

Update to Port Authority Board

DECEMBER 15, 2022



MARKET ANALYSIS
AND FEASIBILITY STUDY

Agenda

- A. Overview of Engagement
- B. Community Engagement Results
- C. Preferred and Alternative Land Use
- D. Next Steps

Meet the Planning Team



Project Manager



Market Analysis &
Economic Development



Local Business &
Entrepreneur Strategies



Community Engagement



Utilities, Infrastructure,
& Capital Improvements

Meet the Advisory Committee

20 Members

Bios on Website



Julie Griffith | *President, Spanish Lake Neighborhood Association*

Julie has over ten years of community involvement in Spanish Lake. She is the current President of the Spanish Lake Community Association. Julie's favorite part of living in Spanish Lake is getting to know the people in Spanish Lake and helping out where she can. When not involved in the community she likes to walk in the park, read, and work in her flower garden.



Tyrone Turner | *Board President, Spanish Lake CDC*

Tyrone is board president for the Spanish Lake Community Development Corporation. Tyrone is Vice-President of Better Family Life's Housing and Asset Development is the agency's lead community developer and personal finance advocate that works to support development from a family perspective. He has developed over 15 years of commercial and personal finance, banking, housing counseling and housing development experience. For the past 12 years he has conducted workshops with well over 6,500 individuals/families on the subjects of homeownership and personal finance as it relates to homeownership.



Patty Murray | *Board Member, Old Jamestown Association*

Patty is the website creator and a board member of Old Jamestown Association. A resident of the Old Jamestown area for over 25 years, she has volunteered extensively in the Hazelwood School District and Girl Scouts. Patty is a board member of AAUW, the American Association of University Women, serving as the Publicity and Communications Chair of the Ferguson Florissant Branch. She and her husband, Bob, a retired Boeing engineer, have lived in the Florissant area for 30 years and have two grown daughters.



Rene Dulle | *Senior Program Manager, St. Louis Community College*

Rene is Senior Program Manager for St. Louis Community College's Workforce Solutions Group. She has over 10 years' experience developing grant opportunities and collaborating with industry to create educational programs as a pipeline to jobs with sustainable wages. She has assisted countless students reach their career goals within the environmental, construction and transportation industries. Rene is also an active member of the local US Green Building Council, and the OneSTL Energy & Emissions working group, engaging in projects to help our region build sustainable, thriving, diverse communities.

School District



Christopher Norman | *Chief Financial Officer and Assistant Superintendent for Finance and Facilities, Hazelwood School District*

Christopher has served as the Hazelwood School District's Chief Financial Officer/Assistant Superintendent for Finance and Facilities since 2017 and also serves on the Hazelwood Economic Development Board. Mr. Norman started his professional career as a band director and music teacher before moving into school administration in various roles, including serving as a high school assistant principal/vocational coordinator, junior high school principal, and a director of financial services. On a personal note, Mr. Norman grew up in Alton, IL and was a frequent visitor to Jamestown Mall. As a result, he looks forward to a revival of the site.

Business Community



Venus Martz | *President, Greater North County Chamber of Commerce*

Venus is the current president and CEO for the Greater North County Chamber of Commerce. A philanthropist and dedicated community member, Venus currently sits on the Board of Directors for North County Inc., Valley Industries, St. Martin's Child Care Center, The Emerson YMCA, and Walter's Walk. She has volunteered for organizations such as the Saint Louis Crisis Nursery, BJC Christian Hospital, the USO, and sits on the City of Florissant's Economic Development Council. She was awarded one of North County Inc.'s 30 Leaders in Their Thirties in 2017; and was named Small Business Monthly's Top 100 St. Louisans to Know To Succeed in Business in 2018.



Rebecca Zoll | *President/CEO, North County Inc.*

Rebecca is the President and CEO of North County Inc., an economic and community development advocacy organization. Rebecca brings over 21 years of experience in not-for-profit management, community engagement and collaborative partnership development. Her marketing, economic development and community advancement experience includes a wide range of projects including: small business training and retention, board development, advocacy around healthcare, transportation, business and workforce development, and education policy, and event planning and execution. North County Inc. build's collaborative partnerships to advance the business and residential climate of the North St. Louis County communities.

Non-Profit Sector



Erica R. Williams | *Executive Director, A Red Circle*

Erica is the Executive Director of A Red Circle. She holds a BA in Paralegal Studies and an MBA, both from Maryville University. Erica is working on her PhD in Public Policy and Administration from Walden University, with a concentration on policy analysis. She is Past Chairs MOCAN - Missouri Council on Activity and Nutrition and is a member of the Food Systems Work Group. When not working for A Red Circle, Erica is on the Board of Directors for Kids Win Missouri and Propel Kitchens, and on the Community Advisory Board for Refuge and Restoration, a nonprofit organization in Farmington, Missouri.



Harold Holmes | *Resident, Fox Manor Subdivision*

Harold is a 23-year resident of Fox Manor Subdivision (adjacent to Jamestown Mall). He is retired from Ameren Missouri and also previously worked as a Defense Contractor at NGA (National Geospatial Intelligence Agency). Harold is currently in his 42nd year as a part-time employee of the St. Louis Cardinals.

Institutions



Dana Ballinger | *Director of Care Coordination & Population Health, Christian Hospital*

Dana has a master's degree in social work and public health. Dana is the Director of Case Management and Population Health at Christian Hospital. Dana has over twenty years of experience in health empowerment and advocacy. Dana leads population health efforts to improve community health by addressing health disparities such as housing, health literacy and access, and other social determinants of health barriers. Dana has been a resident of North County for 17 years. She is empowered by the unique opportunities that North County has to offer.



Jaelyn C. Johnson | *Assistant Director of Education, Saint Louis Zoo*

Jaelyn is currently the Assistant Director of Education at the Saint Louis Zoo. With over two decades of experience with developing and implementing programs and managing staff, she provides administrative and leadership support to staff on various education programs and projects. She is an active member of the Zoo's Diversity, Equity, Accessibility, and Inclusion (DEAI) Committee, where she collaborates with staff across multiple departments on various DEAI initiatives, including increasing diverse community engagement. She is currently spearheading pilot programs at the WildCare Park and serves on the Spanish Lake North Node



Chandan K. Mahanta | *Resident*

A 23-year resident of the Old Jamestown neighborhood, Chan is a retired architect. He is currently a member of the Old Jamestown Association Board and is a past president. In the recent past Chan served as a member of the Christian Hospital Foundation Board, and represented North St. Louis County in the Metropolitan Sewer District Rate Setting Commission. A native plants and prairie environment restoration enthusiast, Chan is staunch supporter for the protection of the Old Jamestown area's unique and rich natural assets.



Tommie Pierson Jr. | *Resident*

Tommie has garnered a richly diverse background that includes experience in engineering, ministry, education, community service, and business development. Tommie served two terms as state representative for a portion of north St. Louis County and now is Director of Business Development for BioRankings, a biostatistics company based in St. Louis. Tommie continues to serve in his community as pastor of inStep Church and as a board member of the Spanish Lake Community Development Corporation.



Kim Potts | *Resident*

Kim has been the Operations Manager for Keeley Properties, a real estate development and property management company for the past 8 years. Kim has lived in North County for over 20 years and is passionate about the revitalization and development of the area. She has served as North Middle School PTA Vice-President and on the Hazelwood Opportunity Center committee. Kim is married with 3 children and 4 grandchildren and loves serving as Editing Director for Bethesda Temple Church.



Jada D. Jenkins Reese | *Resident*

North county resident since 1971 when my parents purchased their home in Northwoods. Educated in and graduated from the Normandy School District. Married my high school sweetheart, Michael, and we purchased our first home in BlackJack later building homes in Florissant and now in unincorporated north St. Louis County. My husband and I raised two children in north county who are now living in Denver, CO and Seattle, WA.

We intentionally decided to remain in north county vs moving west. I am excited to serve on this Jamestown effort as every resident deserves a vibrant community - one that is safe, engaging and provides a sense of pride. For most, our home purchase is our largest investment. What happens to the Jamestown Mall site is vital to us, north county and the region. My hope is that the outcome of this effort contributes to the wellbeing of north countians, young and old.

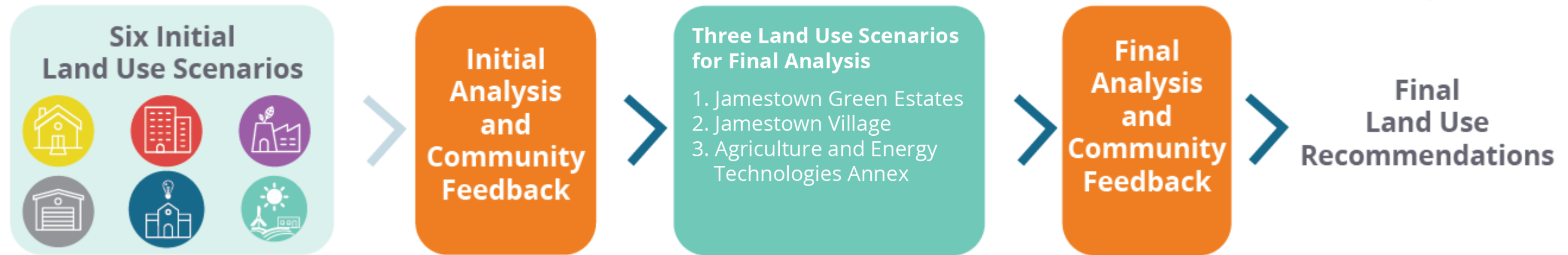


Randy Schroeder | *Resident*

I grew up in Old Town Florissant and move to New Jamestown Road, across from the mall, 38 years ago. I have been a union carpenter for 42 years. I am also a charter member of North County labor club and currently Vice President of North County Legislative Club. I love to hunt, fish and anything to with the outdoors. What I like most about our community is the people.

Process

PROJECT PROCESS



OVERVIEW OF ENGAGEMENT

"For the first time in over a decade, there is strong community support for the direction and future of the Jamestown Mall site."

Website

- Over **4,600** unique visitors to date

E-Blasts

- Over **500** sign-ups from website



The St. Louis County Port Authority is conducting a Market Analysis and Feasibility Study in 2022 that combines a comprehensive market analysis of a wide range of realistic redevelopment scenarios with extensive community engagement. The purpose of the Jamestown Mall Market Analysis and Feasibility Study is to evaluate the feasibility of potential redevelopment opportunities that are commercially feasible and align with the needs and desires of the surrounding community.

[CLICK HERE TO SIGN UP TO BE EMAILED WITH PROJECT UPDATES](#)

RECENT SCHEDULE

February: Study Kickoff

March 23rd: Advisory Committee Meeting #1

April 12th: Advisory Committee Meeting #2

May 24th: Advisory Committee Meeting #3

Goals of the Study



Public Forum #2

SEPTEMBER 21

- 4:30 – 7:30pm
- Location: Wildcare Park (St. Louis Zoo)
- Open House Style Format
- Over 200 attendees



October Small Group Discussions

- October 3, 5, and 6



Advisory Committee

- Last meeting on October 25th

AgTech Stakeholder Meeting

- Meeting on November 18th at Partnership Office

COMMUNITY ENGAGEMENT RESULTS



SCENARIO 1 | JAMESTOWN GREEN ESTATES

WHAT'S INVOLVED?

Residential mix with a strong emphasis on open space/agriculture as a market differentiator (agri-living).

Agriculture opportunities could range from professional ag growing facilities to residential amenities such as community gardens or agriculture/natural areas as residential common areas or residential buffering.

"Front Door" of the development could include high impact, high design retail and restaurants to elevate the image of the site and to welcome to visitors.

KEY STATS

Single family homes

- 160 -180 homes
- For sale (\$325,000 - \$450,000)
- 45 acres

Senior housing

- None

Community center

- None

Villas (duplex/attached units)

- 200 - 220 units
- For sale (\$225,000 - \$275,000)
- For rent (\$1,900 to \$2,400 per month)
- 34 acres

Neighborhood mixed commercial

- 70,000 - 82,000 sq. ft.
- 7.5 acres

Open space

- 29.5 acres open space/ agriculture
- 26 acres conservation

BENEFITS

- New, modern housing
- Abundant outdoor and nature-based amenities
- Retention and attraction of residents to North County
- Residential marketing niches (e.g., agri-living, conservation design, proximity to WildCare Park)
- Elevated front door commercial
 - High impact, high design retail and restaurants
 - Enhanced image of the site
- Amount of retail/commercial better aligned with current market demand.

CHALLENGES

- Rising cost of housing construction
 - May force housing price points to exceed market demand
- Increased commercial competition in North County
 - Retail upgrades in Florissant/Hazelwood



Concept Diagram

The concept diagram is not a "master plan". It is meant to convey the scale of land uses and potential development principles of the scenario. This is just one example of the potential location of uses on the site.



CONCEPT SKETCH



Note:
The above sketch is only a "concept" meant to convey an example of development to help visualize the land uses and potential development principles as part of the scenario.



SCENARIO 2 | JAMESTOWN VILLAGE

WHAT'S INVOLVED?

- Higher density of residential (ranging up to townhomes and duplexes).
- Small area of higher density for senior living apartments in "front door village."
- Commercial front door of high quality design to include corporate and incubator office spaces. Strong focus on job generation, especially as part of elevated front door.
- Greater emphasis on a shared community space such as a village green but also with integrated trails and small parks.

KEY STATS

Single family homes

- 90 - 110 homes
- For sale (\$325,000 - \$450,000)
- 27 acres

Senior housing

- 100 - 120 senior units
- For rent (\$1,500 to \$2,000 per month)
- 14 acres

Community center

- Subdivision only: 2.0 acres
- Community: 4 - 5 acres

Villas (duplex/attached units)

- 300 - 330 units
- For sale (\$225,000 - \$275,000)
- For rent (\$1,900 to \$2,400 per month)
- 50 acres

Neighborhood mixed commercial

- 150,000 - 179,000 sq. ft.
- 16.5 acres

Open space

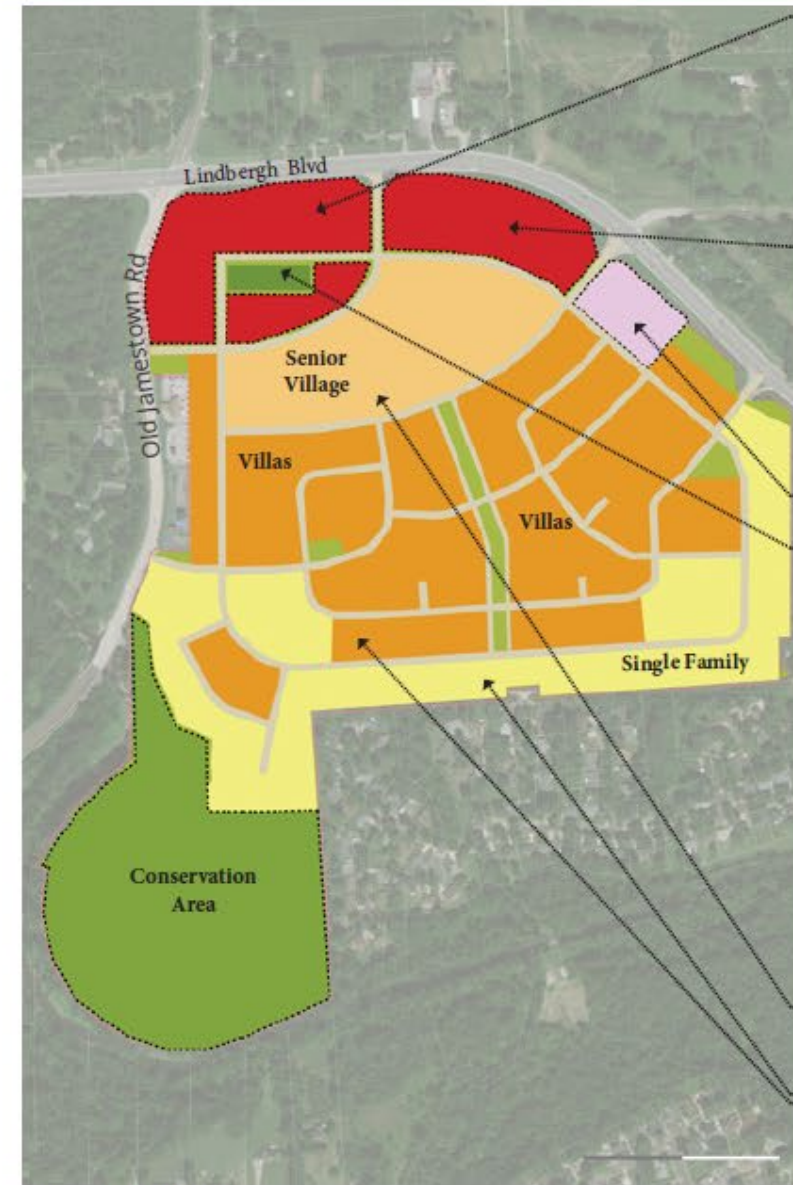
- 4.5 acres open space
- 26 acres conservation

BENEFITS

- New, modern housing
- Variety of styles and demographic targets (e.g., seniors)
- Retention and attraction of residents to North County
- Residential marketing niches (e.g., walkable, senior village, proximity to WildCare Park)
- Elevated front door commercial
 - High impact, high design retail and restaurants
 - Enhanced image of the site
- Office and incubator space
- Amount of retail/commercial better aligned with current market demand.

CHALLENGES

- Rising cost of housing construction
 - May force housing price points to exceed market demand
- Increased commercial competition in North County
 - Retail upgrades in Florissant/Hazelwood



Neighborhood Commercial



Office / Commercial Space



Community Center

Flexible Outdoor Community Space



Senior Village (Residential)

Residential



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SCENARIO 2 | JAMESTOWN VILLAGE

CONCEPT SKETCH



Senior Housing Village

Flexible Outdoor Community Space

- Special Events
- Programs
- Farmers' Market

Office and Incubator Office Space

Commercial Pedestrian Plazas

- Outdoor Seating and Dining
- Pedestrian Scaled

Multi-Use Trail along Lindbergh

Neighborhood Mixed Commercial (High impact, high design retail and restaurants to elevate the image of the site and to welcome visitors)

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SCENARIO 3 | AGRICULTURE AND ENERGY TECHNOLOGIES ANNEX

WHAT'S INVOLVED?

Emphasis on expansion space for agriculture technologies and production facilities for growing firms from St. Louis regional Ag-Tech centers.

In addition to agriculture focus, remain open to research and technology opportunities outside of agriculture that can expand regional opportunities.

Opportunity for high productivity agriculture facilities utilizing advanced technology in food growth relatively close to population centers.

Renewable energy (solar) to provide electricity (or partially offset).

KEY STATS

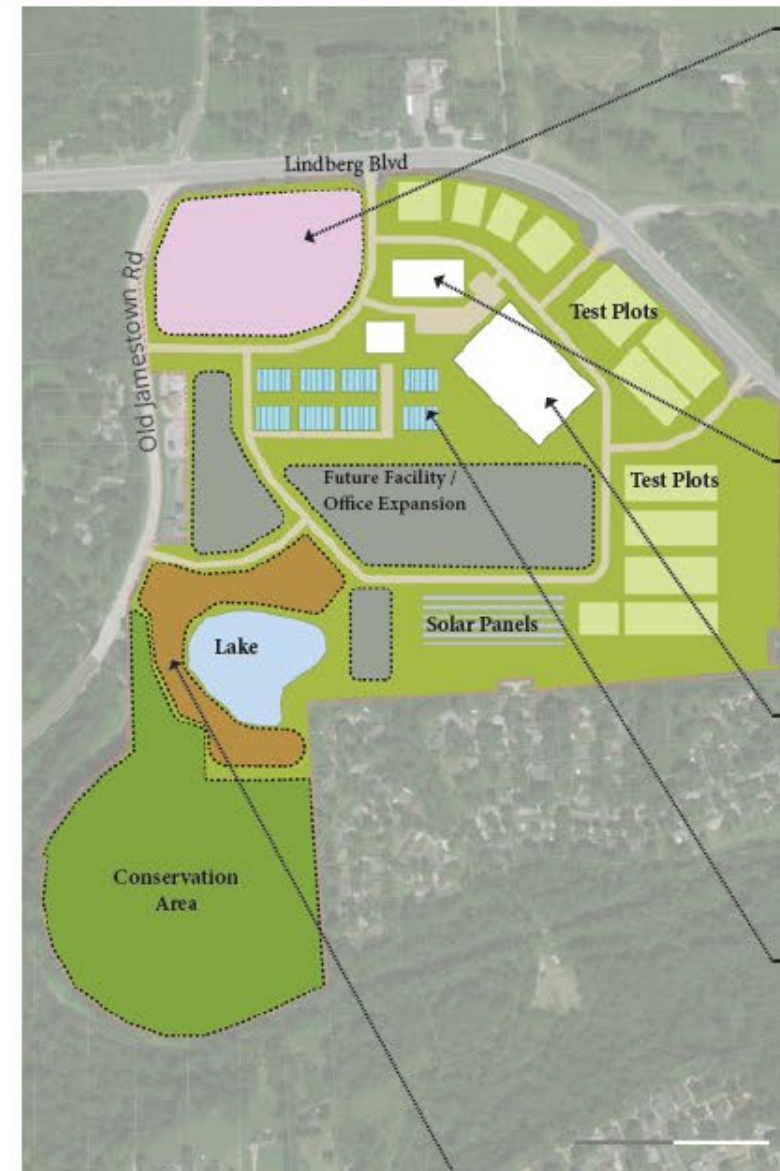
- Hi-Tech Large Scale Green House
 - Precision Fermentation Facility
 - Greenhouses
 - Lower-cost Facilities
 - Field Test Plots
 - Solar Energy
- Annex Front Door with Office/Job Training, Neighborhood grocery/retail, Community open space

BENEFITS

- Ag-Tech is a major St. Louis regional economic sector.
- Strong indications of a regional need for additional space for the Ag-Tech sector.
- New science emerging from established companies
- Spaces/facilities need varies, but could include:
 - Greenhouses
 - Test plots
 - Precision Fermentation
 - Lower-cost facility spaces
- Central location in U.S. agricultural belt
- While onsite jobs may be limited, the site could play an important role in the regional economy.
 - Close to skilled labor force
 - Close to research centers
 - Close to international airport
 - Less expensive land
- Agriculture land north of Lindbergh Blvd could support and benefit from this scenario.
 - Land is out of flood plain
 - Otherwise limited development potential

CHALLENGES

- Many unknowns. Better indicators and data likely available in next 12-24 months
- Site may not be close enough to other existing clusters (39 North and Cortex) to be an "annex"
- Workforce training programs still in creation and expansion
- Implementation will require a different model than a developer RFP. Would need regional organization to implement.
 - Cooperation among local, regional, and state economic development groups
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Annex "Front Door"

Precision Fermentation Facility

Hi-Tech Large Scale Greenhouse

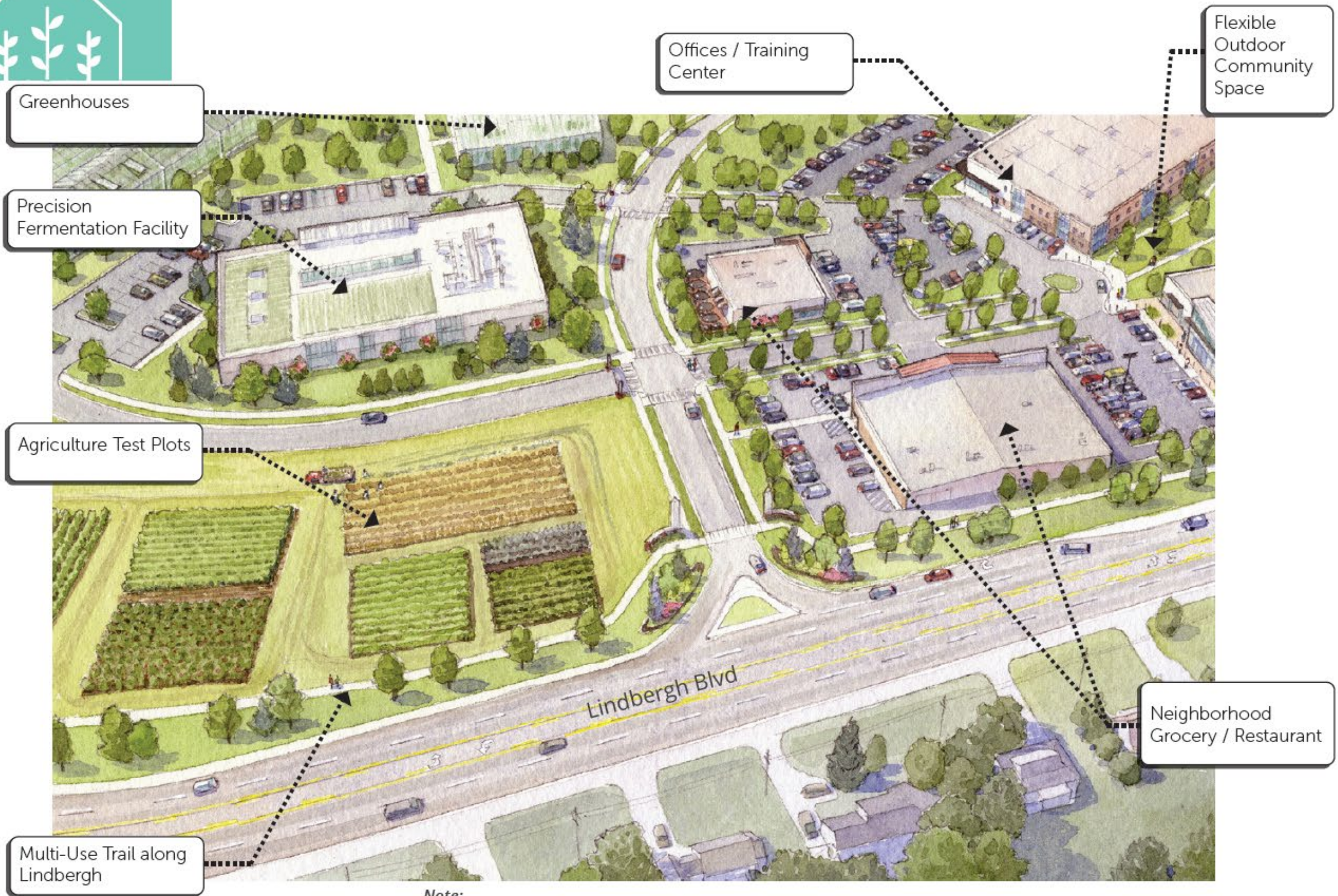
Greenhouses / Growing Hoops

Conference / Special Events Center

Test Plots

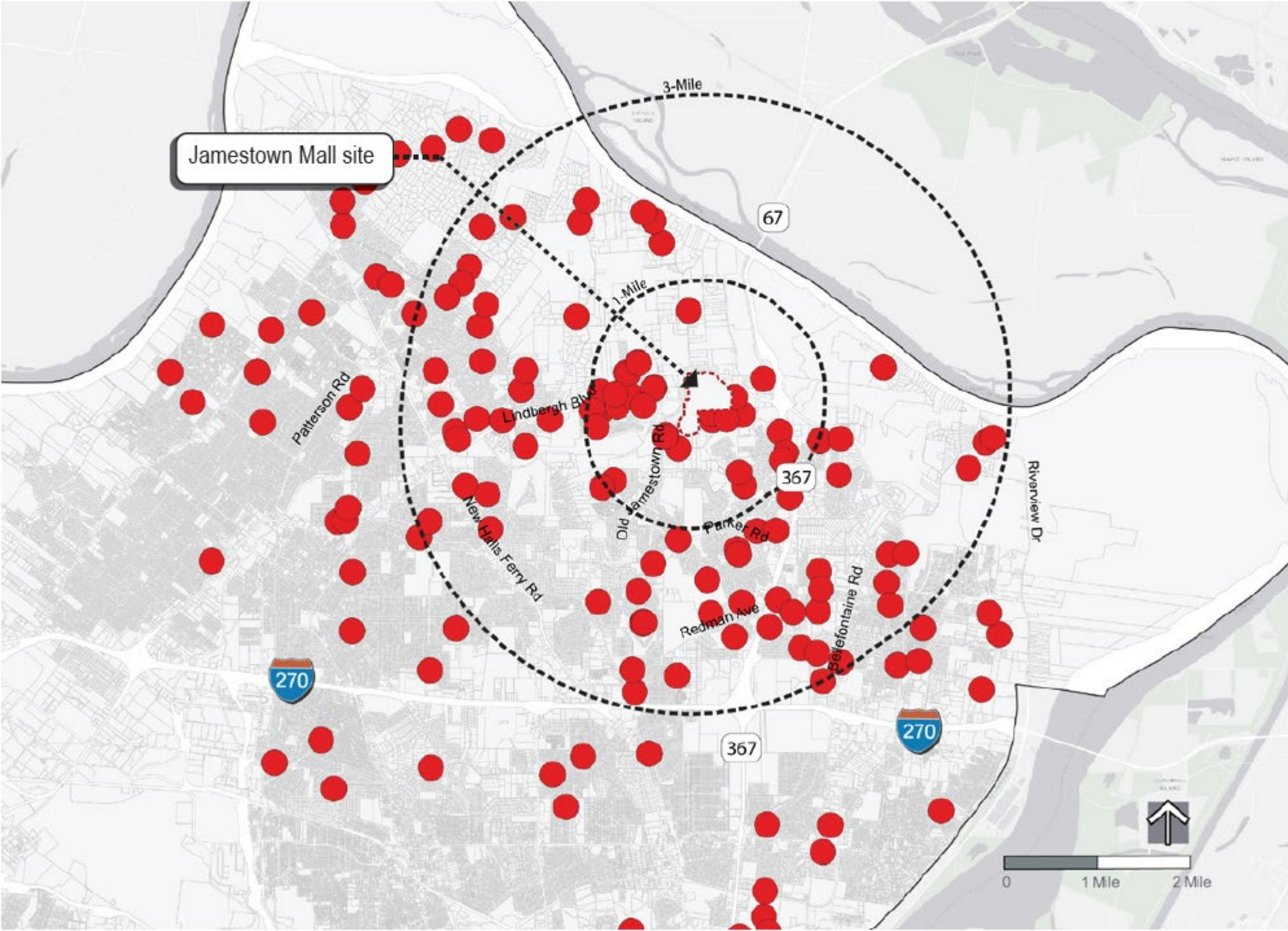


CONCEPT SKETCH

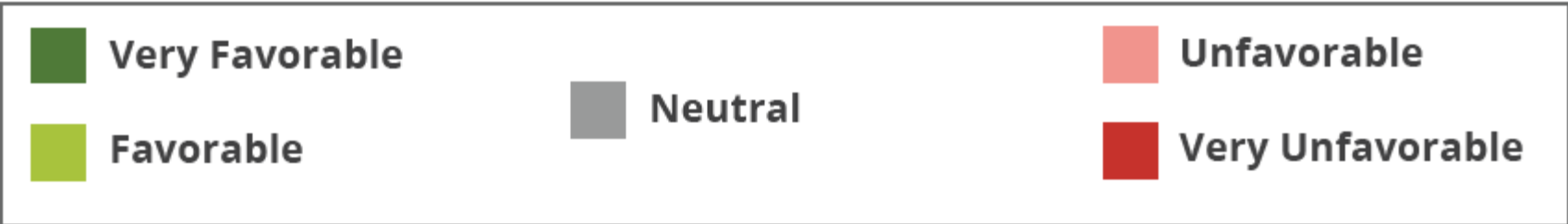
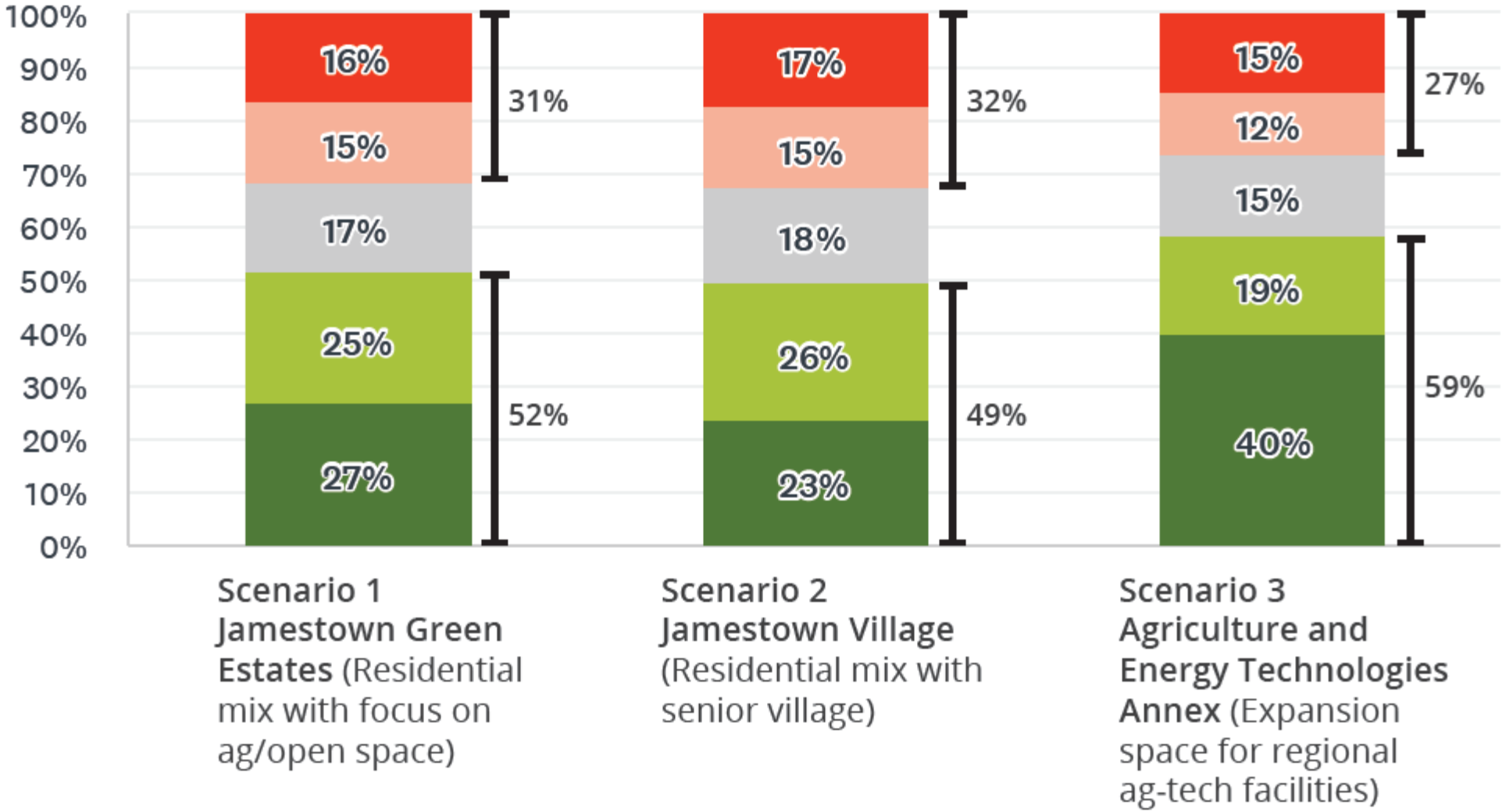


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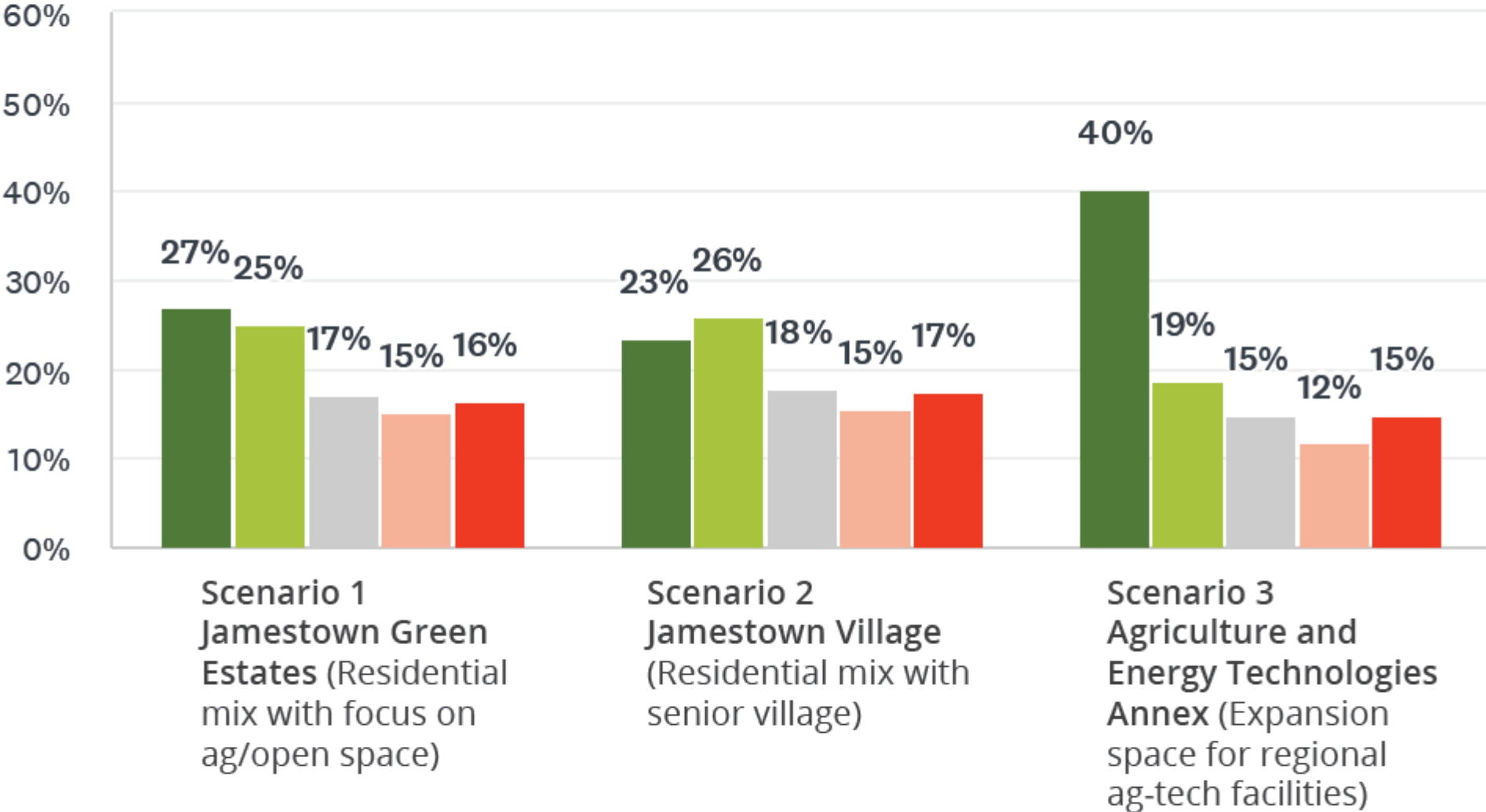
Location of Comment Responses



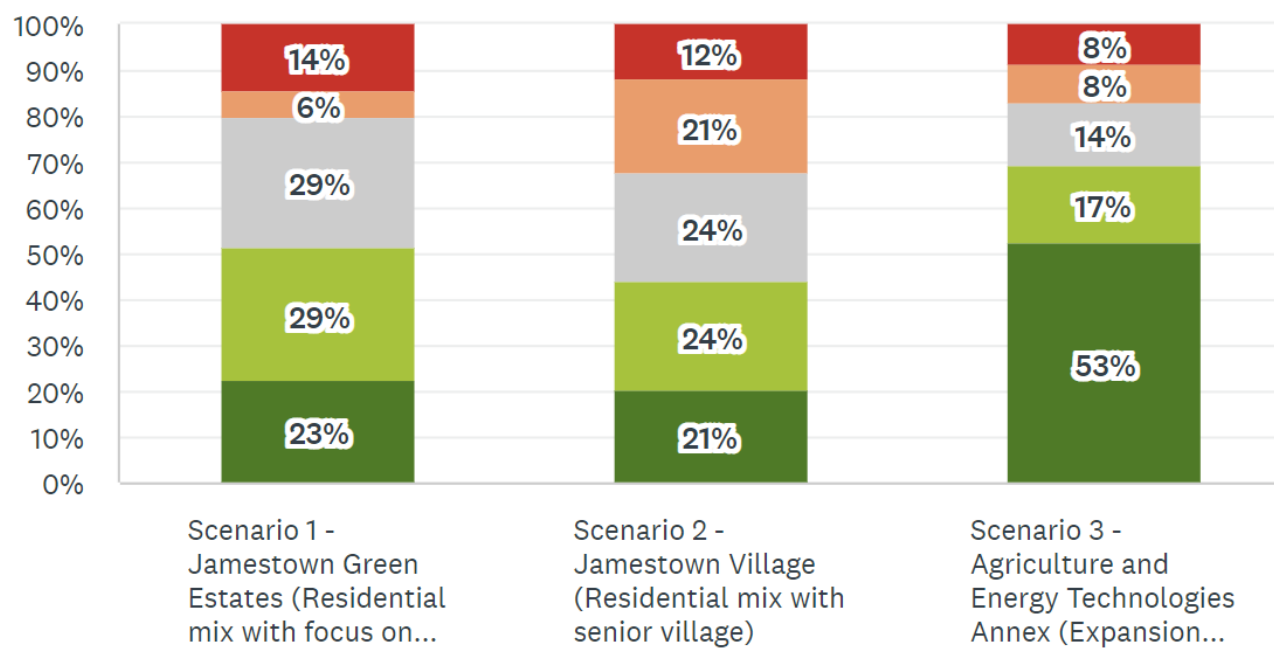
Q4. After reviewing the three land use scenarios, how do you view each scenario in terms of favorability?



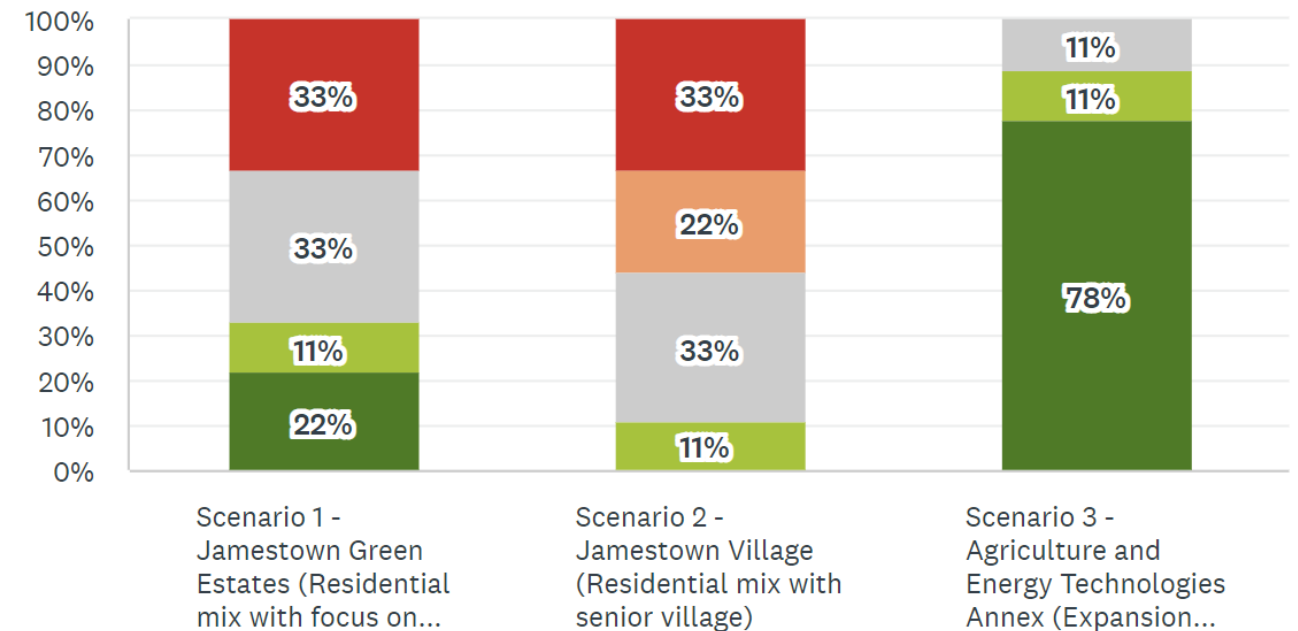
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RESPONDENTS (1-MILE RADIUS OF SITE)



RESPONDENTS (ADJACENT TO SITE)



PREFERRED LAND USE

ALTERNATIVE LAND USE

Goals of the Study

- “end result may be one preferred land use scenario, but more likely two to three land use scenarios that reflect community feedback...”

Recommended Land Use Scenario

- **Scenario 3 - Agriculture and Energy Technologies Annex**
(Final report uses the term “Ag-Food Technology Campus”)

Alternative Consideration

Scenarios 1 & 2 received substantial levels of favorability.

- Concerns: Conversion to rental properties. (However, newer, higher price point housing in North County has shown strong continued ownership.
 - Residential scenarios with mixed-use would provide opportunities for amenities that the community has expressed.
 - Market concerns: Rising mortgage rates (in addition to rising housing construction costs) further dampens new residential.
- **Alterations to Scenarios 1 & 2**
 - Senior (55+) Agri-Living
 - Market perspective: Growing senior population.
 - Community perspective: More open to senior focused residential.

Recommended Land Use:



SCENARIO 3 | AGRICULTURE AND ENERGY TECHNOLOGIES ANNEX

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Conference / Special Events Center



Test Plots



Alternative Land Use:

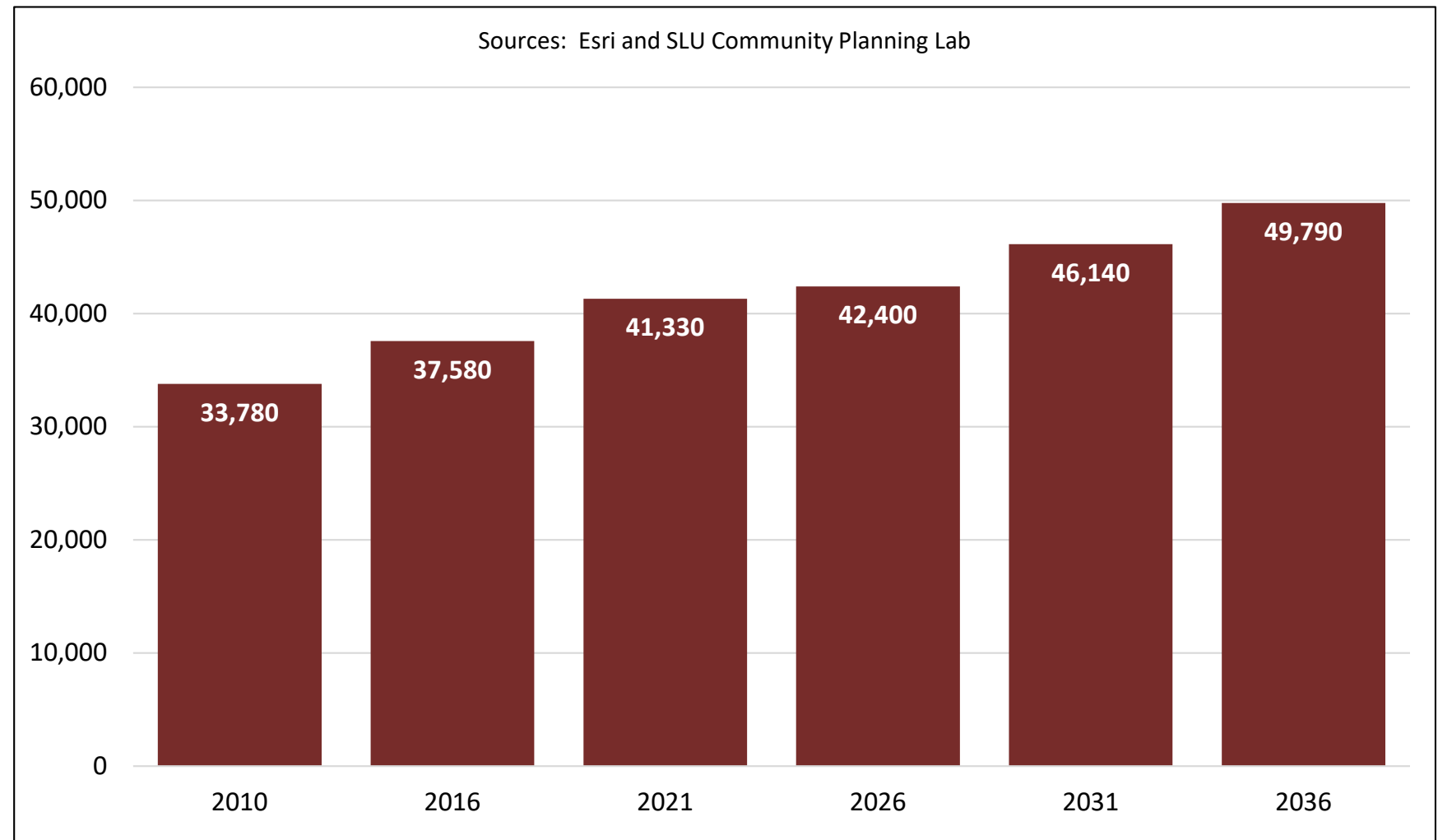
Alterations to Scenarios 1 & 2: Focus on Senior (55+) Agri-Living

Growing Senior Population

The total senior population is projected to reach nearly **50,000 in North County by 2036**, from just over 40,000 in 2021.

This would be a 20.5% increase in 15 years.

While equivalent projections for the entire North County population are not available, U.S. Census projections indicate that America's total population will increase at only about half that rate.



Alternative Land Use:

Alterations to Scenarios 1 & 2: Focus on Senior (55+) Agri-Living

Agri-Living

- Market differentiator for residential.
- Respects context of site.
- Working agriculture has potential for functional (and branding) tie-in with WildCare Park

Precedent: Chickahominy Falls, Richmond, VA



Ag-Food Technology Campus

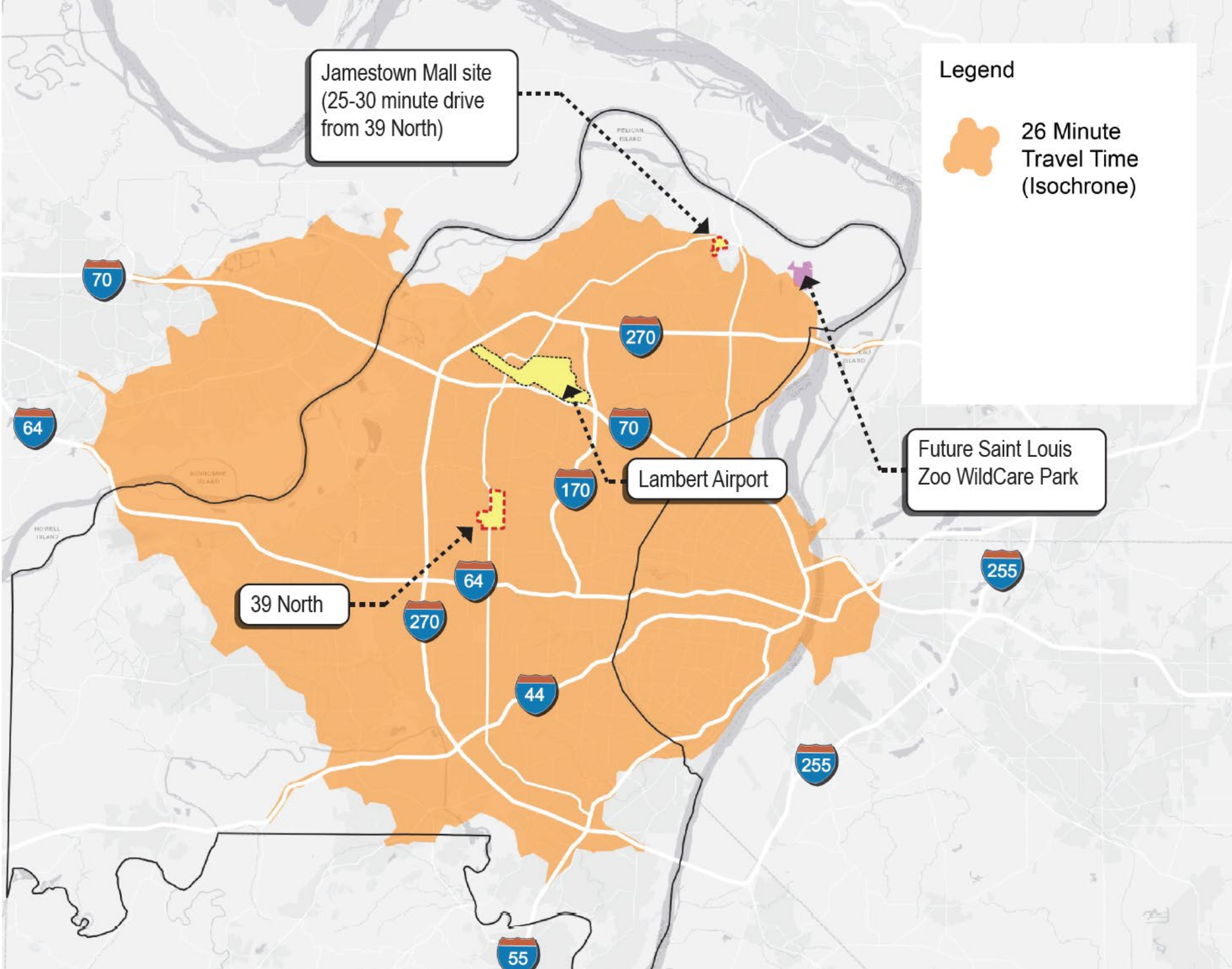
BENEFITS

- **Opportunity for North St. Louis County to align with the Greater St. Louis Jobs Plan.**
- **Opportunities for expansion space to support the growing regional AgTech/Ag-Food sector.**
 - Test Plots
 - Greenhouses
 - Other facilities
- **Leveraging existing agriculture land north of Lindbergh Boulevard.**

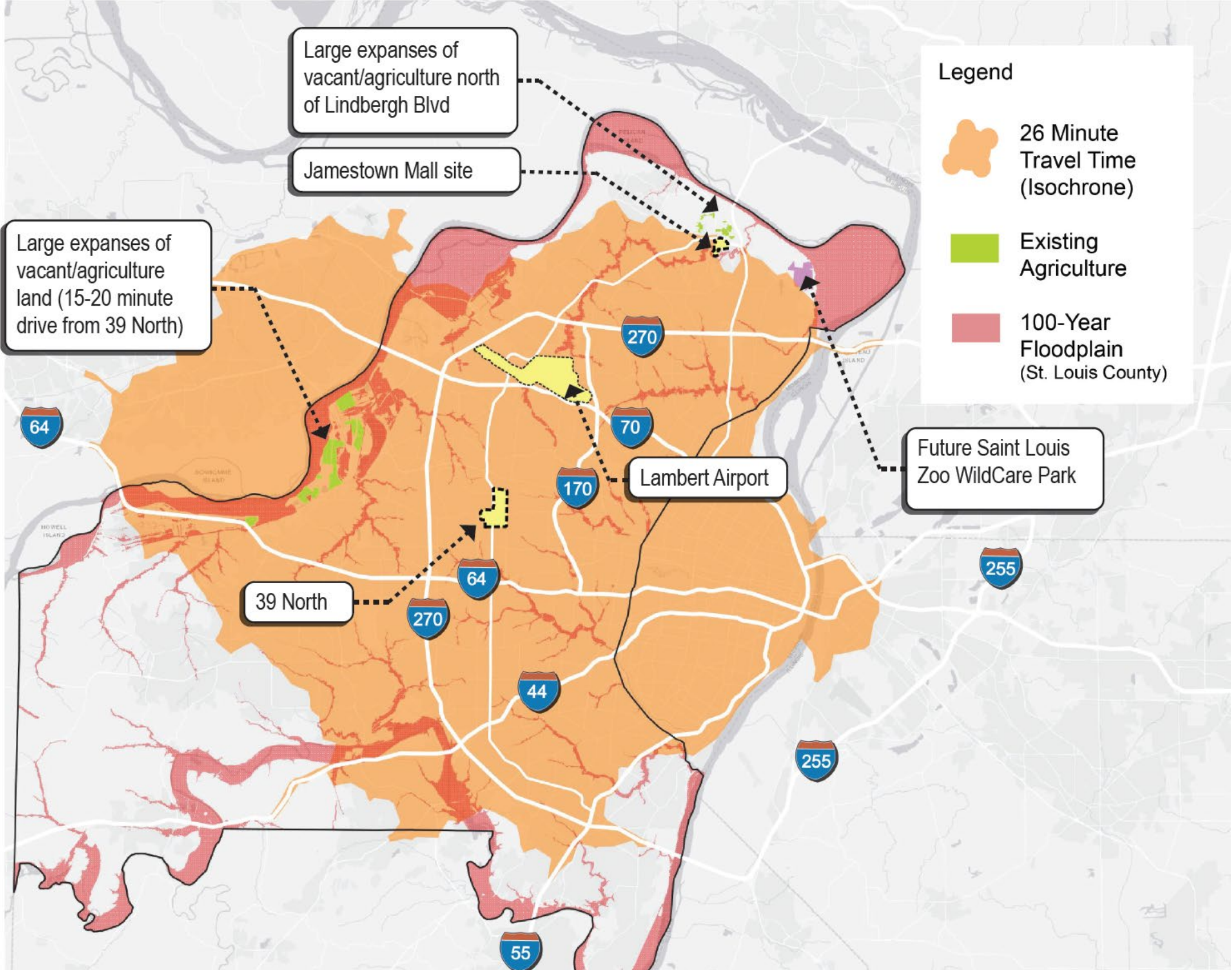
CHALLENGES

- November AgTech stakeholder meeting helped provide perspective
- **Implementation will require a different model than a developer RFP.** Will need regional organization to implement.
 - Cooperation among local, regional, and state economic groups.
 - Patient money, variety of incentives.
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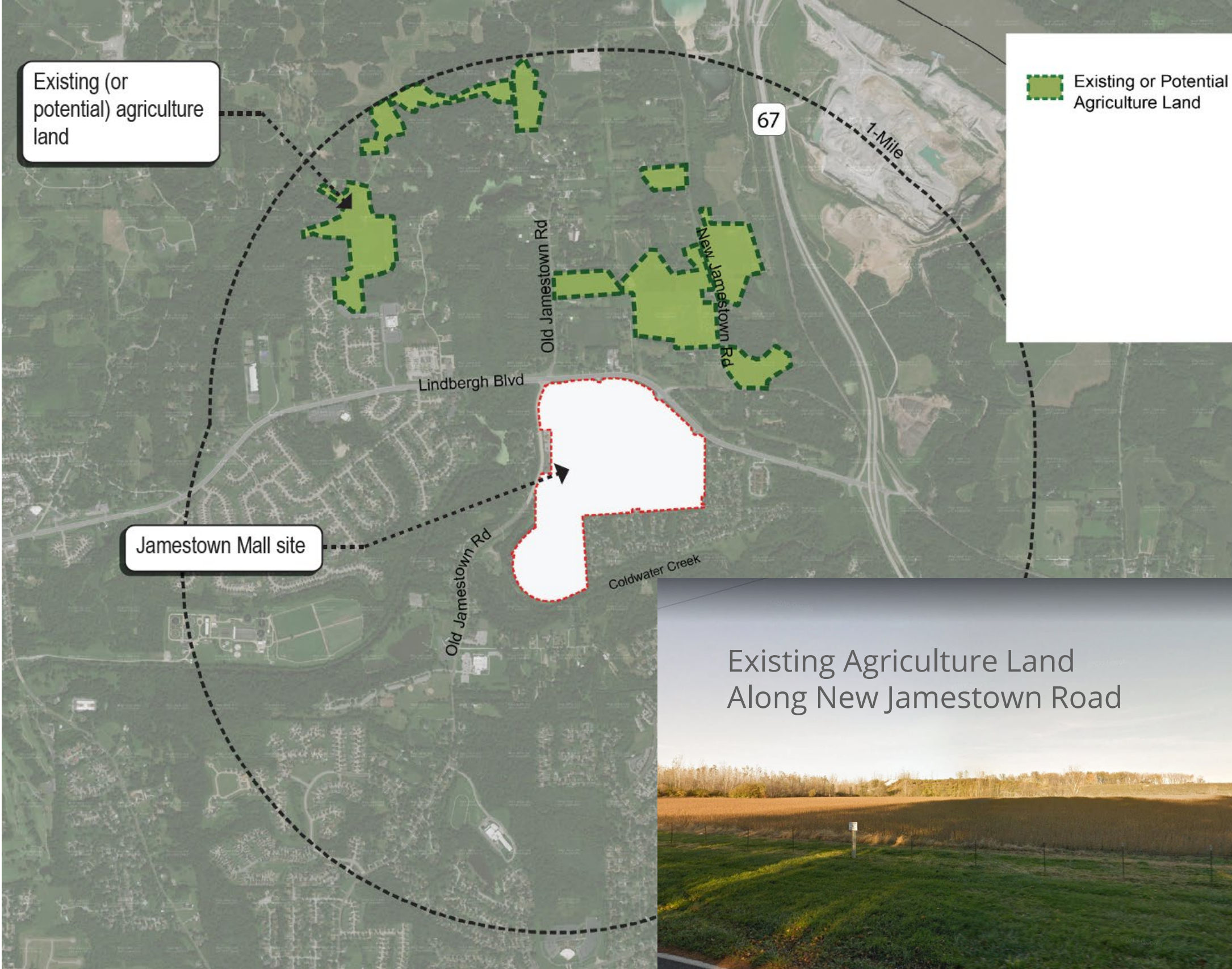
Proximity to 39 North



Proximity to Existing Agriculture

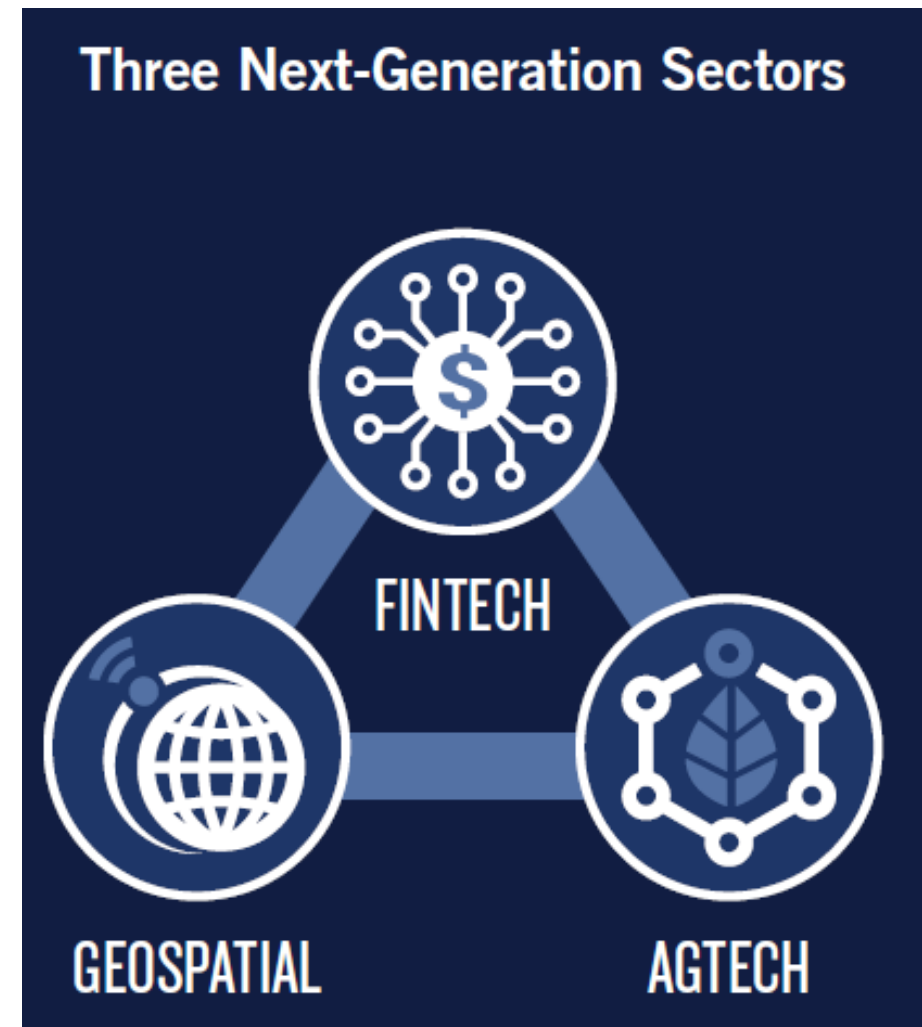


Proximity to Existing Agriculture

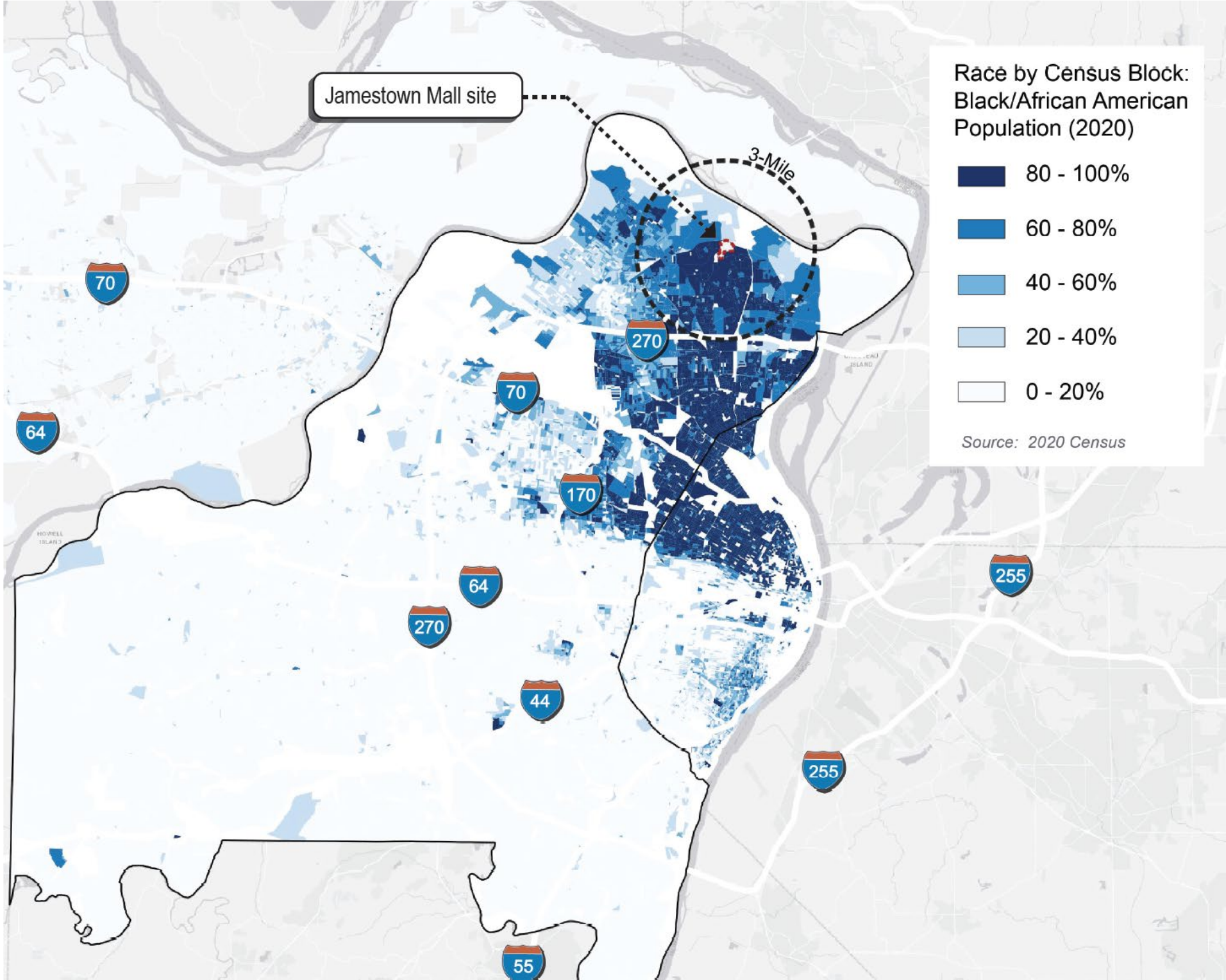


Alignment with Greater St. Louis Jobs Plan

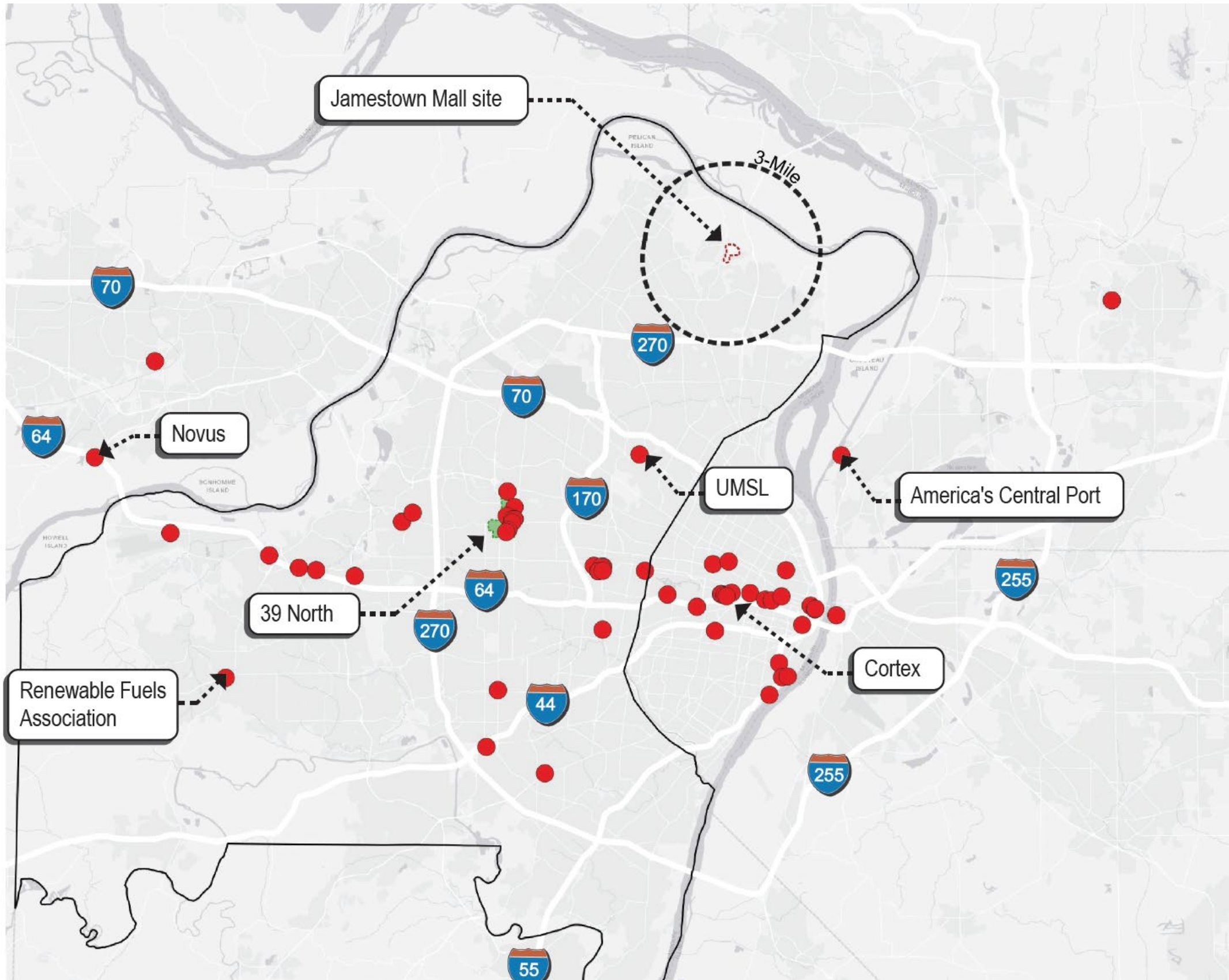
- **AgTech is a Next-Generation Sector** (Make the St. Louis Metro a Hub for Next-Generation Industries and Technologies)
- **Advancing racial equity and social justice is a key concern in the metro area.**



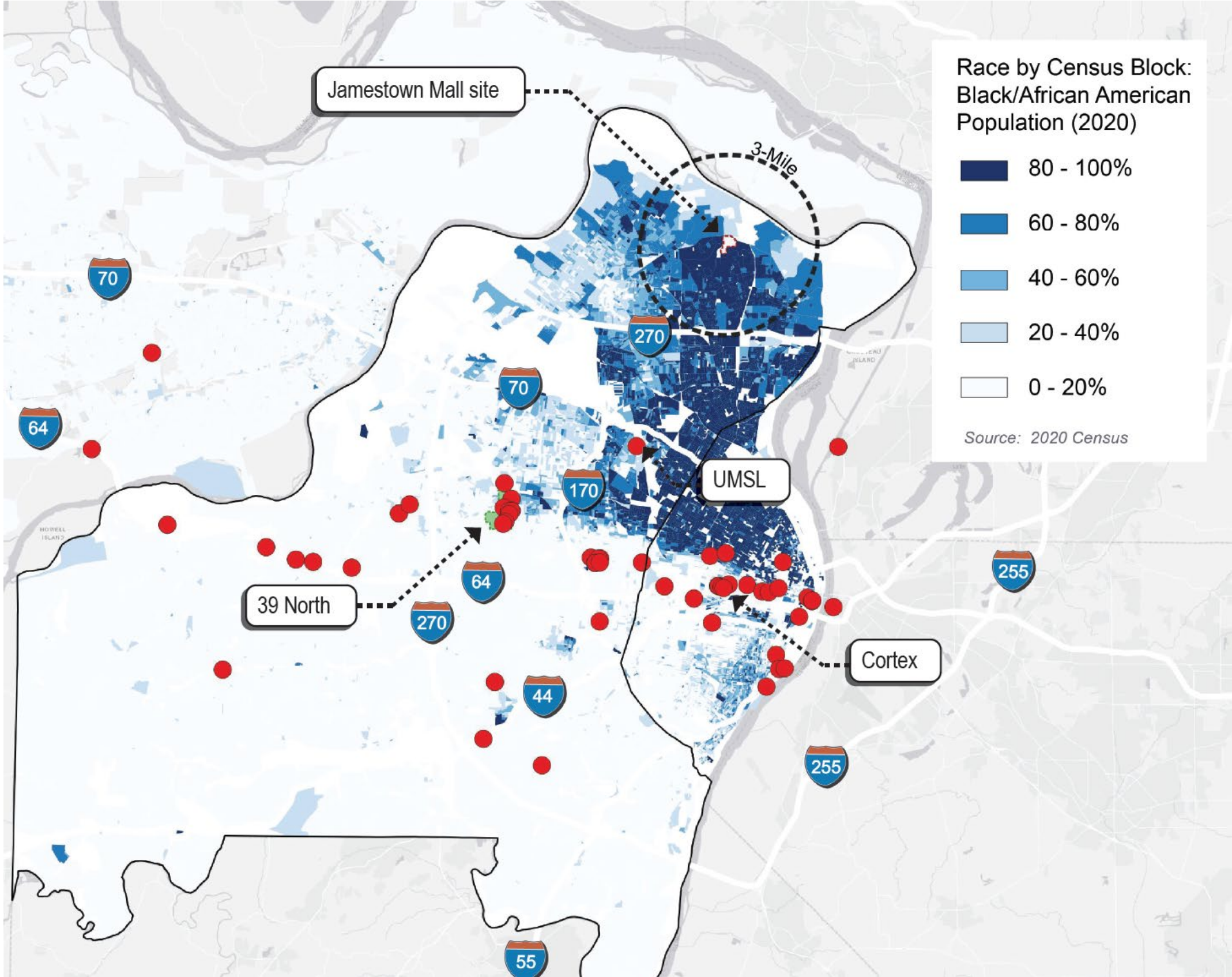
Advancing Racial Equity



Advancing Racial Equity: AgTech Ecosystem



Advancing Racial Equity: AgTech Ecosystem



Next Steps

- **Final Report (Fall)**

Report Recommendations

- **“Exploration Window”**
 - 24-30 months
 - Regional AgTech Working Group
 - Development Master Plan
- **Request for Proposals**
- **Other**
 - Retain Site Control
 - Addition Site Testing
 - Ensure Socio-Economic Benefits
 - Promotion and Marketing
 - Continue to Generate Local Interest in the Scenario and the Site
 - Transition of Website and Communications

DISCUSSION/QUESTIONS