

Appendix 1

Technical Memorandum #1: Assessment of Employment Service Needs

This Technical Memorandum provides a brief overview of community employment services and training needs in the South Green neighborhood and identifies key opportunities for alleviating those needs.

The H.A.R.T. Job Center has reviewed the skills development and training needs of lower income residents of its service area, including the South Green neighborhood. Based on the review of 860 clients, mostly AFDC recipients, H.A.R.T. has concluded that the community's key training requirements include: 60% need English as a Second Language; 55% have a less than sixth grade reading level, and 65% need job training.

The South Green NRZ Committee has identified the low level of educational attainment and the high level of unemployment as a key neighborhood problem. Educational attainment in the South Green neighborhood is similar to the overall levels of educational attainment in the City of Hartford. Only 63% of South Green adults over the age of 25 have completed high school; 15% of South Green adults have received a bachelors or more advanced college degree. These comparatively low levels of educational attainment were reflected in a 1990 unemployment rate of 11% of the neighborhood work force, again paralleling the overall Hartford conditions.

Access for area residents to training and support services designed to meet these employment and training needs is particularly difficult because of the low percentage of automobile ownership by South Green residents. As of the 1990 census, nearly 53% of South Green households did not own an automobile compared to the 39% of all Hartford households that did not own a vehicle.

Overcoming these difficulties provides the potential for exploiting a key neighborhood resource. South Green has a large base of young residents who, with proper training, can become important elements of the region's future workforce. The neighborhood's excellent access to some of the region's largest employers as well as its roadway access to the greater Hartford area provide well-trained neighborhood residents with numerous employment opportunities.

The South Green NRZ Committee has identified this issue as a key objective: to create workforce skills programs and employment opportunities for existing and future South Green residents. This effort is expected to include tax credits for businesses hiring area residents and job trainers, the development of a job skills center in the neighborhood, the extension and expansion of public transportation to allow access to new jobs and the expansion of subsidized day care and child development facilities. An immediate objective is to increase the availability of adult basic education, English as a second language, and skill training services in the community.

Some education and training resources now exist within the community to meet these needs. These resources include programs in Adult Basic Education (ABE) and English as a Second Language (ESL) offered at the Bulkeley School on Wethersfield Avenue by the City of Hartford Public Schools and additional employment skills training offered by Guakia, Inc. at 335 Wethersfield Ave.

However, the City of Hartford Public Schools has indicated that its preference would be for its adult-oriented programs to be housed away from its traditional primary and secondary school functions. The District has expressed interest in relocating the adult programs currently administered from the Bulkeley School, possibly to the Academy of Performing Arts complex on Wethersfield Avenue, which will be partially vacated in 1999. This effort could be undertaken by the City of Hartford Public Schools leasing space from the Capitol Region Education Council (CREC). The South Green Neighborhood Revitalization Zone Committee could coordinate program development with the City of Hartford Public Schools to assure that the curriculum offered meets the educational and employment training needs of South Green's adult population.

Appendix 2

Market Conditions

An assessment was completed of development market conditions in the South Green NRZ area including retail trade, other commercial uses, and housing market conditions.

Retail Market Analysis

A retail market analysis was conducted by Urban Partners to describe the current performance of South Green area retailers and to identify opportunities for the further development of retailing in the area based on the capture of area residents' retail purchases.

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

All retail establishments in the area were classified by type of business according to the principal lines of merchandise sold, the usual trade designation, estimated square footage and level of sales. All establishments are classified according to the numeric system used by both government and industry practice -- the Standard Industrial Classification of Establishments (SIC). Banks and other financial establishments are excluded from the assessment because banking activities -- deposits, loans, etc. -- cannot be added to sales volume data for other types of retail establishments.

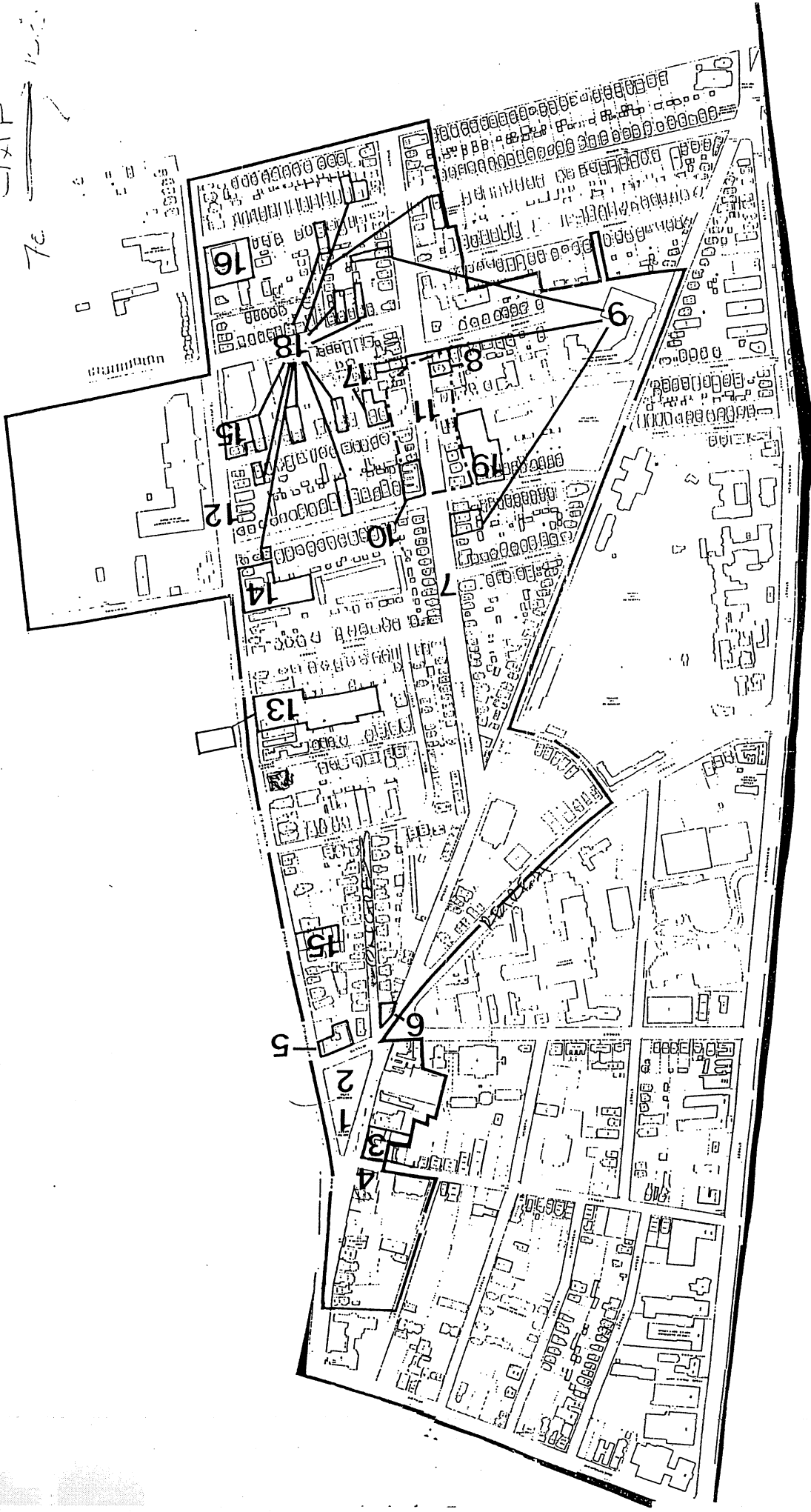
The term "retail store sales" is defined in the analysis to include the sales by establishments which are normally found in pedestrian-oriented retail shopping areas. This definition excludes the sales of automobile dealerships and repair facilities, service stations, fuel oil dealers and non-store retailing.

The above definition of retail store sales differs from that of conventional secondary data sources, such as the Bureau of the Census, which include in their data the sales of automobile dealerships and non-store retailing operations and do not include the sales of service establishments such as barber shops, beauty salons and dry cleaners.

Retail Trade Area

The retail trading area is that area from which most of the retail district's sales are derived. For the South Green area, this area ranges generally from Sheldon and Buckingham Streets on the north to Barker and Meadow Streets on the south and from Washington Street on the west to just east of Colt Park. (see Map 5).

Map 5
South Green NRZ Strategic Plan Elements



Trade Area Retail Supply

To identify and characterize shopping opportunities available to trade area residents, Urban Partners completed an inventory of all retail business establishments located within the South Green retail trading area. The results of this inventory, in terms of characterization of retail type, location and number, is included as Appendix 1 to this document. As **Table 2** indicates, there are currently 74 retail businesses offering goods and services located in the retail trading area. These businesses occupy an estimated 110,000 SF of gross leasable area (GLA). We estimate that these 74 retail stores generate \$23 million in sales annually.

Convenience goods are those items that individuals typically buy in locations convenient to their home or work. Shopping and other retail goods include apparel, furniture, books, CDs, cards, gifts, jewelry, plants and garden supplies, hardware, lumber, auto supplies, etc. Most of the South Green retail businesses provide convenience goods and services (46 stores), including 23 groceries and convenience stores and 19 restaurants and bars. The area's 17 shopping and other retail goods establishments provide a very scattered array of goods. In these areas, there are very few retail categories in which multiple stores exist, severely hindering the ability of consumers to comparison shop for goods within the district. Interestingly, the area contains no drug stores or laundromat or dry cleaning establishments.

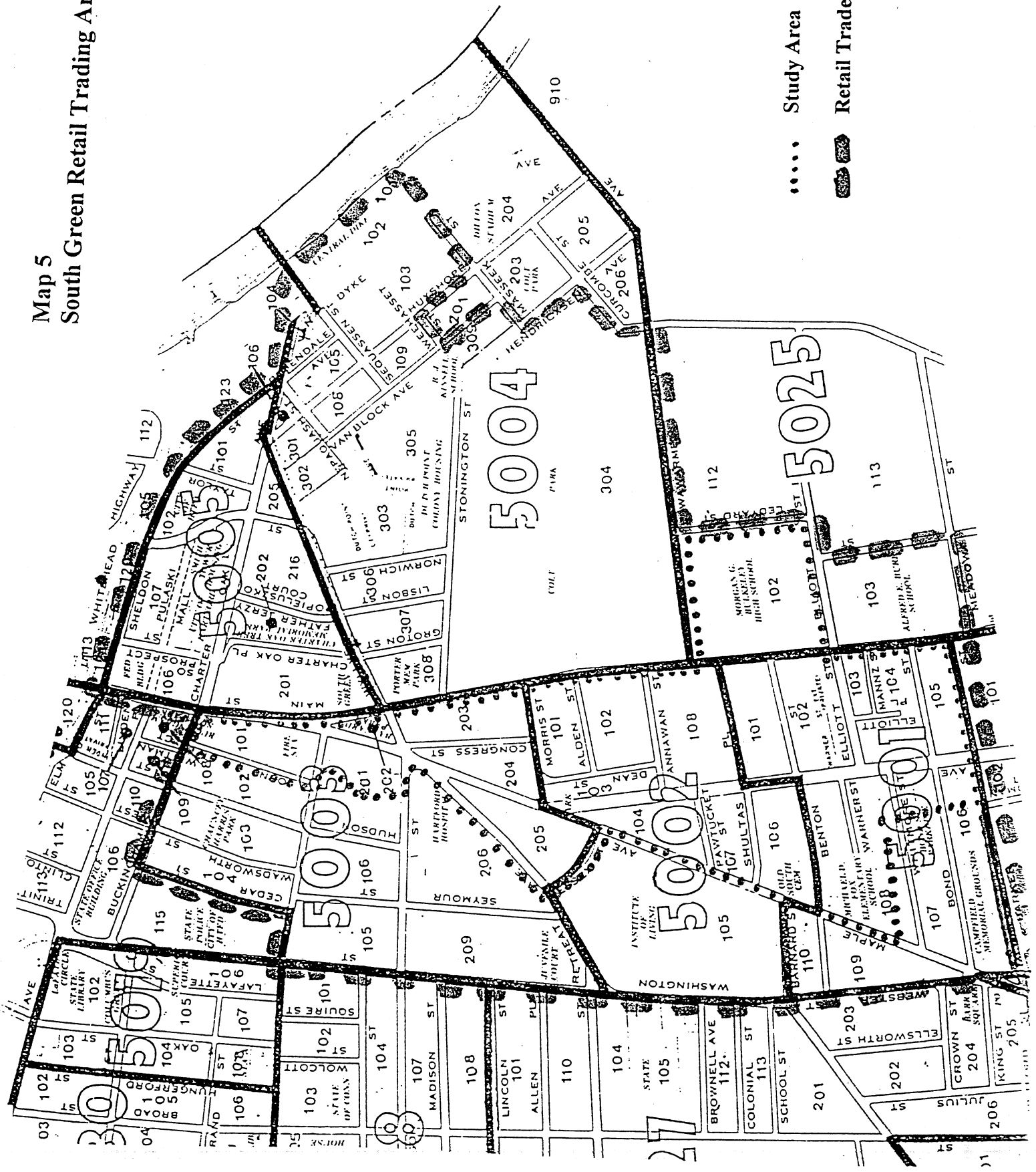
Trade Area Retail Demand

Based on 1990 census data, the South Green retail trading area has a population of approximately 13,000. We have adjusted this population down to 11,669 based on the U.S. Census Department's projection that the current City of Hartford population is 11.1 percent less than it was in 1990. The total 1997 income of this area (using 1990 census income data adjusted for inflation) is approximately \$150 million. Using information about the retail spending behavior of Hartford area residents, as compiled by *Sales and Marketing Management*, we estimate that the primary trade area's population spends approximately \$62 million on retail goods annually, of which \$32 million is spent on convenience goods, \$28 million is spent on other shopping and retail goods and \$2 million is spent on personal services such as laundry, dry cleaning and hair care (see **Table 3**).

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

In analyzing the retail market demand within a portion of a larger metropolitan area, these behavioral observations translate into a series of analytical rules-of-thumb:

Map 5
South Green Retail Trading Area



..... Study Area

▬ Retail Trade Area

Table 2
Estimated Retail Store Performance
South Green Trade Area Retail Businesses - 1997

| RETAIL CATEGORY | No. of Stores | S.F. GLA | Retail Sales (\$1000) | Sales /SF | Pct. of Stores | Pct. of GLA | Pct. of Sales |
|---|---------------|----------|-----------------------|-----------|----------------|-------------|---------------|
| TOTAL | 74 | 109,900 | \$22,998 | \$209 | 100.00 | 100.00 | 100.00 |
| CONVENIENCE GOODS--TOTAL | 46 | 74,800 | \$18,340 | \$245 | 62.16 | 68.06 | 79.75 |
| 5411--Convenience Stores | 20 | 25,300 | \$6,284 | \$248 | 27.03 | 23.02 | 27.32 |
| 5412--Supermarkets | | | | | 0.00 | 0.00 | 0.00 |
| 5412--Grocery Stores | 3 | 12,500 | \$4,800 | \$384 | 4.05 | 11.37 | 20.87 |
| 5423--Meat/Fish Stores | | | | | 0.00 | 0.00 | 0.00 |
| 5431--Fruit & Vegetables | | | | | 0.00 | 0.00 | 0.00 |
| 5441--Candy & Nuts | | | | | 0.00 | 0.00 | 0.00 |
| 5462--Bakeries | 1 | 2,000 | * | * | 1.35 | 1.82 | 0.00 |
| 5499--Other Speciality Foods | | | | | 0.00 | 0.00 | 0.00 |
| 5921--Liquor & Beer Distributors | 3 | 3,700 | \$710 | \$192 | 4.05 | 3.37 | 3.09 |
| 5812--Restaurants and Fast Food | 16 | 26,300 | \$5,562 | \$211 | 21.62 | 23.93 | 24.18 |
| 5813--Bars and Lounges | 3 | 5,000 | \$584 | \$117 | 4.05 | 4.55 | 2.54 |
| 5913--Drug Stores/Pharmacies | | | | | 0.00 | 0.00 | 0.00 |
| SHOPPING GOODS--TOTAL | 10 | 15,900 | \$2,562 | \$161 | 13.51 | 14.47 | 11.14 |
| 5311--Department Stores | | | | | 0.00 | 0.00 | 0.00 |
| 5332--Other General Merchandise Stores | 1 | 1,800 | * | * | 1.35 | 1.64 | 0.00 |
| 5391--Warehouse Clubs | | | | | 0.00 | 0.00 | 0.00 |
| 5392--Catalog Showrooms | | | | | 0.00 | 0.00 | 0.00 |
| 5611--Men's Apparel | | | | | 0.00 | 0.00 | 0.00 |
| 5621--Women's Apparel | | | | | 0.00 | 0.00 | 0.00 |
| 5631--Women's Accessories & Specialities | | | | | 0.00 | 0.00 | 0.00 |
| 5641--Children's Apparel | | | | | 0.00 | 0.00 | 0.00 |
| 5651--Family Apparel; Shoes | 2 | 1,600 | \$290 | \$181 | 2.70 | 1.46 | 1.26 |
| 5699--Miscellaneous Apparel & Accessories | | | | | 0.00 | 0.00 | 0.00 |
| 5712--Furniture | | | | | 0.00 | 0.00 | 0.00 |
| 5713--Floor Coverings | | | | | 0.00 | 0.00 | 0.00 |
| 5714--Draperies, Curtains, and Upholstery | | | | | 0.00 | 0.00 | 0.00 |
| 5719--Miscellaneous Household Furnishings | | | | | 0.00 | 0.00 | 0.00 |
| 5722--Household Appliances | | | | | 0.00 | 0.00 | 0.00 |
| 5731--Radio/TV/Electronics | | | | | 0.00 | 0.00 | 0.00 |
| 5734--Computer & Software Stores; CD/Tape/Video | 2 | 6,300 | \$1,005 | \$160 | 2.70 | 5.73 | 4.37 |
| 5736--Music Stores | | | | | 0.00 | 0.00 | 0.00 |
| 5941--Sporting Goods | 2 | 3,800 | \$660 | \$174 | 2.70 | 3.46 | 2.87 |
| 5942--Book Stores | | | | | 0.00 | 0.00 | 0.00 |
| 5943--Stationers/Office Supply | | | | | 0.00 | 0.00 | 0.00 |
| 5944--Jewelry Stores | 2 | 1,700 | \$304 | \$179 | 2.70 | 1.55 | 1.32 |
| 5945--Toys & Hobbies | | | | | 0.00 | 0.00 | 0.00 |
| 5946--Camera, Photo Supply | | | | | 0.00 | 0.00 | 0.00 |
| 5947--Gift, Novelty, Souvenir Stores | 1 | 700 | * | * | 1.35 | 0.64 | 0.00 |
| 5948--Luggage & Leatherwork | | | | | 0.00 | 0.00 | 0.00 |
| 5949--Sewing, Needlework | | | | | 0.00 | 0.00 | 0.00 |
| OTHER RETAIL STORES | 7 | 11,100 | \$1,080 | \$97 | 9.46 | 10.10 | 4.70 |
| 5211--Lumber/Building Supplies | | | | | 0.00 | 0.00 | 0.00 |
| 5231--Paint/Glass/Wallpaper Stores | | | | | 0.00 | 0.00 | 0.00 |
| 5251--Hardware Stores | | | | | 0.00 | 0.00 | 0.00 |
| 5261--Garden Supply Stores | | | | | 0.00 | 0.00 | 0.00 |
| 5532--Auto Supplies & Parts Stores | 1 | 2,000 | * | * | 1.35 | 1.82 | 0.00 |
| 5931--Used Merchandise | 4 | 7,500 | \$510 | \$68 | 5.41 | 6.82 | 2.22 |
| 5992--Florists | | | | | 0.00 | 0.00 | 0.00 |
| 5993--Tobacco Stores | 1 | 600 | * | * | 1.35 | 0.55 | 0.00 |
| 5994--Newsstands | | | | | 0.00 | 0.00 | 0.00 |
| 5995--Optical Stores | | | | | 0.00 | 0.00 | 0.00 |
| 5999--Pet Stores | | | | | 0.00 | 0.00 | 0.00 |
| 5999--Art Dealers | 1 | 1,000 | * | * | 1.35 | 0.91 | 0.00 |
| 5999--Other Miscellaneous Retail Stores | | | | | 0.00 | 0.00 | 0.00 |
| SERVICES | 11 | 8,100 | \$1,016 | \$125 | 14.86 | 7.37 | 4.42 |
| 7211--Laundries; Dry Cleaning | | | | | 0.00 | 0.00 | 0.00 |
| 7231--Hair Salons | 11 | 8,100 | \$1,016 | \$125 | 14.86 | 7.37 | 4.42 |

*Suppressed Data

Table 3
Estimated Retail Store Purchases - 1997
By South Green Trade Area Residents

| | |
|---|-----------|
| TOTAL POPULATION | 11,669 |
| TOTAL INCOME (\$000) | \$150,044 |
| TOTAL RETAIL PURCHASES (\$000) | \$61,705 |
| CONVENIENCE GOODS--TOTAL (\$000) | \$32,181 |
| 5411--Convenience Stores | \$1,772 |
| 5412--Supermarkets, Grocery Stores | \$18,489 |
| 5423--Meat/Fish Stores | \$295 |
| 5431--Fruit & Vegetables | \$106 |
| 5441--Candy & Nuts | \$72 |
| 5462--Bakeries | \$315 |
| 5499--Other Speciality Foods | \$186 |
| 5921--Liquor & Beer Distributors | \$1,132 |
| 5812--Restaurants and Fast Food | \$5,186 |
| 5813--Bars and Lounges | \$313 |
| 5913--Drug Stores/Pharmacies | \$4,315 |
| SHOPPING GOODS--TOTAL | \$19,314 |
| 5311--Department Stores | \$4,946 |
| 5332--Other General Merchandise Stores | \$580 |
| 5391--Warehouse Clubs | \$814 |
| 5392--Catalog Showrooms | \$168 |
| 5611--Men's Apparel | \$558 |
| 5621--Women's Apparel | \$1,745 |
| 5631--Women's Accessories & Specialities | \$200 |
| 5641--Children's Apparel | \$165 |
| 5651--Family Apparel | \$1,826 |
| 5661--Shoe Stores | \$996 |
| 5699--Miscellaneous Apparel & Accessories | \$176 |
| 5712--Furniture | \$1,127 |
| 5713--Floor Coverings | \$356 |
| 5714--Draperies, Curtains, and Upholstery | \$32 |
| 5719--Miscellaneous Household Furnishings | \$344 |
| 5722--Household Appliances | \$302 |
| 5731--Radio/TV/Electronics | \$733 |
| 5734--Computer & Software Stores | \$243 |
| 5735--Record/Tape/Video Stores | \$217 |
| 5736--Music Stores | \$100 |
| 5941--Sporting Goods | \$805 |
| 5942--Book Stores | \$446 |
| 5943--Stationers/Office Supply | \$96 |
| 5944--Jewelry Stores | \$780 |
| 5945--Toys & Hobbies | \$592 |
| 5946--Camera, Photo Supply | \$123 |
| 5947--Gift, Novelty, Souvenir Stores | \$588 |
| 5948--Luggage & Leatherwork | \$56 |
| 5949--Sewing, Needlework | \$199 |
| OTHER RETAIL STORES | \$8,586 |
| 5211--Lumber/Building Supplies | \$3,804 |
| 5231--Paint/Glass/Wallpaper Stores | \$345 |
| 5251--Hardware Stores | \$685 |
| 5261--Garden Supply Stores | \$352 |
| 5532--Auto Supplies & Parts Stores | \$1,591 |
| 5931--Used Merchandise | \$315 |
| 5992--Florists | \$318 |
| 5993--Tobacco Stores | \$44 |
| 5994--Newsstands | \$39 |
| 5995--Optical Stores | \$268 |
| 5999--Pet Stores | \$149 |
| 5999--Art Dealers | \$116 |
| 5999--Other Miscellaneous Retail Stores | \$561 |
| SERVICES | \$1,624 |
| 7211--Laundries; Dry Cleaning | \$880 |
| 7231--Hair Salons | \$744 |

- Convenience good shopping is generally confined to the primary trade area
- Personal services and routine amusement activities will also generally be confined to the primary trade area
- Expenditures made at restaurants and other prepared food outlets will occur chiefly within the primary trade area, but some restaurant expenditures made by the primary trade area population will be lost to established restaurants located outside the primary trade area. Similarly, some restaurant sales in the primary trade area will be attracted from residents who live elsewhere in the region.
- Expenditures made by primary trade area residents for shopping good items will more likely occur within the area, but a substantial proportion of these sales will occur outside the area. Similarly, significant sales will be attracted from residents outside the primary trade area to any large, well-known stores located within the primary trade area.
- Specific high-quality stores within the primary trade area may attract significant clientele from well beyond the primary trade area for highly-targeted single destination trips for specialized purchases.

We anticipate that opportunities for retail development within the South Green neighborhood will largely be convenience goods and shopping and retail goods which cater to smaller, convenience-oriented purchases. For example, a resident of the South Green trading area might travel to a large, highway oriented hardware store, such as a Home Depot, purchase paint or electrical equipment; however, the same resident will most likely purchase the forgotten paint brush or extension cord at a more convenient neighborhood location. Similarly, a resident may make a weekend trip to the Barnes & Noble in West Hartford to search for a specific book, but might rely on a local bookstore to make a more spontaneous after work book or magazine purchase.

Based on this analysis, we note that while the total demand for retail sales by stores located within the primary trading area is \$61 million (see **Table 4**), it is likely that only a portion of these sales will be captured by South Green based stores.

Retail Development Opportunities

On **Table 4**, we have compared the sales potential calculated above with the current level of retail sales in the South Green retail trading area to compute available potential for new or expanded retail stores within the trading area. This analysis highlights the current performance of area stores compared to their market potential.

Nearly \$39 million in retail purchases are being made by South Green trade area residents outside the neighborhood. These purchases are supporting 236,000 SF of store space that could, in theory, be located within South Green. However, it is extremely unlikely that certain store categories (such as department stores and catalog showrooms) would locate in a neighborhood area. Therefore, as shown on **Table 4**, we estimate that up to 173,000 SF of this market potential

Table 4
Retail Development Opportunities
South Green Trade Area - 1997

| | Current Sales Level All Primary Trade Area Stores | Sales Potential Primary Trade Area Stores | Available Potential For Primary Trade Area Stores | Retail Opportunities (In SF) | Retail Opportunities Appropriate For South Green (In SF) |
|---|---|---|---|------------------------------------|--|
| TOTAL SALES (\$000) | \$22,998 | \$61,705 | \$38,707 | 236,000 | 173,000 |
| CONVENIENCE GOODS--TOTAL | \$18,340 | \$32,181 | \$13,841 | 58,000 | 41,000 |
| 5411--Convenience Stores | \$6,284 | \$1,772 | (\$4,512) | | |
| 5412--Supermarkets, Grocery Stores | \$4,800 | \$18,489 | \$13,689 | 30,000 | 30,000 |
| 5423--Meat/Fish Stores | \$0 | \$295 | \$295 | 1,000 | |
| 5431--Fruit & Vegetables | \$0 | \$106 | \$106 | | |
| 5441--Candy & Nuts | \$0 | \$72 | \$72 | | |
| 5462--Bakeries | * | \$315 | * | | |
| 5499--Other Speciality Foods | \$0 | \$186 | \$186 | 1,000 | |
| 5921--Liquor & Beer Distributors | \$710 | \$1,132 | \$422 | 2,000 | |
| 5812--Restaurants and Fast Food | \$5,562 | \$5,186 | (\$376) | | |
| 5813--Bars and Lounges | \$584 | \$313 | (\$271) | | |
| 5913--Drug Stores/Pharmacies | \$0 | \$4,315 | \$4,315 | 24,000 | 11,000 |
| SHOPPING GOODS--TOTAL | \$2,562 | \$19,314 | \$16,752 | 114,000 | 75,000 |
| 5311--Department Stores | \$0 | \$4,946 | \$4,946 | 33,000 | |
| 5332--Other General Merchandise Stores | * | \$580 | * | 4,000 | 4,000 |
| 5391--Warehouse Clubs | \$0 | \$814 | \$814 | 5,000 | |
| 5392--Catalog Showrooms | \$0 | \$168 | \$168 | 1,000 | |
| 5611--Men's Apparel | \$0 | \$558 | \$558 | 3,000 | 3,000 |
| 5621--Women's Apparel | \$0 | \$1,745 | \$1,745 | 11,000 | 11,000 |
| 5631--Women's Accessories & Specialities | \$0 | \$200 | \$200 | 1,000 | 1,000 |
| 5641--Children's Apparel | \$0 | \$165 | \$165 | 1,000 | 1,000 |
| 5651--Family Apparel; Shoes | \$290 | \$2,822 | \$2,532 | 17,000 | 17,000 |
| 5699--Miscellaneous Apparel & Accessories | \$0 | \$176 | \$176 | 1,000 | 1,000 |
| 5712--Furniture | \$0 | \$1,127 | \$1,127 | 8,000 | 8,000 |
| 5713--Floor Coverings | \$0 | \$356 | \$356 | 2,000 | 2,000 |
| 5714--Draperies, Curtains, and Upholstery | \$0 | \$32 | \$32 | | |
| 5719--Miscellaneous Household Furnishings | \$0 | \$344 | \$344 | 2,000 | 2,000 |
| 5722--Household Appliances | \$0 | \$302 | \$302 | 2,000 | 2,000 |
| 5731--Radio/TV/Electronics | \$0 | \$733 | \$733 | 4,000 | 4,000 |
| 5734--Computer & Software Stores | \$1,005 | \$460 | (\$545) | | |
| 5736--Music Stores | \$0 | \$100 | \$100 | 1,000 | 1,000 |
| 5941--Sporting Goods | \$660 | \$805 | \$145 | 1,000 | 1,000 |
| 5942--Book Stores | \$0 | \$446 | \$446 | 4,000 | 4,000 |
| 5943--Stationers/Office Supply | \$0 | \$96 | \$96 | | |
| 5944--Jewelry Stores | \$304 | \$780 | \$476 | 2,000 | 2,000 |
| 5945--Toys & Hobbies | \$0 | \$592 | \$592 | 4,000 | 4,000 |
| 5946--Camera, Photo Supply | \$0 | \$123 | \$123 | 1,000 | 1,000 |
| 5947--Gift, Novelty, Souvenir Stores | * | \$588 | * | 4,000 | 4,000 |
| 5948--Luggage & Leatherwork | \$0 | \$56 | \$56 | | |
| 5949--Sewing, Needlework | \$0 | \$199 | \$199 | 2,000 | 2,000 |
| OTHER RETAIL STORES | \$1,080 | \$8,586 | \$7,506 | 56,000 | 49,000 |
| 5211--Lumber/Building Supplies | \$0 | \$3,804 | \$3,804 | 31,000 | 31,000 |
| 5231--Paint/Glass/Wallpaper Stores | \$0 | \$345 | \$345 | 2,000 | 2,000 |
| 5251--Hardware Stores | \$0 | \$685 | \$685 | 5,000 | 5,000 |
| 5261--Garden Supply Stores | \$0 | \$352 | \$352 | 2,500 | 2,500 |
| 5532--Auto Supplies & Parts Stores | * | \$1,591 | * | 7,000 | |
| 5931--Used Merchandise | \$510 | \$315 | | | |
| 5992--Florists | \$0 | \$318 | \$318 | 2,000 | 2,000 |
| 5993--Tobacco Stores | * | \$44 | | | |
| 5994--Newsstands | \$0 | \$39 | \$39 | | |
| 5995--Optical Stores | \$0 | \$268 | \$268 | 1,500 | 1,500 |
| 5999--Pet Stores | \$0 | \$149 | \$149 | 1,000 | 1,000 |
| 5999--Art Dealers | * | \$116 | | | |
| 5999--Other Miscellaneous Retail Stores | \$0 | \$561 | \$561 | 4,000 | 4,000 |
| SERVICES | \$1,016 | \$1,624 | \$608 | 8,000 | 8,000 |
| 7211--Laundries, Dry Cleaning | \$0 | \$880 | \$880 | 8,000 | 8,000 |
| 7231--Hair Salons | \$1,016 | \$744 | (\$272) | | |

could reasonably be captured in South Green if appropriate sites can be identified.

These opportunities exist in several categories. For convenience goods, opportunities exist for the development of up to an additional 30,000 SF of supermarket/grocery store space and for a comprehensive 11,000 SF drug store. Given the location of Walgreen's at Washington and Park and the CVS on Franklin just below Barker, a new drug store in the South Green community is likely to be a Rite Aid or Eckerd's and would be best situated on Wethersfield Avenue to serve the eastern portions of the neighborhood and benefit from vehicular traffic on this major thoroughfare.

Because of the very limited non-convenience retailing that is currently available in the South Green area, opportunities exist in most shopping goods and other retail goods categories. Significant opportunities exist to capture a portion of neighborhood residents' apparel and home furnishings purchases as well as home repair and gardening spending. The physical character of South Green's commercial streets--Park, Main, Franklin, Maple and Wethersfield--suggests that most store development will involve smaller store spaces.

Additionally, the South Green community suffers from a complete lack of dry cleaning and laundromat facilities, which provides opportunity for several such businesses to open throughout the neighborhood.

Given these conditions, the best opportunities for new or expanded retail development include:

- expansion of the C - Town supermarket on Wethersfield
- a new discount drug store on Wethersfield
- apparel stores and other smaller shopping goods stores on Park, Franklin, Wethersfield, and surrounding Barnard Park
- a hardware store
- a laundromat.

Commercial Development Analysis

Office Development

The South Green area is currently experiencing minimal demand for professional office development. Medical practices related to Hartford Hospital are becoming more constricted, and any additional development of professional space for this segment of the office market will likely occur along Retreat Street or in the Maple/Wyllys area.

Office space within the South Green neighborhood is, however, comparatively inexpensive, with current space available for between \$7-9/SF. The gradual development of smaller scale non-medical office space in the area may be an appropriate use for which a limited market exists. In addition to office space development in some of the architecturally interesting buildings on Wethersfield Avenue, office space development will be a compatible use for the upper floors of "Club Habana" at 7 Maple Street.

Hotel Development

We have been asked to examine the market for hotel development in the South Green area. Anecdotal industry information suggests that the hotel market in Central Connecticut is extremely tight for weeknights and that there is some level of occupancy on weekend nights. This is certainly true in the Hartford market, where the market is significantly influenced by state government, major corporate employers, Hartford Hospital, Trinity College, University of Hartford and other large area employers.

Currently, a number of hotel projects are being proposed to serve the Hartford market. While it is unclear which of these projects will proceed, these proposals reinforce the perception that there is a sizable market which may support the development of multiple new hotels.

The site at the northwestern corner of Main and Park Streets has approximately 150 feet of frontage on each of these streets and is sufficiently large to accommodate a mid-sized hotel facility. The site's easy access to the Hartford Hospital, the state government and the downtown business center markets make it an excellent hotel location, particularly for a moderately-priced hotel capturing a more price-sensitive market than can be accommodated in new development on more expensive downtown sites.

Interest has also been expressed in the development of a catering facility/banquet hall and a bank office at this site. Both are appropriate and compatible with the hotel functions and represent visible community-serving uses of this prominent site.

The "Gut Building" that fronts Park Street and is adjacent to the potential hotel site is scheduled to be developed as a senior housing facility by La Casa de Puerto Rico. Development will include residential units on upper levels with retailing on the ground floor. If development of the Gut

Building project occurs, it would be appropriate to extend this ground floor retailing to the ground floor of the hotel complex, on both its Park and Main Street frontages. In addition to providing a complementary use to the hotel and banquet hall functions of the site, this development would provide an important linkage between Park Street and downtown retailing.

Joint parking arrangements will be required to service the Gut Building development and any hotel/banquet facility at this site. Such parking can be accommodated using the portion of the Gut Building site that is accessible from John Street and developing driveways and loading zones through to the hotel.

Residential Market Analysis

The very erratic housing market conditions in the Hartford area during the last several years, particularly in this and adjacent neighborhoods, has created much uncertainty about the reasonableness of various market opportunities. However, several observations can be made about housing conditions in the South Green neighborhood and surrounding areas:

- Within the South Green community, several of the cul de sac streets seem to provide stable, homeownership zones. This suggests that there is an enthusiasm for homeownership within the community if provided in the right environment and with appropriate security.
- There is a recent firming up of values in the Maple Townhouse development; however, levels remain well below their initial sales prices.
- The adjacent Frog Hollow neighborhood has determined that sizable demolition is necessary to reduce housing density to a level that more appropriately meets market demand.
- As part of the Trinity-sponsored housing development, the decision has been made to build a very specific housing type -- two unit homes with an owner-occupied unit and a rental unit. These 2,600 SF structures are costing approximately \$200,000 to construct and will be priced in the \$90,000s. The homes will be developed a few at a time to test the waters for their demand.
- Occupancy of well-maintained rental units owned by non-profit sponsors varies tremendously from building to building and block to block. Vacancy rates in this type of unit vary from 0 to 20 percent.

Because of the confusing and somewhat contradictory information available about the housing market in Hartford, it is difficult to draw conclusions about what type of residential development is appropriate for the South Green community. The rehabilitation of each of the 43 vacant buildings that currently exist in the neighborhood would provide close to 240 new units. Obviously, development at this density would oversaturate the market, and is not desired, within the South Green community.

Given this uncertainty, a more reasonable approach will involve experimenting with different approaches to reuse at each of the available sites. Potential reuse scenarios include:

- For larger mixed use buildings, such as the mostly-vacant building on the southeast corner of Franklin Avenue and Shultas Place, rehabilitation as ground floor retail and upper floor rental residential.
- For prominent larger structures on generally good blocks, such as the two large structures on the west side of Franklin between Pawtucket Street and Shultas Street, rehabilitation as rental residential or as cooperatives.

- For more isolated, structurally sound Perfect 6s, conversion to two large owner-occupied units, with unfinished third floor bonus rooms.
- For concentrations of severely deteriorated structures on smaller side streets, demolition, reconfiguration of street layout to allow for cul de sac formation, and development of lower density single-family homes for sale.
- For properties adjacent to confined commercial uses, such as the several Wethersfield Avenue structures just south of Benton and two properties on the south side of Benton Street east of Franklin, demolition to provide off-street parking and expansion space for these adjacent commercial uses.

Appendix 1

South Green Retail Inventory

| Address | Name | SIC | SF | In NRZ |
|----------------|--------------------------------|------|------|--------|
| 54 Barnard | Los Vecinos | 5411 | 700 | |
| 25 Charter Oak | Charter Oak Gallery | 5999 | 1000 | |
| 29 Charter Oak | Charter Oak Package Store | 5921 | 1000 | |
| 31 Charter Oak | Easy Shopping | 5411 | 1800 | |
| 1 Congress | South Green Market 'n' Deli | 5411 | 500 | * |
| 21 Franklin | Comerio Bargain Store | 5651 | 1000 | * |
| 25 Franklin | Garay's Food Mart | 5411 | 1100 | * |
| 33 Franklin | Bill's Package Store | 5921 | 1200 | * |
| 86 Franklin | City Fare | 5812 | 1000 | * |
| 93 Franklin | Ray Taksar Bicycle | 5941 | 800 | * |
| 95 Franklin | Alpine Bar | 5813 | 1200 | * |
| 122 Franklin | Vera's Market | 5411 | 1500 | * |
| 135 Franklin | Exoticut Haircut Salon | 7231 | 700 | * |
| 157 Franklin | Brother Bones Cafe | 5812 | 1600 | * |
| 158 Franklin | Tavarez Food Market | 5412 | 2500 | * |
| 180 Franklin | Fade Away Barber Salon | 7231 | 800 | * |
| 183 Franklin | Tember Lan Boot Store | 5661 | 600 | * |
| 191 Franklin | Hector of Hartford | 7231 | 800 | * |
| 200 Franklin | Corner Grind Shop | 5812 | 1200 | * |
| 201 Franklin | Danish Cigar & Cigarette | 5993 | 600 | * |
| 227 Franklin | South End Bakery & Pastry Shop | 5462 | 2000 | * |
| 238 Franklin | DiMauro's Grocery | 5412 | 1500 | * |
| 240 Franklin | Ultimate Cut | 7231 | 400 | * |
| 240 Franklin | Village Music Flava | 5735 | 300 | * |
| 250 Franklin | Fantasia Hair Design | 7231 | 600 | * |
| 252 Franklin | Touch Nails | 7231 | 600 | * |
| 104 Jefferson | Doc Stop Restaurant | 5812 | 1000 | |
| 40 John | La Copa Cafe | 5813 | 2000 | * |
| 113 Main | Friendly Market & Deli | 5411 | 700 | * |
| 207 Main | La Dolce Vita Restaurant | 5812 | 4000 | * |
| 219 Main | Heidi's Breakfast & Lunch | 5812 | 2000 | * |
| 223 Main | Santo Hair Forum | 7231 | 1500 | * |
| 250 Main | Hero's Sport Shop | 5941 | 3000 | |
| 250 Main | Max Bibo's | 5812 | 1600 | |
| 250 Main | Mundo De Oro Jewelry | 5944 | 800 | |
| 250 Main | Kathy's Convenience Store | 5411 | 800 | |
| 250 Main | Headline Designers | 7231 | 600 | |
| 87 Maple | TJ's Ringside Cafe | 5813 | 1800 | * |
| 95 Maple | Bacon Antiques | 5931 | 1000 | * |
| 99 Maple | Los Titanes Restaurant | 5812 | 1500 | * |
| 194 Maple | Centropiezas Auto Parts | 5532 | 2000 | * |
| 573 Maple | Evelyn's Hair Design | 7231 | 700 | |
| 608 Maple | Anna's Creations | 7231 | 800 | |
| 612 Maple | Colon's Party Shop | 5943 | 700 | |
| 615 Maple | Sam's Grocery | 5411 | 1500 | |
| 616 Maple | Ciale's Grocery | 5411 | 1200 | |

| | | | | |
|------------------|--------------------------------|------|------|---|
| 61 Norwich | CBL Food Market | 5411 | 1500 | |
| 31 Park | Danny's Grocery | 5411 | 1000 | |
| 69 Park | Dave's Furniture & Appliances | 5931 | 1600 | |
| 83 Park | El Riricon Caleno Restaurant | 5812 | 600 | |
| 85 Park | Vazquez Housewares | 5719 | 1800 | |
| 89 Park | Veronica's Cosmetics & Jewelry | 5913 | 900 | |
| 90 Park | El Bohio | 5812 | 1000 | |
| 91 Park | Ricky's Used Appliances | 5931 | 900 | |
| 100 Park | Express Mart II | 5411 | 1000 | |
| 111 Park | Business Machines Warehouse | 5943 | 6000 | |
| 158 Park | Comerio Restaurant | 5812 | 1000 | |
| 208 Park | Los Cabanitos | 5411 | 2000 | |
| 220 Park | Hartford Market | 5411 | 1200 | |
| 226 Park | Mayra's Hair Salon | 7231 | 600 | |
| 251 Park | Morris Package Store | 5921 | 1500 | |
| 84 Van Block | La Familia Grocery | 5411 | 600 | |
| 168 Washington | Chinese Kitchen | 5812 | 1800 | |
| 170 Washington | Goodwill Thrift Shop | 5931 | 4000 | |
| 174 Washington | McDonalds | 5812 | 4000 | |
| 184 Washington | BP Store | 5411 | 800 | |
| 240 Washington | On the Run | 5411 | 3000 | |
| 120 Webster | The Whole Donut | 5812 | 1500 | |
| 3 Wethersfield | Yarlyn Supermarket | 5411 | 1600 | * |
| 165 Wethersfield | C-Town Supermarket | 5412 | 8500 | * |
| 347 Wethersfield | Adame Market | 5411 | 1800 | * |
| 349 Wethersfield | Royal Pizzeria | 5812 | 1500 | * |
| 375 Wethersfield | Subway | 5812 | 1000 | * |
| 427 Wethersfield | Oscar's Market | 5411 | 1000 | * |