty of navigating within the city.
- Some parts of the community have few alternatives to using a car to travel and to eliminate traffic congestion.
- Streets in the community are not designed according to their use in order to assure appropriate travel speeds, particularly through downtown, making pedestrian activity unsafe and unappealing.
- Many community streets, pedestrian paths, and bicycle routes are not utilized because they do not create inviting facilities.
- The City of East Point does not have enough sidewalks, and those that exist are in need of maintenance improvements.
- No dedicated bike paths, multi-use trails or bike lanes within the city.
- No greenway or multi-use trail currently exists along Main Street/US 29 providing a connection outside of the city.
- Major components of the transportation system are not under the jurisdiction of the City, which includes interstate highways, major thoroughfares, air, rail, and public transportation facilities; this situation complicates the City's ability to address community-identified needs due to challenges of coordination and permitting.
- Freight rail lines and MARTA rail lines create physical barriers within the community.

Opportunities

- Great connectivity exists throughout most of the city, although there is a need to maintain and repave city streets.
- The existing sidewalk network needs to be maintained, improved, and expanded.
- Improving sidewalks, streetscapes, and street furniture, and installing artwork throughout downtown will improve the image and character of downtown and increase its viability as an activity center.
- The LCI identified a need for a public parking deck downtown to remedy existing and future parking issues, especially providing adequate parking for retail customers.
- Display prominent automobile signage for wayfinding and to help create an identity for the city.
- Consider the appropriate balance between industrial uses with freight truck activity and compact, pedestrian-friendly infill development.
- Increase the availability of alternative modes of travel in parts of the city that are underserved by these modes.
- Desire for a greenway with a multi-use trail along Main Street/US 29 from downtown to the Lakewood MARTA station to connect into the greenway trail as proposed in the Lakewood/McPherson LCI study, and for a pedestrian connectivity loop that connects Center Park, Sumner Park, and Conley Preserve with downtown.
- Improve the bicycling and pedestrian experience and slow vehicular travel speeds by redesigning streets appropriately for their use, adding traffic calming features, and spatially defining the streets with buildings, trees, and lighting.
- Promote the usage of MARTA public transportation to reduce and prevent traffic congestion.
- Create attractive and welcoming gateways into the city boundaries and define the entrances into the Central Business District.
- Promote landscaped pedestrian linkages between the downtown area and various neighborhoods within the city.
- Create a network of multi-use trails that will link into the PATH system or the City of Atlanta's planned BeltLine trail, transit, and park project.
- Strengthen relationships with regional and state agencies to reduce challenges related to coordination and permitting of transportation projects.
- Continue to market community based on its regional locality and its proximity to major roadway networks.
- Use of the East Point MARTA station for long-term parking serving Hartsfield-Jackson Atlanta International Airport.
- Enhancement of Washington Road to serve as a connection between Downtown East Point and The Marketplace joining the newly annexed area with East Point.

PART THREE:

Community Profile

Introduction

The Community Profile section provides support and evidence for the potential issues or opportunities identified in the previous section. This section also uncovers and discusses in more detail any further issues or opportunities not previously identified. It also explores any significant local trends of which decision-makers should be made aware and identifies whether recommended character areas should be adjusted (for example, to avoid intrusion into environmentally sensitive areas).

In order to ensure a concise and readable Community Assessment report, the Community Profile only includes evaluations, data, and maps necessary to substantiate and illustrate potential issues or opportunities, to document significant trends affecting the community, or to support character area delineation. All other evaluations, data, and maps that were not essential for substantiating potential issues or opportunities, documenting significant trends, or supporting character area delineation can be found in the Technical Appendix to this report.

Population

Quick Facts

- Population: 33,712
- Lost 15% of population since 2000
- More racially diverse - rapidly growing Hispanic population
- Aging population
- Per capita income: \$20,726
- 18% poverty rate

Since 1990, East Point has experienced both growth and decline. After trends of continued growth to 2000, the 2010 Census shows that the population of East Point dropped to **33,712**. This represents a reduction of 5,883 residents since the 2000 Census, an average annual rate of decline of approximately 1.5%, and a **total reduction of 14.9%** over the last 10 years. Coinciding with total population loss, there has been a decrease in the number of households as well, specifically an 8.4% reduction since 2000. In contrast, the majority of other municipalities in the indirect area and region have seen steady to large increases in population.

Table 12 : East Point Population and Household Trends

City of East Point Population and Household Trends, 2010						
	1990	2000	2010	1990 to 2000 % Change	1990 to 2010 % Change	2000 to 2010 % Change
Total Population	34,402	39,595	33,712	15.1%	-2.0%	-14.9%
Total Households	13,373	14,553	13,333	8.8%	-0.3%	-8.4%
Average Household Size	2.57	2.72	2.53	5.8%	-1.7%	-7.1%

Source: United States 2010 Census

The forecasted population, shown in the following Figure 18, shows an estimated increase of 1,380 residents by 2020 but then decreases in both 2030 and 2040 based on historic trends. When comparing East Point to the City of Atlanta and Fulton County in terms of growth based on their respective projected estimates, the data shows that East Point is not expected to grow as rapidly or as much as the City of Atlanta and Fulton County over the next 30 years. East Point’s growth projection for future population based on historic trends indicates **little to no growth** over the next 30 years. Population trends reveal that the number of families is declining more rapidly than the number of households; there are more households occupied by single individuals or non-families than by families than there were in the past.

Both external factors and internal policy and investment may interrupt the population trend. An alternative future projection should be developed based on the results of the Community Agenda and targeted development goals.

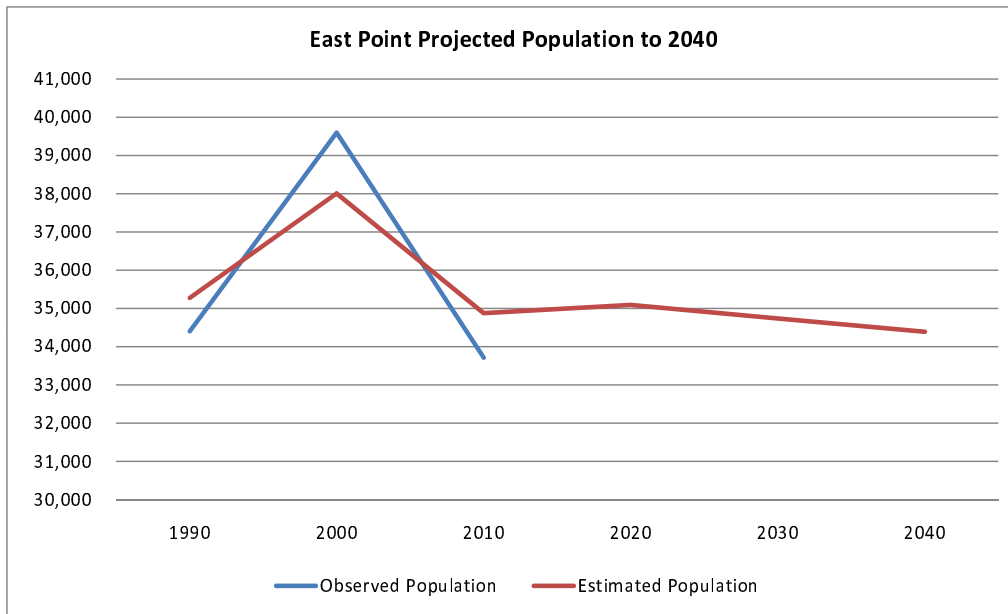
During the period of population growth from 1990 to 2000, East Point’s population grew younger on average, with more people aged 24 and under replacing older adults. However, from 2000 to 2010, this trend reversed, and the population got older. There are fewer young people born or moving into East Point to replace the growing senior population.

Table 13 : East Point Population 1990-2000

East Point Historic Population by Age, 1990-2010							
Total	Stage of Life	1990	%	2000	%	2010	%
Under 5 years	Pre-School	2,767	8.0%	3,457	8.7%	2,676	7.9%
5 to 14 years	Elementary to Middle School	5,042	14.7%	6,401	16.2%	4,674	13.9%
15 to 19 years	High School	2,384	6.9%	3,048	7.7%	2,385	7.1%
20 to 24 years	College	2,786	8.1%	3,401	8.6%	2,634	7.8%
25 to 44 years	Family Forming	11,947	34.7%	12,408	31.3%	10,144	30.1%
45 to 64 years	Peak Earning	5,486	15.9%	7,734	19.5%	8,274	24.5%
65 years and over	Seniors	3,990	11.6%	3,146	7.9%	2,925	8.7%
	TOTAL	34,402	100.0%	39,595	100.0%	33,712	100.0%

Source: United States Census 1990, 2000, 2010

Figure 18 : East Point Projected Population to 2040

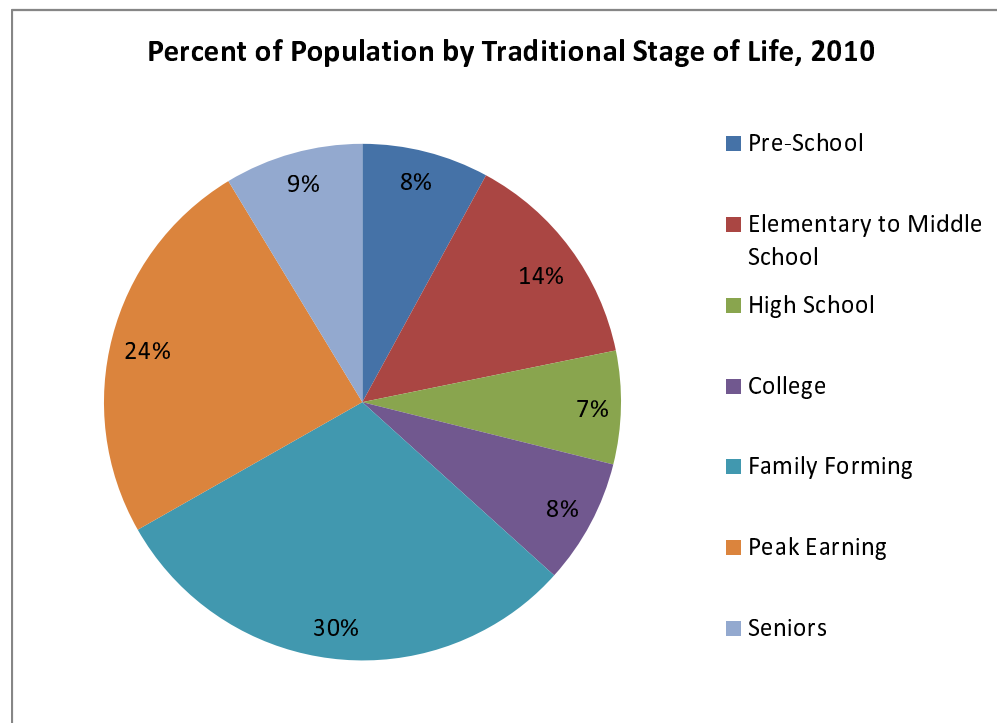


Source: United States 2010 Census; Pond & Company projection

In the next 20 years 24% of East Point’s population will have aged into the 65 and over age cohort (see Technical Appendix, Section 1). This follows the national and regional trend of an **aging population**. The Atlanta Regional Commission (“ARC”) predicts that one in five Atlanta residents will be over the age of 60 by the year 2040. As our society’s lifespan extends and active seniors live independently for longer, access to recreation, health services, and appropriate housing choices for older residents will become more and more important. East Point will need to be able to adapt and provide sufficient services and access to services if there is a desire to accommodate an option of aging in place for residents.

24% of East Point’s population will be 65 or older in 20 years. This aligns with national and regional trends.

Figure 19 : East Point Population by Stage of Life



Source: United States Census, 2010

The Hispanic population of East Point has grown by 500% in the last 20 years.

The largest racial group in East Point is African American with a population of 24,924 or 73.9% of the city’s total population. The White population has decreased significantly from 10,881 in 1990 to 3,978 in 2010. The 2010 Hispanic population has increased six times or is nearly 500% its 1990 level, making it the fastest growing racial group in East Point. Currently, Hispanics comprise 11.5% of East Point’s population, a proportion comparable to the Atlanta region, according to the ARC. As seen in Table 14, Hispanics make up a larger share of the population in East Point than in Atlanta or Fulton County, but smaller than the national share. The White population is smaller and the Black population is larger in East Point than in the comparison areas.

Table 14 : East Point Racial Composition

East Point Racial Composition, 2010			
	1990	2000	2010
White Alone	10,881	6,376	3,978
Black or African American Alone	22,823	30,949	24,924
Hispanic Origin	653	2,998	3,890
American Indian and Alaska Native Alone	74	80	94
Asian or Pacific Islander	249	280	277
Other Race	375	1,910	549

Source: United States 1990, 2000, 2010 Census

Nationally, the 2000-2010 period experienced births overtaking immigration as the main driver of Hispanic population increases. If East Point follows regional trends, Hispanics could make up 20% of the population by 2035. The entire Atlanta metro region is growing more diverse and will continue to do so for the next several decades. Not only does East Point need to ensure that adequate services are provided for these new residents, the city should create opportunities for new citizens to be active, engaged, and connected to the community.

Table 15 : East Point Racial Composition Compared, 2010

Racial Composition by Share of Population Comparison, 2010				
	East Point	Atlanta	Fulton County	US
White Alone	11.8%	36.3%	40.8%	63.7%
Black or African American Alone	73.9%	53.4%	43.5%	12.2%
Hispanic Origin	11.5%	5.2%	7.9%	16.3%
American Indian and Alaska Native Alone	0.3%	0.2%	0.2%	0.7%
Asian or Pacific Islander	0.8%	3.1%	5.6%	4.8%
Other Race	1.6%	1.8%	2.0%	2.1%

Source: United States Census 1990, 2000, 2010

East Point has identified and made efforts to alleviate poverty within the city, including applying for Opportunity Zone support to redevelop blighted areas and creating Tax Allocation Districts to spur economic development. **18% of East Point’s residents are in poverty**, a rate that is greater than the national poverty rate (13.5%) and the poverty rate in Georgia (15%) but lower than in Atlanta (21.3%). The **per capita income** in East Point is **almost half** of the per capita income in Atlanta and Fulton County. Although the average family income is similar to that of the City of Atlanta and Fulton County, the lower per capita income signifies that there are more workers in each household. More specifically, it suggests that both parents are wage earners rather than one staying home as a primary caregiver.

Table 16 : East Point Per Capita Income

City of East Point Per Capita Income, 2010			
	1990	2000	2009 (ACS)
Per Capita Income	\$ 12,508.00	\$ 15,175.00	\$ 20,726.00
Percent Change	-	17.6%	26.8%

Source: United States 1990, 2000 Census, American Community Survey (2007-2009)

Slowed income growth affects the entire state. Job type does not account for all income trends, nor does the overall state of the economy, since Georgia is experiencing income changes differently than the rest of the country. The State of Georgia ranks 50th in the nation for per capita income growth (Fiscal Research Center, Georgia State University, December 2009). The region's cost of living, however, may partially make up for lower income gains. National studies show that the Metro Atlanta region has the third lowest cost of living among the ten most populous metro areas; the region has the fifth lowest cost of living among the ten fastest growing metropolitan areas with populations greater than one million.

Table 17 : East Point Population by Ratio of Income to Poverty Level

East Point Population by Ratio of Income to Poverty Level, 2009						
Income / Poverty Level	City of East Point		City of Atlanta	Fulton County	State of Georgia	United States
	People	Percent	Percent	Percent	Percent	Percent
Total	41,997	100.0%	100.0%	100.0%	100.0%	100.0%
Under .50	2,946	7.0%	11.2%	7.9%	6.7%	5.8%
.50 to .99	4,604	11.0%	10.1%	7.5%	8.3%	7.6%
1.00 to 1.24	2,305	5.5%	4.7%	4.2%	4.7%	4.4%
1.25 to 1.49	2,610	6.2%	4.5%	4.2%	4.9%	4.5%
1.50 to 1.84	3,799	9.0%	5.4%	5.1%	6.6%	6.3%
1.85 to 1.99	2,026	4.8%	2.2%	2.2%	2.8%	2.7%
2.00 and over	23,707	56.4%	61.8%	68.8%	65.9%	68.6%

Source: American Community Survey 2005-2009

The **educational attainment of East Point's residents is somewhat lower** than that of residents in nearby municipalities. In 2009, **79.7%** of East Point residents had attained their high school diploma or its equivalency, 47.4% had at least some college education, 29.4% held higher education degrees, and 14.8% held a bachelor's degree. In comparison, 87.8% of Fulton County's population achieved high school graduation and 45.8% are college graduates. The City of Atlanta has 82.9% high school graduates and 27.1% college graduates. 20.3% of East Point residents have not graduated from high school, compared to 13% in Atlanta and 11.5% in Fulton County.

20% of East Point residents age 25 and up have not graduated from high school.

Table 18 : East Point Average Education Attainment, 1990-2009

East Point Average Education Attainment, 1990-2009						
	1990		2000		2009 (ACS)	
Less than 9th grade	2,118	9.8%	1,755	7.7%	2,662	9.5%
9th to 12th grade, no diploma	3,877	17.9%	3,723	16.3%	3,000	10.8%
High school graduate (includes equivalency)	6,454	29.9%	7,458	32.6%	9,016	32.3%
Some college, no degree	4,297	19.9%	4,956	21.6%	5,007	17.9%
Associate's degree	969	4.5%	955	4.2%	1,690	6.1%
Bachelor's degree	2,755	12.8%	2,756	12.0%	4,137	14.8%
Graduate or professional degree	1,134	5.2%	1,298	5.7%	2,386	8.6%

Source: United States 1990, 2000 Census, American Community Survey (2007-2009)

Economic Development

Quick Facts

- Number of jobs: 13,342
- Biggest employer: Tenet South Fulton Medical Center, with 875 jobs
- Major industries: services, healthcare, retail, manufacturing
- Unemployment rate: 13.7%

As East Point prepares its Community Agenda, decision makers will evaluate a range of questions related to the economic health of the city. For example, what economic mix should the city seek for a healthy employment base? What kind of industries will emerge in the metropolitan region, and how can the city position itself to take advantage of changing markets? This section presents information regarding the economic base (employment type and industry categories), wage and labor force information, and regional trends. Analysis of the economic base can direct recruitment toward businesses that complement existing industry or require the skills of residents currently exporting labor to other regions. This data provides basic but vital information for more effective decisions concerning the health of the local economy.

The two biggest employers in East Point - Tenet South Fulton Medical Center and the City of East Point - fall into the services and government categories. East Point's largest employers are listed in Table 19. According to the National Bureau of Labor Statistics, of the 20 fastest growing occupations in the U.S. economy, **half are related to healthcare** (Occupational Outlook Handbook 2010-2011). For the **Metro Atlanta region**, all of the fastest growing occupations identified by the Georgia Department of Labor through 2018 also occur in the health and medical related jobs. Home Health Aides top the list, projected to grow over 100% in the next five years. In Georgia, healthcare is also a rapidly growing industry, with jobs in elderly care and individual and family services expected to almost double from 2008-2018. Consulting and office administrative workers are also expected to be in high demand statewide by 2018.

Table 19 : East Point Major Employers, 2011

East Point Major Employers, 2011		
Company	Location	Number of Employees
Tenet - South Fulton Medical Center	Cleveland Ave	875
City of East Point	East Point St	523
Owens-Brockway Glass Company, Inc	Sylvan Rd	416
Newell Recycling	Central Avenue	325
Williams Printing Company	North Commerce Dr	221
Bonterra Nursing Center	Felton Dr	157
Lowe's	Camp Creek Marketplace	155
Target	Camp Creek Marketplace	151
Holiday Inn	Virginia Ave	140
Crowne Plaza Hotel - Atlanta Airport	Virginia Ave	133
PPG Industries, Inc	Oakleigh Dr	105
Doubletree Club Hotel	Norman Berry Dr	72

Source: City of East Point

Around 40% of East Point's labor force is concentrated within three industry sectors for employment: **Educational Services / Healthcare / Social Assistance** at 15.3%; Professional, Scientific / Management / Administrative / Waste Management Services at 13.1%; and Retail trade at 12.1%. Due to the close proximity to Hartsfield-Jackson Atlanta International Airport, the Accommodation and Food Services industries play a key employment role, growing from 1% in 1990 to 10.6% in 2009. Overall total employment has grown by 22.5% from 2000 to 2009 (U.S. Census 2000, American Community Survey 2007-2009).

For the “Tri-City” Super District (East Point, College Park and Hapeville), ARC 2010 estimate reports indicate that the **Services** and the **Transportation / Utilities / Communications industry (TCU)** categories each generate about **one-third of all employment**. Retail provides 17% of all employment, while Government accounts for 10%.

By 2030, ARC anticipates that the Tri-City Super District will maintain essentially the same employment profile, although TCU will drop to 26% and Services will increase slightly to constitute 31% of total share. “FIRE” industries (Finance, Insurance, and Real Estate) will likely experience an increase to provide 11% of employment.

Table 20 : East Point Major Employers, 2011

Employment Forecast for Tri-City Super District (East Point, College Park, Hapeville)									
Year	Construction	Manufacturing	Transportation, Communication, Utilities	Wholesale Trade	Retail Trade	Finance, Insurance, Real Estate	Services	Government	TOTAL
2010	607	1,348	16,003	1,049	7,496	1,871	12,513	4,533	45,420
2020	702	1,352	16,699	1,248	9,435	5,656	17,075	5,245	57,412
2030	740	1,416	17,199	1,146	10,588	7,422	20,094	6,611	65,216
2040	785	1,602	17,739	1,038	12,329	9,456	23,464	8,015	74,428

Source: ARC 20-County Forecast - TriCity Super District 2011

In 2000, approximately 1,715 of East Point residents worked and lived in the city, but the 2009 ACS results showed that only 978 of East Point residents worked and lived in the same place. This was a 43% reduction in the number of people who lived and worked in East Point. The jobs-to-housing ratio is 0.86 (discussed in the Housing section). Geographically, the majority of the workforce is located in the eastern portion of East Point. The eastern portion of East Point lies within close proximity to the airport and I-85; further, the MARTA Rail Station directly serves the subarea.

There are only 0.86 jobs in East Point for every household.

As of June 2011, **13.7% of East Point residents were unemployed**. A greater portion of the work force is unemployed in East Point than in Georgia (9.9%), Fulton County (11%), and Atlanta (11.8%). The current national unemployment rate is 9.2% (Georgia Department of Labor Civilian Labor Force Estimates, <http://www.dol.state.ga.us/pdf/pr/laborforce.pdf>).

Table 21 : East Point Labor Force Participation

East Point Labor Force Participation, 2000-2009			
	2000	2009 (ACS)	Percent Change (Weighted Average)
Total Males and Females	28,767	33,556	7.7%
In labor force:	18,985	24,013	11.7%
Civilian Labor force	18,960	23,863	11.4%
Civilian Employed	17,300	20,903	9.4%
Civilian unemployed	1,660	2,960	28.1%
In Armed Forces	25	150	71.4%
Not in labor force	9,782	9,543	-1.2%

Source: U.S. Census 2000, ACS 2009

For both Labor Force Participation and Place of Work statistics, the data was analyzed based on a weighted average in order to compare the population changes between 2000 and 2009. During that time, East Point’s labor force increased by 26% from 18,985 in 2000 to 24,013 in 2009 (American Community Survey, “ACS”).

Table 22 : Median Household Income by Age of Householder

Median Household Income by Age of Householder			
	East Point	Fulton Co.	Georgia
All households:	\$ 40,546.00	\$ 58,648.00	\$ 49,173.00
Householder under 25 years	\$ 25,811.00	\$ 25,792.00	\$ 24,819.00
Householder 25 to 44 years	\$ 43,060.00	\$ 61,777.00	\$ 53,035.00
Householder 45 to 64 years	\$ 40,607.00	\$ 71,173.00	\$ 58,203.00
Householder 65 years and over	\$ 33,832.00	\$ 35,382.00	\$ 31,662.00

Source: Data collected from 2009 American Community Survey

The median household income in East Point is \$40,564.

The median **household income for East Point is \$40,564**, which is \$18,102 lower than Fulton County and \$8,627 lower than the State of Georgia. The household earners between the ages of 45 to 64 years old, which is typically the peak earning period during a person’s career, earn 75.3% less (\$30,566) than those in Fulton County.

Two of the greatest development changes that will influence the city will stem from the Fort McPherson closing and redevelopment efforts and the expansion of the Hartsfield-Jackson Atlanta International Airport. How the city recovers along with the region from housing market instability will also determine the economic health of the East Point as an attractive draw for new businesses and industry.

The city has pursued multiple initiatives targeting economic dynamics it can more directly influence. Work to stimulate economic conditions include the development of two Tax Allocation Districts (TADs), becoming a Main Street City, pursuing a TOD master plan to implement its LCI, pursuing an Opportunity Zone for tax incentives, and launching an Economic Development Plan (summer 2011). For more detailed descriptions of these and **economic development resources**, see the Technical Appendix, which also describes the function of the East Point Business and Industrial Development Authority, the East Point Main Street efforts, the East Point Business Association, the South Fulton Chamber of Commerce and county business support agencies, among others.

East Point has small-scale, local-serving office uses, which are supported by those seeking office locations close to home, those that require clients to visit them and find their customer base within a residential community, and those that seek convenient regional access. The downtown core of East Point is well positioned to support this type of office development. The city arguably boasts the **best access** in the region; direct interstate access, MARTA commuter rail, and close proximity to Hartsfield-Jackson Atlanta International Airport form an unusual group of assets that create a competitive advantage.

Strategic planning by the City of East Point to exploit local assets will become more critical as the region and nation recover from the recent recession; market trends in the metro Atlanta region indicate only slow recovery. Recovery across all industries will occur only as employment grows. In its most recent (February 2011) 2010-2040 regional population and employment projections, the Atlanta Regional Commission lowered its estimates of job growth in the 20-county Atlanta region, last published in

2009. Nonetheless, the ARC's population and employment forecasts show moderately strong long-term growth for the 20-county Atlanta region. The ARC expects that **8.3 million people will call the region home** by the year 2040, an increase of roughly three million people from today. Job growth, although not as robust as in the 1990s, will remain strong in the long term, as well. The ARC forecasts the region to have 3.65 million jobs by 2040, an addition of about 1.5 million jobs from today. One of the more significant trends that the ARC expects is the shrinking of the labor force participation rate (LFPR) over the coming decades. The labor force participation rate is expected to fall from a high of almost 74% in 2000, to around 62% by 2040.

Economic Demand Projection

Local Economic Demand projections are based on economic trends and population projections and project demands in four (4) major market areas in East Point: office, industrial, retail, and residential. The majority of data is based on the *East Point Market Assessment and Demand Trends* report prepared by Huntley Partners, Inc. (2011).

Residential

The lingering impact of the recent recession and current slow recovery is most keenly felt in the housing industry. Specifically, East Point's stock of vacant housing is quite large and likely to take several years to achieve any degree of normality, or equilibrium. Demand for all types of housing is projected to remain negative over the next ten years – i.e. there is more than enough excess housing inventory to satisfy demand through 2021 for both single-family detached and multi-family attached housing.

Industrial

Considering both the current amount of excess industrial inventory in East Point as well as ARC's employment projections for jobs in industrial occupations in the East Point area, demand for new industrial space in East Point will be minimal not only over the next ten years, but also over the next 25. While there remains the possibility – perhaps even the probability – that the definition of “industrial space” will broaden to include facilities for emerging “new industries” that are geared toward biomedical and information technologies, creating jobs that will be highly valued in any urbanized community, “old industries” in East Point are rapidly disappearing.

Retail

Demand for new retail will be strong in East Point and could begin to generate new retail businesses and perhaps new development in the City as early as 2012-2013. Current unmet retail demand of 326,700 square feet is geared toward the type of Power Center and Community Shopping Center retailers that tenant Camp Creek Marketplace, and that center will likely move to attract that demand as the ability of mainstream national and regional retailers to expand improves with the consumer economy over the next 2-3 years. However, there also appears to be both current unmet and growing demand for dining and “non-box” general merchandise stores that are found more often in urbanized communities and city/town centers.

Office

Perhaps the biggest area of new development for East Point based on projected demand is space for professional and business services – generally Class A office and new Class B office park multi-tenant space. Camp Creek Trade Center will continue to provide opportunities for single-user build-to-suit office space as well as “new industrial” space mentioned above. It may move to attract multi-tenant leased office buildings and, in doing so, meet the anticipated demand for Class B office park – i.e.,

suburban – space. However, demand should also generate activity in the existing warehouse-conversion facilities in the Downtown/MARTA district as well as the development of new office buildings – or office space in mixed-use facilities – in the city’s center.

Gross 10-Year and 25-Year Demand for space in East Point

Based on households, income and employment growth, total projected demand for retail, office and residential product within the City of is summarized in Table 23.

Table 23 : Total Demand for Space/Units in East Point 2011-2036

Total Demand for Space/Units within East Point 2011-2036				
	Years 1-10		Total 25 Years	
	2011-2021		2011-2036	
Retail from Current Unmet Demand	163,369	sq ft	163,369	sq ft
From Employee/Visitor Markets	24,073	sq ft	54,258	sq ft
Retail from Market Area Household & Income Growth	514,831	sq ft	1,160,394	sq ft
Retail*	702,272	sq ft	1,378,021	sq ft
Neighborhood Services (from household growth)	27,046	sq ft	70,588	sq ft
Office (from employment growth)	822,890	sq ft	1,937,510	sq ft
Industrial (from employment growth)	442,907	sq ft	744,810	sq ft
Residential: Single Family Detached Houses	786	units	2,051	units
Residential: Townhouses/Condos	139	units	362	units
Residential: Multi-family Rentals/Apartments	879	units	2,293	units
Total Residential Units: All Types	1,803	units	4,706	units

*2022-2036 Retail AGR = 1.52%

Excess Inventory within East Point

“Excess inventory” is defined as the portion of vacant supply that is in excess of a “normal” amount of vacant supply that one would find in a stable, balanced community where supply and demand are in relative equilibrium – is reflected in Table 24. Based on current levels of vacant retail, office and industrial space, as well as the number of months of housing unit supply on the market, the City has an overabundance of existing retail, neighborhood services, office and industrial space, as well as residential units as indicated in the far-right column in Table 24.

Table 24 : Current Excess Inventory in East Point

Current Excess Inventory within East Point				
City as % of Total Submarket:	Retail	30%		
	Neighborhood Services	100%		
	Office	10%		
	Industrial	5%		
	City Vacant SF	Vac %	Excess %	Excess SF
Retail: Stable Vacancy @ 8%	188,148	8.5%	6%	11,970
Neighborhood Services: Stable @ 9%	22,368	12.4%	28%	6,158
Office: Stable @ 10%	170,875	16.3%	39%	66,012
Industrial: Stable @ 8%	684,110	15.9%	50%	340,385
Residential	City Vacant Units		Excess Units	
Total Vacant Units	3,892		60%	2,335
SFD % of Vacant Units	44%			1,027
Townhouses % of Vacant Units	6%			140
Rental % of Vacant Units	50%			1,168

Net 10-year and 25-year Demand within East Point

Taking into account the excess inventory that current exists in the East Point' market area across product categories, the net demand for new retail and office space is over the next ten years (2011-2021) is relatively high, particularly with respect to retail. Over the 25-year period through 2036, that demand becomes even more significant.

Table 25 : East Point Demand Net Current Excess Inventory

Total East Point Demand Net of Current Excess Inventory, 2011-2036		
	Years 1-10 2011-2021	Total 25 Years 2011-2036
Retail	690,302 sq ft	1,366,051 sq ft
Neighborhood Services (from household growth)	20,887 sq ft	64,430 sq ft
Office (from employment growth)	756,878 sq ft	1,871,498 sq ft
Industrial (from employment growth)	102,523 sq ft	404,425 sq ft
Residential: Single Family Detached Houses	(242) units	1,024 units
Residential: Townhouses/Condos	(1) units	222 units
Residential: Multi-family Rentals/Apartments	(289) units	1,125 units
Total Residential Units: All Types	(532) units	2,371 units

Based on the analyses above, the East Point could experience new development in the amounts given below over an initial 10-year 2011-2021 period, as well as the total 25-year period 2011-2036. Several caveats bear repeating, however:

- In all markets – office, retail and residential – there are relatively large “excess” inventories. For purposes of converting total area demand into feasible, demand-supported new development, one must assume that at least a sizeable portion of currently vacant commercial space or dwelling units will absorb an amount of new demand over the next ten years approximately equal to 50-60% of the excess vacant inventories in the East Point Market Area.
- Some products – demand notwithstanding – will not be built/developed in the East Point due to (1) the lack of available land for the type of product envisioned and/or (2) community policies which put constraints on such development. An example of the first is single-family detached residential homes, due primarily to the amount of land each requires. An example of the second is multi-family rental units, apartments not being viewed favorably in communities where rental units appear to dominate ownership units.

Housing

Detailed housing statistics were obtained from the American Community Survey (ACS) results. For a city of East Point's size, the most comprehensive statistics are estimates based on three years of data. The results discussed here are based on data collected from 2007-2009.

According to the ACS 2007-2009 estimate, there are **18,797 housing units** in East Point. Slightly more than half of the housing units are single-family detached homes, and about a third of the housing units are in multi-family buildings. Most of East Point's housing stock was built in the mid-20th century. Construction slowed in the 1980s and 1990s, but picked up in the 2000s, with about 15% of East Point's homes dating from the last decade.

The **housing vacancy rate** in East Point is **24.3%**, with 4,571 vacant housing units in the city. The housing vacancy rates from Fulton County and the state of Georgia from the same time period are 17.2% and 14.1%, respectively. About 40% of the vacant homes are listed for rent.

About half of the occupied housing units are owner-occupied, while the other half is occupied by renters. Most owners live in single-family homes, while most renters live in apartment buildings. More young people in East Point (under 45) live in rental housing, while more people aged 45 and up live in owner-occupied housing. Many owner-occupied homes in East Point (about a third) are occupied by a householder over the age of 60, more than Fulton County or Georgia. This fact contributes to East Point's designation as a "Naturally-Occurring Retirement Community," or a place where there are many seniors living independently in the community.

Quick Facts

- Housing units: 18,797
- Vacancy rate: 24.3%
- Home ownership rate: 50%
- Median home value: \$146,100
- 44.2% are cost burdened

24.3% of homes in East Point are currently vacant.

Table 26 : East Point Household Units in Structure

Units in Structure, 2009				
	Owner-Occupied		Renter-Occupied	
	Units	%	Units	%
Total Occupied Units	7,135	100.0%	7,091	100.0%
Single-family	6,842	95.9%	2,381	33.6%
Duplex	39	0.5%	714	10.1%
3-19 units	75	1.1%	2,841	40.1%
20 or more units	69	1.0%	829	11.7%
Mobile home	110	1.5%	326	4.6%

Source: American Community Survey (2007-2009) Table B25032

Home values have been rising fast, increasing by 70% since 2000.

The **median value of an owner-occupied home** in East Point was **\$146,100** in 2009. Housing values have increased almost 70% since 2000, faster than in Fulton County or Georgia. Median monthly owner costs were \$1,263. The **median monthly rent was \$822**. The U.S. Department of Housing and Urban Development recommends spending no more than 30% of a household’s total income on housing costs. In East Point, there are not enough housing units that would be classified as affordable by this standard to the almost 4,000 households with annual incomes of less than \$25,000. East Point’s **median household income is \$40,546**, making homes with total monthly costs of \$1,013 or less affordable to the average household. The relatively low per capita income in East Point could present a barrier to housing affordability.

The U.S. Department of Housing prepares Census data to identify “cost burdened” households, or those that actually do pay 30% or more of their income on housing. In East Point, **44.2% of households are cost burdened**, and **20.1% are severely cost burdened**, or paying more than 50% of their total income on housing. Renters are more likely to pay more of their household income on housing; 53.9% of East Point renters are cost burdened, while 35.4% of owners are cost burdened.

Table 27 : Cost Burdened Households

Cost Burdened Households, 2009						
	East Point		Fulton County		Georgia	
All Households: Owners and Renters						
	Units	%	Units	%	Units	%
Not cost burdened	7,539	53.0%	213,849	58.8%	2,146,153	62.1%
30% - 49%	3,422	24.1%	77,340	21.3%	674,506	19.5%
50% or Greater	2,860	20.1%	63,548	17.5%	520,480	15.1%
Not Computed	405	2.8%	8,689	2.4%	113,886	3.3%
Total Units	14,226	100.0%	363,426	100.0%	3,455,025	100.0%
Owners						
	Units	%	Units	%	Units	%
Not cost burdened	4,511	63.2%	138,860	66.4%	1,637,145	70.4%
30% - 49%	1,515	21.2%	41,078	19.6%	413,807	17.8%
50% or Greater	1,013	14.2%	27,904	13.3%	258,919	11.1%
Not Computed	96	1.3%	1,362	0.7%	17,083	0.7%
Total Units	7,135	100.0%	209,204	100.0%	2,326,954	100.0%
Renters						
	Units	%	Units	%	Units	%
Not cost burdened	3,028	42.7%	74,989	48.6%	509,008	45.1%
30% - 49%	1,907	26.9%	36,262	23.5%	260,699	23.1%
50% or Greater	1,847	26.0%	35,644	23.1%	261,561	23.2%
Not Computed	309	4.4%	7,327	4.8%	96,803	8.6%
Total Units	7,091	100.0%	154,222	100.0%	1,128,071	100.0%

Source: American Community Survey (2007-2009) Tables B25070 and B25091

East Point residents experience some other housing problems, as well. 122 occupied housing units lack plumbing, and 199 are missing complete kitchen facilities. About **4.6%** of homes in East Point are **overcrowded**, with more than 1 person per room. The overcrowding rate in East Point is higher than in Fulton County (2.4%) and in Georgia as a whole (1.4%).

One of East Point's greatest cultural assets is its historic neighborhoods. Located close to downtown, these original neighborhoods are made up of a variety of housing types and styles. These residents have strong ties to the community; there are a number of active neighborhood associations. One organization, the East Point NORC (Naturally-Occurring Retirement Community), provides services and social opportunities for the many senior adults living in their own homes.

East Point is a
“Naturally Occurring
Retirement
Community.”

While East Point is extremely well situated between Atlanta and the airport and on interstates and MARTA, it does not have enough employment opportunities for its residents. The U.S. Census Bureau's Center for Economic Studies identified **12,279 jobs** in East Point, fewer than the 14,226 households. 7.2% of these jobs are held by East Point residents, and 6% of East Point residents work in the city.

Natural and Cultural Resources

East Point does not have an abundance of natural resources within its city limits, but it does have a rich history and valuable cultural resources. The city has adopted the Environmental Part V standards to protect their water resources while allowing development to occur. These resources, as well as other environmentally sensitive areas and cultural assets, are catalogued below. East Point does not produce an **inventory of its environmentally sensitive areas or natural resources**.

No major rivers fall within the East Point city limits. There are a few large creeks, such as Camp Creek and Utoy Creek, running through the city limits. These water bodies are protected by city's Stream Buffer Protection ordinance, which requires a 50-foot natural vegetative buffer on both sides of a stream bank and an additional 25-foot impervious surface setback.

There are a few small lakes and ponds located within the city limits, including Judy's Lake. The city also has a reservoir within its boundary, on Headland Road.

Portions of East Point fall into a water supply watershed. There are two water supply watersheds within the city limits, both in the eastern older part of the city: the Flint River Watershed and the Ocmulgee River Watershed. Both of these watersheds are larger than 100 square miles, so they are considered to be large water supply watersheds and there are no specified minimum criteria for protection of streams in these areas.

Only about ten acres of East Point's land area, just along the city limits in the southwest region, fall into a groundwater recharge area. The recharge area has been designated as a probable area of thick soils and should be treated as a significant recharge area. The Department of Natural Resources protects groundwater recharges areas with criteria for storage and disposal of hazardous and agricultural wastes, design of septic systems, and new development.

Quick Facts

- Part V standards are in place to protect water resources
- 2 water supply watersheds within city limits
- 10 acres of groundwater recharge area
- Historic downtown, homes, and warehouses are an important cultural resource

Wetlands within the State of Georgia are protected by the Department of Natural Resources' Rules for Environmental Planning Criteria. There are a number of small areas of wetland scattered throughout East Point, totaling about 28 acres. Filling or draining these areas should be avoided.

The city has no protected mountains within its boundary, but it does regulate development on steep slopes. The City of East Point's zoning regulations discourage constructing buildings on sites with slopes of 33% or greater. While a few areas of steep slopes have been identified primarily in the central part of the city, the topography poses few development concerns. The soil types in East Point are also suitable for urban development.

The City of East Point's primary public water source is Sweetwater Creek via an intake in Douglas County. Water storage and flow management take place at the Ben Hill Reservoir.

The city has approximately 735 acres of land, or almost 8% of the city's total land area, in floodplains. Most of this falls into the 100-year floodplain. Many of the floodplain areas are located along the western boundary of the city. In the southwest region, Camp Creek produces the largest floodplain area and most of the 500-year floodplains that are within the city limits.

While there are a few endangered and threatened species with habitats in Fulton County, none of them can be found in East Point. There are a few species that can be found in East Point that the Georgia DNR has classified as rare, including one bird and three plants. While it does indirectly protect habitats through ordinances protecting stream buffers and trees, East Point **does not currently participate in any land conservation programs**. Conserving land and protecting it from development can provide both habitat protection and a community asset.

East Point has deep roots as an early industrial and railroad town. While a number of historic commercial and industrial properties survive downtown, the city has not documented them or listed them on historic registers. However, the city's seven old warehouses along Norman Berry Drive on the north and extending south to the Atlanta Utility Works were listed on the National Register of Historic Places in 1985. The early residential neighborhoods are important historic and cultural resources, as well. With a variety of housing types and styles, these diverse neighborhoods exemplify the early housing market in East Point, with industrial workers living on the same street as factory managers. The **Dick Lane Velodrome** is another unique but underutilized community feature. While there is a historical society in East Point, the city has **not formally adopted historic preservation regulations** into its municipal code.

Community Facilities and Services

The City of East Point is governed by a Mayor and City Council. The City Manager is the head of the administrative branch of East Point's government and is responsible for ensuring that adequate services are provided to the city's approximately 33,000 residents.

The City of East Point has signed a Service Delivery Strategy ("SDS") agreement with Fulton County and the thirteen other cities within its boundaries. The SDS determines which entity is responsible for each of a number of services, from emergency response to environmental protection. The Fulton County SDS has been reviewed to confirm which services East Point is responsible for and to make sure that the city is providing them.

East Point's police force of 139 officers and three fire stations provide public safety to residents. The South Fulton Medical Center, located on Cleveland Avenue, provides emergency and extended medical care.

Governed by the Fulton County School System, East Point has **six public elementary schools, two public middle schools, and one public high school**. One charter middle school and four private schools are also located within the city limits. Point University, formerly Atlanta Christian College, is a higher-education facility located on Dodson Drive. The Atlanta-Fulton County Public Library System has one branch in downtown East Point and plans to construct another within the city in 2011 or 2012.

The city has a total of **163 acres of park space** in 18 different parks. East Point has nine mini-parks (all three acres or smaller), five neighborhood parks, two community parks, a nature park, and a sports complex. The updated 2010 Parks and Recreation Master Plan identified a deficit of about 100 acres of park space in the city.

East Point owns its own municipal water system, with water supplied by Sweetwater Creek and stored in the Ben Hill reservoir. The city also purchases electricity for its citizens through the Municipal Electric Authority of Georgia. Both of these assets result in low utility rates for East Point citizens. The city has also established a Stormwater Management Utility, a funding mechanism that supports stormwater services provided to community residents. East Point is currently updating its Solid Waste Management Plan.

Quick Facts

- 6 public elementary schools, 2 public middle schools, and 1 public high school
- New Fulton County library will soon be built in the city
- 163 acres of park space in 18 parks
- City-owned utilities, including water, power, and stormwater management

The city has several historic residential and industrial neighborhoods.

Intergovernmental Coordination

The Technical Appendix identifies the full range of government entities the City of East Point coordinates with for comprehensive service delivery, including Fulton County, Atlanta Regional Commission (ARC), Fulton County Schools, MARTA, the Metropolitan North Georgia Metropolitan Water District, and state agencies such as the Department of Community Affairs (DCA) and Georgia Department of Transportation (GDOT). Several opportunities for enhanced coordination have been identified. For example, the city does not collaborate with Fulton County or adjacent cities for Comprehensive Planning purposes, and there are no border agreements in place. East Point does not share any services, such as parks and recreation, E-911, police, water, or sewerage, with other local governments.

Transportation

Quick Facts

- 198 miles of road
- Dick Lane Velodrome in Sumner Park is a destination for cyclists
- Good transit coverage, with MARTA rail station and 319 MARTA bus stops

The City of East Point is well served by regional air, rail, and vehicular transportation facilities. Hartsfield-Jackson Atlanta International Airport, on the southeastern border of the City, provides superior access to all parts of the United States and the rest of the world. CSX and Norfolk-Southern both operate north-south rail lines through the City. The Metropolitan Atlanta Rapid Transit Authority’s (MARTA) north-south rail line passes through the City. Interstate highways I-85, I-75, and I-285 pass through or near the city, and the city has a well-developed local roadway network. This mix of airport facilities, freight rail, transit, highway, and local roads helps to provide the City of East Point with a well-connected, multi-modal transportation network. The Technical Appendix fully documents the City’s existing and planned transportation network.

Roads and Highways

There are approximately 198 road miles in the city. The City of East Point has very good regional roadway access, with interstate highways I-85 and I-285 passing through the city limits of East Point. I-75 is located a little over a mile from the city, while I-20 is located approximately 3 miles north of the City. Numerous other roadways serve the local needs of drivers in the city.

All of the roadways with more than two lanes in the city are interstate highways, freeways, and arterials. These roadways, particularly I-85, I-285, and Camp Creek Parkway/SR 6, are the primary roadways that experience traffic congestion problems in the city. Most of these roadways pass along the edges of the city. The primary multi-lane roadway that passes through the city is Main Street/US 29. Having multilane roadways primarily on the edges of the city prevents significant amounts of external commuter traffic from passing through the heart of the city. The 2-lane, local roadway network then provides good connectivity throughout most of the city.

The street network in downtown East Point is a grid. This provides very good connectivity in the downtown area. The rest of the city’s roadways do not make a true grid street network. However, the street network is roughly a grid, composed of arterial and collector roadways which cut across the city and numerous local roadways which provide connectivity between the arterial and collector roadways.

While local street connectivity overall is very good, there are a number of barriers to connectivity throughout the city. The most notable are the CSX and Norfolk-Southern freight railroad lines and the MARTA heavy rail line located in the city. A number of roadways also act as barriers within the city or along the edge of the city including I-75, I-285, Langford Parkway/SR 166, and Camp Creek Parkway/SR 6. Vehicular traffic as well as bicyclists and pedestrians can only cross the rail lines and these roadways at specific locations. The rail lines cutoff the eastern side of the city from the rest of the city. However, these identified roadways are primarily along or near the edges of the city, so they have little impact on internal connectivity within the city. The main impact is to connectivity to the area surrounding the city.

The local street network provides very good connectivity within East Point, allowing local traffic to avoid congested highways and arterials. However, many of these roadways were not designed appropriately according to their use to assure appropriate travel speeds, particularly in downtown, making pedestrian activity unsafe and unappealing. The city has the opportunity to redesign streets appropriately for their use, add traffic calming features, and spatially define the streets with buildings, trees, and lighting to improve the bicycling and pedestrian experience.

Bicycle Facilities

The City of East Point is home to the Dick Lane Velodrome, a 0.2-mile 36° banked concrete track for bicycle racing. The Velodrome, located in Sumner Park, is owned by the city and is home to bicycle racing, youth bicycle activities, and is used for city functions. While the Velodrome is an asset to the city, there are no dedicated bike paths, multi-use trails, or bike lanes within the city.

The *City of East Point LCI Study* recommended a greenway trail along Main Street/US 29 from downtown to the Lakewood MARTA station to connect into the greenway trail proposed in the Lakewood/McPherson LCI study. The study also recommended other greenway trails, including one connecting downtown to the Dick Lane Velodrome. Implementing these recommended projects would start to address the lack of bicycle facilities in the city and help to make the city more bicycle-friendly.

Pedestrian Facilities

The premier pedestrian facility in the city is the 210-foot-long, eight-foot-wide pedestrian bridge which was constructed in 2001. The bridge spans the MARTA lines and four active rail lines and links downtown with new redevelopment sites east of the tracks. This facility helps pedestrians, including many students from Tri-Cities High School, to cross over the MARTA and freight rail tracks.

The *City of East Point LCI Study* documented the need for improvements to and maintenance of the current sidewalk network as a community-identified issue. Streets in the downtown core area of East Point typically have some type of sidewalk, but conditions vary. Major streets within the downtown area have minimum sidewalk widths of five feet and maximum sidewalk widths of ten feet along the east side of Main Street near the MARTA station. They are continuous throughout. The streets, however, are in need of street treatments. The sidewalks come alive during lunchtime, and the East Point MARTA station generates a significant amount of pedestrian traffic.

The 210-foot pedestrian bridge provides connectivity across the railroad tracks.

The local street grid in and around the downtown core provides numerous opportunities for pedestrian access to several downtown attractions. However, a lack of sidewalks and pedestrian amenities such as shade trees, benches, and way-finding signage discourages pedestrians. To address this issue, the *City of East Point LCI Study* made recommendations for pedestrian facilities including sidewalks as well as greenways that would be used by bicyclists and pedestrians.

East Point has a MARTA rail station and 319 bus stops.

Public Transportation

Fulton and DeKalb Counties are serviced by the largest transit system in Georgia, the Metropolitan Atlanta Rapid Transit Authority (MARTA). Public transportation, including rail and bus, is available throughout East Point. A number of bus routes serve the city, feeding riders into the MARTA heavy rail system. The East Point MARTA heavy rail station is located in the heart of downtown at the intersection of East Main Street with Washington Road.

There is fairly good transit coverage overall in the city. Increased MARTA usage has the potential to reduce traffic congestion on roadways in and around the city and make downtown a more vibrant activity center. The city can promote usage of MARTA by improving the pedestrian and bicycle infrastructure downtown and encouraging new development and redevelopment in the downtown area.

Areas with Limited Mode Choices

Relative to most of Metro Atlanta, the city is fairly well served by alternative transportation choices, particularly in the downtown core and along major thoroughfares. The area of the city least served by alternative transportation modes is that which developed west of the downtown core in the style of low density, auto-dependent subdivisions of single-family residences. The intersection of Dodson Drive and Hogan Road is at the heart of this area. There are numerous cul-de-sacs in this area, the streets are not laid out in a grid, and there is no sidewalk network. These factors discourage pedestrian traffic and effective transit service.

Additional bicycle and pedestrian infrastructure are the primary ways the city can address this issue. The additional infrastructure will improve the bicycling and pedestrian environment. It will also make the area more transit supportive by making it easier for people to reach the transit service.

Areas with Insufficient/Inadequate Parking

An assessment of the availability of parking was performed for the downtown core as part of the *City of East Point LCI Study*. Based on conversations with City staff and City Council, there is a perceived need for parking as 85% of the total spaces are private. Since the success of retail redevelopment in the downtown core depends on providing sufficient parking for patrons, it is clear that there is a need for adequate public parking. Development of an adequately sized public parking deck, however, is hampered by the parcel size and the need for appropriate clear zones for interior movement. Ultimately, the study identified parking as a priority and suggested that a parking deck downtown, available for the public, would remedy the current and future parking issues.

Freight

CSX and Norfolk-Southern both operate north-south rail lines through the city making freight connections to the rest of the nation readily available. Norfolk-Southern operates Industry Yard in the city of East Point. Other intermodal facilities are operated throughout the rest of the Metro Atlanta area by both railroad companies.

All state routes and interstate highways are available for use to commercial truck traffic. Trucks also use other roadways, particularly in commercial and industrial areas. These roadways include, but are not limited to, Central Avenue, Washington Road, Sylvan Road, Norman Berry Drive, and Willingham Drive. In some locations there is a conflict of scale between the city competitive advantage in hosting industrial uses with freight truck activity and its goal of compact, pedestrian-friendly infill development. Where appropriate, the city can identify ways to reduce or restrict truck traffic on some roadways while making roadways in industrial areas more truck-friendly. This will help both types of development and their associated transportation infrastructure to exist successfully in the city.

Commercial and General Purpose Air Terminals

There is no airport in the City of East Point. Hartsfield-Jackson Atlanta International Airport, on the southeastern border of the city, provides superior air access both domestically and internationally. As the world's busiest airport, it serves as a major connecting hub for destinations around the world. Due to the airport's proximity to the city, three private off-site parking lots for the airport are located along Camp Creek Parkway/SR 6. Hartsfield-Jackson Atlanta International Airport is accessible from East Point via multiple roadways as well as by taking the MARTA heavy rail system two stations south of the city.

Areas with Significant Traffic Congestion

Traffic congestion is a significant problem in the Metro Atlanta area. Congestion is a result of both the existing transportation infrastructure and the existing land use in an area. As development intensifies, more trips are made, increasing the demand on the transportation network.

The primary roadways that experience traffic congestion problems in the city are I-85, I-285, and Camp Creek Parkway/SR 6. These roadways experience high traffic volumes as they carry significant amounts of commuter traffic, regional traffic, and interstate traffic. It should be noted that residents of East Point can use MARTA heavy rail transit to avoid this traffic congestion when commuting to a number of major job centers, including downtown and midtown Atlanta, Buckhead, Perimeter Center, and Hartsfield-Jackson Atlanta International Airport. Some segments of Main Street/US 29 and Washington Road also experience traffic congestion problems. However, alternate routes exist for local trips so that drivers can avoid these roadways when needed, particularly during the peak hours.

Table 28 : Programmed Long-Range Transportation Projects

Planned Long-Range Projects in the City of East Point					
ARC ID	Completion Date	Project Type	Project Description	From	To
FS-017A	2020	Interchange Capacity	Reconstruction, with increased capacity, of the interchange at I-285 and Washington Road	I-285 Interchange	At Washington Road
AR-268B	2020	Fixed Guideway Transit Capital	Commuter Rail Stations and Park and Ride lots; <i>Note - No stations are planned in East Point, but the transit line passes through the City on an existing freight rail line.</i>	City of Atlanta	City of Lovejoy
FS-197	2020	Roadway Operational Upgrades	Roadway update/safety and signal improvement project and includes fiber optic interconnections for traffic signals on Virginia Avenue.	Harrison Road	Norman Berry Drive/Bobby Brown Parkway
FS-201	2030	General Purpose Roadway Capacity	Addition of one general purpose lane in each direction along Virginia Avenue.	Main Street/ US 29 (College Park)	I-85 (East Point)
FS-200A	2030	General Purpose Roadway Capacity	Segment 1 of this project includes widening Washington Road to a 4-lane undivided road, improving traffic signals on Washington Road, intersection improvements at Hammaraskjold Avenue, Janice Drive and Carmel Drive, sidewalks, bike paths, and street lighting.	I-285	Desert Drive
FS-200B	2030	General Purpose Roadway Capacity	Segment 2 involves adding one general purpose lane in each direction along Washington Road.	Camp Creek Parkway/SR 6	Delowe Drive
FS-200C	2030	General Purpose Roadway Capacity	Segment 3 involves adding one general purpose lane in each direction along Washington Road.	Delowe Drive	Legion Way/US 29

Source: ARC Envision6 Regional Transportation Plan (RTP)

Table 29 : Programmed Short-Range Transportation Projects

Programmed Short-Range Projects in the City of East Point					
ARC ID	Completion Date	Project Type	Project Description	From	To
FS-211	2013	Bicycle/ Pedestrian Facility	Addition of two 4' wide bicycle lanes and two 6' wide sidewalks on Semmes Street.	Washington Road	Norman Berry Drive

Source: ARC Envision6 FY 2008-2013 Transportation Improvement Program (TIP)

In addition to the locations described above, field reviews indicated that traffic congestion is present at the I-285 at Camp Creek Parkway/SR 6 interchange. This area experiences traffic congestion problems primarily during the lunchtime peak period, weekday PM peak period, and at times during weekend PM peak periods. Traffic congestion at highway interchanges is common during AM and PM peak commute travel periods. Local land use includes a large amount of retail and restaurant development, multi-family residential development, and offsite parking facilities for Hartsfield-Jackson Atlanta International Airport. Additionally, nearby industrial development adds significant amounts of truck traffic to Camp Creek Parkway/SR 6 and to this interchange. This combination of local land uses, as well as commuter and regional traffic, all contribute to the traffic congestion at and near this interchange.

Shifting future development to the downtown area will reduce the need for trips to take place on already congested freeways and other major roadways. Instead, local roads can be used to access downtown by vehicular traffic. Implementing plans for improved bicycle and pedestrian infrastructure will provide bike/pedestrian connections between downtown and the surrounding area. The MARTA heavy rail station will continue to provide regional connectivity without the delays associated with congested roadways during peak traffic periods.

The Atlanta Regional Commission's (ARC's) Regional Transportation Plan (RTP) is a long-range plan that includes a mix of projects including roadways, bridges, bicycle/pedestrian infrastructure, transit services, and more. By federal law, the RTP is required to cover a minimum planning horizon of 20 years and must be updated every four years in areas that don't meet federal air quality standards. The Envision6 RTP is the currently adopted plan for the Metro Atlanta area.

The ARC's RTP is used to create a short-term work program with programmed funding sources known as the Transportation Improvement Program (TIP). The TIP is developed using the highest priority transportation projects from the RTP and must be financially balanced. The current TIP is for FY 2008-2013. Programmed projects from the current TIP and planned projects from the current RTP are listed in Tables 28 and 29.

The tables show that one project in the City of East Point is included in the current TIP. This is a bicycle and pedestrian safety project on Semmes Street. The typical cross section for this project includes two 11' wide traffic lanes, two 4' wide bicycle lanes, one 8' wide parking lane, and two 6' wide sidewalks.

The ARC RTP includes a number of projects in the city. The projects that may have the most impact on the city include the interchange capacity project at I-285 and Washington Road and the capacity projects along Washington Road. These projects will increase the roadway capacity for the primary connection between downtown East Point, I-285, and the development along Camp Creek Parkway/SR 6. The interchange project will also help to relieve traffic congestion at the interchange of Camp Creek Parkway/SR 6 and I-285. These projects have completion dates in 2020 and 2030. As no funding has been programmed for these projects, this is a projected completion date that may change before the projects are implemented.

It should be noted that project AR-268B, the commuter rail line from the City of Atlanta to the City of Lovejoy, passes through the City of East Point but likely will not have a station in East Point. Nearby stations for this commuter rail line will likely be in downtown Atlanta and at the Southern Crescent multi-modal station.

Underutilized Transportation Facilities

A small number of roadways in the city are interstates, freeways, or arterials. Most of the roadways in the city are local roadways, along with some collector roadways. These roadways carry relatively low traffic volumes, although they also have a relatively low volume capacity. These roadways are utilized well by local traffic but do not have excess capacity for commuter or regional traffic.

The East Point MARTA rail station is marketed as a major asset to the City; however, it is an under-utilized part of the city’s transportation infrastructure. While the East Point MARTA rail station is located in downtown, it is surrounded by relatively low-density land uses. Additional development and some redevelopment in the downtown area, particularly at higher densities than some of the existing development, would provide more potential riders to better utilize the East Point MARTA rail station. Increasing transit ridership will also help to reduce future traffic congestion on roadways in the city as well as in the region.

PART FOUR:

Consistency with Quality Community Objectives

DCA adopted the Quality Community Objectives (QCO) as a statement of the development patterns and options that will help Georgia preserve unique cultural, natural and historic resources while looking to the future and developing to its fullest potential. As a planning tool, the Quality Community Objectives Assessment delineates a series of indicators for 15 policy objectives, organized into the form of a checklist meant to help conduct the analysis for the Community Assessment.

This assessment is meant to give a community an idea of how it is progressing toward reaching these objectives set by the Department, but no community will be judged on progress. The assessment is a tool for use at the beginning of the comprehensive planning process. Each of the fifteen QCOs has a set of yes/no questions, with additional space available for assessors' comments. The questions focus on local ordinances, policies, and organizational strategies intended to create and expand quality growth principles.

The QCOs serve as policy reference for the community as it prepares to participate in developing the Community Agenda. This initial assessment is meant to provide an overall view of the community's policies, not an in-depth analysis at this stage.

DEVELOPMENT PATTERNS

Traditional Neighborhoods

Traditional neighborhood development patterns should be encouraged, including use of more human scale development, compact development, mixing of uses within easy walking distance of one another, and facilitating pedestrian activity.

Statement	Yes	No	Comments
If we have a zoning code, it does not separate commercial, residential and retail uses in every district.		X	Zoning separates uses, but there are zoning categories that allow mixed-use (MI, MIX, CR, CUP, EI)
Our community has ordinances in place that allow neo-traditional development “By right” so that developers do not have to go through a long variance process.	X		
We have a street tree ordinance that requires new development to plant shade-bearing trees appropriate to our climate.	X		
Our community has an organized tree-planting campaign in public areas that will make walking more comfortable in summer.		X	We do however have a Sidewalk Bank.
We have a program to keep our public areas (commercial, retail districts, parks) clean and safe.	X		
Our community maintains its sidewalks and vegetation well so that walking is an option some would choose.		X	
In some areas, several errands can be made on foot, if so desired.		X	
Some of our children can and do walk to school safely.	X		However not beyond the frontage of the school
Some of our children can and do bike to school safely.		X	Bike lanes do not exist. However a Safe Route to School Program is being established
Schools are located in or near neighborhoods in our community.	X		

Infill Development

Communities should maximize the use of existing infrastructure and minimize the conversion of undeveloped land at the urban periphery by encouraging development or redevelopment of sites closer to the downtown or traditional urban core of the community.

Statement	Yes	No	Comments
Our community has an inventory of vacant sites and buildings that are available for redevelopment and/or infill development.	X		Not all vacant sites throughout the City are identified, but all of the prime redevelopment properties are.
Our community is actively working to promote Brownfield redevelopment.		X	
Our community is actively working to promote Greyfield redevelopment.		X	The 2006 Corridors TAD Plan identified several areas and staff actively promotes redevelopment through contact with developers and brokers.
We have areas of our community that are planned for nodal development (compacted near intersections rather than spread along a major road.)	X		The 2006 Corridors TAD Plan identifies 11 such areas, and staff actively promotes redevelopment through contact with developers and brokers.
Our community allows small lot development (5000 SF or less) for some uses.		X	

Sense of Place

Traditional downtown areas should be maintained as the focal point of the community or, for newer areas where this is not possible, the development of activity centers that serve as community focal points should be encouraged. These community focal points should be attractive, mixed-use, pedestrian-friendly places where people choose to gather for shopping, dining, socializing, and entertainment

<i>Statement</i>	<i>Yes</i>	<i>No</i>	<i>Comments</i>
If someone dropped from the sky into our community, he or she would know immediately where she was, based on our distinct characteristics.		X	
We have delineated the areas of our community that are important to our history and heritage and have taken steps to protect those areas.		X	
We have ordinances to regulate the aesthetics of development in our highly visible areas.	X		
We have ordinances to regulate the aesthetics of development in our highly visible areas.	X		
We have ordinances to regulate the size and type of signage in our community.		X	
If applicable, our community has a plan to protect designated farmland.			N/A

Transportation Alternatives

Alternatives to transportation by automobile, including mass transit, bicycle routes, and pedestrian facilities, should be made available in each community. Greater use of alternate transportation should be encouraged.

<i>Statement</i>	<i>Yes</i>	<i>No</i>	<i>Comments</i>
We have public transportation in our community.	X		
We require that new development connects with existing development through a street network, not a single entry/exit.	X		
We have a good network of sidewalks to allow people to walk to a variety of destinations.		X	
We have a sidewalk ordinance in our community that requires all new development to provide user-friendly sidewalks.	X		Sidewalk Bank
We require that newly built sidewalks connect to existing sidewalks wherever possible	X		
We have a plan for bicycle routes through our community.		X	
We allow commercial and retail development to share parking areas wherever possible.	X		

Regional Identity

Each region should promote and preserve a regional “identity,” or regional sense of place, defined in terms of traditional architecture, common economic linkages that bind the region together, or other shared characteristics.

<i>Statement</i>	<i>Yes</i>	<i>No</i>	<i>Comments</i>
Our community is characteristic of the region in terms of architectural styles and heritage.		X	
Our community is connected to the surrounding region for economic livelihood through businesses that process local agricultural products.		X	
Our community encourages businesses that create products that draw on our regional heritage (mountain, agricultural, metropolitan, coastal).		X	
Our community participates in the Georgia Department of Economic Development’s regional tourism partnership.	X		
Our community promotes tourism opportunities based on the unique characteristics of our region.	X		This has become a larger area of focus with the increase of the Hotel Tax in June 2011. The City has partnered with the ACVB to better capitalize on potential tourism opportunities.
Our community contributes to the region, and draws from the region, as a source of local culture, commerce, entertainment, education.		X	

RESOURCE CONSERVATION

Heritage Preservation

The traditional character of the community should be maintained through preserving and revitalizing historic areas of the community, encouraging new development that is compatible with the traditional features of the community, and protecting other scenic or natural features that are important to defining the community's character.

<i>Statement</i>	<i>Yes</i>	<i>No</i>	<i>Comments</i>
We have designated historic districts in our community.		X	
We have an active historic preservation commission.	X		
We want new development to complement our historic development, and we have ordinances in place to ensure that happening.		X	

Open Space Preservation

New development should be designed to minimize the amount of land consumed, and open space should be set aside from development for use as public parks or as greenbelts/wildlife corridors. Compact development ordinances are one way of encouraging this type of open space preservation.

<i>Statement</i>	<i>Yes</i>	<i>No</i>	<i>Comments</i>
Our community has a greenspace plan.	X		
Our community is actively preserving greenspace – either through direct purchase, or by encouraging set-asides in new development.		X	Conservation subdivision permitted under regulations adopted 2008 and 2009
We have a local land conservation program, or, we work with state or national land conservation programs to preserve environmentally important areas in our community.		X	
We have a conservation subdivision ordinance for residential development that is widely used and protects open space in perpetuity.	X		See subdivision regulations adopted in 2009

Environmental Protection

Environmentally sensitive areas should be protected from negative impacts of development, particularly when they are important for maintaining traditional character or quality of life of the community or region. Whenever possible, the natural terrain, drainage, and vegetation of an area should be preserved.

<i>Statement</i>	<i>Yes</i>	<i>No</i>	<i>Comments</i>
Our community has a comprehensive natural resources inventory.		X	
We use this resource inventory to steer development away from environmentally sensitive areas.		X	
We have identified our defining natural resources and have taken steps to protect them.		X	
Our community has passed the necessary Part V Environmental Ordinances, and we enforce them.			???
Our community has and actively enforces a tree preservation ordinance.	X		
Our community has a tree-replanting ordinance for new development.		X	
We are using stormwater best management practices for all new development.	X		
We have land use measures that will protect the natural resources in our community (steep slope regulations, floodplain or marsh protection, etc.) .	X		

SOCIAL AND ECONOMIC DEVELOPMENT

Growth Preparedness

Each community should identify and put in place the pre-requisites for the type of growth it seeks to achieve. These might include infrastructure (roads, water, sewer) to support new growth, appropriate training of the workforce, ordinances and regulations to manage growth as desired, or leadership capable of responding to growth opportunities and managing new growth when it occurs.

Statement	Yes	No	Comments
We have population projections for the next 20 years that we refer to when making infrastructure decisions.		X	
Our local governments, the local school board, and other decision-making entities use the same population projections.		X	
We have a Capital Improvements Program that supports current and future growth.	X		
We have designated areas of our community where we would like to see growth. These areas are based on the natural resources inventory of our community.		X	We have identified prime redevelopment areas in 2 TAD Plans.

Appropriate Businesses

The businesses and industries encouraged to develop or expand in a community should be suitable for the community in terms of job skills required, long-term sustainability, linkages to other economic activities in the region, impact on the resources of the area, and future prospects for expansion and creation of higher-skill job opportunities.

Statement	Yes	No	Comments
Our economic development organization has considered our community's strengths, assets, and weaknesses and has created a business development strategy based on them.		X	Recognizing this deficit, the City approved a Citywide Strategic ED Plan to address this and other essential ED strategies. It will begin in August 2011.
Our ED organization has considered the types of businesses already in our community, and has a plan to recruit business/industry that will be compatible.		X	Recognizing this deficit, the City approved a Citywide Strategic ED Plan to address this and other essential ED strategies. It will begin in August 2011.
We recruit businesses that provide or create sustainable products.		X	
We have a diverse jobs base, so that one employer leaving would not cripple us.		X	

Employment Options

A range of job types should be provided in each community to meet the diverse needs of the local workforce.

Statement	Yes	No	Comments
Our economic development program has an entrepreneur support program.		X	Only through partnership with other organizations at this time.
Our community has jobs for skilled labor.	X		
Our community has jobs for unskilled labor.	X		
Our community has professional and managerial jobs.		X	Although this is an area we are seeking to improve

Housing Choices

A range of housing size, cost, and density should be provided in each community to make it possible for all who work in the community to also live in the community (thereby reducing commuting distances), to promote a mixture of income and age groups in each community, and to provide a range of housing choice to meet market needs.

Statement	Yes	No	Comments
Our community allows accessory units like garage apartments or mother-in-law units.	X		
People who work in our community can afford to live here, too.	X		
Our community has enough housing for each income level (low, moderate, and above-average incomes)	X		
We encourage new residential development to follow the pattern of our original town, continuing the existing street design and recommending smaller setbacks.	X		
We have options available for loft living, downtown living, or “neo-traditional” development.		X	
We have vacant and developable land available for multifamily housing.	X		
We allow multifamily housing to be developed in our community.	X		
We support community development corporations building housing for lower-income households.	X		
We have housing programs that focus on households with special needs.		X	
We allow small houses built on small lots (less than 5,000 square feet) in appropriate areas.		X	

Educational Opportunities

Educational and training opportunities should be readily available in each community – to permit community residents to improve their job skills, adapt to technological advances, or to pursue entrepreneurial ambitions.

Statement	Yes	No	Comments
Our community provides work-force training options for our citizens.		X	Only through partnership with other organizations at this time.
Our workforce training programs provide citizens with skills for jobs that are available in our community.		X	
Our community has higher education opportunities, or is close to a community that does.	X		
Our community has job opportunities for college graduates, so that our children may live and work here if they choose.	X		Several businesses , organizations and medical facilities that actively recruit people w/ degrees are located in EP.

GOVERNMENTAL RELATIONS

Local Self-Determination

Communities should be allowed to develop and work toward achieving their own vision for the future. Where the state seeks to achieve particular objectives, state financial and technical assistance should be used as the incentive to encourage local government conformance to those objectives.

Statement	Yes	No	Comments
We have a citizen-education campaign to allow all interested parties to learn about development processes in our community.	X		
We have processes in place that make it simple for the public to stay informed on land use and zoning decisions, and new development.	X		
We have a public-awareness element in our comprehensive planning process.	X		
We have clearly understandable guidelines for new development.	X		
We offer a development guidebook that illustrates the type of new development we want in our community.		X	
We have reviewed our development regulations and/or zoning code recently and are sure that our ordinances will help us achieve our QCO goals.	X		
We have a budget for annual training for planning commission members and staff, and we use it.	X		
Our elected officials understand the land-development process in our community.		X	

Regional Cooperation

Regional cooperation should be encouraged in setting priorities, identifying shared needs, and finding collaborative solutions, particularly where it is critical to success of a venture, such as protection of shared natural resources or development of a transportation network.

Statement	Yes	No	Comments
We plan jointly with our cities and county for Comprehensive Planning purposes		X	
We are satisfied with our Service Delivery Strategies	X		
We cooperate with at least one local government to provide or share services (parks and recreation, E911, Emergency Services, Police or Sheriff's Office, schools, water, sewer, other).		X	

City of East Point Mission 2036 Comprehensive Plan Update

**Prepared for the city of East Point, Georgia
Department of Planning & Zoning**

by

POND & COMPANY

in association with

Huntley Partners & PEQ

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City of East Point: Market Assessment and Demand Trends



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City of East Point: Market Assessment and Demand Trends

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East Point Community Assessment

The purpose of this analysis is to arrive at a common understanding of the City of East Point's existing economic strengths and challenges. This analysis is expressed in the context of the state and metro Atlanta economies as a means of understanding East Point's relative position within Georgia and Metro Atlanta and highlighting its potential competitive advantages over ten-year and twenty-five-year timeframes.

I. Current and Emerging Market Conditions

The impact of the 2007-2009 global economic recession continues to be felt by commercial and industrial real estate markets around the world. Rising vacancy rates and declining rental rates defined nearly every market and sector here in the United States through most of 2010, with signs of stabilization being seen in late 2010 and early 2011. Through most of the past several years, however, eroding demand and increasing supplies of sublease space further impacted the market, leading to a near standstill in transaction volume. Banks and financial institutions have continued to focus on cleaning up their balance sheets and are moving aggressively to dispose of commercial real estate loans and financially distressed real estate assets – included residential mortgages – in the coming year.

1. Office Market

Metro Office Market

As it relates to the office market recovering, Atlanta remains in a holding pattern. The Atlanta office market is still waiting for consistent signs of stabilizing. A record amount of available office space exists in the market. This byproduct of the economic downturn and overzealous spec developers will require years of sustainable growth in order to return to a more balanced market. The good news is the economy is beginning to strengthen and Atlanta office leasing is more active now than it was twelve months ago. In addition, no speculative construction has taken place in the market for almost two years. Heading into mid-year 2011, office leasing activity is expected to intensify with a number of large space requirements likely to be signed. The majority of these requirements, however, will be lateral moves within the market, meaning modest absorption will persist. Outside of these transactions though, Atlanta will maintain its significance as a regional hotspot for companies to consolidate their offices.

The consensus among local and regional forecasters is that, while its economic fundamentals remain solid, Atlanta is likely to lag other major markets in restoring occupancy rates. Although service producing jobs are expected to show improvements by the second half of 2011, banking and housing industry woes will continue to counterbalance Atlanta office market growth in the coming year. In addition, the city saw the delivery of three large office buildings in Buckhead totaling 1.6 million square feet in 2010, over 60% of which is currently vacant. The imbalance this created between supply and demand means the Atlanta market will be saturated potentially with a six-year supply of office space.

Atlanta Office Market Conditions

Year	Qtr	Inventory SF/Units	Completions	Inventory Growth%	Vacant Stock	Vacancy Rate	Vacancy Change(BPS)	Occupied Stock	Net Absorption	Asking Rent	Ask Rent % Chg
2005	Y	136,291,000	1,084,000	- 0.4%	24,104,000	17.7%	-140	112,187,000	1,498,000	\$19.88	0.7%
2006	Y	136,871,000	1,695,000	0.4%	22,021,000	16.1%	-160	114,850,000	2,663,000	\$20.38	2.5%
2007	Y	138,575,000	2,618,000	1.2%	20,905,000	15.1%	-100	117,670,000	2,820,000	\$21.20	4.0%
2008	Y	139,790,000	1,970,000	0.9%	23,237,000	16.6%	150	116,553,000	-1,117,000	\$21.43	1.1%
2009	1	139,641,000	334,000	- 0.1%	23,847,000	17.1%	50	115,794,000	-759,000	\$21.44	0.0%
2009	2	139,909,000	530,000	0.2%	24,392,000	17.4%	30	115,517,000	-277,000	\$21.40	- 0.2%
2009	3	141,426,000	628,000	1.1%	26,409,000	18.7%	130	115,017,000	-500,000	\$21.33	- 0.3%
2009	4	141,041,000	0	- 0.3%	25,970,000	18.4%	-30	115,071,000	54,000	\$21.20	- 0.6%
2009	Y	141,041,000	1,492,000	0.9%	25,970,000	18.4%	180	115,071,000	-1,482,000	\$21.20	- 1.1%
2010	1	142,588,000	1,633,000	1.1%	28,325,000	19.9%	150	114,263,000	-808,000	\$21.18	- 0.1%
2010	2	142,398,000	0	- 0.1%	28,603,000	20.1%	20	113,795,000	-468,000	\$21.17	0.0%
2010	3	142,511,000	564,000	0.1%	29,609,000	20.8%	70	112,902,000	-893,000	\$21.16	0.0%
2010	4	142,474,000	0	0.0%	29,796,000	20.9%	10	112,678,000	-224,000	\$21.17	0.0%
2010	Y	142,474,000	2,197,000	1.0%	29,796,000	20.9%	250	112,678,000	-2,393,000	\$21.17	- 0.1%
2011	Y	142,474,000	0	0.0%	28,516,000	20.0%	-90	113,958,000	1,280,000	\$21.31	0.7%
2012	Y	143,158,000	684,000	0.5%	27,377,000	19.1%	-90	115,781,000	1,823,000	\$21.67	1.7%
2013	Y	144,722,000	1,564,000	1.1%	26,233,000	18.1%	-100	118,489,000	2,708,000	\$22.11	2.0%
2014	Y	146,718,000	1,996,000	1.4%	24,593,000	16.8%	-140	122,125,000	3,636,000	\$22.70	2.7%
2015	Y	149,124,000	2,406,000	1.6%	22,672,000	15.2%	-160	126,452,000	4,327,000	\$23.64	4.1%

Source: REIS

East Point Office Market

The potential office market for East Point draws from several different Metro Atlanta submarkets in addition to specialized markets such as those encompassing medical and health-related services and research facilities (a focus of the Fort McPherson redevelopment). Those submarkets include the following:

1. **Downtown Atlanta**
2. **Northside Drive / Georgia Tech** (part of the Midtown submarket)
3. **West Atlanta** (a portion of the overall West Atlanta submarket, this eastern sector is also called “West Atlanta”)
4. **Airport / North Clayton (County) Area** (part of the South Atlanta submarket)

Current office inventory and other conditions within this East Point Office Market Area are summarized in the following table, which includes total rentable square feet (RSF), vacant square feet (VAC square feet), vacancy rate (VAC%), year-to-date net absorption of space (ABSORP), square feet of new office space delivered year-to-date (DELIVER), space currently under construction (U/C), and quoted rent rates per square foot (RATES).

East Point Market Area: Current Office Market Conditions							
	RSF	VAC SF	VAC %	ABSORP	DELIVER	U/C	RATES
Class A	16,784,515	3,453,336	20.6%	236,242	-	-	\$ 19.54
Downtown	15,337,831	3,013,023	19.6%	260,022	-	-	\$ 19.49
Nside/GTech	341,104	116,313	34.1%	19,395	-	-	\$ 20.32
Airport/NClay	1,105,580	324,000	29.3%	(43,175)	-	-	\$ 20.04
W. Atlanta	-	-	0.0%	-	-	-	\$ -
Metro Atlanta			19.9%	274,419	1,813,024	107,500	\$ 21.65
Class B	22,475,243	1,797,445	8.0%	(198,622)	21,000	30,000	\$ 15.72
Downtown	14,893,353	767,988	5.2%	(78,812)	-	-	\$ 15.45
Nside/GTech	568,812	124,398	21.9%	1,863	-	-	\$ 18.49
Airport/NClay	6,452,815	805,331	12.5%	(133,639)	21,000	30,000	\$ 15.92
W. Atlanta	560,263	99,728	17.8%	11,966	-	-	\$ 17.93
Metro Atlanta			16.0%	(223,201)	21,984	64,536	\$ 16.88
Class C	9,172,765	2,308,941	25.2%	(198,554)	-	-	\$ 14.83
Downtown	4,567,841	1,088,991	23.8%	(175,728)	-	-	\$ 16.06
Nside/GTech	373,371	36,753	9.8%	13,535	-	-	\$ 16.89
Airport/NClay	2,927,844	579,416	19.8%	(33,157)	-	-	\$ 13.32
W. Atlanta	1,303,709	603,781	46.3%	(3,204)	-	-	\$ 13.33
Metro Atlanta			14.9%	(111,386)	-	-	\$ 14.66
TOTAL	48,432,523	7,559,722	15.6%	(160,934)	21,000	30,000	\$ 18.09
Downtown	34,799,025	4,870,002	14.0%	5,482	-	-	\$ 18.80
Nside/GTech	1,283,287	277,464	21.6%	34,793	-	-	\$ 19.00
Airport/NClay	10,486,239	1,708,747	16.3%	(209,971)	21,000	30,000	\$ 16.02
W. Atlanta	1,863,972	703,509	37.7%	8,762	-	-	\$ 15.81
Metro Atlanta			17.4%	(163,337)	1,690,320	85,536	\$ 19.09

Source: CoStar

2. Industrial Market

Metro Industrial Market

An executive with Industrial Developments International (IDI) expects 2011 to be “a transitional year” for Atlanta area industrial real estate, according to the *Atlanta Business Chronicle*. In its own way, 2010 also was a year of transition, as the crippling losses of 2009 yielded to the slower pace of decline indicative of stabilization. Indeed, some observers have reported the reemergence of positive net absorption at different points in 2010, an assessment in accord with Reis’s analysis. While vacancy remains severely elevated—an effect of the freewheeling development typical for Atlanta—the emerging trend features both a downward movement in the rate of vacancy and a marked decline in construction, including the virtual elimination of speculative endeavors. The severe rental declines of the past two years also have reached, or soon will reach, their end. Optimism is growing; near-term prospects have improved as Atlanta maintains its position as the Southeast’s dominant distribution market.

Atlanta Industrial Market Conditions

Year	Inventory SF	Completions	Vac %	Vacant Stock	Occupied Stock	Net Absorption	Eff Rent \$	%Change	Industrial Employment
2006	333,525,000	4,854,000	14.7	49,028,000	284,497,000	5,455,000	\$3.90	0.5	365,484
2007	339,249,000	5,724,000	15.0	50,887,000	288,362,000	3,865,000	\$3.95	1.3	362,657
2008	342,529,000	3,280,000	15.9	54,417,000	288,112,000	-250,000	\$3.89	-1.5	347,065
2009	343,382,000	853,000	17.3	59,405,000	283,977,000	-4,135,000	\$3.61	-7.2	313,547
2010	344,017,000	635,000	17.8	61,235,000	282,782,000	-1,195,000	\$3.44	-4.7	313,902
2011	345,046,000	1,029,000	17.1	59,003,000	286,043,000	3,261,000	\$3.42	-0.7	317,645
2012	348,238,000	3,192,000	16.7	58,156,000	290,082,000	4,039,000	\$3.47	1.7	323,066
2013	354,347,000	6,109,000	16.3	57,759,000	296,588,000	6,506,000	\$3.56	2.4	334,477
2014	362,400,000	8,053,000	16.0	57,984,000	304,416,000	7,828,000	\$3.66	2.9	342,991
2015	369,413,000	7,013,000	15.3	56,520,000	312,893,000	8,477,000	\$3.78	3.2	346,832

Sources: REIS, Moody's Economics

As the market turns the corner, Reis expects to see 3.3 million square feet of positive net absorption in 2011 accompanied by a 70 basis point drop in the vacancy rate and a firming up of rents. "Absent additional speculative development," summarizes Cushman & Wakefield, "Atlanta's industrial sector will report stabilizing occupancy in 2011 as demand rebounds further. As vacancy decreases, rental rates will stabilize and concessions will become less prevalent." Construction will slowly re-enter the picture, with possible speculative development in 2012.

East Point Industrial Market

The East Point site is situated to draw from two major submarkets in the Metro Atlanta area, as well as two minor submarkets, as follows:

1. Central Atlanta (major submarket)
2. Chattahoochee (major submarket)
3. Fulton Industrial District (part of I-20/West Fulton major submarket)
4. Airport/North Clayton (part of South Atlanta major submarket)

First quarter 2011 conditions of the East Point industrial market area, as defined by these four Metro Atlanta submarkets, are summarized in the following table.

East Point Market Area: Current Industrial Market Conditions							
	RSF	VAC SF	VAC %	ABSORP	DELIVER	U/C	RATES
Flex Space	7,404,354	704,886	9.5%	(46,341)	-	-	\$ 8.51
Central Atl	3,678,753	250,980	6.8%	14,473	-	-	\$ 9.86
Fulton Indust	1,210,712	77,466	6.4%	5,848	-	-	\$ 3.29
Airport	2,514,889	376,440	15.0%	(66,662)	-	-	\$ 9.04
Metro Atlanta			15.5%	(313,767)	-	-	\$ 8.14
Warehouse	147,649,410	22,995,049	15.6%	(560,687)	1,180,000	18,750	\$ 2.90
Central Atl	14,299,408	1,294,866	9.1%	(79,965)	-	-	\$ 3.58
Fulton Indust	49,933,549	8,394,422	16.8%	(116,693)	-	-	\$ 2.69
Airport	83,416,453	13,305,761	16.0%	(364,029)	1,180,000	18,750	\$ 2.91
Metro Atlanta			13.1%	(1,563,736)	-	1,158,750	\$ 3.66
TOTAL	155,053,764	23,699,935	15.3%	(607,028)	1,180,000	18,750	\$ 4.98
Central Atl	17,978,161	1,545,846	8.6%	(65,492)	-	-	\$ 4.89
Fulton Indust	51,144,261	8,471,888	16.6%	(110,845)	-	-	\$ 2.74
Airport	85,931,342	13,682,201	15.9%	(430,691)	1,180,000	18,750	\$ 6.34
Metro Atlanta			13.3%	(1,504,456)	-	1,158,750	\$ 4.03

Source: CoStar

To the extent that the East Point market starts to show significant signs of improvement during the current year, as is anticipated for the Metro market overall, it should experience a return to positive absorption, a slight decrease in vacancies, and a leveling if not increase in rates. The amount of vacant space, however, is significant at over 23 million square feet, with 13.7 million being in the Airport Submarket. There are no indications that industrial space within the City of East Point – approximately 5% of the total submarket inventory – is faring better than that within the balance of the submarket.

3. Retail Market

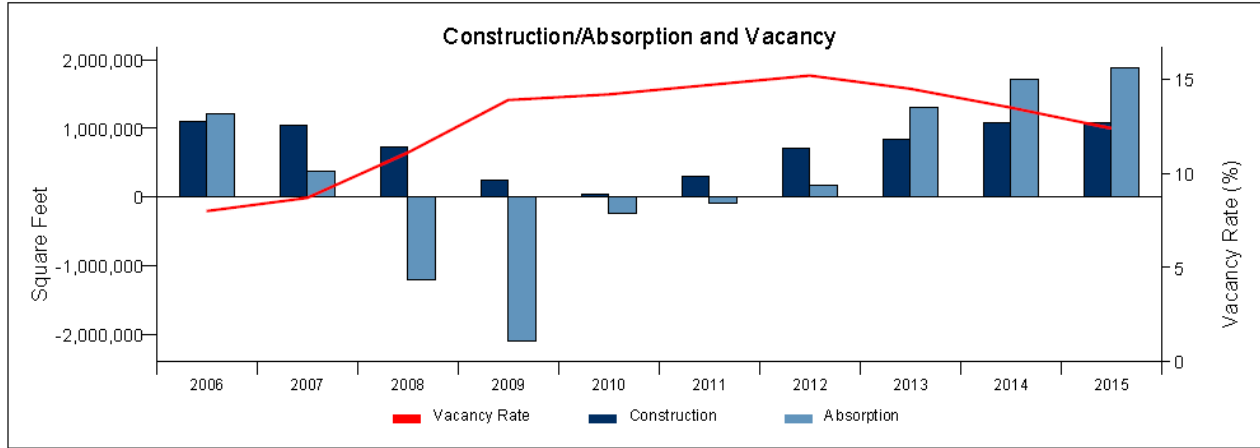
Metro Retail Market

A slow economic recovery and timid consumer spending along with large volumes of empty retail space, a residue of Atlanta's latest development cycle, make for a slow recovery and persistent soft conditions. Elements of gradual improvement, however, are discernible.

Atlanta Retail Market Conditions

Year	Qtr	Inventory SF/Units	Completions	Inventory Growth%	Vacant Stock	Vacancy Rate	Vacancy Change(BPS)	Occupied Stock	Net Absorption	Asking Rent	Ask Rent % Chg
2005	Y	78,001,000	1,353,000	1.8%	6,453,000	8.3%	80	71,548,000	649,000	\$16.73	3.1%
2006	Y	79,094,000	1,093,000	1.4%	6,333,000	8.0%	-30	72,761,000	1,213,000	\$17.10	2.2%
2007	Y	80,134,000	1,040,000	1.3%	7,007,000	8.7%	70	73,127,000	366,000	\$17.42	1.9%
2008	Y	80,866,000	732,000	0.9%	8,944,000	11.1%	240	71,922,000	-1,205,000	\$17.49	0.4%
2009	1	80,996,000	130,000	0.2%	9,379,000	11.6%	50	71,617,000	-305,000	\$17.39	-0.6%
2009	2	81,056,000	60,000	0.1%	10,443,000	12.9%	130	70,613,000	-1,004,000	\$17.25	-0.8%
2009	3	81,092,000	36,000	0.0%	10,727,000	13.2%	30	70,365,000	-248,000	\$17.19	-0.3%
2009	4	81,102,000	10,000	0.0%	11,282,000	13.9%	70	69,820,000	-545,000	\$17.16	-0.2%
2009	Y	81,102,000	236,000	0.3%	11,282,000	13.9%	280	69,820,000	-2,102,000	\$17.16	-1.9%
2010	1	81,102,000	0	0.0%	11,539,000	14.2%	30	69,563,000	-257,000	\$17.14	-0.1%
2010	2	81,102,000	0	0.0%	11,554,000	14.2%	0	69,548,000	-15,000	\$17.12	-0.1%
2010	3	81,137,000	35,000	0.0%	11,575,000	14.3%	10	69,562,000	14,000	\$17.20	0.5%
2010	4	81,137,000	0	0.0%	11,555,000	14.2%	-10	69,582,000	20,000	\$17.23	0.2%
2010	Y	81,137,000	35,000	0.0%	11,555,000	14.2%	30	69,582,000	-238,000	\$17.23	0.4%
2011	Y	81,430,000	293,000	0.4%	11,942,000	14.7%	50	69,488,000	-94,000	\$17.26	0.2%
2012	Y	82,131,000	701,000	0.9%	12,475,000	15.2%	50	69,656,000	168,000	\$17.41	0.9%
2013	Y	82,963,000	832,000	1.0%	12,004,000	14.5%	-70	70,959,000	1,303,000	\$17.65	1.4%
2014	Y	84,042,000	1,079,000	1.3%	11,364,000	13.5%	-90	72,678,000	1,719,000	\$18.13	2.7%
2015	Y	85,118,000	1,076,000	1.3%	10,561,000	12.4%	-110	74,557,000	1,879,000	\$18.69	3.1%

“The pace of new household formation, which hit a 30-year low in 2010, will not accelerate to historical norms until 2012, limiting demand for in-line space in newer suburban communities,” states Marcus & Millichap in its 2011 outlook report on the local market. “Retail sales will also reach pre-recession levels.” Reis's market data, meanwhile, indicate a mixed performance or occupancy even as vacancy rates remain painfully high. Indicated as well is the return of growth to rents, although gains have been small, and the return of positive net absorption to some sectors. While a large volume of space remains under construction, activity is dominated by a few large-format projects.



Source: REIS

The Atlanta retail market reached stability – although one might describe it as having “bottomed out” – during 2010, with overall quarterly vacancy rates varying only slightly from the year-end rate of 14.2%. Absorption was a negative -238,000 square feet. However, asking rents began moving up and deliveries of new inventory totaled only 35,000 square feet for the year. A continued lack of delivery of significant new space should allow a gradual return to “new normal” growth starting in 2013.

East Point Retail

The basic East Point retail submarket market is located primarily within the larger South Atlanta Retail Submarket. Conditions within that South Atlanta Submarket are basically indicative of those currently existing within the smaller East Point retail market area, which is defined as the 7-mile-radius combined Primary, Secondary and Tertiary markets described above and throughout this analysis.

East Point Market Area: Current Retail Market Conditions							
Category	Total RSF	Vacant RSF	Vacancy Rate	Net Absorption	Delivered RSF	RSF Under Construct	Quoted Rates
General	2,548,176	250,087	9.8%	(33,899)	-	-	\$ 8.71
Mall	817,743	15,517	1.9%	107,100	-	-	\$ 22.50
Power Cntr	-	-	0.0%	-	-	-	\$ -
Shop Cntr	3,974,828	361,556	9.1%	17,812	-	-	\$ 10.56
Specialty	-	-	0.0%	-	-	-	\$ -
TOTAL	7,340,747	627,160	8.5%	91,013	-	-	\$ 16.51
Metro			10.6%				\$ 13.77

Sources: CoStar, Dorey's

Relative to overall Metro Atlanta retail conditions, the East Point retail submarket (“College Park/SW Atlanta” in CoStar’s database) is performing well, with vacancies at a moderately healthy 8.5% and quoted rates at \$16.51 per square foot, well above Metro’s \$13.77. The Mall rates are particularly impressive at \$22.50.

4. Residential Market

Metro Atlanta Residential Market

Atlanta, like the rest of the nation, is weathering an “unusually slow” economic recovery as it struggles with previous overbuilding of residential real estate according to RealtyTrac. Atlanta led the nation in new single-family home construction every year between 1995 and 2005, so it took a big beating when housing turned down during the second half of the decade. Housing prices rose only modestly during the boom years, but lending was overly aggressive and many homebuyers had little equity in their homes to begin with. A high proportion of mortgage loans made during the housing boom were either subprime or Alt-A. The net result has been a surge in mortgage delinquencies and foreclosures, and the problem is likely to linger for some time to come.

The recession and its aftermath, meanwhile, have ravaged Atlanta’s once-hot housing market. According to RealtyTrac, the MSA ranked 26th among the nation’s top 206 metro areas in rate of foreclosure for third quarter 2010 as fully 1.38% of existing ownership stock (29,824 residences) received notifications. This nearly doubles the 0.72% national rate calculated for the period. “The market still has to deal with a lot of foreclosures, which are both a symptom of the fragile economy and the hangover from bad loans,” an executive with Harry Norman Realtors informed the *Atlanta Business Chronicle* in January 2011. While there are reasons to believe the market has bottomed out, “there is still a lot of downward pressure on pricing resulting from foreclosures and short sales.” Over the 12-month span concluding with November, data from First Multiple Listing Service (FMLS) indicate a 6.0% drop off in sales volume year-over-year. According to Standard & Poor’s S&P/Case-Shiller Home Price Index as reported by the *Chronicle*, Atlanta was one of six metro areas in which the average selling price has fallen “beyond the recent lows seen in most other markets in the spring of 2009.”

5. Current Excess Inventory in East Point

In each of the four major categories of real estate products – retail, office, industrial and residential – the City of East Point itself holds only a portion of the existing supply within each industry’s respective market area. Specifically, the City of East Point contains approximately 30% of the total retail inventory within the retail submarket most closely associated with East Point; approximately 10% of the office inventory; and approximately 5% of the industrial inventory. Since the Neighborhood Services inventory is calculated based on housing within the East Point city limits, 100% of that inventory is assumed to be within the city. Residential inventory within East Point is based on the 2010 Census, which 3,892 vacant housing units out of a total inventory of 17,225 – a vacancy rate of 22.6%. Optimistically, this is at least 15 months of available supply.

“Excess inventory” is not the same as vacant supply. Rather, it is the amount of vacant space or housing units in excess of what can be considered a healthy level of vacancies within a given type of real estate. Similar to unemployment rates, a certain level of vacancy is not only acceptable but necessary for a market to be stable, with supply and demand balanced and “in equilibrium.” Otherwise, too little vacant supply results in purchase prices or rent rates that are too high for a given market, driving away (or not attracting in the first place) otherwise desirable residents (consumer markets) and businesses.

Thus, estimating the amount of “excess inventory” – or vacant supply that should be considered in excess of a stable balance of supply and demand – involves taking the identified vacant space or housing units within the market area in question, determining what share of the level/percentage of those vacancies

are in excess of a stable market, then applying that excess vacancy level to the current-vacant space or units. “Stable” vacancy rates for each type of real estate market are generally accepted to be as follows:

- Retail: 8% vacancy rate
- Local Office: 9% vacancy rate
- Office: 10% vacancy rate
- Industrial: 8% vacancy
- Residential: a 6-month supply of housing

Since Local Office is not tracked separately but does represent a hybrid of the Office and Retail categories, a mid-point stable-market vacancy rate of 9% is assumed. Residential market equilibrium is assumed to be a six-month supply of housing units.

Current Excess Inventory within East Point					
City as % of Total Submarket:	Retail =	30%			
	Neigh Services =	100%			
	Office =	10%			
	Industrial =	5%			
		<u>City Vacant SF</u>	<u>Vac %</u>	<u>Excess @</u>	<u>Excess SF</u>
Retail: Stable Vacancy @ 8%		188,148	8.5%	6%	11,970
Neighborhood Services: Stable @ 9%		22,368	12.4%	28%	6,158
Office: Stable @ 10%		170,875	16.3%	39%	66,012
Industrial: Stable @ 8%		684,110	15.9%	50%	340,385
Residential		<u>City Vacant Units</u>		<u>Excess Units</u>	
Total Vacant Units		3,892		60%	2,335
SFD % of Vacant Units		44%			1,027
Tow nhouses % of Vacant Units		6%			140
Rental % of Vacant Units		50%			1,168

This excess supply will be incorporated into the demand projections in the following section in order to determine “net” demand projections for retail, office, industrial, local/community office and residential.

II. Economic Trends

1. Looking Forward - Recovery Timing

Clearly the entire Metro Atlanta Region has suffered from the national economic downturn that began in 2007. Given the severity of the current “Great Recession,” economists have generally lowered expectations of what a recovery may look like and what a return to normal growth will be. These lowered expectations are summed up by the media’s use of the phrase “a return to the new normal” in describing an economic recovery that stabilizes at much lower – but hopefully less volatile and more sustainable – growth rates than those experienced in the heady economic expansions and associated bubbles that characterized recoveries in the past several decades.

As applied to Metro Atlanta’s recovery to levels of “new normal” growth, a weak consensus (major differences of opinion remain as to the timing and extent of recovery) has emerged pointing to recoveries in the markets for major types of development as follows:

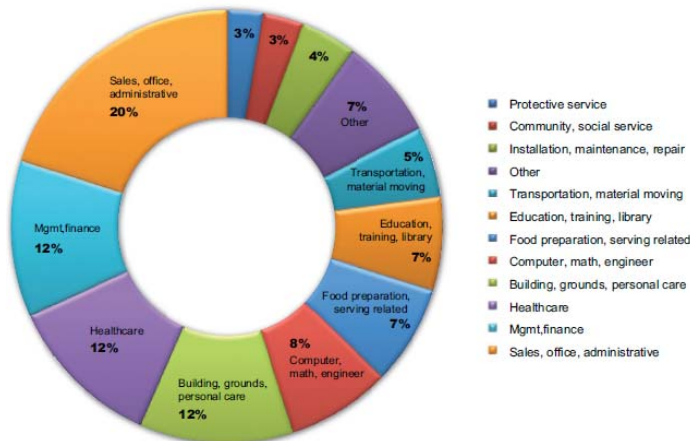
- **Residential:** Slight improvement in housing sales through 2011 coupled with continuing declines in sale prices as sellers – particularly banks writing down foreclosure inventories – increasingly prioritize moving product over pricing. Slight improvement in sales and prices is anticipated through 2012 with some degree of stabilization in the market being achieved by the end of 2013. The “new normal” for the overall residential market is projected to be achieved in mid-to-late 2013 and early 2014 for sale properties. Rental properties are beginning to strengthen with respect to both occupancy and effective rates, with the “new normal” for apartments being reached in 2012.
- **Retail:** Declining rates and occupancy continuing and perhaps temporarily accelerating through mid-2011, with market stabilization in late-2011 and continuing through 2012. However, a “new normal” is not anticipated until 2013-2014.
- **Office:** Basically the same pattern of recovery as retail, but with larger inventories and longer lead times for new development than retail, “new normal” stabilization occurring in 2014-2015.
- **Hotels:** New location-specific deals will continue during 2011 even with overall declines in rates and occupancy. The hospitality market should see signs of substantive recovery as reflected in the increasing availability of capital in 2012, building to the “new normal” in 2013.

2. Employment Growth Projections

Metro Atlanta

Recovery across all industries will occur only as employment grows. In its most-recent (February 2011) 2010-2040 regional population and employment projections, the Atlanta Regional Commission lowered its estimates of job growth in the 20-county Atlanta region, last published in 2009. Nonetheless, the ARC’s population and employment forecasts show moderately-strong long-term growth for the 20-county Atlanta region. ARC expects that 8.3 million people will call the region home by the year 2040, an increase

of roughly three million people from today. Job growth, although not as robust as in the 1990s, will remain strong in the long-term, as well. ARC forecasts the region to have 3.65 million jobs by 2040, an addition of about 1.5 million jobs from today. One of the more significant trends ARC expects is the shrinking of the labor force participation rate (LFPR) over the coming decades. The labor force participation rate is expected to fall from a high of almost 74% in 2000, to around 62% by 2040.



Expected Growth by Occupation 2010 – 2040

In terms of specific occupations, then, it should be no surprise that healthcare occupations will be one of the leaders in percentage change between 2010 and 2040. Sales, office and administrative occupations will capture the bulk of the growth between 2010 and 2040. Management and finance occupations, healthcare occupations and occupations in building, landscape and other personal services will each capture approximately 12% of all growth in occupations between now and 2040.

In the short-term, according to Dr. Rajeev Dhawan, Director of the *Economic Forecasting Center of Georgia State University*, the Atlanta metro area, after losing almost 129,000 jobs in 2009, will experience a moderate loss of 12,500 in calendar year 2010. In calendar year 2011, 42,500 job gains are expected, including 11,800 “premium” job gains. The recovery picks up in 2012 when 51,600 jobs (13,300 premium jobs) are expected to be created.

East Point Market Area Employment Projections

Overall employment growth in these submarkets is projected from Atlanta Regional Commission (ARC) employment growth forecasts, considered to be the most comprehensive and detailed database in the region. The projections are based on employment growth in a collection of ARC-defined Superdistricts that encompass the overall East Point Market Area, which will generate the bulk – approximately 90% - of the demand for office space that the City of East Point itself will draw upon. The baseline East Point Superdistrict employment estimates for 2009 (the most recent from ARC at that geographic level) are increased or reduced by the number of jobs estimated to be gained or lost in 2010 within major employment categories and adjusted to confirm to the county-level employment estimates recently released (February 2011) by ARC.

East Point Market Area: Change in Employment by Sector 2009-2016								
	CONST	MFG	TCU	WHOL	RETL	FIRE	SVCS	GOV
2009	4,409	14,959	66,896	11,866	11,744	33,778	87,987	36,072
2010	-18.7%	-5.9%	-0.9%	-4.2%	0.5%	-1.8%	0.8%	-1.5%
2011	-5.9%	0.8%	2.1%	1.7%	0.2%	2.4%	1.6%	-1.2%
2012	3.5%	2.6%	4.2%	2.3%	1.5%	3.0%	1.5%	1.2%
2013	4.0%	3.0%	3.0%	3.0%	2.0%	2.5%	3.0%	1.0%
2014	5.0%	4.0%	4.0%	4.0%	2.5%	3.0%	3.5%	3.0%
2015	5.0%	4.0%	4.0%	3.0%	3.0%	3.5%	4.0%	2.0%
2016	4.0%	3.0%	3.0%	2.0%	3.5%	4.0%	4.0%	2.0%
Stable	2.0%	0.5%	1.0%	0.5%	2.0%	2.0%	1.8%	0.5%

Sources: ARC, GSU EFC, Huntley Partners

Applying growth projections to the 2009 base numbers and adjusting for the recent ARC county-level estimates, employment in the East Point Market Area through 2036 is estimated as follows:

East Point Market Area: Employment									
Year	CONST	MFG	TCU	WHOL	RETL	FIRE	SVCS	GOV	TOTAL
2009	4,409	14,959	66,896	11,866	11,744	33,778	87,987	36,072	267,711
2011	3,373	14,189	67,686	11,561	11,826	33,952	90,155	35,105	267,847
2016	4,163	16,705	80,930	13,310	13,379	39,737	105,511	38,451	312,185
2021	4,596	17,127	85,058	13,646	14,771	43,873	115,355	39,422	333,848
2026	5,075	17,559	89,397	13,991	16,309	48,440	126,118	40,417	357,304
2031	5,603	18,002	93,957	14,344	18,006	53,481	137,884	41,438	382,715
2036	6,186	18,457	98,750	14,706	19,880	59,048	150,749	42,484	410,259

Sources: ARC, GSU EFC, Huntley Partners

3. East Point and Market Area Strengths

The extent to which national and regional economic conditions impact development and redevelopment at East Point will be determined largely based on whether current area strengths are built upon.

Strengths are those attributes that currently do, or potentially could attract people – consumer markets – to residential and commercial (retail, services, office, hotel) offerings within the community, city or, in this case, the East Point community. Strengths can be a source of new or additional consumers. They can attract entirely new consumer markets. They can provide the foundation for facilitating redevelopment – both private development and public improvements – that improves a community and the people and businesses within it.

The **Strengths** of the Market Area are numerous, as is reflected in both the Demographic Profile and the Market Demand analysis. Key strengths include the following:

- **Location:** The City enjoys a central location between two major employment centers – Downtown Atlanta and Atlanta Hartsfield-Jackson International Airport – and good proximity to the retail offerings and cultural amenities of the CBD.
- **Interstate Access:** East Point has very good access to Interstates 75, 85 and 20, as well as Atlanta’s I-285 perimeter highway and Langford Parkway (US 166).
- **Airport Proximity:** The East Point site’s proximity to Atlanta Hartsfield-Jackson International Airport represents a significant long-term strength with respect to residential and office development.
- **MARTA Stations:** The existence of the East Point MARTA Station is arguably the East Point Downtown area’s greatest long-term asset due to the link it provides to the airport, the Downtown-Midtown CBD, major Atlanta-area universities and residential concentrations along MARTA’s metro-wide fixed-rail system. Moreover, the Fort McPherson MARTA Station just north of the East Point city limits along Main Street allows even more convenient access as well as a valuable long-term linkage to the Fort McPherson redevelopment.

- **Extended Market Area:** Due to the interstate access and MARTA stations/links mentioned above, East Point’s residential, office and retail market areas are extended well beyond standard “draw areas.”

Collectively, these strengths make East Point extremely attractive as a development site, the current economic downturn notwithstanding.

III. Projected Demand in the East Point Market

The potential for new office, retail and residential development within the City of East Point does refer specifically to development demand that could occur within the boundaries of the East Point based purely on:

1. identification and definition of the market areas from which demand is generated
2. projected growth in demand within these market areas, and
3. share of the total market demand (share of market or “SOM”) that the City of East Point could reasonably be expected to attract.

1. Definitions of East Point Market Areas

The analyses of current and projected demographic profile as well as the potential market-driven development growth are based fundamentally on the market areas that the real estate market – office, industrial, retail and residential for purposes of this analysis – depend upon for support and growth. In this analysis, each industry type has a related market area.

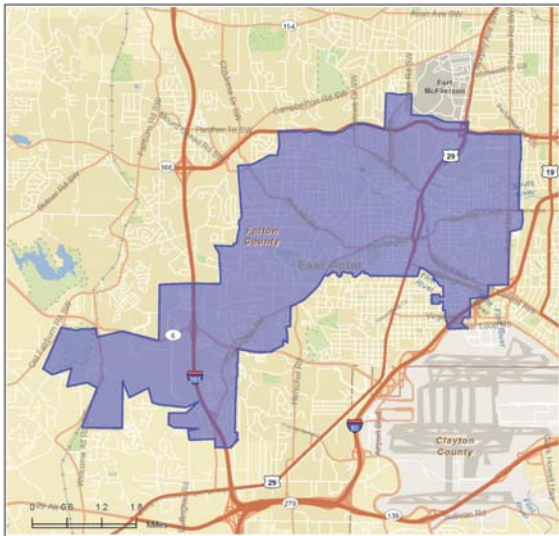


Figure 1: East Point Boundaries

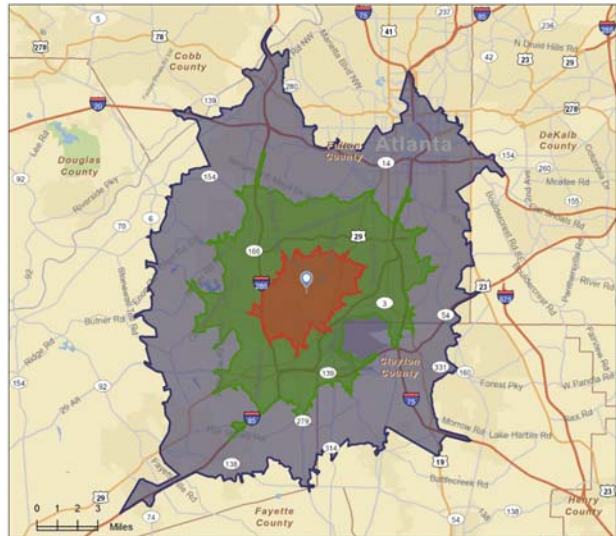


Figure 2: East Point “Drive-time” Market Area

Retail Demand: The City of East Point obviously is defined by its formal boundaries (Figure 1). The local resident market area – the basis for a major portion of retail demand – is often defined by major retailers by “drive-time” (Figure 2), the time it takes to get from a residence to the center point of the City. The drive-time map above shows the 5-, 10- and 15-minute drive times for the East Point market area. For

SF of Space per Employee	
<i>Profession</i>	<i>SF/Employ</i>
Prof/Business Services	356.0
FIRE	339.6
Wholesale/Retail	335.5
Manufacturing	318.3
Government	311.2
TCU	292.6
Construction	306.8

a. Office Space Demand Projections

Of the eight major employment categories, four generate demand for office space:

- **TCU** (Transportation, Communications, Utilities) – 20% of TCU employment generates demand for office space
- **FIRE** (Finance, Insurance, Real Estate)
- **SVCS** (Business and Professional Services)
- **GOV** (Government, including Education)

The other categories of employment, with the exception of Construction (**CONST**) also generate demand for space, but generally that space is considered Industrial Space. Retail (**RETL**) employment-generated space is considered in the Retail Demand section.

New Demand for Office Space within East Point Primary Market Area

Five-year gains in office-related employment in the Market Area are reflected below, with the majority of gains being in the Business and Professional Services. During the ten-year 2011-21 period, a total of 42,044 jobs are expected to be added to the East Point area economy, with an additional 55,684 added in the following 15-year period 2021-36, for a total increase of 97,728 employees in office-related industries in the area by 2036.

East Point Market Area: Office-related Job Gain/Loss							
Year	TCU*	FIRE	SVCS	GOV	TOTAL	CUMUL	ANN INC
2011							
2016	1,987	5,785	15,356	3,346	26,474	26,474	5,295
2021	619	4,136	9,844	971	15,570	42,044	3,114
2026	651	4,566	10,762	995	16,975	59,019	3,395
2031	684	5,042	11,767	1,021	18,513	77,532	3,703
2036	719	5,566	12,864	1,046	20,196	97,728	4,039

**15% of TCU requires enclosed Office space*

Based on space (square feet) requirements per employee within each job category (“SF/Employ”), employment gains within the overall East Point Office Market Area will generate the following demand for net new office space in five-year increments through 2036.

East Point Market Area: Office Space (SF) Demand Gain/-Loss							
Year	TCU	FIRE	SVCS	GOV	TOTAL	CUMUL	ANN INC
SF/Employ	293	340	356	311			
2011							
2016	581,241	1,964,604	5,466,529	1,041,284	9,053,657	9,053,657	1,810,731
2021	181,181	1,404,548	3,504,238	302,152	5,392,119	14,445,775	1,078,424
2026	190,423	1,550,735	3,831,179	309,782	5,882,118	20,327,893	1,176,424
2031	200,136	1,712,136	4,188,624	317,604	6,418,500	26,746,394	1,283,700
2036	210,345	1,890,337	4,579,418	325,624	7,005,723	33,752,117	1,401,145

Sources: ARC, GSU EFC, Huntley Partners

Thus, over the next five years, demand in the East Point Market Area for additional office space based on office-related employment growth is projected to total 9,053,657 square feet. An additional 5,392,119 square feet in demand will be generated in the five-year period 2016-21, for a total of **14,445,775** square feet over the next ten years. Through 2036, gross demand for office space within the East Point Market Area will total **33,752,117** square feet.

New Demand for Office Space within City of East Point

Based on reasonable assumptions regarding (1) the shares of market (SOM) that the City of East Point itself will attract of the total area employment growth driving demand for various types of office space and (2) the amount of “induced” demand that could be attracted from outside East Point’s basic market area, the projected demand for office-related space with the City is estimated at **1,645,781** square feet over the 10-year period 2011-21 and a total of **3,875,020** square feet over the 25-year period 2011-36.

East Point City: Office Space (SF) Demand Gain/-Loss							
Year	TCU	FIRE	SVCS	GOV	TOTAL	CUMUL	ANN INC
E Point SOM	5.0%	10.0%	11.0%	10.0%			
+Induced	10.0%	10.0%	10.0%	10.0%			
2011							
2016	31,968	216,106	661,450	114,541	1,024,066	1,024,066	204,813
2021	9,965	154,500	424,013	33,237	621,715	1,645,781	124,343
2026	10,473	170,581	463,573	34,076	678,703	2,324,483	135,741
2031	11,007	188,335	506,824	34,936	741,102	3,065,586	148,220
2036	11,569	207,937	554,110	35,819	809,434	3,875,020	161,887

Sources: ARC, GSU EFC, Huntley Partners

New Demand for Office Space within City of East Point Net of Excess Inventory

Based on the Excess Inventory analysis, there are currently 66,012 square feet of excess Office space within East Point – an amount of vacant office space that will need to be absorbed if East Point’s Office market is to return to stability, or “equilibrium.” Reducing demand by this amount yields a net 10-year demand within the City of East Point for Office space to a robust **756,878** square feet and 25-year demand to **1,871,498** square feet.

Total East Point Demand Net of Current Excess Inventory 2011-2036			
		Yrs 1-10	Total 25 Yrs
		2011-2021	2011-2036
Office (from employment growth)	SF =	756,878	1,871,498

b. Neighborhood Services Space Demand Projections

New Demand for Neighborhood Services Space within East Point

The increase in households within the various market areas will in itself create demand for space for business, professional (e.g. legal, medical, financial, real estate) and other services directed toward the local residential community. Based on an industry standard of demand for 15 square feet of such space per household, the total new Neighborhood Services space required in the City of East Point by 2021 will total **27,046** square feet over the next ten years and **70,588** square feet through 2036 based on the projected increase in households by 2036.

Demand for New Neighborhood Services within East Point					
Market Area	New Households	Local Office SF/HH	Total SF Demand	Share of Market	Total New SF Demand
East Point 2011-21	1,803	15	27,046	100%	27,046
East Point 2011-36	4,706	15	70,588	100%	70,588
Total SF Demand from New Household Formation: 2011-21					27,046
Total SF Demand from New Household Formation: 2011-36					70,588
<i>Each new household supports</i>		15	<i>SF of Neighborhood-serving office</i>		

While this type of space is typically considered office space, it is often found in smaller retail centers. However, since demand is based on the number of households in an area rather than trackable sales, it is not included in retail demand projections. It remains a separate class of space.

New Demand for Neighborhood Services Space within City of East Point Net of Excess Inventory

Based on the Excess Inventory analysis, there are currently 6,158 square feet of excess Neighborhood Services space within East Point. Reducing demand by this amount yields a net 10-year demand within the City of East Point for Neighborhood Services space to **20,887** square feet and 25-year demand to **64,430** square feet.

Total East Point Demand Net of Current Excess Inventory 2011-2036			
		Yrs 1-10 2011-2021	Total 25 Yrs 2011-2036
Neighborhood Services (from household growth)		SF = 20,887	64,430

c. Industrial Space Demand Projections

Of the eight major employment categories, four generate demand for industrial space:

- **CONST** (Construction) – 20% of TCU employment generates demand for enclosed industrial space, usually flex space, but also some basic warehouse space
- **TCU** (Transportation, Communications, Utilities) – 65% of TCU employment generates demand for enclosed industrial space, usually flex space office space
- **MFG** (Manufacturing) – including light manufacturing, assembly and processing
- **WHOL** (Wholesale) – primarily storage and distribution; some processing

East Point Market Area: Industrial-related Job Gain/-Loss							
Year	CONST*	MFG	TCU*	WHOL	TOTAL	CUMUL	ANN INC
2011							
2016	158	2,516	8,608	1,749	13,031	13,031	2,606
2021	87	422	2,683	336	3,528	16,559	706
2026	96	432	2,820	345	3,693	20,252	739
2031	106	443	2,964	353	3,866	24,118	773
2036	117	455	3,115	362	4,049	28,167	810

*20% of CONST requires enclosed Industrial space

65% of TCU requires enclosed Industrial space

ARC projects that **16,559** industrial-related jobs will be added to the East Point market area over the next ten years, with an additional **11,608** projected over the following 15 years for a total of **28,167** over the 25-year period 2011-2036.

New Demand for Industrial Space within Primary Market

Based on the average amount of space as measured in square feet that are required in these Industrial-related occupations, the demand in the East Point Market Area over the next ten years (to 2021) for additional industrial space based on industrial-related employment growth is projected to total **7,092,686** square feet. Through 2036, gross demand for industrial space within the East Point Market Area will total of **12,365,560** square feet.

East Point Market Area: Industrial Space (SF) Demand Gain/-Loss							
Year	CONST	MFG	TCU	WHOL	TOTAL	CUMUL	ANN INC
SF/Employ	307	318	293	336			
2011							
2016	242,361	800,769	3,874,937	586,793	5,504,860	5,504,860	1,100,972
2021	132,933	134,264	1,207,870	112,759	1,587,826	7,092,686	317,565
2026	146,768	137,655	1,269,484	115,606	1,669,513	8,762,198	333,903
2031	162,044	141,131	1,334,240	118,525	1,755,940	10,518,138	351,188
2036	178,910	144,694	1,402,300	121,518	1,847,422	12,365,560	369,484

Sources: ARC, GSU EFC, Huntley Partners

New Demand for Industrial Space within City of East Point

Based on the reasonable SOM assumptions regarding the amount of the total Market Area industrial demand that the City can attract, the projected demand for this type of space with the City is estimated at **590,543** square feet over the 10-year period 2011-21 and **993,080** square feet over the 25-year period 2011-36.

East Point City: Industrial Space (SF) Demand Gain/-Loss							
Year	CONST	MFG	TCU	WHOL	TOTAL	CUMUL	ANN INC
E Point SOM	10.0%	15.0%	5.0%	15.0%			
+Induced	10.0%	10.0%	10.0%	10.0%			
2011							
2016	26,660	132,127	213,122	96,821	468,729	468,729	93,746
2021	14,623	22,154	66,433	18,605	121,814	590,543	24,363
2026	16,145	22,713	69,822	19,075	127,754	718,297	25,551
2031	17,825	23,287	73,383	19,557	134,051	852,349	26,810
2036	19,680	23,875	77,126	20,050	140,732	993,080	28,146

Sources: ARC, GSU EFC, Huntley Partners

New Demand for Industrial Space within City of East Point Net of Excess Inventory

Based on the Excess Inventory analysis, there are currently 340,385 square feet of excess Industrial space within East Point. Reducing demand by this amount yields a net 10-year demand within the City of East Point for Neighborhood Services space to only **102,523** square feet and a total 25-year demand of only **404,425** square feet.

Total East Point Demand Net of Current Excess Inventory 2011-2036			
		Yrs 1-10	Total 25 Yrs
		2011-2021	2011-2036
Industrial (from employment growth)	SF =	102,523	404,425

Both the 2011-21 negative net demand, as well as the small 25-year net demand for industrial space appears to be the product of two basic factors: (1) the extremely high Warehouse-space vacancy rate in the East Point area and (2) the intense competition in the Airport/South Atlanta industrial market.

d. Retail Demand Projections

As described above, retail demand is based primarily on growth in households and income within a defined market area, not on projected employment growth within a Superdistrict or group of census tracts – although such employment growth is directly related to both household and income growth. Another source of short-term demand is “Unmet Demand,” as described below.

New Demand for Retail Space within Primary Market from Current Unmet Retail Demand

The analysis suggests that there is potential for increasing the share of retail expenditures made by East Point Market Area residents, who have increasing levels of disposable income. However, with respect to some major categories of goods, they have little retail in their immediate communities in which to spend that income.

The categories of retail that are particularly relevant to the study area include those that (1) exhibit a significant excess of demand over supply, resulting in a “leakage” of residents’ consumer spending out of the community, and (2) generally are found within taxable facilities – stores, restaurants, malls and other physical buildings.

The categories of retail that are particularly relevant to any community include those that exhibit a significant excess of demand over supply, resulting in residents spending out of their community. This

excess demand is known as “leakage” in that money that would be spent by an area’s residents on retail goods and services if they were available in the area itself is spent outside the area in communities where such retail does exist – i.e. consumer dollars “leak” out of a community due to a lack of retail supply.

The amount of unmet retail demand in the East Point Primary, Secondary and Tertiary market areas could support **326,738** square feet of new and/or repositioned retail within East Point’s 3-mile Primary Market area as reflected in the table below.

Potential New Demand for Retail Space within Primary Market From Current Unmet Demand: 2011-2021			
Primary Market Area		55,718	SF
Total Secondary Market Area	334,317		
Total Tertiary Market Area	776,949		
Into Primary Market Area from Secondary Market Area @	36%	119,122	SF
Into Primary Market Area from Tertiary Market Area @	20%	151,899	SF
Current Unmet Retail Demand in Primary Area		326,738	SF

The list of such major retail categories incorporated into the chart below identifies those categories that are most significant in assessing current unmet retail demand within the Primary (0-3 miles), Secondary (3-5 miles) and Tertiary (5-7 miles) Market Areas.

Retailers with Most Unmet Demand in East Point Market Area*								
Rank: Retailers with Most Unmet Demand	Gross Mkt Area Unmet Demand	GMA SOM	Net Demand	Sales PSF	Supportable Retail SF	# of Stores	Avg SF per Store	Examples**
1 Bldg Material, Lawn, Garden	\$ 58,824,138	22%	\$ 19,184,893	\$ 300	63,950	1	100,000	Home Depot, Lowes
2 Dept. Stores	\$ 57,225,385	25%	\$ 14,771,473	\$ 300	49,238	0	100,000	JC Penny, Sears
3 Full-service Restaurants	\$ 53,983,326	26%	\$ 14,298,445	\$ 350	40,853	5	7,500	Outback
4 Electronics & Appliances	\$ 55,202,438	22%	\$ 11,920,269	\$ 300	39,734	1	50,000	Frye's
5 Apparel & Accessories	\$ 43,412,069	26%	\$ 11,399,473	\$ 300	37,998	2	20,000	
6 HH Furnishings/Equipment	\$ 29,697,053	26%	\$ 6,477,551	\$ 300	21,592	1	30,000	Amer Signature Furn
7 Grocery Stores	\$ 30,398,738	28%	\$ 7,447,691	\$ 350	21,279	0	70,000	Publix, Kroger
8 Limited-service Eating	\$ 20,182,547	25%	\$ 5,651,113	\$ 350	16,146	6	2,500	Chipotle, Zaxbys
9 Special Food Services	\$ 15,255,954	26%	\$ 3,737,709	\$ 350	10,679	7	1,500	
10 Other Misc Store Retailers	\$ 10,407,847	50%	\$ 2,426,015	\$ 300	8,087	8	1,000	
11 Sports, Hobbies, Books, Music	\$ 7,025,903	23%	\$ 1,853,090	\$ 300	6,177	0	30,000	Barnes&Noble
12 Drinking Places	\$ 4,595,250	0%	\$ 1,822,876	\$ 350	5,208	2	3,000	Bar with limited menu
13 Health & Personal Care	\$ 3,329,588	33%	\$ 874,017	\$ 300	2,913	3	1,000	Beauty, Vitamins
14 Misc. General Merchandise	\$ 1,984,434	18%	\$ 347,276	\$ 300	1,158	0	200,000	Super Walmart, Target
15 Florists	\$ 655,614	40%	\$ 327,963	\$ 300	1,093	1	800	
16 Office Supply/Stationary	\$ 628,035	26%	\$ 131,887	\$ 300	440	0	10,000	Office Max/Depot
17 Beer, Wine, Liquor	\$ 296,957	21%	\$ 67,558	\$ 350	193	0	2,500	
Specialty Food Stores	\$ -	23%	\$ -	\$ 350	-	-	1,500	
Used Merchandise Stores	\$ -	0%	\$ -	\$ 300	-	-	1,000	

* "East Point Market" same as 3-mile Primary Market

** Examples of types of retailers, some of which are already in the market; not necessarily recommendations for the East Point area

"SOM": Share of Market = Percentage of Unmet Demand that the East Point Area can reasonably expect to attract

New Demand for Retail Space within Primary Market from Household Growth

Projected increases in population and households within the three East Point market areas are

particularly relevant to the retail demand analysis. Estimates of incremental demand over the 10-year 2011-21 period for retail and related services incorporate available demographic and income data, as well as growth projections over that 10-year timeframe.

Based on 2010-2021 new household growth and the increase in per-household disposable income, an additional **1,029,662** square feet of new retail offerings could be supported within the East Point by 2021 from new demand attracted from the Primary, Secondary and Tertiary Market Areas.

Potential New Demand for Retail Space within Primary Market From Household and Income Growth: 2011-2021		
Primary Market Area	365,087	SF
Secondary Market Area	306,653	SF
Tertiary Market Area	357,922	SF
Retail Demand from Market Area Growth	1,029,662	SF

Anticipated increases in demand for specific types of retail in the East Point based on its potential Share of Market within each of its retail market areas reveal that new demand over the next ten years will be sufficient to support additional retail stores in all major retail categories, as indicated in the table below.

Additional Retail SF Demand from Household Growth: 2011-21 Total Market Area (0-7 miles)					
Selected Retail Categories	Total Area Additional Spending	Area Share of Sales			
		Share	Additional Spending	Sales Per SF	Additional SF
Food Away from Home	\$ 213,300,095	30%	\$ 64,934,413	\$ 350	185,527
Food at Home	494,404,665	30%	150,690,277	350	430,544
HH Furnishings/Equipment	110,371,094	28%	30,944,078	300	103,147
Computers & Accessories	14,108,991	23%	3,306,289	300	11,021
TV/Video/Sound Equipment	82,347,960	28%	23,124,424	300	77,081
Entertainment/Rec - Stores	201,676,134	16%	32,993,966	300	109,980
Apparel & Accessories	110,604,107	30%	33,708,572	300	112,362
Vehicle M & R	60,309,683	0%	-	300	-
SELECTED RETAIL TOTALS	\$ 1,287,122,730	26%	\$ 339,702,020	\$ 330	1,029,662

Retail categories of particular relevance to the East Point include the following:

- **Supermarkets/Grocery Stores** (as reflected in “Food at Home” expenditure projections) = 430,544 SF additional demand
- **Restaurants** (as reflected in “Food Away from Home” expenditure projections) = 185,527 SF additional demand
- **Entertainment & Recreation** = 109,980 SF additional demand
- **Household Furnishings and Equipment** = 103,147 SF additional demand
- **Apparel and Accessories** = 112,362 SF additional demand

New Retail Demand from Area Employees

Area employees – primarily daytime employees – represent an additional source of significant demand for retail in the East Point. Average annual retail expenditures by daytime employees as estimated by the International Council of Shopping Centers (ICSC) and the Urban Land Institute (ULI) equal approximately \$3,200 per employee, with approximately 50% being spent within the East Point Market. Based on the projected growth of employment within the East Point, new (additional) retail demand based on-site employment and per-employee retail expenditures is estimated at **48,145** square feet.

Additional Retail SF Demand from Area Job Growth: 2011-21 0-3 mile Market Area					
Selected Retail Categories	Total Area Additional Spending	Area Share of Sales			
		Share	Additional Spending	Sales Per SF	Additional SF
All Retail: Current Employees	\$ 14,185,631	65%	\$ 9,220,660	\$ 330	27,948
All Retail: New Area Employees	\$ 10,251,083	65%	\$ 6,663,204	\$ 330	20,197
TOTALS	\$ 24,436,714	65%	\$ 15,883,864		48,145

Total New Demand for Retail Space 2011-2021 within the Primary Market

Based on the above assumptions and calculations, by 2021 there will be enough new demand for store-based retail from (1) current unmet demand, (3) household and income growth within the East Point 7-mile market area and (3) growth in employees within the East Point 3-mile Primary Market Area to support **1,404,545** square feet of additional retail space.

Total New Demand 2011-2021 for Retail Space within Primary Market Area	
Retail	
From Current Unmet Demand	326,738 SF
From New Area Employees	48,145 SF
From All Market Areas 10-year Growth	1,029,662 SF
Total Retail	1,404,545 SF

New Demand for Retail Space within City of East Point

Based on the supportable assumption that approximately 35% of the total retail demand within the 3-mile Primary Market is contained within the City of East Point, demand for retail within the city from all sources could support an additional **702,272** square feet of retail over the 10-year 2011-21 period and a total of **1,378,021** square feet through 2036.

Total Demand for Space/Units within East Point 2011-2036		
	<i>Yrs 1-10</i>	<i>Total 25 Yrs</i>
	2011-2021	2011-2036
Retail From Current Unmet Demand	163,369	163,369
From Employee/Visitor Markets	24,073	54,258
Retail From Market Area Household & Income Growth	514,831	1,160,394
Retail *	SF = 702,272	1,378,021
<i>*2022-2036 Retail AGR =</i>		1.52%

New Demand for Retail Space within City of East Point Net of Excess Inventory

While the total demand for new retail space over the next ten years is estimated at 702,272 square feet, 11,970 square feet of “excess” vacant retail space is estimated to exist currently within the City of East Point. It is assumed that this excess supply – a very small amount – will be absorbed over the next five years so that the retail market can return to equilibrium by 2016 even as new retail space is developed.

Total East Point Demand Net of Current Excess Inventory 2011-2036		
	<i>Yrs 1-10</i>	<i>Total 25 Yrs</i>
	2011-2021	2011-2036
Retail	SF = 690,302	1,366,051

Thus, the net demand for new retail development over the next ten years (2011-2021) is **690,302** square feet. This same amount is deducted from the 25-year demand projections, resulting in an estimated **1,366,051** square feet of demand for new retail development by 2036.

e. Housing Demand Projections

New Demand for Housing with the City of East Point

Housing demand for a specific development/redevelopment site is projected according to the same basic approach as retail demand: a likely market area is defined, growth within that market area is projected, the site’s share-of-market assumption is made and housing preferences (ownership or rental, single-family or multi-family unit, etc.) are applied to determine the number, types and timing of potential new demand for housing. In the case of a standard geographic unit such as a city, county or state, projections are made using basic census data historical and trend analyses.

The projections of household increases as well as the preferences for types of housing contained in the Demographic Profile section of this report are incorporated into the projections of demand for new housing units within the City of East Point. The increase in total demand for housing units over any given period of time is assumed to be the same as the projected increase in households over that same time period.

Summary of Demand for Households within City of East Point		
	2011-21	2011-36
2010 Total Households: City of East Point	12,007	12,007
2021 Total Households: City of East Point	13,810	
2036 Total Households: City of East Point		16,713
Total Increase	1,803	4,706
Ow ned Housing Preference	51%	51%
Single-Family Detached	85%	85%
Tow nhouse/Condo	15%	15%
Rented Housing Preference	49%	49%
Total Increase in Types of Households		
Ownership Households	925	2,413
Single-Family Detached	786	2,051
Tow nhouse/Condo	139	362
Rental Households/Multifamily Apartments	879	2,293

Sources: ESRI, USBOC, Huntley Partners

Over the next ten years, a demand for a total increase of 1,803 housing units is projected within the City, of which 925 (51%) are anticipated to be owned units and 879 (49%) are anticipated to be rental units. Over the 25-year period 2011-36, a demand for a total of 4,706 new housing units is anticipated, with 2,413 being ownership units and 2,293 being rental units. Of the ownership units, 2,051 are anticipated to be single-family detached housing and 362 are anticipated to be townhouse or condominium units.

Net New Demand for Housing with the City of East Point

As with net demand for additional office, industrial and retail space, the total demand for new housing units must take into account the amount of excess housing inventory that is currently on the market. There appears to be approximately 15 months supply of housing currently on the East Point, or more than double what would be available in a healthy, stable market. Given this assumption, approximately 60% (conservatively) of the vacant housing units in East Point can be considered “excess inventory” that should be absorbed over the next five years as the East Point housing market moves toward stability.

Of the 3,892 identified vacant housing units in as of year-end 2010, approximately 60% - or 2,335 units – can be considered excess inventory that should be included in any housing stock involved in meeting the demand for new housing in East Point. Absent specific current data on either the types of housing represented by the vacant units or the amount of vacant units being offered for sale or rent, the following assumptions are incorporated into a breakdown of current excess units:

- 100% of the excess units are on the market for ownership or rental
- excess inventory is evenly split between for-sale and for-rent units due to a weaker for-sale market even though current preferences reflected in occupied housing units in East Point are 51% ownership and 49% rental
- excess single-family detached and townhouse ownership units reflect American Community Survey preferences

- once excess inventory is absorbed, demand for new housing units will equal projected household increases – i.e. market stability will be maintained once it is achieved through excess inventory absorption

Incorporating these assumptions, the net demand for housing within the City of East Point is reflected in the following table.

Summary of Demand for Households within City of East Point Net of Excess Inventory		
	2010	
2010 Total Vacant Units	3,892	
Excess Vacant Units %	60% *	
Total Excess Vacant Units 2010	2,335	
% of Vacant Units: Ownership	50%	
% Single-Family Detached	88%	
% Townhouse/Condo	12%	
% of Vacant Units: Rental (Apartments)	50%	
Excess Vacant Units: Ownership	1,168	
Single-Family Detached Units	1,027	
Townhouse/Condo Units	140	
Excess Vacant Units: Rental (Apartments)	1,168	
Projected Demand Net of Excess Units	2011-21	2011-36
Ownership Households	(243)	1,245
Single-Family Detached	(242)	1,024
Townhouse/Condo	(1)	222
Rental Households/Multifamily Apartments	(289)	1,125
Total Net Demand: Housing Units	(532)	2,371

**15 month supply on market vs "stable" 6 month supply*

Over the next ten years, there will be a net negative demand in the City of East Point of **-532** housing units. Of these, **-243** will be ownership units and **-289** will be rental units. Of the **-243** ownership units, **-242** will be single-family detached units. Townhouse and condominium unit demand will be effectively zero through 2021.

Over the 25-year period 2011-2036, there will be demand for a total of **2,371** new units, of which **1,245** will be for owned units (1,024 single-family detached and 222 townhouse/condo units) and **1,125** will be for rental units (assumed to be overwhelmingly multifamily units – i.e. apartments).

3. Total Demand for Retail, Office and Residential Development

Based on the analyses above, the East Point could experience new development in the amounts given below over an initial 10-year 2011-2021 period, as well as the total 25-year period 2011-2036. Several caveats bear repeating, however:

- In all markets – office, retail and residential – there are relatively large “excess” inventories. For purposes of converting total area demand into feasible, demand-supported new development,

one must assume that at least a sizeable portion of currently vacant commercial space or dwelling units will absorb an amount of new demand over the next ten years approximately equal to 50-60% of the excess vacant inventories in the East Point Market Area.

- Some products – demand notwithstanding – will not be built/developed in the East Point due to (1) the lack of available land for the type of product envisioned and/or (2) community policies which put constraints on such development. An example of the first is single-family detached residential homes, due primarily to the amount of land each requires. An example of the second is multi-family rental units, apartments not being viewed favorably in communities where rental units appear to dominate ownership units.

a. Total Primary Market Demand

Based on household, income and employment growth, total projected demand for retail, office and residential product within retail and residential 3-mile Primary Market, as well as the office and industrial East Point market areas, the amount of development that could be supported within those respective Primary and Superdistrict markets over the next ten years (2011-2021) is summarized in the following table.

Total New Demand 2011-2021 for Space/Units within Primary Market Area		
Retail		
From Current Unmet Demand	326,738	SF
From New Area Employees	48,145	SF
From All Market Areas 10-year Growth	1,029,662	SF
Total Retail	1,404,545	SF
Neighborhood Services (from household growth)	27,046	SF
Office (from employment growth)	1,645,781	SF
Industrial (from employment growth)	590,543	SF
Residential: Single Family Detached Houses	3,688	Units
Residential: Townhouses	347	Units
Residential: Multi-family Rental/Apartments	5,933	Units
Total Residential Units: All Types	9,968	Units

b. Total Demand within the City of East Point

Based on household, income and employment growth, total projected demand for retail, office and residential product within the City of is summarized in the following table.

Total Demand for Space/Units within East Point 2011-2036			
		Yrs 1-10	Total 25 Yrs
		2011-2021	2011-2036
Retail From Current Unmet Demand		163,369	163,369
From Employee/Visitor Markets		24,073	54,258
Retail From Market Area Household & Income Growth		514,831	1,160,394
Retail *	SF =	702,272	1,378,021
Neighborhood Services (from household growth)	SF =	27,046	70,588
Office (from employment growth)	SF =	822,890	1,937,510
Industrial (from employment growth)	SF =	442,907	744,810
Residential: Single Family Detached Houses	Units =	786	2,051
Residential: Townhouses/Condos	Units =	139	362
Residential: Multi-family Rental/Apartments	Units =	879	2,293
Total Residential Units: All Types	Units =	1,803	4,706

*2022-2036 Retail AGR = 1.52%

c. Excess Inventory within East Point

“Excess inventory” is defined as the portion of vacant supply that is in excess of a “normal” amount of vacant supply that one would find in a stable, balanced community where supply and demand are in relative equilibrium – is reflected in the following table. Based on current levels of vacant retail, office and industrial space, as well as the number of months of housing unit supply on the market, the City has an overabundance of existing retail, neighborhood services, office and industrial space, as well as residential units as indicated in the far-right column in the table below.

Current Excess Inventory within East Point				
City as % of Total Submarket:	Retail =	30%		
	Neigh Services =	100%		
	Office =	10%		
	Industrial =	5%		
		City Vacant SF	Vac %	Excess @
Retail: Stable Vacancy @ 8%		188,148	8.5%	6%
Neighborhood Services: Stable @ 9%		22,368	12.4%	28%
Office: Stable @ 10%		170,875	16.3%	39%
Industrial: Stable @ 8%		684,110	15.9%	50%
Residential		City Vacant Units		Excess Units
Total Vacant Units		3,892		60%
SFD % of Vacant Units		44%		1,027
Townhouses % of Vacant Units		6%		140
Rental % of Vacant Units		50%		1,168

d. Net 10-year and 25-year Demand within East Point

Taking into account the excess inventory that current exists in the East Point’ market area across product categories, the net demand for new retail and office space is over the next ten years (2011-2021) is relatively high, particularly with respect to retail. Over the 25-year period through 2036, that demand becomes even more significant.

Total East Point Demand Net of Current Excess Inventory 2011-2036			
		Yrs 1-10 2011-2021	Total 25 Yrs 2011-2036
Retail	SF =	690,302	1,366,051
Neighborhood Services (from household growth)	SF =	20,887	64,430
Office (from employment growth)	SF =	756,878	1,871,498
Industrial (from employment growth)	SF =	102,523	404,425
Residential: Single Family Detached Houses	Units =	(242)	1,024
Residential: Townhouses/Condos	Units =	(1)	222
Residential: Multi-family Rental/Apartments	Units =	(289)	1,125
Total Residential Units: All Types	Units =	(532)	2,371

IV. Comprehensive Plan Implications

The above assessment of current market conditions and demand trends impacting East Point lead to several observations related to future development in the City and the policies that may shape that development.

1. Demand Trends

Residential: The lingering impact of the recent recession and current slow recovery is most keenly felt in the housing industry. Specifically, East Point’s stock of vacant housing is quite large and likely to take several years to achieve any degree of normality, or equilibrium. Demand for all types of housing is projected to remain negative over the next ten years – i.e. there is more than enough excess housing inventory to satisfy demand through 2021 for both single-family detached and multi-family attached housing.

Industrial: Considering both the current amount of excess industrial inventory in East Point as well as ARC’s employment projections for jobs in industrial occupations in the East Point area, demand for new industrial space in East Point will be minimal not only over the next ten years, but also over the next 25. While there remains the possibility – perhaps even the probability – that the definition of “industrial space” will broaden to include facilities for emerging “new industries” that are geared toward biomedical and information technologies, creating jobs that will be highly valued in any urbanized community, “old industries” in East Point are rapidly disappearing.

Retail: Demand for new retail will be strong in East Point and could begin to generate new retail businesses and perhaps new development in the City as early as 2012-2013. Current unmet retail demand of 326,700 square feet is geared toward the type of Power Center and Community Shopping Center retailers that tenant Camp Creek Marketplace, and that center will likely move to attract that demand as the ability of mainstream national and regional retailers to expand improves with the consumer economy over the next 2-3 years. However, there also appears to be both current unmet and growing demand for dining and “non-box” general merchandise stores that are found more often in urbanized communities and city/town centers.

Office: Perhaps the biggest area of new development for East Point based on projected demand is space for professional and business services – generally Class A office and new Class B office park multi-tenant space. Camp Creek Trade Center will continue to provide opportunities for single-user build-to-suit office space as well as “new industrial” space mentioned above. It may move to attract multi-tenant leased office buildings and, in doing so, meet the anticipated demand for Class B office park – i.e. suburban – space. However, demand should also generate activity in the existing warehouse-conversion facilities in the Downtown/MARTA district as well as the development of new office buildings – or office space in mixed-use facilities – in the city’s center.

2. Potential Major Area and Regional Developments

MARTA: The East Point MARTA Station remains a development anchor whose potential has only been partly realized. As both market demand as described above and other major area/regional developments as described below create a foundation for more urbanized transit-oriented development, the MARTA station should become more of an access catalyst for development in downtown East Point.

Fort McPherson Redevelopment: The immediate negative impacts of the closing of Fort McPherson will eventually be dwarfed by the redevelopment of the 500-acre site. The current redevelopment Master Plan calls for a mixed use development combining life sciences-based research, medical and standard office space; urban-oriented retail and dining; historic live-work options; and a range of housing types including small-lot single-family detached housing, townhomes, condominiums and multi-family rental units. As both a residential and employment center, Fort McPherson could significantly add to the redevelopment potential of the portion of the Main Street Corridor stretching from the East Point city limits at Fort McPherson itself south into the downtown area.

Commuter and/or Intercity Rail: In 7-10 years, the Atlanta-to-Macon leg of intercity rail should be completed. Regardless of whether it is a shorter commuter-rail leg or an intercity leg to Macon, this passenger rail operation will increase significantly the importance of the East Point MARTA station and its entry into the downtown area.

Princeton Lakes and Camp Creek Marketplace: Both the Princeton Lakes residential-and-office community and, to a somewhat lesser extent, the Camp Creek Marketplace have room for expansion to accommodate the residential, office and retail demand projected in this assessment. Both will continue to attract traditional residential and retail tastes and price points. Their very presence as major activity nodes, however, should facilitate demand for more urbanized residential and retail offerings in the Main Street Corridor, particularly the downtown/MARTA station area.

Airport Expansion and Connections: Continued on-Airport expansion (e.g. the International Terminal), planned transit/transportation systems (e.g. Automated People Mover system) linking the airport to surrounding communities, the “Aerotropolis” Hapeville redevelopment, and the convention/conference hub development in College Park present East Point with opportunities rather than (in the case of Hapeville and College Park’s initiatives) competition. East Point’s active pursuit – through zoning, incentives and marketing – of these same new markets of businesses, residents and consumers could provide the City with the ability to tap into the strong demand that is projected for the area over the next 10-25 years.

3. Development Policy Implications

Higher-density Residential: Current (and historical) higher appraised/assessed values, projected demand and housing-type preferences, and site availability all point to a policy preference for higher-density residential, although “higher-density” would actually mean anything higher than single-family detached units.

Office Base: Zoning should encourage the development of office space as mixed-use components as well as stand-alone buildings. East Point needs to tap into the strong professional and business services demand projected in the area with a mixture of incentives and marketing geared specifically at building the foundation for an office base that is currently lacking.

Downtown/Urban Center Retail: Retail demand generally and unique, urbanized retail and dining specifically is strong. As with office demand, this is a market that shows tremendous potential but could be attracted away from East Point by nearby competing communities.

Mixed Use Development: All demand indicators point to mixed use development, with its appeal to both potential residents and potential businesses seeking to take advantage of East Point’s location strengths, which emphasize urban environments, tastes and pricing.

Corridor Development: The Main Street Corridor should be zoned and incentivized for mixed use development that excludes traditional industrial uses of any kind but allows an urbanized, higher-density mix of residential, office and retail. No industrial zoning should occur within this corridor, particularly the northern segment linking downtown East Point to Langford Parkway and the Fort McPherson redevelopment.

1 **FULTON COUNTY, GEORGIA**

2 **CITY of EAST POINT**

3
4 **A RESOLUTION**

5 **TRANSMITTING THE CITY OF EAST POINT'S MISSION 2036 COMPREHENSIVE**
6 **PLAN UPDATE: COMMUNITY ASSESSMENT AND PUBLIC PARTICIPATION PLAN**
7 **TO THE GEORGIA DEPARTMENT OF COMMUNITY AFFAIRS FOR REVIEW AND**
8 **APPROVAL**

9
10 **CASE NO: 2011M-002-09**

11
12 *WHEREAS, the Georgia Planning Act of 1989 established the Minimum Planning Standards and*
13 *Procedures for Local Comprehensive Planning; and*

14
15 *WHEREAS, the Georgia Planning Act requires that local governments prepare a Comprehensive Plan*
16 *Update; and*

17
18 *WHEREAS, the City of East Point has completed its Community Assessment component and Public*
19 *Participation Plan for review and approval; and*

20
21 *WHEREAS, the City of East Point held a Public Hearing on September 19, 2011 at its regular City*
22 *Council Meeting at 1526 East Forrest Avenue – Suite 400 in East Point, Georgia; and*

23
24 *WHEREAS, the Atlanta Regional Commission is the reviewing agency for local comprehensive plans*
25 *on behalf of the Georgia Department of Community Affairs.*

26 **NOW BE IT RESOLVED BY THE CITY COUNCIL OF EAST POINT** that the Mission 2036 Comprehensive Plan
27 Update: Community Assessment and Public Participation Plan be submitted to the Atlanta Regional Commission
28 on behalf of the Georgia Department of Community Affairs for review and approval per the requirements of the
Georgia Planning Act of 1989.

Public Hearing: 9-19-11

SO PASSED AND APPROVED this 19 day of Sept. 2011.

SPONSORED BY:

Earnestine Pittman

Earnestine Pittman, Mayor
City of East Point, Georgia

APPROVED AS TO FORM:

Nina R. Hickson

Nina Hickson, City Attorney

ATTEST:

Agnes Beltran-Goodwine

Agnes Beltran-Goodwine, City Clerk

