CITY OF GRAND PRAIRIE
2021 HOUSING STRATEGY

Prepared by

FREESE AND NICHOLS

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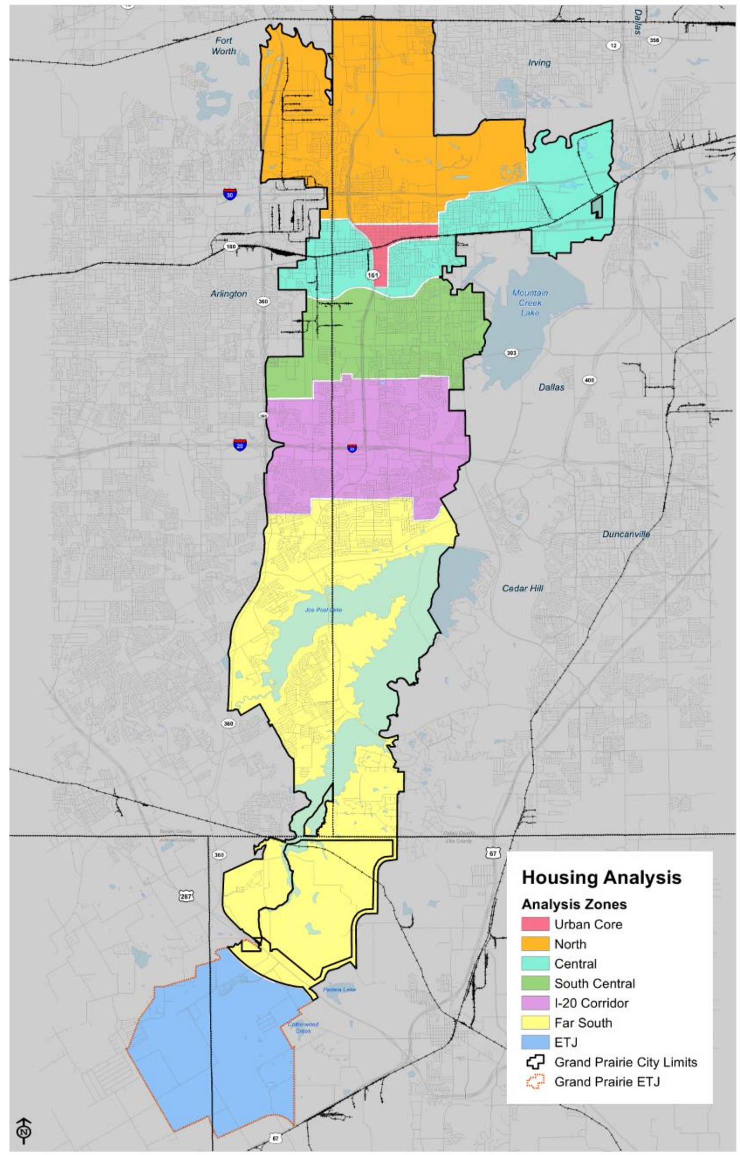
Introduction

The City of Grand Prairie is in many ways unique among the cities that border Dallas and Fort Worth. It is in fact one of only two cities, along with Irving, that border both of the core Metroplex cities. It is also unique because of its location near both DFW Airport and multiple large bodies of water (Mountain Creek Lake and Joe Pool Lake), sitting in multiple counties (Dallas, Tarrant, and Ellis), and having frontage along four major freeway corridors (IH-30, IH-20, SH 360, and SH 161), the historic Bankhead Highway (SH 180, formerly US 80), and Spur 303 (Pioneer Pkwy). While these corridors brought much growth to Grand Prairie over the past century, they also create many challenges. Growth, including associated freeways and airports, have been known to worsen air quality and disproportionately impact the city with increased traffic and noise. While the lakes, particularly Joe Pool, are aesthetic and recreational assets, they, along with their accompanying flood zones, also reduce the potential for housing, retail, and jobs in the city. Approximately 30% of Grand Prairie sits within a Federal Emergency Management Agency (FEMA) designated floodplain. Historically, development has favored neighboring cities with greater access to residents and businesses, using Grand Prairie's trade area to support shopping and dining options outside of Grand Prairie (an occurrence known as "leakage"). Parcels identified on Grand Prairie's Future Land Use Map as Commercial often sit vacant when they are near these flood zones, which increases the pressure on the City to approve them for high-density housing.

Figure 1: City of Grand Prairie Boundaries and Major Districts



In addition, development pressure has increased the velocity of growth, creating unique development patterns in the few remaining developable acres left in the City. Since the current Comprehensive Plan was adopted in 2018, approximately 400 acres of High-Density Residential (defined as more than 12 dwelling units per acre) have been added to the Future Land Use Map, resulting in more than a 25% increase. Of those 400 acres, approximately half was changed from Commercial/Retail/Office and approximately 8% from Low-Density and Medium-Density Residential.

There are also challenges when it comes to analyzing Grand Prairie's housing stock. Grand Prairie's borders are so long and narrow, there are several subareas of the City that require further analysis to paint an accurate picture of the City's housing profile. The development patterns of Grand Prairie are similar to the classic onion-like layers found in many metropolitan areas (e.g., an urban core surrounded by first-ring suburbs that are in turn surrounded by second-ring suburbs and so on). Grand Prairie could be considered a "first-ring suburb" of Dallas due to it bordering Dallas and its rise following the first wave of urbanization in North Texas in the early to mid-20th century. However, several factors distort this analysis, including Grand Prairie's relative isolation from Dallas by Mountain Creek Lake, its history as an industrial hub and blue-collar jobs center, and the existence of the typical onion pattern of development within Grand Prairie itself. Rather than existing entirely within a "first-ring" tier, Grand Prairie contains its own layers of first, second, and even third and fourth rings of development that align with neighboring cities such as Arlington, Cedar Hill, and Mansfield.

Within these rings, there are multiple housing types that reflect the era in which they were built, from Grand Prairie's founding as a city oriented around a rail stop and an aircraft manufacturing facility in the early 1900s to its days as a "bedroom community" in the middle to late 20th century, and now a diverse city oriented around jobs, entertainment, and recreation. With its location between Dallas and Fort Worth, two cities experiencing their own apartment booms driven by an increase in jobs and scarcity of housing, Grand Prairie faces a new challenge of how to handle more rapid growth than it has experienced in the past. While Grand Prairie has long been one of the largest cities in the Metroplex by population and has typically seen growth rates of more than 30% in each decade, the city has rarely faced so much housing pressure for high density residential development in such a short span of time (see Figure 2).

For example, if all currently entitled multi-family projects are built, Grand Prairie's population is projected to rise from approximately 190,000 in 2018 to over 215,000 by 2023, a 13% increase in only a five-year period. While this is in-line with historic population growth trends, the multi-family housing stock in the city (defined by the Census Bureau as consisting of three or more dwelling units) will have nearly doubled from 15,950 units in 2015 to 30,152 units in 2023.

In response to this pressure, the City of Grand Prairie issued a moratorium in February 2021 on "multi-family developments" defined as any of the following:

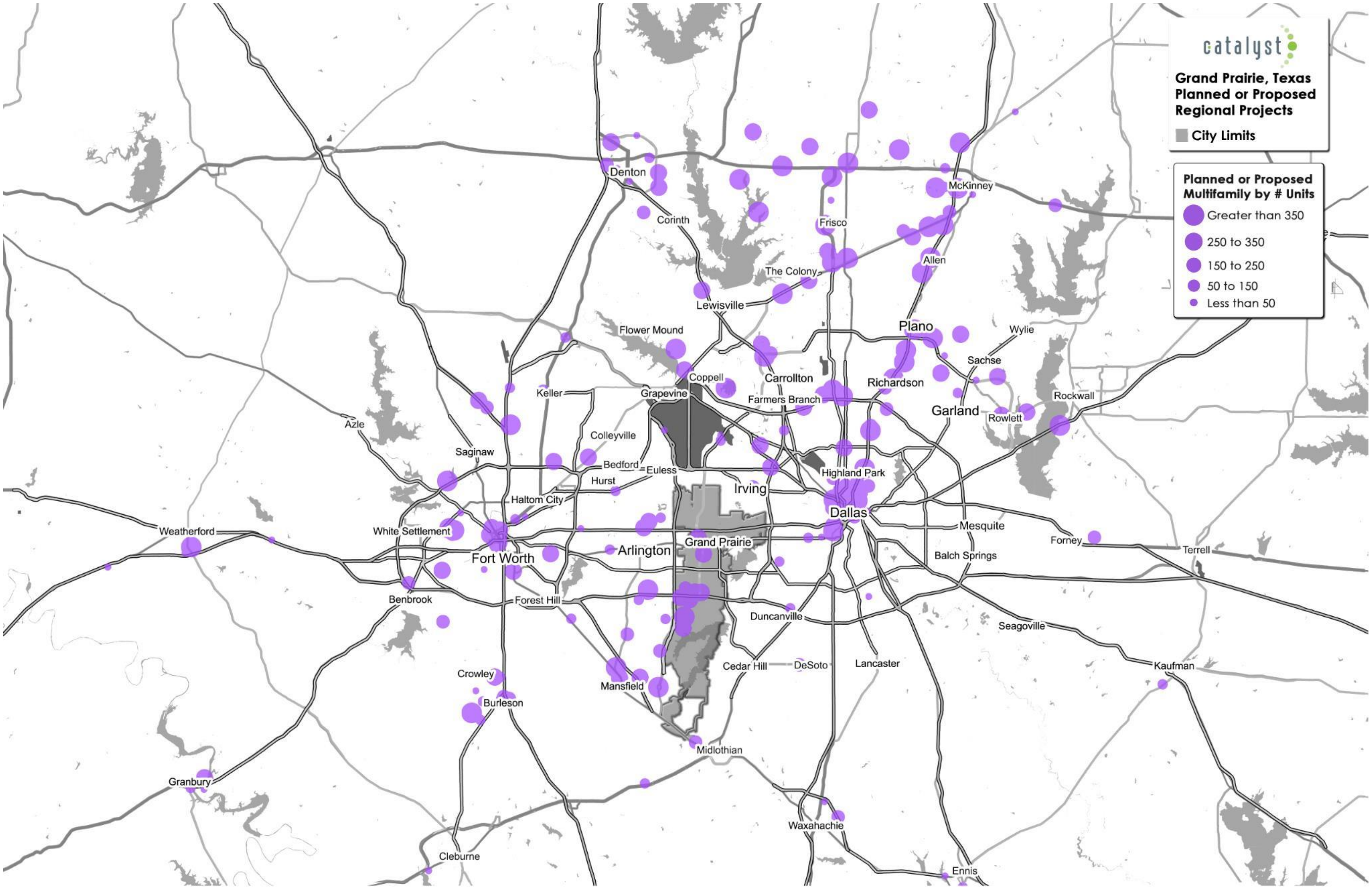
- Single-Family Attached

- Single-Family Townhouse
- Single-Family – Hybrid Housing (build to rent)
- 2-Family/Duplex
- 3 & 4 Family
- Multi-Family Apartment Uses

The ordinance adopting the moratorium cited findings related to traffic congestion, the ability of the city to serve new developments with water and sewer, and concerns regarding crime and code enforcement related to the rise in multi-family construction. To address these pressures, the City seeks to develop a set of strategic recommendations for managing the growth of multi-family and other types of housing. This study is based upon research conducted by Freese and Nichols, Inc. in cooperation with Catalyst Commercial. The research methodology seeks to understand and take inventory of Grand Prairie's existing housing stock and the current demand for housing (both multi-family and single-family) and compare these market forces to the City's current housing policy, including the provisions for housing within Grand Prairie's 2018 Comprehensive Plan and the Future Land Use Map. Based on this analysis, this report recommends key changes in land use strategy and approach.

While the recommendations contained within this document may recommend further reaching changes such as regulatory amendments to the City's Unified Development Code or impact fees, this report is not intended to be a regulatory document, nor to the changes proposed to the Future Land Use Map carry the authority of zoning. This report is intended solely as a guide to managing Grand Prairie's future demand for housing and maximize the potential of the city to build out in an effective way that creates lasting value for the City's neighborhoods and commercial corridors.

Figure 2: Planned Multi-Family Development in DFW and Grand Prairie



Analysis of Existing Housing and Demographics

Demographic Profile

Housing consists of buildings where people live. While this may seem overly simplistic, it's important to differentiate housing from other buildings that contain activities such as schools, shopping, and manufacturing. There is nothing inherently magical about a certain form of housing; as with other buildings, getting the "right" type of housing depends on identifying the needs of the community and the appropriate manner and locations to best serve those needs. A small city generally does not contain high-rise office buildings, while a large city generally does not contain a large amount of garden office buildings near its core.

While it is difficult for a city-wide analysis to accurately capture the demographic nuances of a city as diverse and large as Grand Prairie, such analysis is important to provide a baseline for comparison on a subarea level. The following sections will detail those subareas and housing types, while this section will establish the baseline city-wide demographic profile.

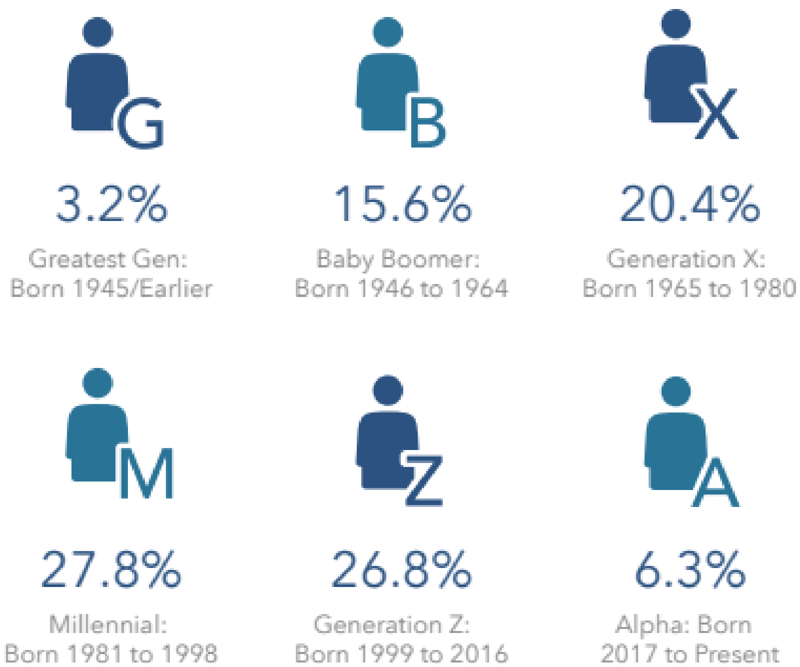
Grand Prairie is a rapidly growing city. The highest growth period in Grand Prairie's history was the period between 1950 and 1990 when the city grew in population from 15,000 to 100,000, or approximately 667%. While that level of percentage growth is no longer conceivable, Grand Prairie is poised to enter another boom period, having more undeveloped land under its jurisdiction than any other city with such close proximity to Dallas and Fort Worth. The question is whether this growth will come at the whims of the market or will it be guided by a strategic policy that is market-responsive but also driven by the city's need for balanced housing growth.

Population

Esri estimates the city's 2020 population to be 204,196. Looking into the future, Esri projects that the city will continue to grow at a rate of close to 1.4% annually, putting the 2025 population at just under 220,000 – an increase of nearly 100,000 from the year 2000 and a nearly threefold increase from 1980.

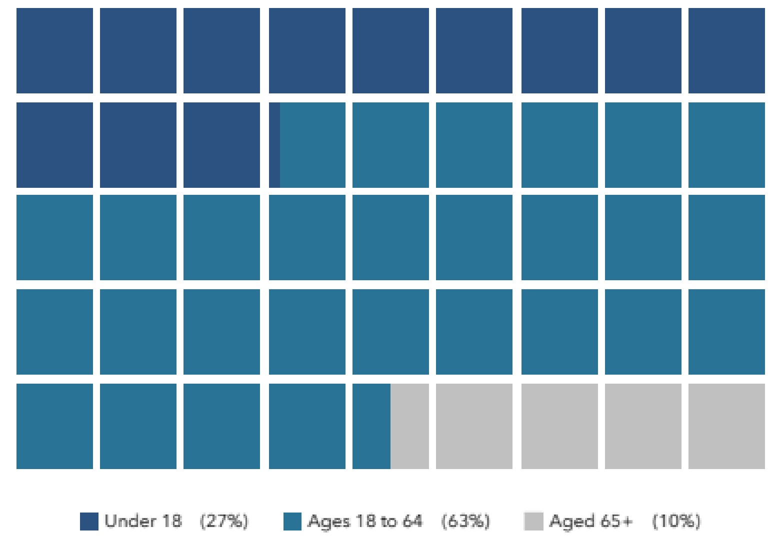
Grand Prairie's population has a median age of 32.5. The largest demographic cohort in the city are Millennials followed closely by Generation Z. These two groups, consisting of persons ages 5 to 40, make up more than half of Grand Prairie's population. The next largest group is Generation X (ages 41 to 56) and Baby Boomers (ages 57 to 75). A new generation, Alpha, consists of persons ages 4 and under, and already represents 6.3% of Grand Prairie's population.

Figure 3: Demographic Cohorts



Approximately 63% of Grand Prairie's population is of working age (18-64) while just over a quarter (27%) is school age with the remainder (10%) retirement age. Each of these groups has particular needs when it comes to housing, with working people and school aged groups needing convenient access to jobs and schools along with space for larger families and the investment security and transfer of wealth that comes with owning a home. Retirement age people, in contrast, benefit more from houses with smaller footprints, less maintenance, and the convenience of living close to shopping and medical facilities.

Figure 4: Population by Age Cohorts



Income

Put in simplified terms, Grand Prairie is a middle-class city with a median household income of $66,263, per capita income (total income divided by population) of $26,631, and a median net worth (assets minus debt) of $81,242.

Households earning between $50,000 to $99,999 make up the largest share of Grand Prairie's households (36.4%). Approximately 22.1% of households make less than $35,000. Approximately 29.0% of households make $100,000 and up. While these raw numbers are encouraging in terms of the wealth and spending power of Grand Prairie's citizenry overall, incomes are not evenly distributed across the city.

Socioeconomic Factors

Many Grand Prairie residents lack adequate access to basic necessities such as food, jobs, and internet access. According to the 2019 U.S. Census American Community Survey, over 17% of residents do not have an internet subscription in their home and 11.6% of residents rely on food stamps. Despite Grand Prairie's location near the heart of DFW, over 50% of residents drive more than 25 minutes to their job each day. All of which have great implications for the impact of housing costs on household budgets.

Housing Costs

Approximately 26% of Grand Prairie homeowners with a mortgage spend more than 25% of their income on a mortgage. Over 53% of renters spent more than 25% of their income on rent, including 11.5% who spent more than 50% of their income. In addition, approximately 1.8% of Grand Prairie residents rely on public assistance to meet housing costs.

Housing Typology

As mentioned in the introduction, roughly 400 acres have been shifted on the Future Land Use Map to High-Density Residential. Much of the new construction of attached residential and multi-family has been truly high density, with new developments raising the overall gross density of these developments from 14.7 units per acre of land to 19.7 units per acre, a 33% increase. While single-family development still makes up on the majority of housing in Grand Prairie both by land use area and by number of units, the number of multi-family units will nearly double in less than a ten-year period (2015-2025) based on existing entitlements, while single-family development will grow at a more modest rate.

Each acre of land developed for housing represents both an opportunity (to provide more housing, to integrate communities, to provide potential customers for businesses) and a potential opportunity cost (preserving land in a natural condition or for other types of development). Land use decisions revolving around housing should therefore balance current needs with future opportunities and should consider whether the benefits of a particular housing type outweigh the costs to the city, either direct costs (infrastructure, patrols, parks) or indirect costs (lost ad valorem or sales tax). Housing decisions should also be based on an understanding of Grand Prairie's local and regional housing market and an understanding of the housing that currently exists in the city. Without this understanding, deciding whether new housing is needed or fits within the community is very difficult.

The following sections describe the housing types that currently exist in Grand Prairie. These types are intended to reflect both styles of housing (single-family or multi-family) and the era and context in which housing has developed in Grand Prairie.

Vought-Era Housing

This is the City's earliest form of housing stock. Vought-Era housing was constructed largely during the post-war period when the Vought aircraft manufacturing plant employed thousands of workers in central Grand Prairie.

The houses are typically modest frame buildings with few decorative features, though these may have been added on by residents over the years. Since the houses were often built with either no garage or a one car garage, later carport additions are common along with additional parking pads in the front yard.

This type of housing exists in a roughly contiguous area between the Dallas and Arlington city limits and between IH-30 and Cottonwood Creek. As detailed in the following section, this area is one of the lowest-income areas of Grand Prairie.

Example of Vought-Era Housing

Post-War Suburban

This housing typology represents the largest share of housing in the city. Post-war suburban is typified by detached single-family lots, deep setbacks, curvilinear streets, and neighborhood identifiers such as entry monuments and coordinated landscaping. This type represents housing stock constructed across a seventy-year time frame (1950s to today) and all across the city.

In an effort to stabilize these neighborhoods, the City has recently begun mandating a heightened level of single-family enhancements in new subdivisions, including coordinated open space, fencing standards, and common amenities. To ensure financial support for the upkeep of these features, the City has mandated the creation of homeowners associations (HOAs) and Public Improvement Districts (PIDs) for new single-family subdivisions and encouraged their creation for existing subdivisions with these types of enhancements.

Example of Post-War Suburban Housing

Contextual Density

This typology represents those areas of the city that include a mixture of housing densities within an integrated neighborhood context. These areas may include single-family detached, medium density such as duplexes, townhomes, and small apartments, and larger high-density housing developments. While these housing types may be separate developments, they are integrated into the surrounding neighborhood fabric and have direct access to a number of services and amenities, including retail, grocery, parks, and other community services. In some cases, these services might even be accessible without the need for a vehicle.

In addition to having access to services, contextual multi-family also benefits from the stabilizing influence of the surrounding neighborhoods. This "eyes on the street" effect helps the City more effectively monitor activities in higher-density housing. When multi-family housing is not located directly on a freeway corridor, it also increases the ability of the Police Department to respond when a crime has been reported since criminals must travel larger distances and spend more time reaching those corridors.

Example of Contextual Density with a School in Single-Family Neighborhood

Example of Contextual Density with Multi-Family Housing Next to a Recreation Facility

Multi-Family Islands

In contrast to contextual multi-family, this type of multi-family mainly exists in the form of large apartment complexes along freeways or major thoroughfares. These islands may exist as part of a larger development with commercial uses entitled but not yet constructed, or they may be standalone developments constructed in areas where other uses such as commercial or industrial are not favored by the market. These multi-family islands have little if any integration with existing neighborhoods or developments and often have access to only a few or limited amenities and services.

Multi-family islands may consist of a single development or a larger concentration of multi-family developments in an isolated area along a major corridor. In the latter case, the dynamics of the area are presumed to be similar, since each development exists as an isolated, gated complex with little or integration with surrounding neighborhoods or areas.

Example of Multi-Family Residential adjacent to empty commercial property along an Interstate

Housing Analysis Zones

Because Grand Prairie is a geographically long and large city, it is impossible to accurately interpret detailed housing figures on a city-wide scale. To determine and explore factors related to housing in Grand Prairie, the analysis presented in this report divides the city into smaller zones based on shared geographic, demographic, and housing characteristics within various sections of the city. This allows areas that developed during a certain time period to be compared with other similar areas rather than simply comparing areas with dissimilar profiles. The recommendations developed for this study will address factors unique to each analysis zone along with city-wide recommendations.

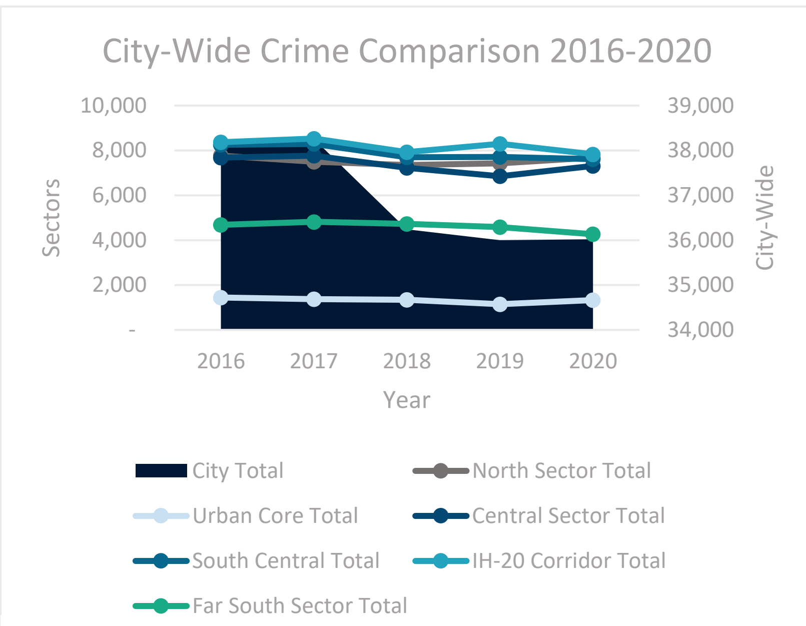
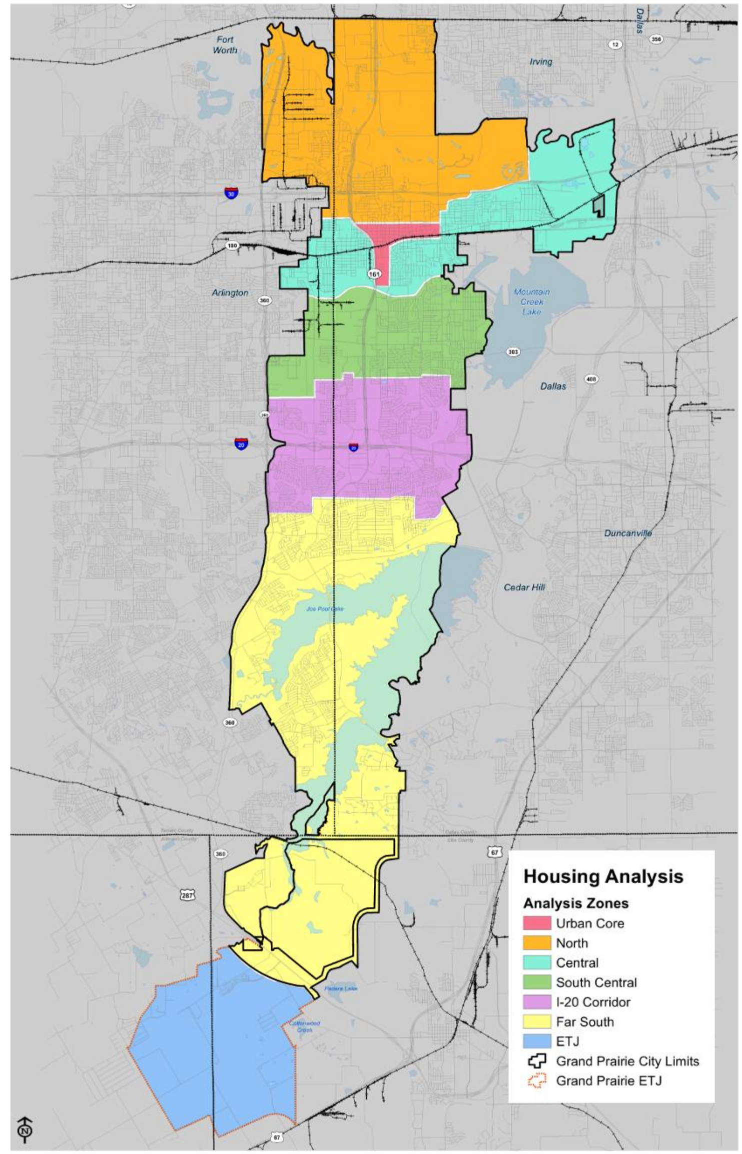


Figure 6: Reported Crimes (City-Wide vs. Analysis Zones)

Figure 5: Analysis Zones



North Sector

This sector has boundaries that begin at the northern and western city limits and extend to MacArthur Road north of IH-30 and to Belt Line south of IH-30. Hill Street and January Lane from the southern boundary of this sector. The area is characterized by large scale industrial developments along SH 360, SH 161, and IH-30.

Post-war suburban and multi-family islands are concentrated between these industrial areas and have historically been impacted by increasing truck traffic that is routed through neighborhoods. The post-war suburban housing that exists in the north sector is typically large-lot single-family detached. The homes are some of the largest in the city north of Joe Pool Lake and take advantage of the heavily wooded environment characteristic of the Cross Timbers region, a characteristic not found in as much abundance elsewhere in the city.

South of this area is one of the larger concentrations of multi-family development in the city near the IH-30 and SH 161 interchange. SH 161 didn't exist when this area was constructed and as a consequence of that construction much of this housing was cut off by the freeway from services in Central Grand Prairie.

This area also contains a concentration of multi-family along SH 360. This area is generally better integrated with nearby commercial development along NW Carrier Parkway and with stable, high-value single-family neighborhoods in northeast Arlington. The Riverside golf course is also a potential mixed-use redevelopment site, further adding to the viability of this area.

Overall, housing in this sector is of moderate age, with the median structure having been built in 1987. Seventy-seven percent of homes were built between 1970 and 2009, meaning the area is largely built out in terms of easy-to-develop tracts. Future housing would need to come from redevelopment or from areas that pose significant development costs due to environmental factors (such as floodplain or landfill reclamation). The characteristic that distinguishes this sector from the rest of the city is that the north is not dominated by single-family detached residential. Single-family makes up 34.2%, while multi-family consisting of 3 to 50 units makes up 42.2%, and mobile homes makes up 11.4%. Despite the low percentage of single-family, the percentage of renters is near 50% and there is a large concentration of medium-density housing such as townhomes and condominiums in the north sector.

Diversity of housing is generally a positive thing for maintaining economic stability and vibrancy and is a worthy goal for the city. Though this sector has good numbers on paper, the housing types are highly isolated from each other and other uses and exist in pockets scattered around the sector. Because of this, there is little context to most housing in the north, and access to most destinations such as schools, retail, and jobs is limited except in certain areas such as the N Carrier Pkwy corridor.

While this area has some concentrations of larger homes and affluent neighborhoods west of SH 161, overall economic health is somewhat lower than the city as a whole. Despite its proximity to one of the larger job centers in Grand Prairie (Great Southwest Industrial Park), residents of the North Sector tend to have long commutes, with 40% having a commute that is 30 minutes or longer and 10% having a commute that is 45 minutes or longer. Nearly 17% of residents have a mortgage that constitutes more than 25% of their expenses. 41.3% of renters spend 25% or more of their income on rent, and 11.5% spend more than 50% of their income.

According to ESRI analysis of U.S. Census Bureau data, the population in the North Sector increases by roughly 8,000 to 34,840 during the day. Many of these jobs are concentrated within the Great Southwest Industrial Park, which boasts more than 60 million square feet of industrial space and hosts major employers such as Bell Helicopter. Despite the high daytime population, retail and restaurants offering in the area are sparse and concentrated along the SH 360 frontage roads and at IH-20 and Belt Line Road. The latter area contains several sites that have benefitted from investments in frontage road construction and floodplain reclamation. With the potential for mixed-use development, this area offers an excellent opportunity for integrated mixed-density residential.

Opportunity Areas

- IH-30 at Belt Line
- SH 161 at Lower Tarrant (future Wildlife Parkway)

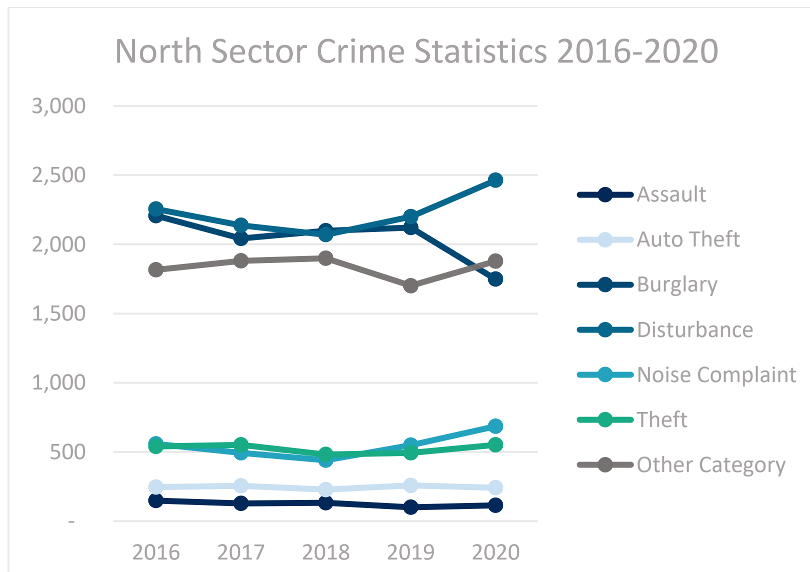
Key Takeaways

- Highest level of housing diversity but little context
- Needs better access to jobs

Table 1: North Sector Statistics

Statistics	North Sector	City
Percent of Single-Family Detached:	34.2%	67.7%
Median Year Built:	1987	1988
Median Home Value:	$167,847	$178,133
Percentage of Renters:	53.6%	38.8%
Percentage that Walk or Bike to Work:	0.2%	0.6%

Figure 7: North Sector Reported Crimes (2016-2020)



Urban Core

This area is centered around the historic downtown of Grand Prairie south of Hill Street between Belt Line Road and the George Bush Turnpike and include the commercial corridors of Main Street and Jefferson Street along with the South Carrier corridor running south of Jefferson to Dickey Road.

While housing in this area typically falls under the Vought-Era profile, the Urban Core has seen steady redevelopment of infill lots, including new construction. The neighborhoods within the Core also benefit from proximity to downtown where the City has made investments in redeveloping the former Central Fire Station into restaurant and event space, constructed a new City Hall and Central Fire Station, and incentivized revitalization of several existing businesses. The Farmer's Market and several festivals and parades also operate downtown and draw several thousand visitors each year.

Since the Urban Core contains several City and County facilities and one of the largest office buildings in Grand Prairie, the daytime population of this sector nearly doubles during the day. Despite this, there is still not enough daytime population in the area to support large-scale commercial development, and the downtown would benefit greatly from more residents to support retail and restaurants in the evening as well as creating a center of gravity to draw visitors from outside the area.

Key Sites

- 161 at Main and Jefferson
- Church-Owned Site west of City Hall

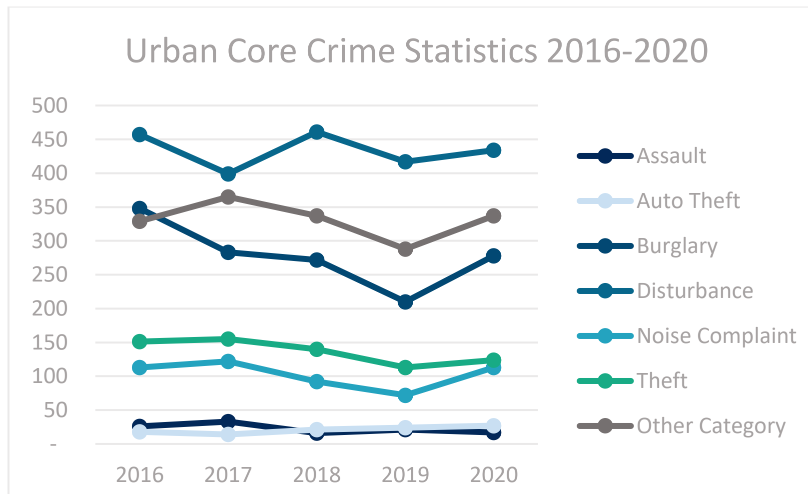
Key Takeaways

- Growing slowly
- Moderate income
- Two-thirds renters

Table 2: Urban Core Statistics

Statistics	Urban Core	City
Percent of Single-Family Detached:	40.7%	67.7%
Median Year Built:	1981	1988
Median Home Value:	$135,177	$178,133
Percentage of Renters:	66.4%	38.8%
Percentage that Walk or Bike to Work:	0.4%	0.6%

Figure 8: Urban Core Reported Crimes (2016-2020)



Central Sector

This sector comprises the oldest areas of Grand Prairie going back to its founding as Dechman in the late 1800s. As noted in the Housing Typology section, smaller workforce housing dominates this area of the city. That housing is further impacted by the industrial, heavy commercial, and auto-oriented businesses that were established north of Henley Field in Dallas throughout the 20th century, including one of the largest concentrations of salvage yards in the Metroplex. The western side of the sector faces similar impacts from the Great Southwest Industrial district and the General Motors plant in Arlington.

These factors, combined with air traffic from DFW Airport and freight rail traffic from the Union Pacific rail line that runs through the middle of the sector, have historically suppressed housing values in central Grand Prairie relative to other sectors to the north and south. However, because the area is centrally located along IH-30 and SH 161, housing pressure from the North Texas real estate market will continue to drive up values relative to their historic base. Since the household incomes in this sector are low, any gentrification that occurs within Central Grand Prairie will disproportionately impact existing residents, many of whom are racial minorities who could struggle to find adequate housing elsewhere in the central portion of the Metroplex.

The City through its Housing and Neighborhood Services Department has made considerable investment in housing in this area through leveraged HUD funding. The housing, which generally consists of single-family homes, helps to stabilize neighborhoods in the disadvantaged areas of Grand Prairie and reduce the blight that results from private-sector real estate speculation and land banking.

Currently, about 10% of housing units are reported as vacant, which is far higher than any other sector, meaning that available housing units are not being absorbed as quickly as housing units in other parts of the city.

According to the USDA, much of the Central Sector is a "food desert", meaning that residents are restricted from having access to fresh foods due to a combination of depressed incomes preventing grocery stores and fresh food markets from locating in the area, and lack of vehicle access making travel outside of the area difficult.

Incomes in the area are certainly depressed. The median household income is roughly 60% of the rest of the city, but per capita income is barely more than half ($15,896 compared to $26,631). The area is nearly 70% Hispanic with over 17% of the population speaking English either "not well" or "not at all". Over 20% of the population possesses less than a 9th grade education. The sector is also the youngest in the city by median age, and the only sector with a median age under 30, meaning that the average resident has likely not reached their peak earning years.

Key Sites

- Great Southwest Parkway at Jefferson
- Downtown Gateway East (between Main and Hill Streets)

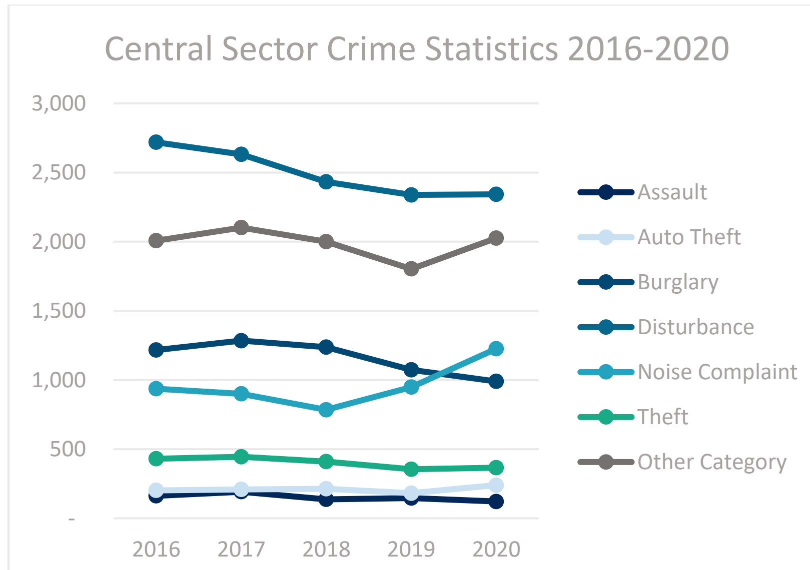
Key Takeaways

- Median home value under $100,000
- Median age under 30
- 20.9% less than 9th grade education
- High vacancy relative to the rest of Grand Prairie possibly indicating speculation

Table 3: Central Sector Statistics

Statistics	Central Sector	City
Percent of Single-Family Detached:	63.8%	67.7%
Median Year Built:	1959	1988
Median Home Value:	$91,901	$178,133
Percentage of Renters:	51.5%	38.8%
Percentage that Walk or Bike to Work:	0.6%	0.6%

Figure 9: Central Sector Reported Crimes (2016-2020)



South Central Sector

The South Central Sector consists of the neighborhoods on the south side of Cottonwood Creek and represent the second generation of housing constructed in Grand Prairie. These homes represent a more conventional suburban pattern of development with curvilinear streets, use of cul-de-sacs, and larger lots. Spur 303 (Pioneer Parkway) has historically anchored this area and, until IKEA opened in 2016, contained nearly all the commercial and retail development in this sector. With the extension and current expansion of the George Bush Turnpike (SH 161), the dynamics of the area have shifted to favor new retail development on that corridor, but infill development and backfill of existing commercial spaces on Pioneer has also continued.

Aside from retail/commercial development, institutional and multi-family developments have proliferated along both commercial corridors. SH 161 hosts the City's signature Epic Central development consisting of a community center, senior center, indoor waterpark, public safety building, and future restaurants and conference hotel. Grand Prairie ISD's magnet high school is also located along the corridor along with several major employers including Lockheed Martin, Poly America, and Living Spaces.

Along Pioneer Parkway, major employers and locations include Mission Tortilla and Asia Times Square, an Asian-themed market with restaurants, shops, and indoor/outdoor event spaces. Sprout's Market recently announced a new store at the corner of Pioneer and Carrier. The City is currently in the process of developing a branding and street improvement strategy for Pioneer Parkway that will identify the parkway as an International Corridor. Overall, the South Central Sector possesses a high potential to support both residential and nonresidential integrated infill and possesses the highest current concentration of Contextual Density housing types, particularly along and near Pioneer Parkway east of Carrier.

As with the North Sector, one of the defining characteristics of the South Central corridor is the housing diversity. Although single-family detached makes up nearly two-thirds of housing as it does in most other sectors of the city outside of the North sector, almost of a quarter of the sector is made up of housing developments containing between 3 and 49 units. Only 4.2% is made up of large apartment complexes (50 or more units). The percentage of renters is under 50%. Aside from the diversity of housing, one of the strong suits of this sector is the way in which housing types are integrated with each other. A mix of densities and housing types are aligned along Pioneer Parkway and Belt Line rather than isolated or oriented along a freeway. This gives residents better access to jobs, schools, and commercial areas along those main thoroughfares and is reflected in the percentage of persons walking or biking to work being 50% higher than any other sector.

Key Sites

- Belt Line between Marshall and Pioneer
- Arkansas at Great Southwest Parkway (south of Asia Times Square)

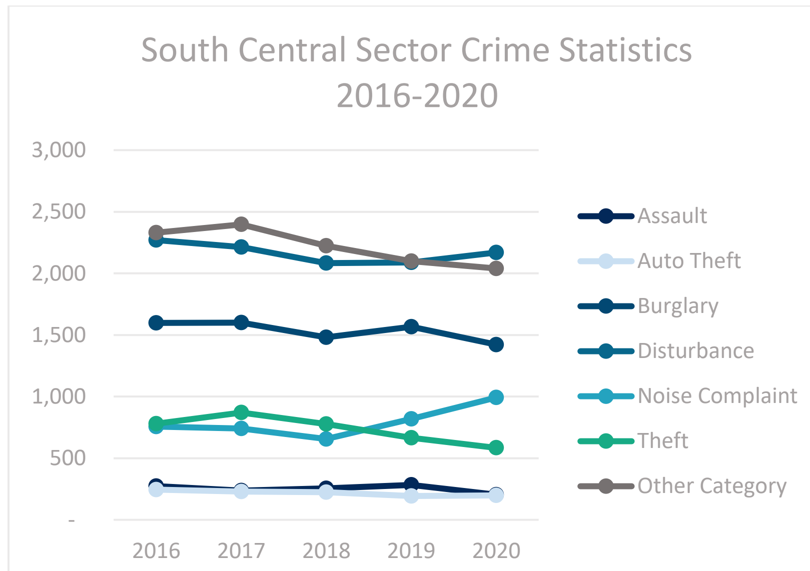
Key Takeaways

- Housing variety with context
- Highest percentage of persons walking to work
- Walkability is high to existing amenities, but barriers are present

Table 4: South Central Sector Statistics

Statistics	South Central Sector	City
Percent of Single-Family Detached:	64.4%	67.7%
Median Year Built:	1979	1988
Median Home Value:	$124,802	$178,133
Percentage of Renters:	44.3%	38.8%
Percentage that Walk or Bike to Work:	0.9%	0.6%

Figure 10: South Central Sector Reported Crimes (2016-2020)



IH-20 Corridor

Until recently, development along this corridor was largely centralized around Carrier Parkway to the east and Great Southwest Parkway to the west. This was due both to the absence of frontage roads along IH-20 and the significant stream corridors and associated floodplains on both sides of the interstate that favored development of estate residential lots, golf courses, and agricultural uses. The two-pronged effect of frontage road construction, which is ongoing, and the extension of the George Bush Turnpike and Lake Ridge Parkway to IH-20 have radically altered the development potential in the area. There is now very little prime undeveloped property remaining along the corridor, which has seen the highest concentration of new multi-family construction in the city, with more than 7,000 units constructed between 2018 and 2021 alone.

Though the area has undergone significant development, many of the original centers of activity have begun to languish, including the Kroger and Walmart anchored centers near Great Southwest Parkway and the Target and Home Depot anchored center near Carrier Parkway. With the exception of the closure of Albertson's and Kohl's stores along the corridor, the area has been spared from widespread closure. In general, the area will benefit from the added connectivity of the frontage roads since the only way to cross from east to west within this sector is on IH-20 itself. Intentional development of the remaining parcels will be necessary to create a more cohesive development pattern.

Key Sites

- Belt Line at IH-20
- Bardin at Great Southwest Parkway
- Mayfield Road corridor (Trader's Village area)

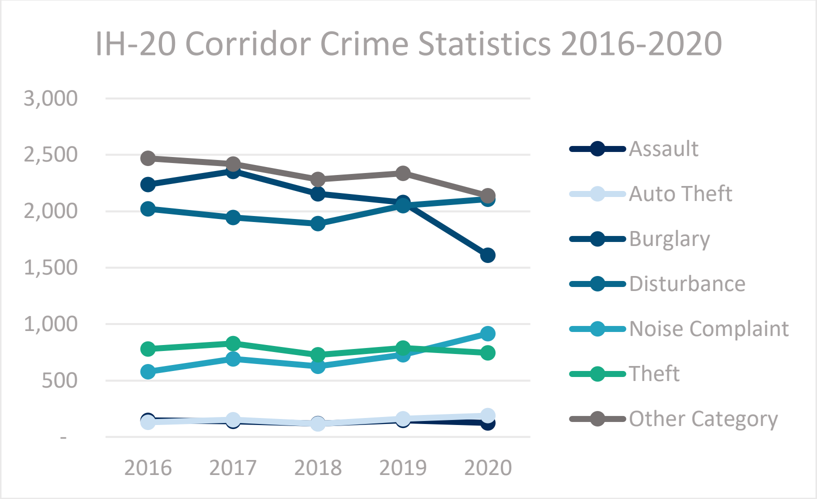
Key Takeaways

- Highest Concentration of Recent High-Density Housing Construction
- Gateway development opportunities exist at both ends of the corridor
- Existing retail is aging

Table 5: IH-20 Corridor Statistics

Statistics	IH-20 Corridor	City
Percent of Single-Family Detached:	80.5%	67.7%
Median Year Built:	1993	1988
Median Home Value:	$185,390	$178,133
Percentage of Renters:	30.6%	38.8%
Percentage that Walk or Bike to Work:	0.5%	0.6%

Figure 11: IH-20 Corridor Reported Crimes (2016-2020)



Far South Sector

As the newest area of the city, this sector represents the outer layer of the “onion” until the ETJ begins to build out. This area is located between SH 360 and Joe Pool Lake and is largely residential, with only one major retail center located at SH 360 and Camp Wisdom Road. Other large developments are institutional in nature, including several churches and schools.

The Far South Sector is the most homogenous in terms of housing type. Nearly all land is devoted to single-family development with some pockets of medium and higher-density housing along SH 360 and Lake Ridge Parkway at England Parkway.

The sector is by far the wealthiest in the city and is the only sector with a median household income over $100,000. The median household in this sector earns more than 25% more yearly income than the next closest sector (South Central). Nearly all neighborhoods in the Far South Sector are within a Public Improvement District (PID), homeowners association (HOA), or both. These associations play a functional role by maintaining amenities, landscaping, and signage, and also a protective role by ensuring those common areas won’t fall into decline so long as the PID and HOA continue to capture adequate funding and the City isn’t burdened with the cost of maintaining these additional amenities.

Non-single-family detached development constitutes only 5% of all housing in this sector, and almost of all of it has been constructed in the last five years.

Key Sites

- Lake Ridge Parkway at Camp Wisdom Road

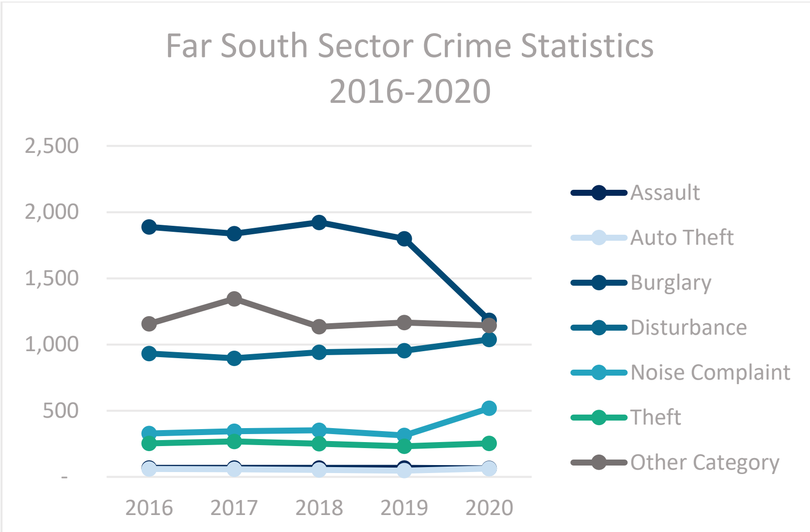
Key Takeaways

- Remaining commercial-zoned tracts should be preserved
- The Peninsula represents an opportunity for a regional destination oriented around Joe Pool Lake

Table 6: IH-20 Corridor Statistics

Statistics	Far South Sector	City
Percent of Single-Family Detached:	94.9%	67.7%
Median Year Built:	2004	1988
Median Home Value:	$253,786	$178,133
Percentage of Renters:	17.9%	38.8%
Percentage that Walk or Bike to Work:	0.6%	0.6%

Figure 12: Far South Sector Reported Crimes (2016-2020)



Extraterritorial Jurisdiction (ETJ)

The ETJ of Grand Prairie is the area extending up to five miles from the current southern limits of the city. Currently, the ETJ is almost entirely undeveloped. Though the area has many challenges, including extensive floodplain areas and lack of access to utilities such as water and sewer, it also presents tremendous potential to build an area from scratch using sound housing principles in the context of a full-service community. The guiding principles for this area are found in the "360 Corridor Plan" and include:

- Preserve and integrate natural assets
- Establish scenic gateways
- Create a regional destination centered around an iconic City facility and signature park
- Provide for adaptability over time
- Ensure diverse and accessible housing stock

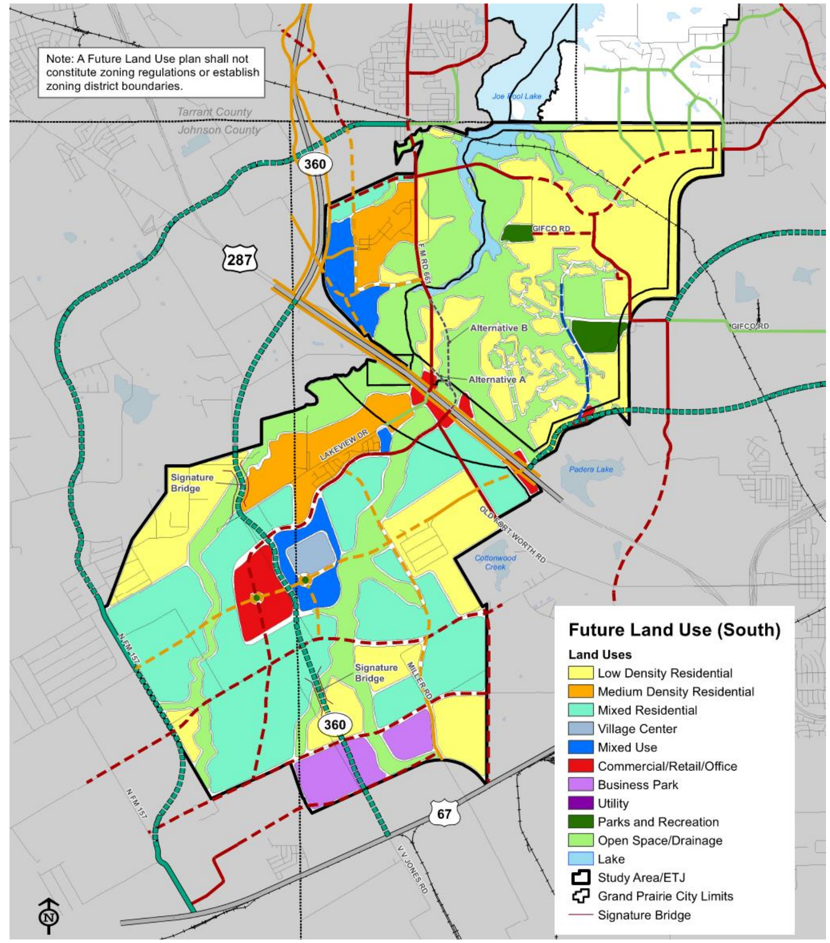


Figure 13: 360 Southgate Corridor Plan and Guiding Principles

Cost of Service

Grand Prairie has a significant amount of developable land remaining in the City that must be accounted and planned for appropriately to ensure the long-term fiscal sustainability and alignment to the community character and vision. To validate the economic benefits of the Future Land Use Plan, Catalyst projected the projected net fiscal benefits of the proposed land uses using a 10-year and 20-year time horizon as part of a separate effort. These projections include the associated additional revenues generated from net-new development and also account for the cost of service based upon the program in the proposed Future Land Use Plan. The revenues are generated from future sales tax and property taxes generated from new development, and the costs are based upon the existing costs required to service current residents and workers, based upon the associated development. A positive outcome would create more revenue than cost, and a negative outcome would assume that the plan creates less revenue that the cost of service or has a negative outcome.

To calculate the incremental cost of service, Catalyst utilized the City of Grand Prairie's 2020-2021 operating expenditures plus debt service from the budget and divided it by the total daytime (workforce) and residential population to obtain the total cost per capita. The resulting current cost of service is approximately $649 per capita.

To extrapolate cost of service, Catalyst distributed the total cost of service to individual residents and workers. Using the proportionate share of workers vs residents, this equates to $455 dollars per resident, and $194 dollars per worker.

Table 7: Cost of Service Per Capita

Cost of Service	
Property Tax per $100	$0.669998
Retail Sales per Sq Ft	$300
Sales Tax (City, Parks, Streets, Crime District, The Epic)	2.0%
Acres (in Square Feet)	43,560
Workforce Population	84,494
Resident Population	197,590
FY 2019 Operating Expenditures	$148,046,434
Debt Service	$35,061,601
Cost Per Capita	$649
Cost Per Capita (Resident)	$455
Cost Per Capita (Workforce)	$194

(City of Grand Prairie, ESRI)

Most public services like transportation, police, and emergency services are rendered to all people and businesses within the City. The American Planning Association (APA) recognizes the high costs of providing these services in conjunction with additional infrastructure costs requires the efficient use of existing facilities, compact land development as well as conservation. Compact development tends to reduce the length of infrastructure (e.g., roadways, utilities) as well as travel distances needed to provide public services (e.g., police, emergency services, garbage collection) ultimately resulting in a reduced cost per capita to provide municipal services. While there is a generally observable trade-off between rural residents and lower public service quality (e.g., less frequent road improvements, well water, septic systems), sprawling urban development tends to demand levels of service comparable to urban communities despite the higher costs.

An example of a small-scale implementation to mitigate development costs include higher-density single-family development centered around a common green or buffered natural system to minimize infrastructure needs while preserving some rural character and open space at the cost of privacy. Utilizing a 2010 study completed for the Environmental Protection Agency (EPA) titled *Smart Growth & Conventional Suburban Development* (Jonathan Ford, PE, 2010), which utilized several case studies, it was revealed that compact residential development reduced infrastructure costs by 30-50% compared to traditional suburban development. Additional benefits of compact development include preservation or partition of open space for farming, agriculture, or other ecological functions, improved public health, increased access to parks and trails, reduced per capita energy consumption, and improved regional mobility (see Figure 14 and Figure 15).

Although there are drawbacks associated with this kind of compact development, they are generally marginal and function as a result of compromise for greater returns elsewhere. Examples of drawbacks to compact development can include increased cost of land, loss of private open space, decreased privacy, and increased local congestion.

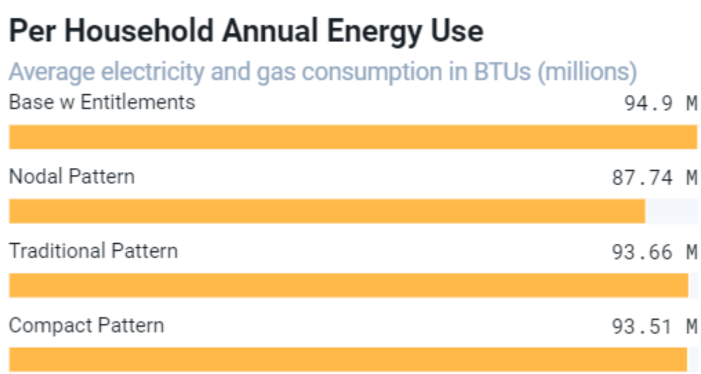
There are various avenues to harnessing the benefits of compact development including fees and regulations, policies and market supported decision-making. Examples of fees and regulations could include the reduction or elimination of minimum parking requirements, development and utility fees, and the utilization of impact fees. The implementation of smart growth policies through economic development efforts and efforts to institute multi-modal or complete streets policies are examples of applicable policies. Flexibility with regards to the development of affordable, market-based housing will allow for development of additional product types that satisfy market needs (townhomes, duplex, hybrid housing, etc.). Ultimately, a holistic strategy to consume less land and increase efficiency, provide the necessary goods and services, and maximize returns to both the city and community should be implemented to avoid any additional cost of service to existing and future residents.

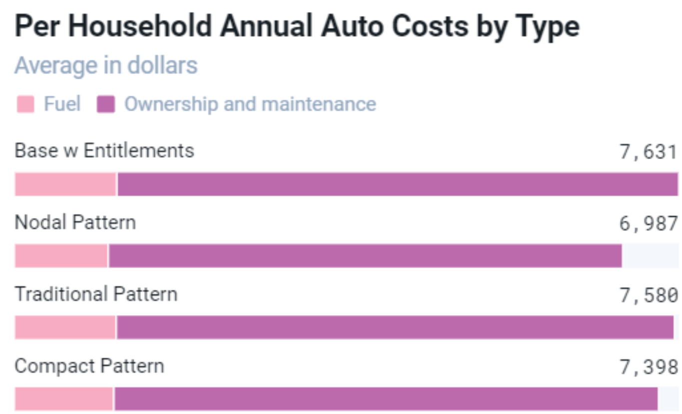
TRADITIONAL APPROACH = single-use, greenfield development, Euclidian separation of uses, "rooftops then retail"

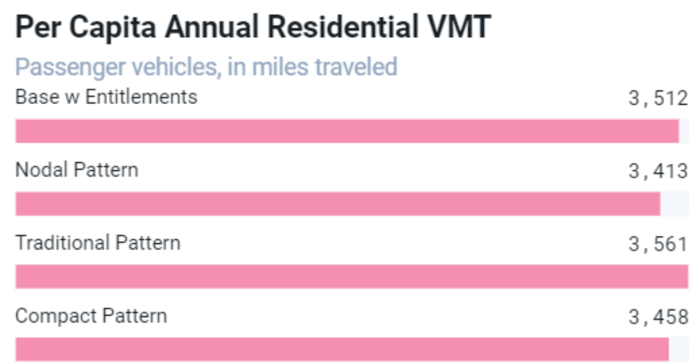
NODAL APPROACH = Focus units around existing and developing nodes of activity

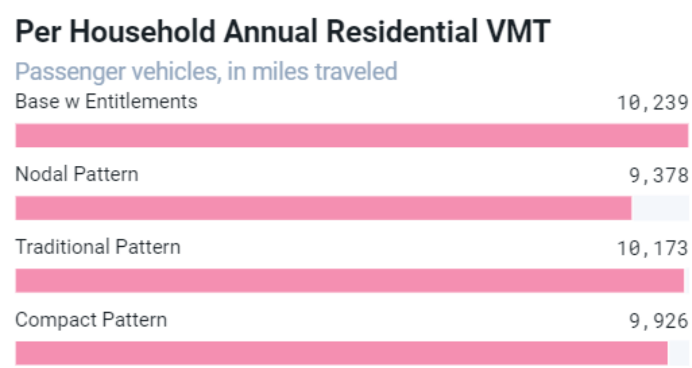
COMPACT APPROACH = Focus units around infill areas near downtown and within existing city footprint

Figure 14: Household Cost Comparison Based on Development Pattern









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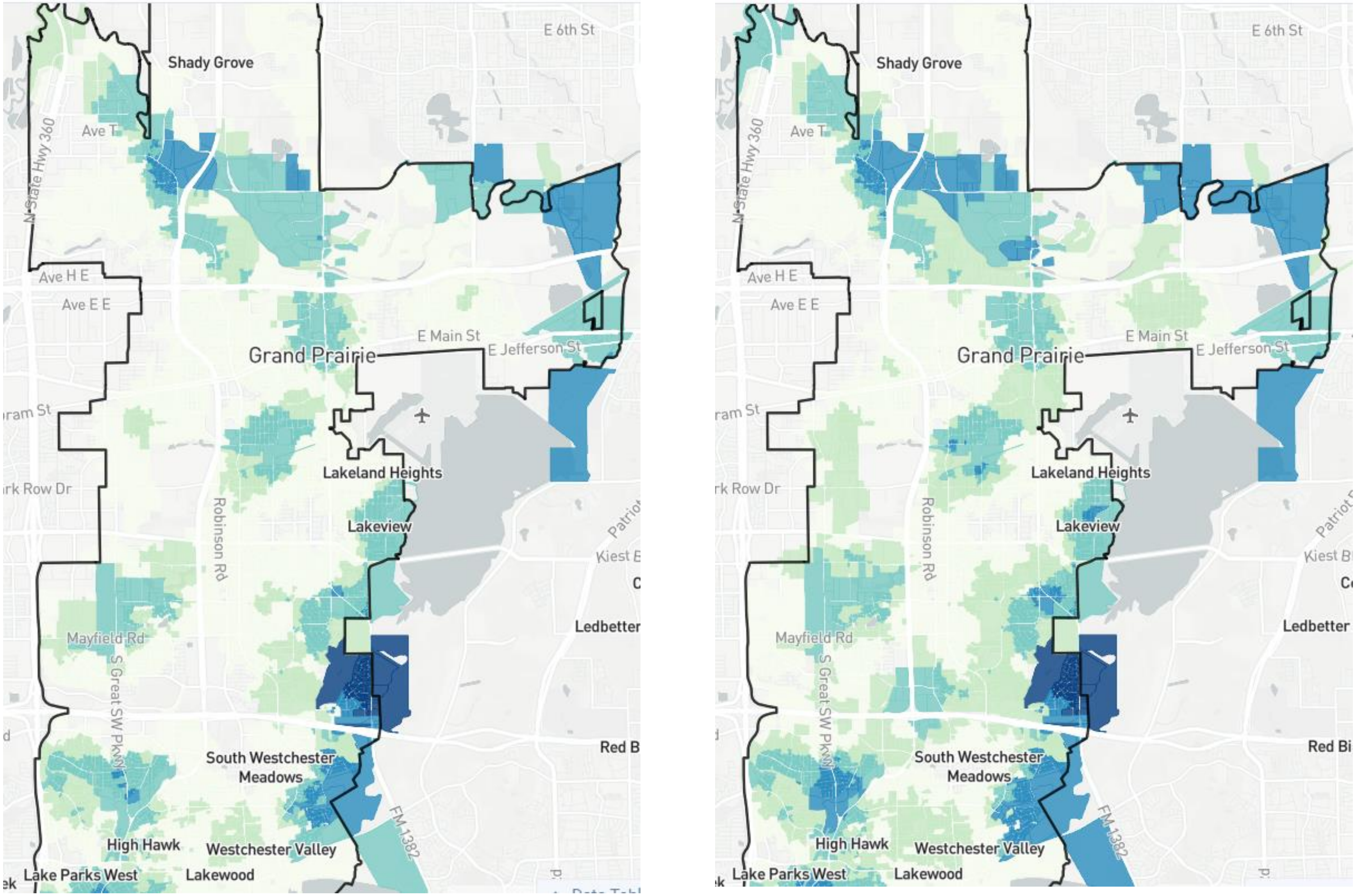

Figure 15: Households with 5 Minute Park Access Based on Traditional Approach (left) and Compact Approach (right)

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Market Analysis

Purpose and Process

Since the adoption of the 2018 Comprehensive Plan, Grand Prairie has experienced significant development pressure in the form of development applications. Located nearly equidistant between Dallas and Fort Worth, Grand Prairie is being tasked with the challenge of deciding how to handle the increasingly rapid development pressure. While Grand Prairie has long been one of the largest cities in the Metroplex by population and has typically seen growth rates of more than 30% in each decade, the city has rarely faced so much housing pressure for multi-family development in such a short span of time.

According to the City of Grand Prairie Ordinance No. 10967-2021, "Over the past seven years, there have been approximately 17 Multi-family Developments constructed in the city in areas where such uses are permitted. Over the same period, 26 Multi-family Developments have been approved for construction and zoning changes and site plans for 18 Multi-family Developments have been approved. In addition, there are currently approximately 16 applications for Multi-family Developments submitted to the City that are under consideration. This represents approximately 17,426 of individual units for occupancy. Due to the number of these developments that have been constructed and approved for construction, new developments of this type under existing development ordinances will result in overcapacity of municipal infrastructure or be detrimental to the health, safety and welfare of the residents of the city."

As a result, Freese and Nichols partnered with Catalyst to conduct a housing analysis to make recommendations to the City on any zoning changes following the results.

Review of Existing Studies

2018 Comprehensive Plan

As part of the comprehensive planning process, robust public engagement was conducted, recorded, and synthesized to capture the views, desires, and beliefs of the community.

- Related to neighborhoods and quality of life, the 2018 Comprehensive Plan explained that "Many residents would like to see targeted revitalization efforts in aging neighborhoods; including expanded housing options, employment opportunities, local retail amenities, and improved provision of services."
- Public input throughout the process revealed the communities desire for a balanced mix of land uses needed to provide a strong tax base, adequate amenities, and demand for services. Many residents view recent growth and development as a good thing for the City, though many residents differ on where additional activity should be focused. High quality development is a top priority for future development, regardless of land use.

As part of the process, the planning team identified several focus areas and brief character descriptions that would serve as catalytic projects to future development. They are as follows:

- Southern Sector/State Highway 360
    - High quality development is the top priority; area will need a balance of residential and nonresidential uses.
- State Highway 161/PGBT
    - Upscale, destination commercial development is a top priority; traffic impacts are a concern.
- Interstate 30
    - Revitalization of northern neighborhoods is needed; there is also potential for an entertainment-based corridor.

Similarly, long-range opportunity areas were identified through the Comprehensive Plan. These are tracts of land larger than 150-acres that possess the potential to host alternative land uses that would benefit the community through redevelopment:

- MacArthur Blvd and IH 30
- Mayfield Rd and SH 360
- Jefferson St east of MacArthur Blvd

Grand Prairie Downtown Master Plan

The Downtown Master Plan outlines the vision and strategic actions that can catalyze and set the vision for Downtown Grand Prairie in motion. This plan built upon the goals outlined in the 2018 Comprehensive Plan update, current assets, and existing character. Several key elements of this plan include:

- The identification of Character Areas
- An illustrative plan that reflects the vision
- An activation/merchandising strategy to implement the plan

There were several goals that emerged through the planning process, and they are summarized as follows:

- Connectivity – This initiative explored wholesale improvements including the Turnback of Main St from TxDOT to the City, as well as opportunities to enable Main St to function as a walkable corridor.
- Enhancing public improvements – This plan identified several areas that can be activated through improved streetscapes and enhanced intersections and easements, including the Union Pacific right-of-way.
- Retain downtown's unique character – The Downtown Master Plan identified and characterized several Character Areas within downtown. The plan also identified opportunities to create and enhance gateway features and transitions between commercial areas and the historic downtown district.
- Expand downtown as a live/work/play destination – Guided by the development of character areas, the Downtown Master Plan outlines a merchandising strategy to activate the proposed development plan and associated activities needed to support future activation of infill and redevelopment of areas within downtown.

Grand Prairie 161 Corridor Plan

This Grand Prairie SH-161 corridor Plan is an extension of the 2018 City of Grand Prairie Comprehensive Plan. The analysis included an evaluation of existing conditions, identification of alternative land use opportunities, and a performance assessment of the city's industrial sector. A major consideration of the study is related to the placement of land uses in conjunction with available capacity of existing streets to protect existing residential areas and future mixed-use areas. Several key takeaways that would impact residential decision making from the study are included below:

- Incorporation of gateway features
- Capitalization of greenway appeal
- Balance of land uses
- Alignment of zoning and uses with the corridor vision

Pioneer Parkway Urban Design Strategy Plan

The Pioneer Parkway Urban Design Strategy Plan highlights key planning considerations for the corridor in the coming years. The plan builds upon the Comprehensive Plan and will set the stage for how Pioneer Parkway fits and functions within the City as a whole. There are several focus areas the plan seeks to understand:

- Physical improvements and placemaking
- Private property retrofitting and beautification
- Housing
- Branding and events
- And leadership

As part of the process, several catalyst intersections were identified along Pioneer Pkwy that could serve as major/minor nodes including:

- Belt Line Rd
- Carrier Pkwy
- Great Southwest Pkwy

At these strategic catalyst intersections, there are targeted improvements that could occur to spur future value generation including landscaped medians, and an SH 161 underpass.

Economic Conditions

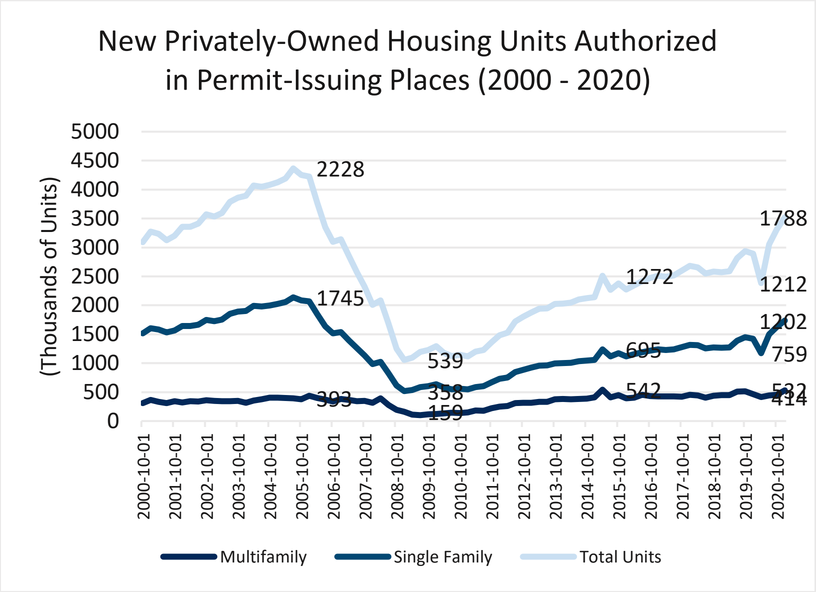
National Housing Trends

With increasing land and material costs, housing supply shortages, and increased construction costs, development continues to create pressure on housing prices. However, future predictions anticipate slowing home sales and appreciation within certain price segments. While interest rates are anticipated to remain low (currently around ~3%), any increase in rates and/or tightening of credit could soften housing prices and increase supply. However, today, low interest rates have enabled several buyers to afford higher cost housing. Any major economic shift would likely result in an increase of existing inventory and slowing of price appreciation, which would likely impact the entry level and middle market product the most.

The United States economic outlook continues to strengthen after experiencing a significant downturn in

2020. Gross domestic product (GDP), the broadest measure of goods and services made in the U.S., grew at a 6.4% seasonally adjusted annual rate in January through March, bringing the GDP back to within 1% of its peak, reached in late 2019, just before the coronavirus pandemic reached the U.S. (Commerce Department). The national economy is recovering after experiencing sharp contraction in 2020, and economic growth continues to accelerate, with unemployment dipping to 6% from a soaring 14.8% rate observed in April 2020 (source: Bureau of Labor Statistics.)

Prior to the 2008 recession, single-family housing permits in the United States reached their peak in Q3 2005 and then plummeted to 358,000 by Q1 2009. Since the economic recovery, permits for single-family housing slowly recovered until hitting a significant dip in Q1 2020 due to COVID-19. The economic shut down halted construction for several months, and put a strain on both supply and deliveries, but made a quick rebound over the next two quarters. During Q1 2008, multi-family construction made up 37% of total permits, but that proportion saw a significant dip followed by strong recovery through Q1 2021, reaching a peak in Q3 2017 with 43% of total building permits being issued for multi-family. Since 2017, construction has shifted and held steady with around 32% of building permits issued for multi-family. Multi-family has proved to be much more resilient in terms of permits being issued recovery than single-family construction. Multi-family construction is above pre-recession levels, whereas overall construction is still well below pre-recession levels.



(Federal Reserve Economic Data)

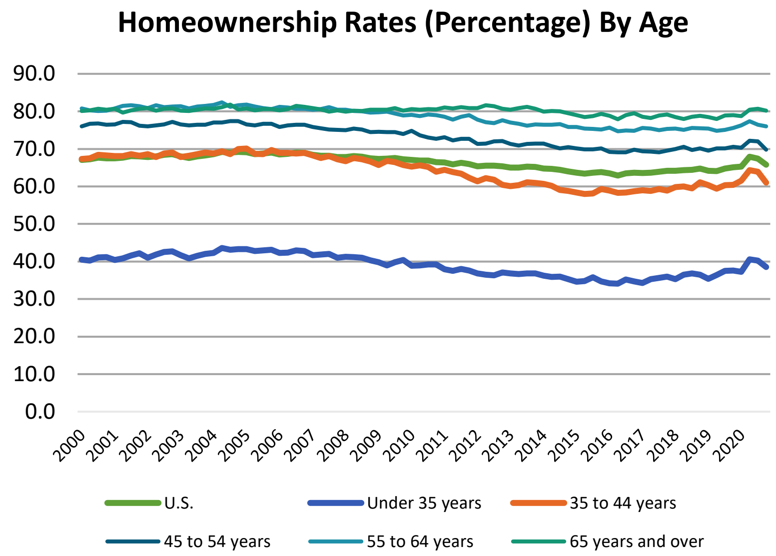
A myriad of factors influences the decision-making process regarding homeownership, including house price, location, neighborhood, family transition, and others. Buying a house is the largest portion of expenditures for most households. Home purchases are not only for shelter but also for expressing values and aspirations. Housing preferences on homebuyer’s demographics such as age, household composition, income, and current housing situation impact the decision to buy a home. The major factors impacting younger buyers' decisions include mortgage accessibility, student loan debt, and delayed onset of marriage and children. While data is limited, the trend is that Millennials are getting married and having children later in life, which reduces the drive to purchase a home. Student loans are often one of the biggest impediments to homeownership, potentially disqualifying this generation from mortgage loans because of low credit scores and high debt ratios.

Nationally, homeownership rates have been falling since 2006, with a brief increase in ownership rate observed in 2020. Overall, this trend has been especially pronounced among younger families (ages 35 to 44). The rate of homeownership has declined by over 9% for families ages 35 to 44 years of age during the period of Q4 2007 to Q4 2020, compared to an overall decline of 2.9% for all households in the United States.

Homeownership Rate	2000 to Q4 2007	Q4 2007 to Q4 2020
All Ages	1.0%	-2.9%
Under 35 years	1.2%	-6.1%
35 to 44 years	-0.1%	-9.2%
45 to 54 years	-1.2%	-7.1%
55 to 64 years	-0.5%	-5.5%
65 years and over	0.2%	-0.1%

(Federal Reserve Economic Data)

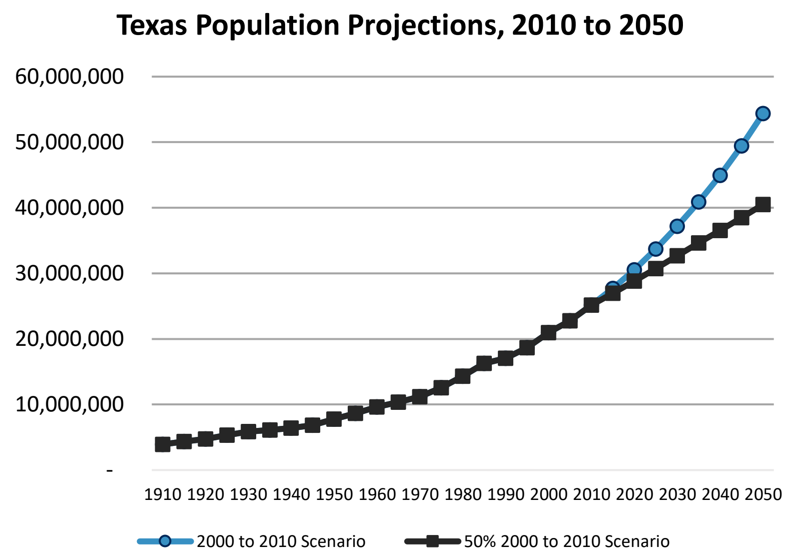
Homeownership rates have generally declined since 2000 for all age groups, but the 35- to 44-year-old range has experienced the largest decline. At the peak of ownership, 70% of this age group identified as homeowners in 2005, and that proportion has fallen to 61% in 2020. While the homeownership rate of all households in the United States holds steady around 61% it is interesting to note that the two age groups with less than U.S. average ownership rates are the under 35 years old group, and the 35- to 44-year-old group. As well, there is an observable trend in propensity for ownership and age, the 65 years or older group has the highest ownership rate, followed by the 55- to 64-year-old group, and the 45- to 54-year-old group, all of which are above the U.S. average.



(Federal Reserve Economic Data)

Texas Housing Trends

Texas makes up nearly 9% of the total population in the United States yet accounted for 32.4% of the total growth between 2019 and 2020. According to the U.S. Census, Texas reached a 2020 population of 29,360,759. More specifically, the urbanized areas of Texas have generated almost all of the population growth on an annual basis, and this trend is anticipated to continue considering Texas is home to five of the largest fifteen cities in the U.S. The suburban ring counties are among the fastest growing, even faster than the Texas population. Based on population projections from the Texas Demographic Center (TDC) utilizing historical growth patterns, it is projected that Texas could reach nearly 55,000,000 residents by 2050.



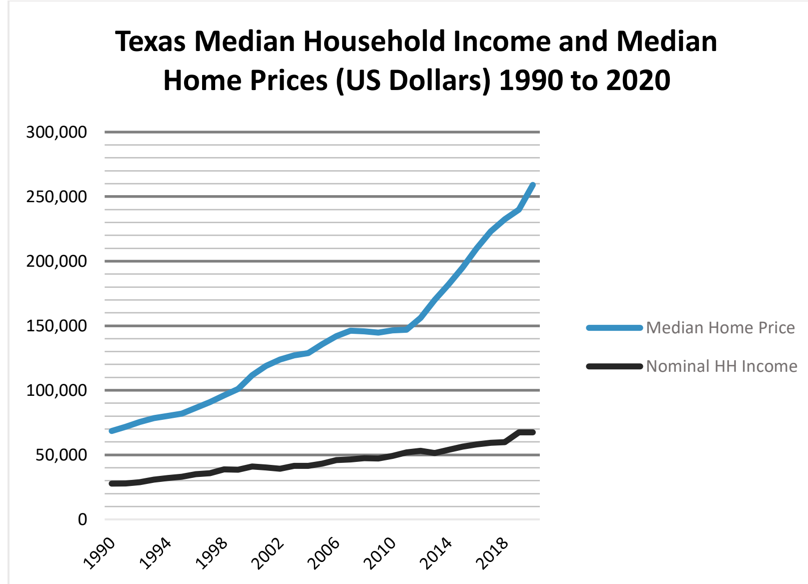
(Texas Demographic Center)

Job growth in the Texas economy continues to expand faster than the nation. Texas employment growth decelerated to a 1.3% annualized rate in April 2021 after increasing by a revised 12.3% in March. According to the Dallas Federal Reserve Bank estimate that job growth will increase by 6.6 percent in 2021—unchanged from last month's estimate—with an 80 percent confidence band of 5.6 to 7.6%. Based on the forecast, 816,000 jobs will be added in the state this year, and employment in December 2021 will be 13.2 million. The Texas unemployment rate held constant at 6.9% in February and March. Resulting in a moderate gain in the labor force to offset a rise in household employment.

In the first four months of 2021, Texas employment rose 4.2%. U.S. employment also saw slower growth in April, increasing 2.2 % after climbing 6.6% in March.

The strong state and metropolitan economies continue to support job and population growth throughout the state creating strong housing demand. Texas housing average days on market fell below two months. Homes priced between $200,000 to 300,000 sold quickly with 54 average days on market, while homes priced below $200,000 averaged 59 days. Rising resource and labor costs limited new supply by homebuilders, which failed to keep pace with economic and population growth.

Increased fiscal expenditures and economic growth have generated concerns the Federal Reserve may accelerate interest rate hikes. In Texas, rising interest rates increased the annual mortgage payment nearly $400 on the median priced home. The following table illustrates the change in median home price and median household income from 2010 – 2020. The results indicate that home prices are increasing at a rate significantly greater than incomes, thus shifting additional burden onto purchasers to meet mortgage demands.



2010 - 2020	Percent Change	Avg. Per Year
Median Home Price	77%	3%
Household Income	38%	1%

(U.S. Census Bureau, Texas A&M University Real Estate Center)

The major issues impacting housing affordability throughout Texas are income growth to price changes in both the rental and for-sale markets. Recent trends indicate home and rental prices increasing much faster than income growth. Rising housing prices are attributed to both demand and supply side factors. Demographic changes include shifting preferences in housing types, attitudes, and desires regarding home choices. Rising interest rates, influenced by both monetary and fiscal policy, are further impacting the cost of purchasing a home. Continued statewide population growth places increased pressure on infrastructure including transportation, education, utilities, and water. Infrastructure maintenance and expansion will further drive-up development and construction costs for housing. Development costs are impacted by land, labor, and lumber prices in addition to other resource prices.

Federal and state lending and environmental regulations impact both the supply and demand costs for housing. Local land use controls regarding density and design, as well as the permitting process and fees impact both the time and costs of housing development.

	2010	2020	% Change
Sales	211,640	393,699	86%
Average Price	$191,014	$315,529	65%
Median Price	$146,417	$259,062	77%

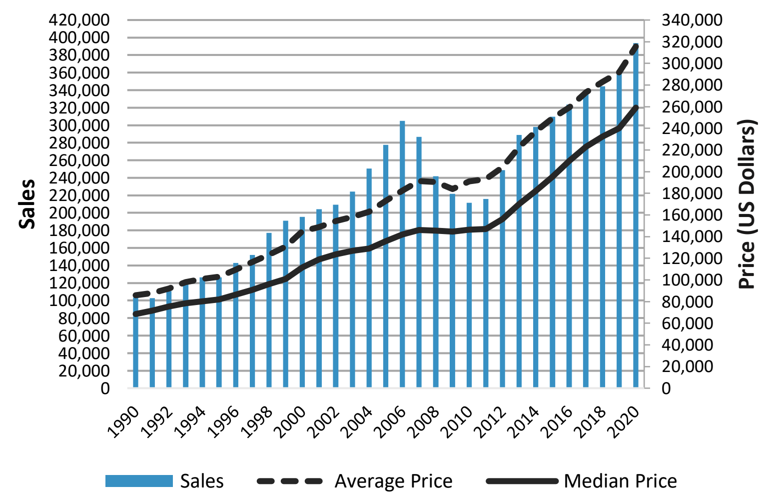
(U.S. Census Bureau, Texas A&M University Real Estate Center)

Home prices rose 11.2% year over year in January according to the latest S&P CoreLogic Case-Shiller Index, representing the largest annual gain in nearly 15 years.

From 2010-2020, the average sales price of a home in Texas rose 65%, while the median price increased 77%.

Over the past 12 years, there has been a significant increase not only in the number of residential units sold, but also the average and median price for which the units are sold. While there has been a slight increase in household incomes over that time period, the rising home prices are causing strain for many households to purchase.

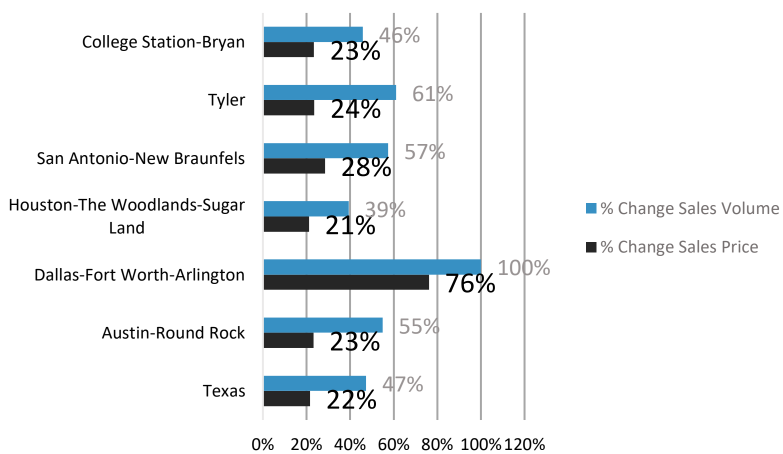
Annual Texas Home Sales



(U.S. Census Bureau, Texas A&M University Real Estate Center)

This trend is particularly observable within the major metro areas of Texas, as they are seeing the bulk of new residential product being built. Prices are increasing faster than sales throughout the state. The sales volume in the Dallas-Fort Worth Metroplex increased 100% from 2016-2020, while the State experienced 47% increase in sales volume. While the state saw a 22% increase in sales price from 2016-2020, the Dallas-Fort Worth Metroplex experienced a 76% increase.

2016-2020 Change in Home Sales and Median Prices by Metro Areas

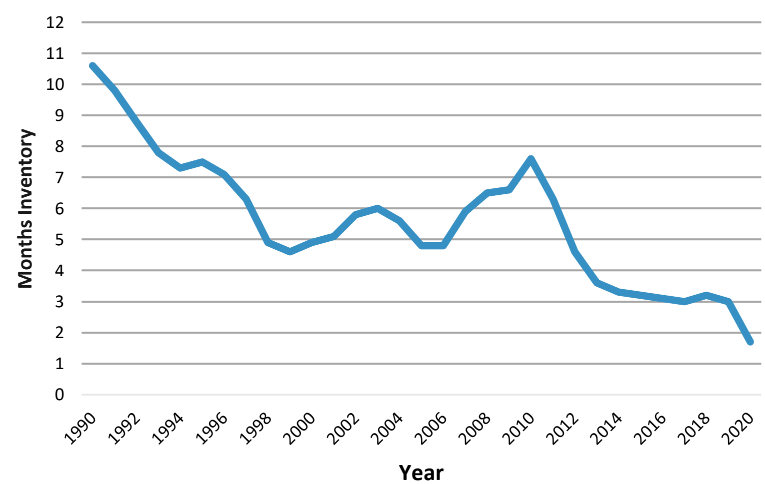


(U.S. Census Bureau, Texas A&M University Real Estate Center)

Monthly inventory had been decreasing year over year from 1990-2000. From 2000-2004, there was a slight increase followed by a decrease, only to increase inventory until 2010, where a significant dip in the months of inventory can be observed. Since 2010, monthly inventory has declined and remained below four months for the last five years. As of Q4 2020, the statewide monthly inventory was a meager 1.7. For reference if there are around 6.5 months of inventory the market is considered "balanced". Actual equilibrium within the local market can differ slightly, but between five to seven months of supply is stable. When inventory falls below six months, sellers gain additional control over price and terms, generally resulting in a significant rise in housing prices.

Since 2013, the available inventory has been less than 4 months, indicative of a tight housing market that strains home prices. Demand for homes has exceeded supply, especially within major metro areas of Texas.

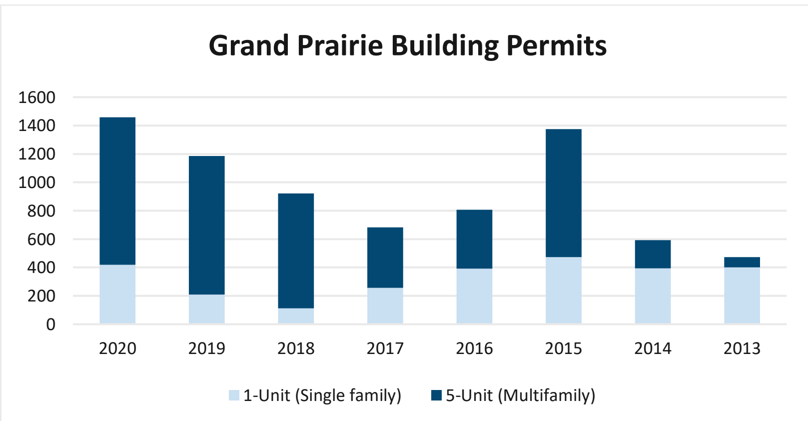
Texas Monthly Inventory



(U.S. Census Bureau, Texas A&M University Real Estate Center)

Local Conditions

Esri estimates the city's 2020 population at 204,196, compared to the North Central Texas Council of Governments (NCTCOG) Jan 1, 2021, estimate of 197,590. Looking into the future, Esri projects that the city will continue to grow at a rate of close to 1.4% annually, putting the 2025 population at just under 220,000, an increase of nearly 100,000 from the year 2000 and a nearly threefold increase from 1980.



(U.S. Census Bureau)

Over the past number of years, there has been a shift in development patterns, not only in the U.S. and state, but also throughout Grand Prairie. The trend indicates that a larger portion of households being constructed are veering away from traditional single-family in lieu of higher-density offerings like duplex, quadplex, and multi-family products. The table below compares the percentage of building permits issued for 5-unit + building structures (multi-family) over time with regards to Grand Prairie and several peer communities.

5-unit +Buildings as Percentage of Total Housing Permits Issued

	2020	2019	2018	2017	2016	2015	2014	2013
Grand Prairie	71%	82%	88%	62%	51%	66%	34%	15%
Arlington	50%	49%	60%	51%	71%	54%	46%	0%
Frisco	23%	32%	54%	55%	57%	40%	32%	14%
Irving	20%	69%	4%	61%	2%	67%	68%	64%
Garland	0%	64%	80%	93%	76%	0%	45%	0%
Mesquite	0%	0%	0%	0%	0%	85%	0%	90%
Mansfield	0%	0%	19%	31%	56%	0%	58%	37%

(U.S. Census Bureau)

Since 2013, the percentage of multi-family permits issued in the City of Grand Prairie has generally increased, reaching a high in 2018, when 88% of permits issued that year were for 5+ unit households. In comparison, several other cities of similar size and development velocity have experienced similar levels of multi-family development, including Arlington, Frisco, and Irving. Mesquite, Mansfield, and to some degree Garland, have experienced less velocity in terms of multi-family development.

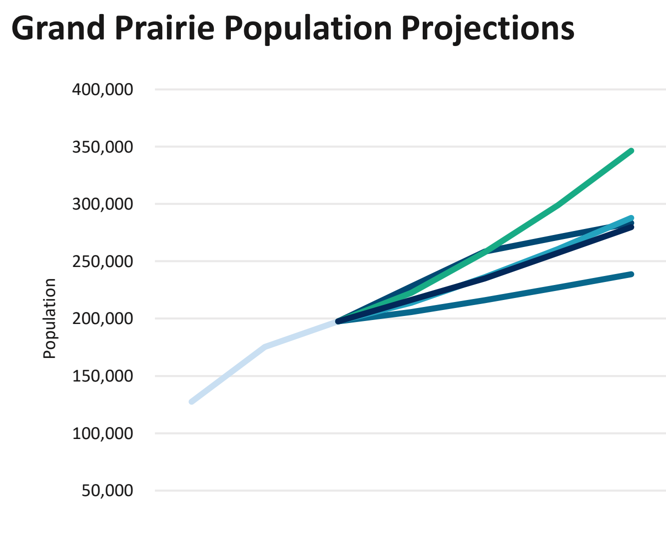
	% Renter Occupied Housing Units	% Change in Renter Occupied Housing Units 2010 - 2020
Irving	65%	6%
Arlington	45%	5%
Mesquite	44%	13%
Grand Prairie	41%	11%
Garland	41%	18%
Frisco	29%	26%
Mansfield	26%	22%

(ESRI)

An anecdotally interesting observation uncovered when analyzing several neighboring communities' proportion of renter-occupied households is the relationship between renter-occupied units and the % change from 2010-2020. The communities with significant proportions of renter-occupied units experienced smaller growth of occupied units over the last ten years, while communities with smaller portions of renter-occupied units grew at a much more rapid rate over the last ten years. This is likely a result of a market-based response to answer demand for product other than owner-occupied single-family detached homes.

According to Harvard University and the National Bureau of Economic Research, there are two major distortions that shape the rental housing market, both of which are created by the public sector. "Federal pro-homeownership policies, such as the home mortgage interest deduction, weaken the rental market and the cities where rental markets thrive. Local policies that discourage tall buildings likewise ensure that Americans have fewer rental options. The economic vitality of cities and the environmental consequences of large suburban homes with long commutes both support arguments for reducing these distortions" (*Rethinking the Federal Bias Toward Homeownership*, Edward L. Glaeser, 2011).

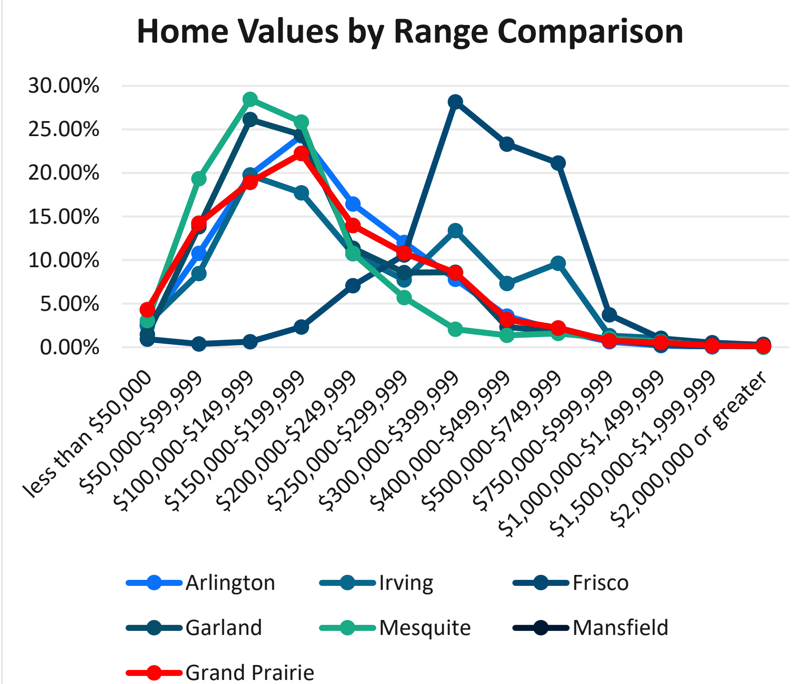
A strong economy is dependent on a variety of factors, including but not limited to location, infrastructure, and access to talent. Grand Prairie is centrally located within the Metroplex, which provides access to a significant regional talent base. The city has frontage along two interstates (I-20 and I-30) as well as two state highways (SH-360 and SH-161) which enables strong regional mobility and connectivity to a national network of rail, air, and highways. Grand Prairie has been able to attract various corporate users over the years of development, including advanced manufacturing and high-tech industries such as defense, aerospace, and auto-oriented uses. Grand Prairie's strong location and assets enable and support demand for additional population.



	2000	2010	1-Jan-21	2025	2030	2035	2040
Historical Data	127,427	175,396	197,590				
TWDB Projections			197,590	228,017	258,443	270,956	283,469
1% CAGR			197,590	205,613	216,101	227,125	238,710
2% CAGR			197,590	213,878	236,138	260,715	287,851
3% CAGR			197,590	222,389	257,810	298,873	346,475
Historical Regional (DFW) Rate			197,590	216,361	235,132	257,470	279,807

According to population projections from a variety of sources, it is anticipated that Grand Prairie could grow to nearly 350,000 residents by 2040, however a population around 280,000 residents in 2040 is likely a more accurate projection. Accommodating this additional population will be critical in terms of residential development.

Comparing Grand Prairie's existing housing stock to several neighboring communities allows for a comparison into the product offerings that may be missing or oversupplied within regional context.



(ESRI)

In review of existing home values by range (ESRI) the existing stock within Grand Prairie is most like Arlington, which is likely a partial result of shared municipal boundaries and similarly timed development throughout the years. The greatest contrast can be observed through Frisco and Mansfield's housing stock as they have significantly larger portions of homes valued at more than $300,000.

	Median Home Value	Average Home Value
Frisco	$399,686	$445,361
Mansfield	$254,307	$283,156
Irving	$206,320	$276,089
Arlington	$185,121	$213,480
Grand Prairie	$178,133	$212,371
Garland	$167,534	$206,886
Mesquite	$148,467	$178,525

(ESRI)

The comparison of median and average home value by community included above generally correlates the most recently developed communities with higher home values. Frisco and Mansfield have seen a rash of new residential development over the past decade, while Mesquite and Garland have seen significantly less development than they did the preceding 10 to 20 years, resulting in older homes and ultimately lower values. Grand Prairie, Arlington, and Irving are all in similar situations; they originally developed their central areas at the start of the post-war period and have continued to fill out the remaining vacant land with development, resulting in a boost in home values. This trend can be observed through recent residential development that has occurred in the southern sectors of Grand Prairie and Arlington. These homes typically generate higher values due to the new construction and elevated quality. While the same can be said about Irving, as the most recent residential development tends to materialize in the form of urban, high-density residential, or planned developments that are highly amenitized and connected to the existing built environment.

The desire for increased housing options (typology) and amenities can be observed through an industry shift towards a consumer and market-based response to supplying residential developments with smaller and diversified footprints of residential units. Apartments that have developed through the form of urban, walkable, and high-end vertical development over the past several years have reaped the rewards of having been in the right place at the right time. Fundamental demand for new apartment development is molding the new geography of opportunity as demographics shift and rent-by-choice cohorts expand. A study conducted by RCLCO Real Estate Consulting found that nearly 15 percent of renters earning over $100,000 are turning to rental products for lifestyle and convenience. The same study indicated that a growing portion of the population ages 55 and over is choosing to rent as well, likely looking to downsize, unlock equity from their homes, as well as the convenience of low maintenance and social freedom.

Housing Analysis Zones

The establishment of the housing analysis zones allows for a more nuanced and micro-level analysis of factors affecting livability in Grand Prairie. According to livability.org, "Livability is the sum of the factors that add up to a community's quality of life – including the built and natural environments, economic prosperity, social stability and equity, educational opportunity, and cultural, entertainment, and recreation possibilities." Improving neighborhood conditions is a priority for policymakers and residents of Grand Prairie. To evaluate neighborhoods, the team conducted a quantitative and qualitative review of Grand Prairie's housing analysis zones.

Emerging Trends

Aging Housing

Grand Prairie has an established stock of housing options, with one of the largest threats quickly becoming the declining quality as homes continue to age and experience disinvestment. There are several significant and remaining infill parcels throughout the city that can mitigate a shortage of new housing by attracting choice residents and executives through a variety of housing types and price points. As neighborhoods continue to age, the City must continually engage its residents and ensure that property values are protected to ensure financial stability and resiliency. The city should take a proactive approach with regards to code compliance, crime deterrence, the mitigation of distressed sales, and limitation of multi-family islands to prevent neighborhood decline and maintain health. Exploring ways to increase connectivity and leveraging the integration of housing into commercial revitalization will benefit neighborhood quality as well.

Multi-Family Quality

Grand Prairie, like many communities, is speckled with aging apartment complexes that suffer from a lack of maintenance and thus negatively impact neighborhood quality. Lack of maintenance contributes to lower rental rates, which in turn discourages owners to reinvest, perpetuating a vicious cycle that has negative implications and is difficult to unwind. Typically, many of these problem properties have debt obligations and other encumbrances, which make repositioning difficult, especially while some owners may prefer to maximize cash flows for short term gains. This approach is contradictory to reinvesting for long term investment goals. A number of these properties are also reaching the end of their useful life and reinvesting may not make economic sense, although they impact adjoining property values and increase service costs for the city.

Commercial Quality

The presence of commercial property (or the promise of future commercial development) can significantly impact the value of nearby homes; however, the degree of this impact can vary widely. Whether or not home prices rise or fall due to commercial property can depend on many variables, including the demographic that the merchandising targets, the size and accessibility of the property, as well as factors like crime and neglect. On the other hand, commercial properties can enhance or even create a unique cultural atmosphere that enhances livability and desirability, which attracts residents willing to pay higher prices for residential properties.

Infrastructure

Aging infrastructure is one of the greatest issues facing cities today, especially for a city with a growing budget of CIP projects. Limited revenues and increased cost of service can outpace the productivity of existing infrastructure and ultimately limit the ability to adequately keep up with new developments. While there are existing improvements to sewer, water, and local streets through much of the city, there are instances of aging streets, single-use utility corridors, disconnected sidewalks and trail systems, and intermittent street lighting. Increased proactive infrastructure investment will increase property values and contribute to economic development and livability in the city. Enhancements can also increase safety and encourage walkability.

Land Use

As cities continue to evolve and adapt, a majority of Grand Prairie's current developments cater to the automobile and some lack the strong adjacency consideration or walkability needed to maximize economic returns. Effective land use policies can reinforce the unique character of the Grand Prairie neighborhoods and create greater investment potential. Effective planning will ensure neighborhood integrity and enable incremental infill that can contribute to the health and vitality of the community.

Analysis Zones Summary

Residential

Some of the most effective measurements of neighborhood performance are directly related to residential sales within each analysis zone. More specifically, leveraging historical Multiple Listing Service (MLS) data by analysis zone gives insight into the micro-level housing markets within the city. Key characteristics of this analysis include the volume of sales by analysis zone, sales prices, and the year the sold property was constructed.

Analysis Zone	Pop.	# Units Sold (Previous 3 Years)	Average Close Price of Sold Units	Median Year Built
North Sector	29,175	483	$241,236	1987
Urban Core	2,822	52	$187,912	1981
Central Sector	30,429	415	$163,801	1959
South Central Sector	41,206	681	$188,973	1979
I-20 Corridor	56,243	1,530	$246,108	1993
Far South Sector	40,571	1,728	$321,266	2004

(Multiple Listing Service (MLS), U.S. Census, ESRI)

In review of this data, it is readily apparent that the increased volume of sales within the I-20 and Far South Sector is likely a direct result of the recently constructed units. The Far South Sector had the most sales over the three-year period with 1,728 sales, followed closely by the I-20 corridor. The Urban Core had by far the least number of sales with only 52

Analysis Zone	% Rental Properties	Median Rent
North Sector	54%	$906
Urban Core	66%	$689
Central Sector	51%	$720
South Central Sector	43%	$834
I-20 Corridor	31%	$1,198
Far South Sector	18%	$1,329

(RealPage, ESRI)

Higher concentrations of rental housing have been shown to negatively impact home values. While rental property plays a critical role in housing, too many rentals can create an imbalance and can contribute to neighborhood decline.

Commercial

Commercial quality has shown to have significant impacts on adjacent residential values. The age characteristics of commercial quality are significant and negative; property values depreciate with age. Newer commercial development tends to follow residential growth, especially single-family residential development. An interesting observation made by Jonathan A. Wiley, Ph.D. while studying the impact of commercial development on surrounding residential property values in Atlanta was that "By the fourth year following completion of a new retail development, prices inside the radius (0.75-miles) are higher relative to outside the radius than they were pre-development and steadily increasing." Additional factors including vacant and delinquent properties can significantly impact property values, while quality development that is context sensitive and connected to the residential fabric can bring premium returns on property values. To further understand these concepts commercial properties (retail) were analyzed within each analysis zone.

The Urban Core analysis zone has by far and wide the greatest amount of retail square footage per capita. This is a result of the significant development and concentration of goods and services in downtown Grand Prairie coupled with the sparce population. Conversely, the Far South sector has the least retail square footage per capita due to the recent nature of new residential development and lack of goods and services. Across the entire United States, there is 56 square feet per capita of retail development, according to the International Council of Shopping Centers (ICSC), and efforts to balance out under- or over-supply of retail square footage can be utilized to appropriately service the surrounding neighborhoods.

Analysis Zone	Population	Average Shopping Center Age	Average Shopping Vacancy	Retail SF per Capita
North Sector	29,175	1992	2.0%	25
Urban Core	2,822	1970	3.7%	320
Central Sector	30,429	1956	3.2%	26
South Central Sector	41,206	1988	2.5%	51
I-20 Corridor	56,243	2001	1.6%	56
Far South Sector	40,571	2007	2.2%	21

(CoStar, ESRI)

Market Demand

To understand residential demand for Grand Prairie, Catalyst calculated residential demand for the competing region, defined as Dallas and Tarrant Counties. The resulting demand was calibrated based upon Grand Prairie's potential capture rate, which was informed by historical building permits and future household projections. Demand for residential units in Grand Prairie is a function of projected growth across the greater region, meaning Grand Prairie will compete to capture these households amongst other communities.

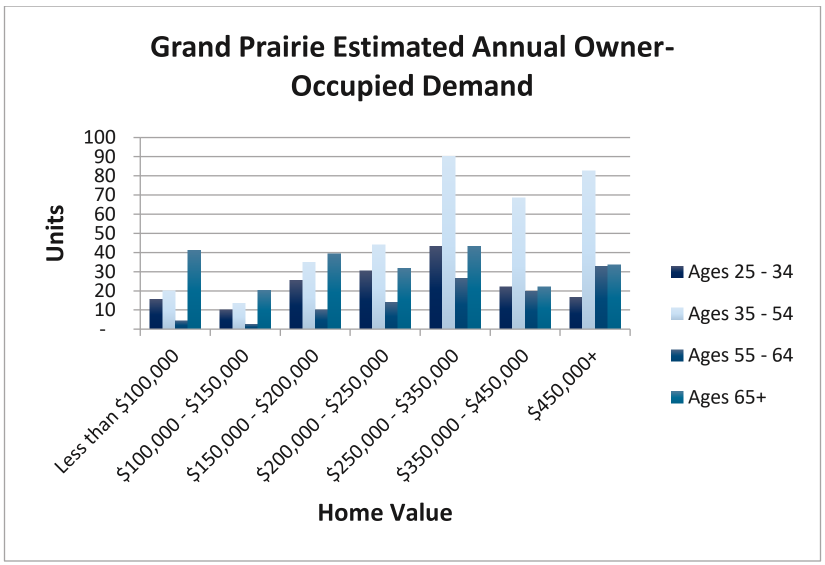
To configure and better understand the potential demand, this analysis was broken down not only by income categories, but also by age groups and product type. This level of analysis allows for a significantly greater understanding of the potential product types in demand as the associated groupings represent different preferences in terms of home typologies.

The analysis indicates that the region is projected to gain over 22,000 total new households on an annual basis over the next five years due to net migration and natural increase (residents entering the homebuying life stage). The annual household growth is anticipated to generate potential demand for 11,025 new households based on the number of qualified earners coupled with the existing ownership propensity throughout the region. However, potential demand for new households is also significantly influenced by turnover of both existing owner and renter homes who anticipate purchasing upon moving, demolitions, and vacancies. The total potential demand for new households is anticipated to exceed 32,000 on an annual basis for the region. The tables below represent the relationship of qualified household income to attainable home value/affordable monthly rental rate.

Qualifying Household Income	Home Value
Less than $35,000	Less than $100,000
$35,000 - $50,000	$100,000 - $150,000
$50,000 - $75,000	$150,000 - $200,000
$75,000 - $100,000	$200,000 - $250,000
$100,000 - $150,000	$250,000 - $350,000
$150,000 - $200,000	$350,000 - $450,000
Greater than $200,000	Greater than $450,000

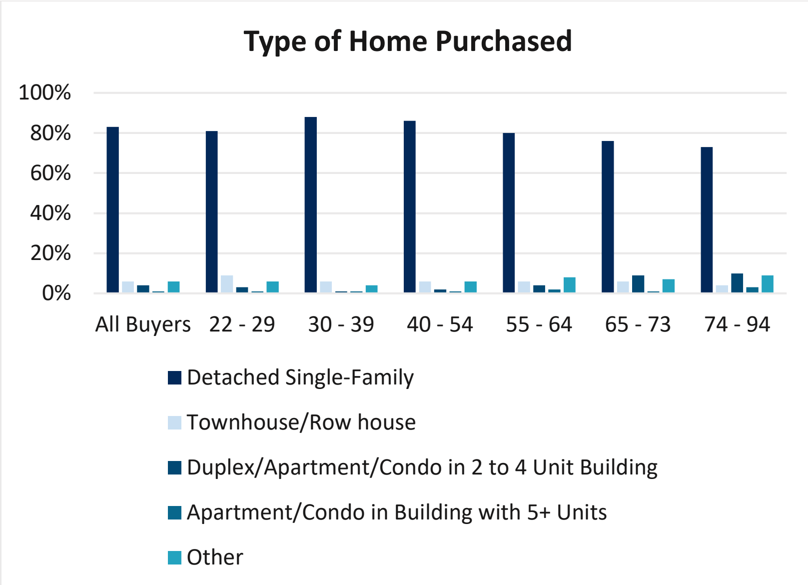
Qualifying Household Income	Monthly Rent
Less than $35,000	$500 - 750
$35,000 - $50,000	$750 - $1,000
$50,000 - $75,000	$1,000 - $1,500
$75,000 - $100,000	$1,500 - $2,000
Greater than $100,000	Greater than $2,000

With regards to owner-occupied demand, across all income categories, our projections show that Grand Prairie has the potential to capture 859 new owner-occupied units annually based on a conservative capture rate, of which, there is demand for over 58% of total new homes valued above $250,000. To better understand, the owner-occupied residential demand was broken down not only by income categories, but also by age groups, and ultimately translated into a variety of owner-occupied product types. The consumer preferences between age groups illustrate a desire and ability for Grand Prairie to offer a variety of home typologies and product types, based on context and location among other factors. The chart below illustrates the potential annual demand for owner-occupied housing by age group in Grand Prairie.



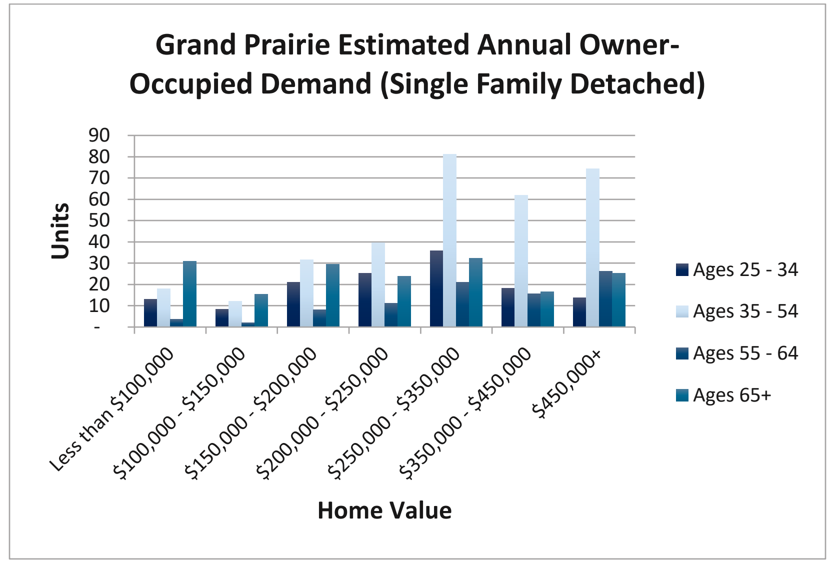
Although the vast majority of Grand Prairie's owner-occupied housing stock is single-family detached, there is opportunity to bolster the product offerings through varied and contextually appropriate alternatives, such as townhomes, condominiums, duplex-quadplex, and hybrid housing among others. With 67% of Grand Prairie's existing housing stock registering as single-family detached, it will be critical that future owner-occupied development seek to differentiate without significantly disrupting or altering the balance of housing stock. To do this, the owner-occupied demand by age group was analyzed by product type.

According to a 2020 National Association of Realtors Home Buyer and Seller trend report, a survey was conducted to understand the housing typologies purchased by age group. The following chart illustrates the preferences of housing typology purchased by age groups purchased in the United States during 2020.

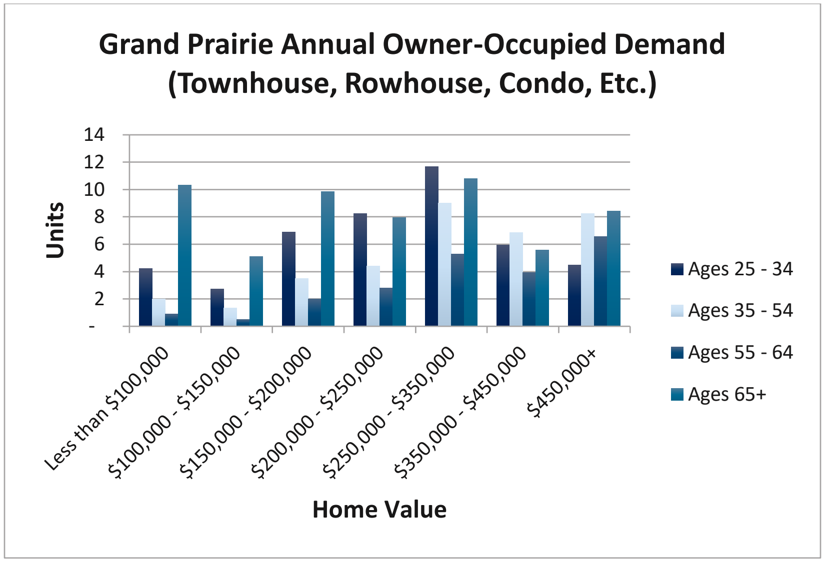


(National Association of Realtors)

The results of the survey indicate the vast majority (83%) of all homebuyers purchased a single-family detached home. The second most popular product type purchased was a townhouse/rowhouse and home types designated as other, at 6% respectively. Duplex/Apartment/Condos in 2 to 4 Unit Buildings came in second to last at 4%, followed by the smallest portion of product, Apartment/Condo in Building with 5+ Units at 1%. To further calibrate the owner-occupied demand for Grand Prairie, this research in conjunction with extensive industry knowledge, conversations with developers, and macroeconomic trends, was utilized to determine the potential annual demand by product type for Grand Prairie. The total annual demand across all age groups for single-family detached product is anticipated to account for 716 units, roughly 83% of the total owner-occupied demand. The chart below illustrates demand for single-family detached units by age group.



Additionally, demand was calculated in the same manner for various other owner-occupied product types. Additional owner-occupied residential typologies include townhomes, rowhomes, duplex/quadplex, hybrid housing, and other non-traditional single-family detached dwellings. The results indicate there is demand for 160 annual units. Of the demand for this product, over 36% is anticipated to service households for those 65 years and older.



In addition to the product preference survey conducted by the Neighborhood Association of Realtors (NAR), respondents were asked to identify neighborhood factors that most impacted their homebuying decision. The top 10 factors are listed below for all age buyers.

Neighborhood Factor	All Buyers
Quality of Neighborhood	63%
Convenient to Job	46%
Overall Affordability of Homes	44%
Convenient to Friends/Family	41%
Convenient to Shopping	30%
Design of Neighborhood	28%
Quality of School District	26%
Convenient to Entertainment/Leisure Activities	23%
Convenient to Schools	22%

(National Association of Realtors)

Unequivocally, the results of the survey speak to a common desire across homebuyers of all ages and lifecycles. The desire for quality, accessibility, and integration into the larger community are critical elements to successful residential development.

As part of this effort, the existing pipeline of preliminary, active, planned developments was analyzed through data provided by Residential Strategies Inc. (RSI). The information included contains statistical information on new home starts, closings, new home, and lot inventories. RSI data does not include any multi-family developments, so to understand the multi-family pipeline data was provided on projects under construction by the City of Grand Prairie. The RSI data is collected quarterly at the lot level and summarized by section, subdivision, and market geographies. Home pricing information is presented at the section level. Start, closing, and home inventory information is also identified by builder. Subdivision attributes such as lot size, school district, lot amenity, master plan and developer are also included.

An analysis of active and future subdivisions by analysis zone was conducted and summarized below. It is important to note that the analysis only considered active and future subdivisions per the RSI data provided. The total number of undeveloped lots is inclusive of the tracked active and future subdivisions only and does not include raw or vacant land outside of the subdivision boundaries.

Active and Future Subdivisions			
Analysis Zone	**Undeveloped Lots**	**Lots Under Construction**	**Price Range**
North Sector	78	0	$130k - $400k
Urban Core	N/A	N/A	N/A
Central Sector	142	0	$139k - $152k
South Central Sector	153	36	$200k - $350k
I-20 Corridor	938	6	$299k - $400k
Far South Sector	5,915	358	$250k - $700k
ETJ	3,344	116	$307k - $475k

According to the Q1 2021 RSI data, the Far South and ETJ analysis zones have the greatest number of undeveloped lots. The Far South analysis zone accounts for 56% of the total undeveloped lots, and nearly 70% of the lots under construction. Similarly, the ETJ makes up the second largest number of undeveloped lots (32%) as well as 23% of lots under construction. The I-20 Corridor is home to nearly 9% of the undeveloped lots, but only has 6 lots currently under construction. The South Central zone has 36 lots under construction and 153 undeveloped lots in the pipeline. A small portion of the total undeveloped lots exist within the North Sector (78) and Central Sector (142), although neither zone has any lots currently under development. The Urban Core is the only analysis zone that does not have any lots undeveloped or under development.

The size of proposed lots within the active and future subdivisions varies by analysis zone, but the Central and North Sectors have the most homogeneous mix, offering 20’x80’ and 50’x100’ lots in the Central, and 110’x110’ and 25’x110’ in the North. The South Central Sector has offerings of lot sizes 30’x80’, 40’x100’, and 60’x120’. The ETJ contains lot offerings sized 60’x120’, 80’x130’, and 65’x120’. The I-20 Corridor analysis zone has a wider variety of lot offerings compared to the previously stated zones, including a variety of small lots (20’x80’, 30’x60’, 30’x80’, and 25’x95’) as well as variety of 40s (45’x85’, 40’x80’) and 50s (50’x110’, 50’x115’). The Far South Sector has by far the largest variety of lot sizes, evidenced by the greatest portion of undeveloped lots and rural nature of the analysis zone. The Far South Sector has proposed several varieties of smaller lots including 20’x80’, 22’x85’, and 22’x110’ amongst several other variations. There is a strong mix of 30s, 40s, 50s, 60s and a variety of large format lots including 130’x345’, 160’x250’, and 135’x208’, amongst others.

Non-Detached Single-Family			
Analysis Zone	**Undeveloped Lots**	**Housing Type**	**Lot Sizes**
North Sector	72	Townhome	25x100
Urban Core	N/A	N/A	N/A
Central Sector	24	Townhome	20x80
South Central Sector	30	Townhome Duplex	30x80
I-20 Corridor	356	Townhome Duplex Condominium Detached Hybrid	30x80 20x80 25x95 30x60
Far South Sector	1,228	Townhome Duplex Condominium Detached	20x80 22x85 31x80 40x80 22x100 30x100

To further understand the nuances of planned developments, non-detached single-family residential property including, but not limited to, duplexes, townhouses, condominiums, mobile homes, mobile home parks, and other multi-unit residential developments, or any other lands upon which there are residential structures that contain more than one dwelling unit were analyzed. However, it is important to note that the multi-family pipeline is not included, but is analyzed separately following this section.

The greatest concentration of undeveloped lots can be observed within the Far South Sector, which makes up 71% of the total pipeline (excluding single-family detached and multi-family developments.) The second greatest concentration can be observed in the I-20 Corridor analysis zone, making up 20% of the pipeline. The additional pipeline is distributed across the remaining zones evenly, apart from the Urban Core, which does not currently have any non-detached single-family product in the pipeline.

The average price of product being proposed within the Far South analysis zone ranges from $293k-$350k. The average price of product in the pipeline within the South Central zone is $300k, while the I-20 Corridor only has values projected for one of the four developments listed at $140k. The average value of townhomes being projected in the north sector are $145k, while the central zone does not have values associated with the preliminary development.

Within the multi-family pipeline (July 2020) there were 2,540 units under construction, of which 62% reside in the I-20 Corridor zone. There are 813 units under construction within the Far South zone, and 154 units under construction within the South-Central Zone. Additionally, there were over 4,900 units that had zoning approved in the pipeline. An analysis of the units in the pipeline reveals the greatest concentration in the Far South zone (1,814 units), followed by the I-20 corridor (1,567 units), North zone (1,072), Urban Core (272), and finally the South Central zone (199).

Figure 16: Typical Single-Family Infill Construction

Figure 17: Example of Recent Multi-Family Construction in the IH-20 Corridor

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Program Development

Land Use

Based on the city's existing Future Land Use Map, there are 7,375 remaining acres of undeveloped land designated for some type of residential. Of these, 5,574 acres are designated for low-density residential, 363 for medium-density residential, 669 for high-density residential, and 768 for mixed-density residential.

Based on the typical density of multi-family in the city today (approximately 19 units to the acre), approximately 13,000 to 15,000 additional multi-family units can be expected under the current Future Land Use Map, depending on annexation. At the current rate of development (over 14,000 multi-family units built or entitled since 2013), the city could run out of available undeveloped land designated as multi-family as early as 2029.

Table 8: Land Use Calculations

City Limits and ETJ		
Designation	**Developed**	**Undeveloped**
Low-Density Residential	14,777 acres	5,574 acres
Medium-Density Residential	231 acres	363 acres
High-Density Residential	1,341 acres	669 acres
Mixed-Density Residential	274 acres	768 acres
Total	**16,624 acres**	**7,375 acres**
City Limits Only		
Designation	**Developed**	**Undeveloped**
Low-Density Residential	14,133 acres	1,386 acres
Medium-Density Residential	231 acres	186 acres
High-Density Residential	1,341 acres	421 acres
Mixed-Density Residential	235 acres	186 acres
Total	**16,624**	**7,375**

Supply and Demand Summary

	North Sector	Urban Core	Central Sector	South Central Sector	I-20 Corridor	Far South
Opportunities	- Significant employment along SH-360 - Few smaller (~20 ac) tracts available through the district - Regional access via SH 161, SH 360, and I-30 - Access to entertainment district (Lone Star Park) - Access to several parks and trails - K-12 school access, including GPHS - Proposed development (The Gateway) along I-20	- Infill housing to minimize vacant lots and enhance cohesiveness - Service industry employment and City Hall/Dallas County Tax office offer opportunity for workers to live close to work - Recent investment in City Hall and integration enhance pedestrian experience - Quality, niche retail restaurants make an attractive amenity (FireHouse Gastro Park, Zavala's, Farmers Market) - Urban Core represents the best opportunity within the city to get an authentic downtown feel - Amenities improve likelihood of achieving sales premiums	- Redevelopment of underutilized or vacant properties - Parks and trails system provide a desirable amenity - Several smaller undeveloped parcels along Great SW Parkway near the Hospital could cater to the 65+ community - Access to several schools	- Access to significant employment - Destination retail/entertainment (EpicCentral, Asia Times Square, Etc.) - Parks and trails system provide a desirable amenity - Good access to K-12 schools, including Dubiski and SGPHS - Pioneer Pkwy Corridor provides quality amenities for residential development	- I-20 serves as a gateway to the community - Remaining developable land is well positioned in relation to entertainment, goods and services, as well as parks and transportation - Access to schools	- Existing residential development is high-quality - Intersection of Camp Wisdowm Rd & Lake Ridge Pkwy should be future mixed-use development - Potential future development of Estes Park could create regional gravity - Potential development can leverage natura amenities like the lake, natural systems, and trails to serve as an amenity
Challenges	- Environmental deterrents (floodplain) - Significant industrial employment can cause adjacency conflicts - Food desert causes residents to have to travel significant distances for groceries and other daily needs	- Downtown environment is still considered primarily auto-oriented - Fragmented ownership leaves few large developable areas - Truck traffic along Jefferson St hinders pedestrian experience - UPPR line can cause traffic and be considered a nuisance	- Established neighborhoods leave little room for net new development - Limited sites available for development - Eastern portion of boundary is surrounded by industrial/floodplain rendering it undevelopable with regards to residential	- Mountain Creek Lake serves as a natural barrier along the eastern boundary - Existing large-scale industrial users such as Lockheed and PolyAmerica make some areas unsuitable for residential development	- Significant residential development has occurred along I-20 and SH-161, leaving few choice parcels - Oversaturation of residential could limit commercial goods and services from developing due to land scarcity - High land costs	- Joe Pool Lake serves as a natural barrier to both inflow and outflow traffic - Lack of existing goods and services enable multifamily islands if mixed-use is not required - Connections to the East are severely limited, causing some concerns about potential congestion
Owner-Occupied Residential						
Owner-Occupied Demand	Low	Moderate	Low	Moderate	High	Moderate
Target	- Single family detached should only be used as infill when higher-density product is not available due to land constraints - High density at I-30 & Belt Line Rd - Potential high density development along Bear Creek north of Shady Grove Rd	- Transitional housing (townhomes, rowhomes, du/quadplex) should buffer high-density from existing neighborhoods	- Single family detached should seek to enhance existing residential development and avoid displacement of existing residents - High density development should occur in areas where connectivity and similar character already exist (Main St and Jefferson St)	- Infill residential along Carrier Pkwy (at Freetown Rd, Arkansas Ln) - Higher-density residential/Mixed-use at Carrier Pkwy & Marshall Dr - Casa Bella Homes development at Freetown Rd & SW 3rd St	- Transitional housing (townhomes, rowhomes, du/quadplex) should buffer commercial uses along I-20 from existing neighborhoods - Infill/high density housing at Robinson Rd & Warrior Dr - High density/Mixed-use around Mayfield Rd & SH-161	- Utility easements and creek corridors offer amenity opportunities and C2natural buffers from existing residential, making high density more desirable - Continued low/medium density residential development along Seeton Rd (Lakeway Estates) - High quality, low density single family near 287
Existing Values	- Median Home Value - $167,847	- Median Home Value - $135,177	- Median Home Value - $91,901	- Median Home Value - $124,802	- Median Home Value - $185,390	- Median Home Value - $253,786
Target Market Values	$300,000 +	$300,000 +	$300,000 +	$350,000 +	$300,000 +	$350,000+
Pipeline	78 Lots in the pipeline (1%)	No lots in the pipeline	142 Lots in the pipeline (1%)	153 Lots in the pipeline (1%)	938 Lots in the pipeline (9%)	6,240 Lots in the pipeline (59%)
Renter-Occupied Residential						
Rental Demand	Low	High	Low	Low	High	Moderate
Target	- High density at I-30 & Belt Line Rd - Product should be highly amenitized and take advantage of regional transportation and destination development while integrating additional uses like retail and office (structured parking, ground floor retail, common green, etc.)	- Vertical mixed-use along Main St and Jefferson St - Housing along Main St should incorporate commercial development - Transitional housing (townhomes, rowhomes, du/quadplex) should buffer high-density from existing neighborhoods - Opportunity for high-density south of Wright Senior Apartments (SH-161 & SW 14th St)	- Higher-density development should occur in areas near existing services/employment to avoid disturbing existing residential - Potential for age-restricted/retirement/medical housing near North American Hospital	- Potential development of the SW corner of Belt Line Rd & Pioneer Pkwy - High density development along Warrior Trl to help activate EpicCentral all times of the day	- The Sutherland PH II - High density/Mixed-use around Mayfield Rd & SH-161 - Potential redevelopment of SW corner Lake Ridge Pkwy & I-20 - Development along Forum Dr at the intersection of Sara Jane Pkwy - Future development of parcel along SH-360 and Doryn Dr north of the Lakes at Grand Prairie	- Future development should integrate goods and services that fill holes in the market (grocery, soft goods, restaurants, etc.) - Mixed-use development along Lake Ridge Pkwy and Camp Wisdom Rd that enhances the existing neighborhoods - Integration of ground floor commercial - Highly amenitized senior-living near 287
Existing Values	- Median Rental Rate - $906	- Median Rental Rate - $689	- Median Rental Rate - $720	- Median Rental Rate - $834	- Median Rental Rate - $1,198	- Median Rental Rate - $1,329
Target Market Values	$1,500+	Mix of afforable and market rate ($1,000+)	$1,000+	$1,000+	$1,500+	$1,500+
Pipeline	1,072 Units in the pipeline	272 Units in the pipeline	No units in the pipeline	199 Units in the pipeline	1,567 Units in the pipeline	1,814 Units in the pipeline

Opportunity Areas

The areas profiled in this section are considered to have the greatest potential to impact development patterns in Grand Prairie and implement the housing strategies recommended in this document. In most cases, these are also areas that will be negatively impacted if past development patterns are allowed to continue. While each opportunity area may contain recommendations specific to that area, it should be assumed that the other more general recommendations of this study are valid if applied with consideration to each area's specific context.

North Sector

Belt Line and I-30

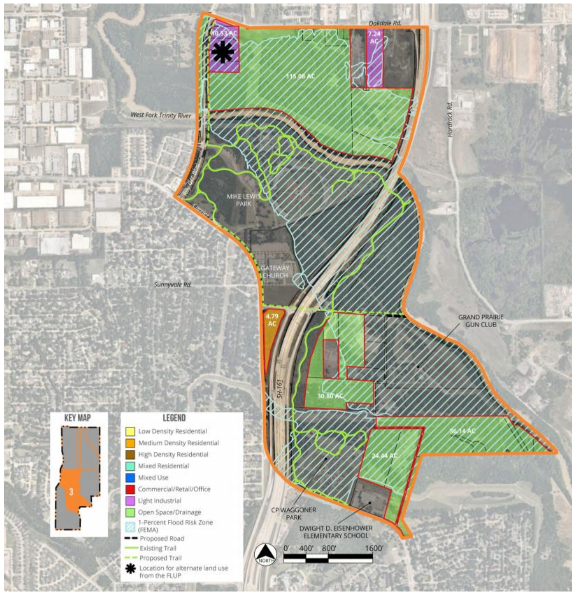
In 2018, Grand Prairie adopted a Gateway Master Plan for the area around the Belt Line Road and IH-30 interchange. The plan, developed by Omniplan, called for a mixed-use destination area with approximately 3,500 multi-family units and several million square feet of commercial office space similar to Las Colinas in Irving or Legacy West in Plano. The timing of when these projects occur is crucial to avoiding replication of the multi-family island effect seen in other locations along I-30. If individual multi-family complexes are constructed in the area with no supporting jobs or retail, it will be a challenge to achieve "grand experiences for the pedestrian" as called for in the plan. On the other hand, if the plan is successfully implemented, it will provide a key signifier to the market that Grand Prairie is ready to support a true mixed-use environment on a large scale and improve the prospects for other similar developments to move forward in other parts of the city.

The success of the plan will also depend upon integration with other activity areas in central Grand Prairie including Turner Park, Grand Prairie High School, and Downtown. The Gateway and Downtown must complement each other with experiences and amenities that are similar but differentiated enough to avoid cannibalization. The housing profile in each area will contribute to this effect, with larger apartments locating within the Gateway Master Plan area, while smaller-scale infill projects activate Downtown. This can reinforce the respective identities of each district, with larger national businesses attracted to the Gateway while homegrown boutique businesses fill spaces in Downtown. The key for the Gateway will be constructing these units simultaneously with the amenities and services envisioned in the Master Plan so that residents are not forced to drive elsewhere for these services.

Figure 18: Grand Prairie Gateway Plan (source: Omniplan)

Wildlife Parkway and SH 161

Figure 19: SH 161 Master Plan



(Source: Freese and Nichols, Inc.)

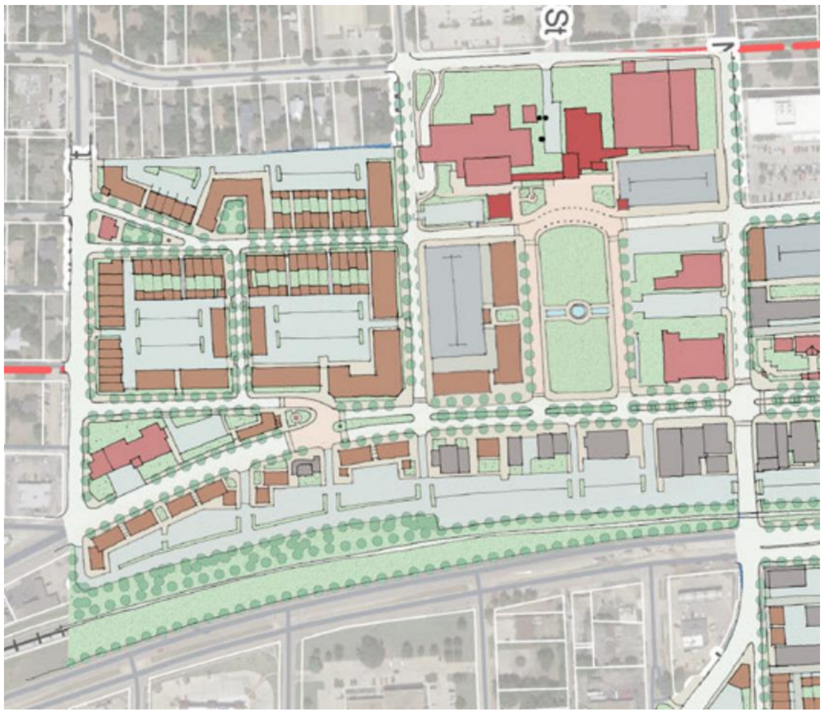
This area is one of several analyzed in the 161 Corridor Plan, which was a follow up to the 2018 Comprehensive Plan developed by Freese and Nichols, Inc. While much of the north SH 161 corridor is dominated by industrial, heavy commercial, and warehouse land uses and is isolated from most major services, this area sits between two of the City's premier parks (Mike Lewis and C.P. Wagoner) and the future Veloweb connection along the Trinity River. The City is also preparing to make a major investment in the extension of Wildlife Parkway to SH 161. This connection has the potential to open up the area for development. With the floodplain challenges that exist, the City would need to work closely with a developer to master plan a mixed-use development with a variety of integrated housing and accessible jobs located in an office and/or manufacturing component of appropriate intensity. The parks and trails in the area would benefit from higher usage at all times of day if more housing and jobs are concentrated nearby.

Development of this nature could also benefit the neighborhoods to the west and south of this area by providing these residents greater access to jobs. Currently, residents of the area experience long commute times and dedicate a high percentage of their income to transportation. Having high-quality housing and more jobs concentrated near the SH 161 and Lower Tarrant interchange could also attract higher-quality retail or restaurant users to the undeveloped tracts on the west side of SH 161, rather than attracting potential users that mainly depend on pass-through traffic.

Urban Core

Calvary Baptist Church

Figure 20: Downtown Master Plan



(Source: Catalyst Commercial)

The 12-acre area immediately to the west of City Hall represents a huge opportunity to build on the investments the City has made to its municipal campus and the former Fire Station 1, and the redesign of Main Street from a highway to an urban street. The majority of this site is owned by Calvary Baptist Church who use it as their main campus. A concept developed in 2018 for the Downtown Master Plan depicts a variety of housing including wrap apartments and owner-occupied townhomes providing for a transition to the existing neighborhoods along College Street and NW 6th Street. Where the site borders Main Street on the southeast corner (currently a Sonic restaurant) the ground floor should consist of corner retail to complement the restaurants on the south side of Main Street. The area opposite the current Fire Station 1 would be redeveloped as Main Street facing retail and restaurants with shared parking along the railroad right of way.

This scenario also envisions a parking structure with shared use between the City, residents, and visitors to Downtown to further centralize parking during festivals and other peak activity periods.

Development of this site would achieve several key goals of the Downtown Master Plan including:

- Revitalizing the western gateway into Downtown;
- Transforming the look and feel of Downtown from a mixture of campus and suburban style development to an integrated urban profile;
- Providing 24-hour population and activation in the area anchored by City Hall and the restaurants along the south side of Main Street; and
- Contribute to the rise of property tax receipts in support of a Downtown TIRZ (Tax Increment Reinvestment Zone).

Central Sector

Downtown Gateway East

The eastern gateway to Downtown presents several challenges for redevelopment. Auto-oriented land uses dominate Main and Jefferson Streets east of Belt Line Road, and many of the lots are narrow and deep, making land assembly difficult. Because the area was developed before the use of current stormwater mitigation techniques, there is also substantial flooding in this area.

Main Street at 14th Street represents a location where all four corners are either consolidated under a single ownership or possess appropriate depth and width to be viable for development. One of the owners, Graff Chevrolet, is a business that may benefit from greater visibility along a regional highway once Main Street is turned back to the City. A land swap may be a viable strategy to acquire land at this intersection.

Other benefits of this location include good access to Main Street from Jefferson and SE 14th Street (which runs all the way to Pioneer Parkway) and the presence of an existing landmark element with the Grand Prairie water tower, which could be utilized for entryway branding for Downtown traffic coming from the Main and Jefferson roundabout planned to the east. Development of this corner with moderate-density housing could be a catalyst to extend the footprint of Downtown and increase the viability of sites along Main Street to redevelop as walkable destinations.

Figure 21: Intersection of E Main St. and 14th Street

(All aerial photography comes from City of Grand Prairie)

Hospital District

This area is centered around the underutilized former Texas General Hospital on N. Great Southwest Parkway. As Grand Prairie currently does not have a full-service hospital, the facility itself represents a good opportunity both to fill a gap in the city's health services offerings and to provide quality non-industrial jobs in this sector.

The area surrounding the hospital also presents a good opportunity for infill development. There are several large undeveloped parcels surrounding the hospital, and though care should be taken to not locate housing in a way that will interfere with hospital operations, creation of medium- or high-density residential near the hospital fulfills many of the guiding principles found in this document. The area is already developed as mixed-density, with good access to jobs, healthcare, and two elementary schools.

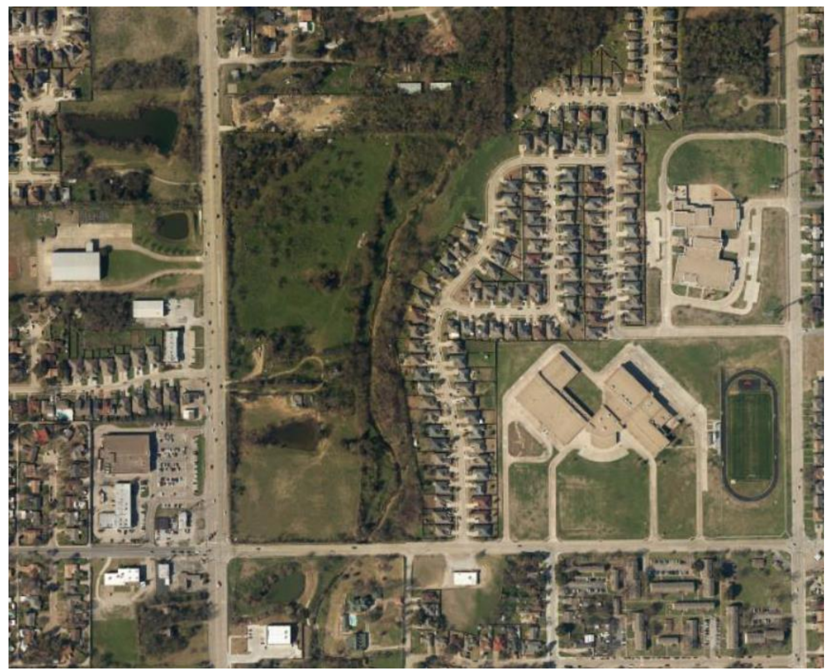
Figure 22: Area Surrounding Former Texas General Hospital

South Central Sector

Belt Line and Marshall

This location has received significant developer interest in the last few years and represents a significant opportunity to achieve mixed-use development that is accessible from two major corridors that span the entire city. The presence of the creek on the east side of the property also represents an opportunity to provide recreational facilities for future residents, and provides a natural buffer from the existing single-family residential development to the east.

Figure 23: Intersection of Belt Line and Marshall

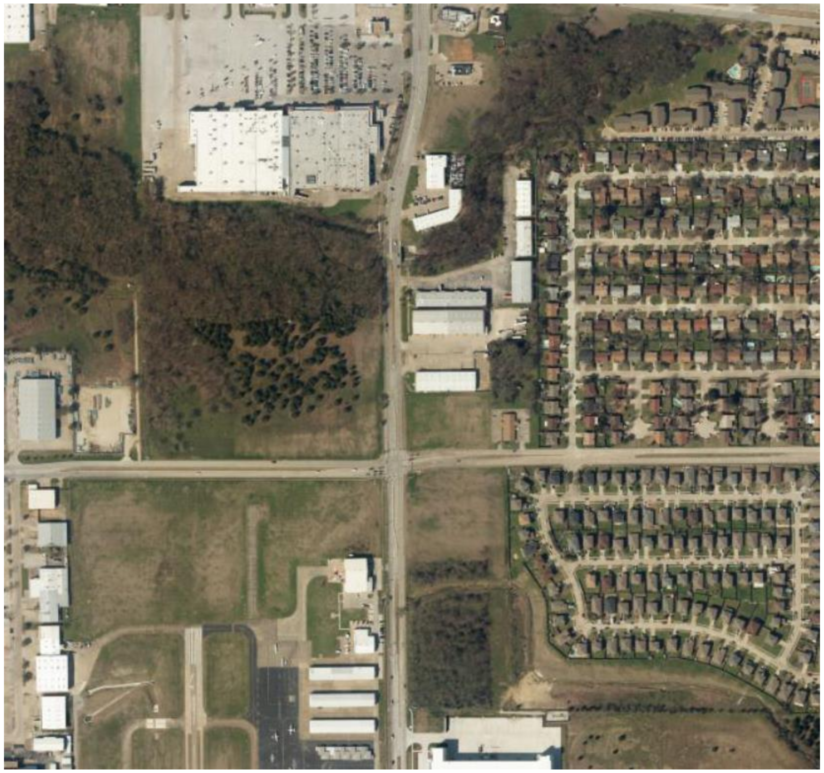


Asia Times Square

Asia Times Square is an emerging cultural hub in central Grand Prairie, offering a myriad of Asian shops and restaurants as well as facilities for celebrations and gatherings throughout the year. The one disadvantage is its location, which is somewhat removed from most neighborhoods in the Central Sector. A potential remedy is to construct more residential units on the vacant parcels to the southeast, which would have the secondary benefit of bringing future residents closer to the jobs hub around Grand Prairie Airport.

This area also has the potential to serve as a linear trail corridor connecting Asia Times Square to EpicCentral, an amenity that would need to be maximized with a higher residential population on the western edge of the city.

Figure 24: Intersection of Great Southwest Parkway and Arkansas, close to Asia Times Square (upper left)



I-20 Corridor

Bardin West

This is a unique area of Grand Prairie with very good visibility from Interstate 20 and Great Southwest Parkway, providing direct access from Arlington and Dallas as well as Joe Pool Lake. Currently there is a mix of older convenience-based development, big box development, and undeveloped parcels.

Because of the size and depth of these parcels, this important gateway has tremendous potential to redevelop in the future as an anchor of south Grand Prairie.

High-density residential development already exists or is planned to the west and south, and future street reconstruction of Bardin and Great Southwest will need to account for safe pedestrian connections between the residential and non-residential uses. One goal should be to reduce the number of driveways along Great Southwest Parkway by utilizing shared access from the frontage road and Bardin, Development or redevelopment of commercial or mixed-use should also consider how to frame the entry from IH-20 to Great Southwest Parkway by allowing or requiring buildings to be built closer to the street with parking in the rear.

Figure 25: Intersection of Great Southwest Parkway and Bardin

Belt Line

The intersection of IH-20 and Belt Line has some characteristics that distinguish it from the intersection at Great Southwest Parkway. Currently, this area is mostly undeveloped. There are also topographical and infrastructure challenges on the south side of IH-20, and the presence of Mountain Creek limits retail opportunities based on traditional drive time analysis.

Nevertheless, this area has the potential to develop as an entertainment and recreation destination, with close access to Joe Pool Lake and Cedar Hill State Park. Lodging and specialty retail should leverage these attractions along with providing high- or medium-density residential.

The City should explore partnerships where the City will assist with infrastructure improvements south of IH-20 for a user that will maximize access and visitors to surrounding amenities in a high-quality mixed-use context. Development in this area should be designed to provide a visual bookend to Great Southwest, with both sites serving as Grand Prairie's IH-20 Gateways.

Figure 26: Intersection of IH-20 and Belt Line

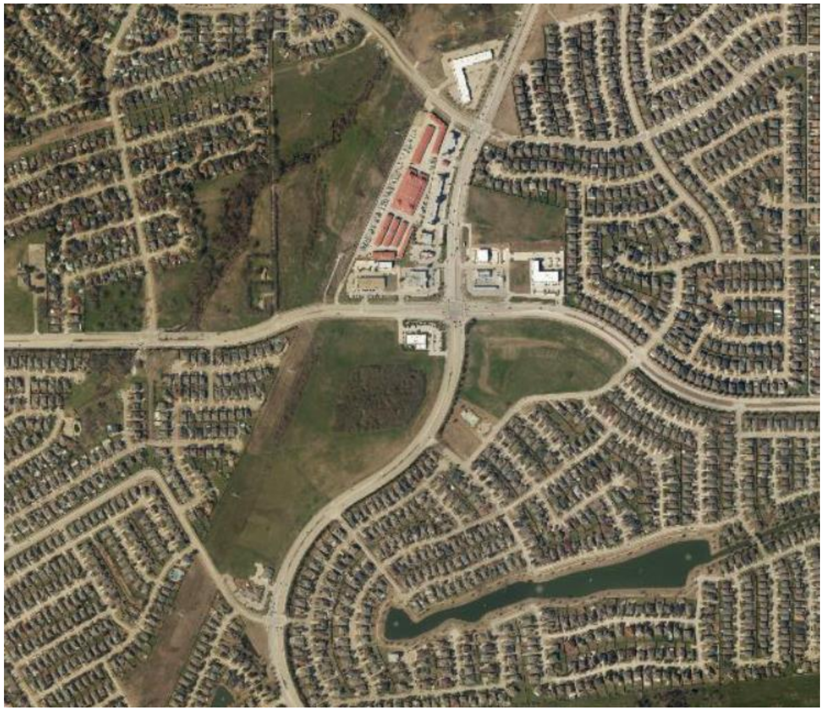
Far South

Lake Ridge and Camp Wisdom

This area has good access to Lake Ridge Parkway and Camp Wisdom Road, which provides tens of thousands of daily vehicle trips. However, this location is hampered by its proximity to SH 360 and the Target-anchored Lake Prairie Towne Center. As such, traditional anchor users such as grocery stores have resisted developing at this location.

Future development should retain the commercial qualities of this location by creating a destination development with outdoor amenities and central open space, while carefully integrating medium-density residential units in a way that respects the existing single-family neighborhoods.

Figure 27: Intersection of Lake Ridge Pkwy and Camp Wisdom Road



Recommended Future Land Use and Regulatory Changes

Guiding Principles

This section is intended to establish policy direction for the City. Not all housing decisions are alike; some may involve competing interests or goals, forcing the City to make context-specific decisions based on the needs of the particular area. There is no "one-size-fits-all" formula that can speak to all situations, but some basic guiding principles can help guide Grand Prairie towards a healthy and diverse housing profile:

1. **New housing should be appropriate to the context of its surroundings**. New housing should be compatible with the form and density of adjacent residential development and be easily accessible by vehicle, bicycle, and walking to services and amenities, including but not limited to: public parks, public trails, schools, libraries, community centers, other public resources, areas of multi-sector employment, retail, restaurants, grocery stores, or other similar resources. Housing should not only be convenient to high-speed roadway connections, especially those that will probably carry residents outside of the city of Grand Prairie or that will not increase convenient access to the resources listed above.

2. **New housing should correspond to services that residents use every day.** New housing, particularly high-density housing, should not only increase the resident population and number of units in the city but should also be built in the context of new or existing commercial, retail, office, or other non-residential development that adds to the city's share of jobs and attractions. New housing that is built next to vacant commercial or non-residential tracts should be avoided.

3. **No one housing type should constitute a disproportionate share of new housing construction.** No substantial "gaps" in the city's housing profile should exist and development should be incentivized where it fills an area of housing need without unduly concentrating a particular housing type. While new housing construction should align with market demand, a high concentration of a single type of housing can create or worsen economic disparities, can lead to rapid population growth or decline based on demographic changes over time, and produce a vicious cycle of neglect and disinvestment over time with no corresponding mechanism for incremental reinvestment over multiple generations.

   Certain housing types, such as high-density multi-family, can also impact the future construction of other housing types such as low- or medium-density residential units if those units cannot be appropriately buffered. New housing construction should therefore be diverse, allowing for the construction of units, densities, and ownership structures that provide opportunities for residents of all incomes and demographic profiles to live and work in Grand Prairie during various life stages.

Zoning changes should be avoided when those changes would favor one or a handful of housing types to the exclusion of other types in the same location or would concentrate a disproportionate share of a single housing type in a way that is substantially inconsistent with the city's overall housing profile.

Where future undue concentration of a housing type is difficult to predict, the City Council should require than the area be master planned to show the relative locations of different residential and non-residential building types so that potential negative effects of development can be avoided or mitigated.

4. **Housing should not be proposed or constructed in areas that are impacted by threats or nuisances.** Threats or nuisances may include effects of industrial or heavy transport operations that involve loading and frequent movement of large trucks or rail cars, that create sounds that are shown to routinely exceed acceptable levels, that produce ejection of particulate matter into the air, or that involve the use of bright lighting that is visible from the property line.

   A grade separated highway or interstate may also be considered a threat or nuisance unless the negative effects on housing proposed along or near the frontage of the highway or interstate is mitigated by the presence of one or more public parks, the preservation of existing trees, or by a buffer of appropriate non-residential uses between the proposed residential use and the highway or interstate. One or more of these features should exist at the time the residential use is constructed and not subsequent to construction of the residential, so that residents will not at any time be exposed to the impacts of the highway or interstate.

5. **Neighborhoods should be allowed to evolve incrementally, especially when they have reached a stage of disinvestment.** Because neighborhood blight is often a function of exhausted resources, particularly in areas that lack good access to plentiful or good-paying jobs, residents are forced to expend too much of their resources simply getting by, with no time or income left over to maintain their property. Some residents are forced to leave these neighborhoods, leaving an opening for acquisition by an absentee investor, gentrification, vacancy, or further decline.

When this pattern begins to occur in areas that are not subject to restrictive covenants, incremental density increases should be allowed, such as allowing construction of accessory units, or splitting larger lots into multiple smaller lots (particularly on corner or "end cap" lots) that will increase the value of property and spur investment in declining neighborhoods without displacing of existing residents.

6. **Infill housing should be appropriate to the form and style of the existing neighborhood.** New residential development in existing residential neighborhoods and subdivisions should be done appropriately without drastically changing the form or function of the neighborhood. Infill housing should be encouraged to mimic the materials, colors, and architectural style of surrounding homes, where an established vernacular exists.

   In areas without an established style or where homes are already "eclectic" in appearance, wide latitude should be given to construct housing that fits market demand, as long as housing is designed in a way that will contribute to the character of the neighborhood and provide a high-quality product in keeping with the City's design guidelines.

   Standalone high-density development should be avoided unless developed in the context of an existing residential or commercial area and in such a way that it will contribute appropriately to the stability and character of the area and surrounding neighborhoods.

7. **New housing should reduce the economic burden on the resident.** The prevailing development pattern in the post-World War II era has largely assumed that the value of property will be captured in the amenities on the property itself, including the housing unit, yards, landscaping, driveways, and sidewalks. However, the burden of maintaining the value of the property is placed almost entirely on individual property owners.

   To mitigate the effects of individual property neglect on new residential neighborhoods, particularly those that are not constructed as "high-end", luxury, or gated communities, developers should be incentivized to concentrate amenities and open spaces where use and maintenance can be shared by the entire neighborhood, or where existing public parks and amenities exist and are easily accessed by the new neighborhood. Amenities in this sense may be thought of as both yards and open space and the homes themselves. Proportionately, the share of those amenities that are located on private individual lots should be reduced where the market does not demand them or where they will constitute a financially disproportionate maintenance burden on future owners.

Multi-Family Recommendations

When it is timed and scaled appropriately, multi-family development can help achieve the "activation energy" that jump starts the development or redevelopment of an area. When scaled inappropriately, multi-family can isolate and divide areas. Neighborhoods are built on the personal investments of multiple generations of residents and property owners, with each generation adapting the built environment to its economic needs. Where multi-family is approved in Grand Prairie, it should contribute to the housing diversity of an area by integrating with existing housing and providing options for multiple generations and life stages to increase personal investments in each area (such as young renters, families, empty nesters, and assisted living).

Use Preference Tiers

For each area of undeveloped land, the City must consider the opportunity cost of approving certain land uses. This cost may be different depending on the size of the property.

One way the City can approach this decision is by establishing a preference tier for large greenfield parcels (over 10 acres): The tiers may be sorted from highest preference to lowest: master-planned development > office > retail commercial > industrial > multi-family.

For smaller greenfield parcels (10 acres or less), the preference tiers may be infill housing > retail commercial > hotel > office > multi-family.

Avoid Rapid Density Increases

If the property is considered "infill" (surrounded by other established areas or neighborhoods), caution should be exercised when the proposal constitutes a substantial increase in density above the density of the surrounding area. If the density is more than 20% above the surrounding residential areas, additional justification may be necessary to approve the development, such a location within two blocks of Main Street or one block of Jefferson in the core or transition zone, or if the development is close to one or more City services or amenities such as a park or community center. In the absence of such supporting justification, multi-family should consist of smaller "missing middle" housing developments that complement the surrounding neighborhoods and utilize existing services and infrastructure

Align Housing with Services and Amenities

The City should discourage housing that is far from city services, retail, parks, police or fire stations, and schools. Access to these services increase the long-term viability of neighborhoods and help to stabilize cost of living and even increasing health factors by reducing vehicle miles traveled and putting more destinations within walking distance. As part of the justification for a proposed rezoning for multi-family development, the City may require an analysis showing how many of these services exist within a quarter- or half-mile of the proposed site (see figures on following pages).

The City may even consider incentivizing housing that results in more people living close to existing services, provided those services are not already overextended. This information should be cross-referenced with City's parks plan, facilities studies, and ISD planning. Potential City incentives include permitting fee or impact fee decreases; a policy for allowing automatic downzoning or density bonuses for incremental higher-density housing (less than a 20% density increase) or development that reserves affordable housing units in areas vulnerable to gentrification; and streamlined development regulations like covered parking exceptions, landscaping exceptions, or building design exceptions.

Conversely, developments that are proposed outside of a ½ mile area of one or more services could be required to pay into a fee-in-lieu to provide for these services in the area if they cannot or should not be provided on-site (such as a community center or a linear park). Consideration should also be given to housing that eliminates or reduces barriers to access for existing residents, by providing a path or sidewalk connection to a service, extending broadband or 5G services through fiber optic installation, or by helping to mitigate drainage issues in areas prone to flooding.

Beyond access to public amenities, housing needs to be located close to jobs, close to fresh foods, and provide internet access to its residents. With each housing decision, City leaders must ascertain how increases in density affects access to one or more of these needs. If housing is proposed in an area that already has access, there are benefits not only to the future residents but also to the businesses that depend on a reliable workforce. If the housing is located far from jobs, there is the potential for the area to become isolated with residents depending spending an inordinate amount on transportation costs just to meet basic needs. Using land for housing also eliminates the possibility to creating jobs or services on these properties.

The opportunity areas discussed in the previous section exhibit several of the characteristics outlined in these recommendations or have the potential to develop into areas of contextual housing with convenient access to jobs, retail, and existing or planned services. These areas are only the most prominent examples. Dozens of other opportunities exist along the City's major roadway corridors and in areas where many vacant commercial-zoned parcels exist that should be reconsidered for appropriate infill housing.

Figure 28: Multi-Family Housing with Access to McFalls Park

Figure 29: Proximity to City Parks

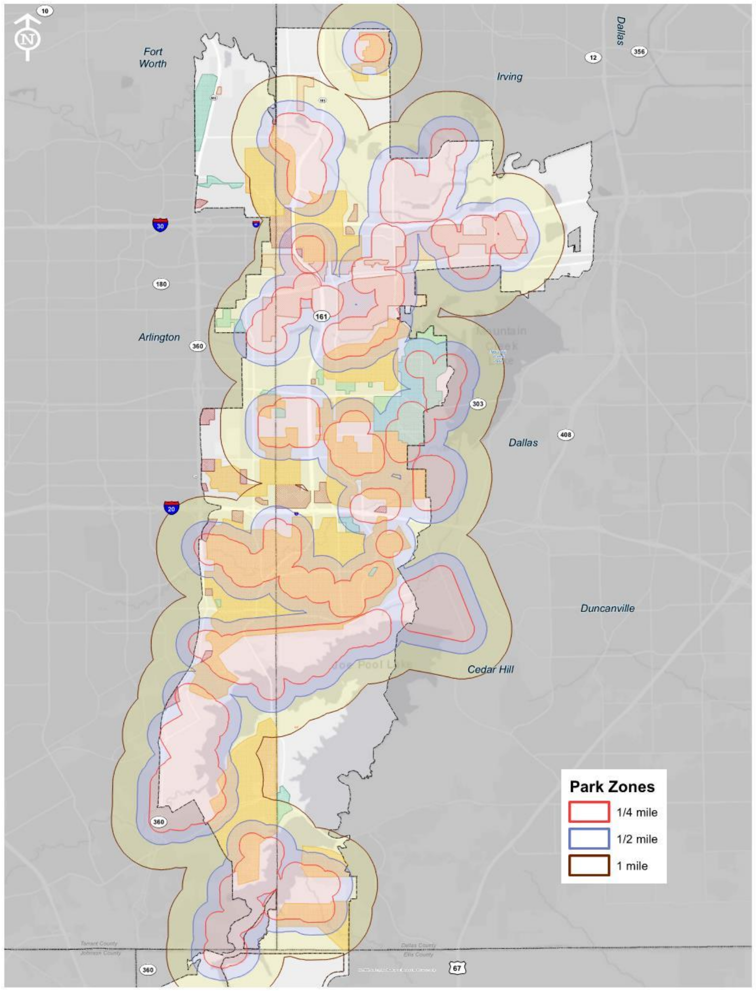
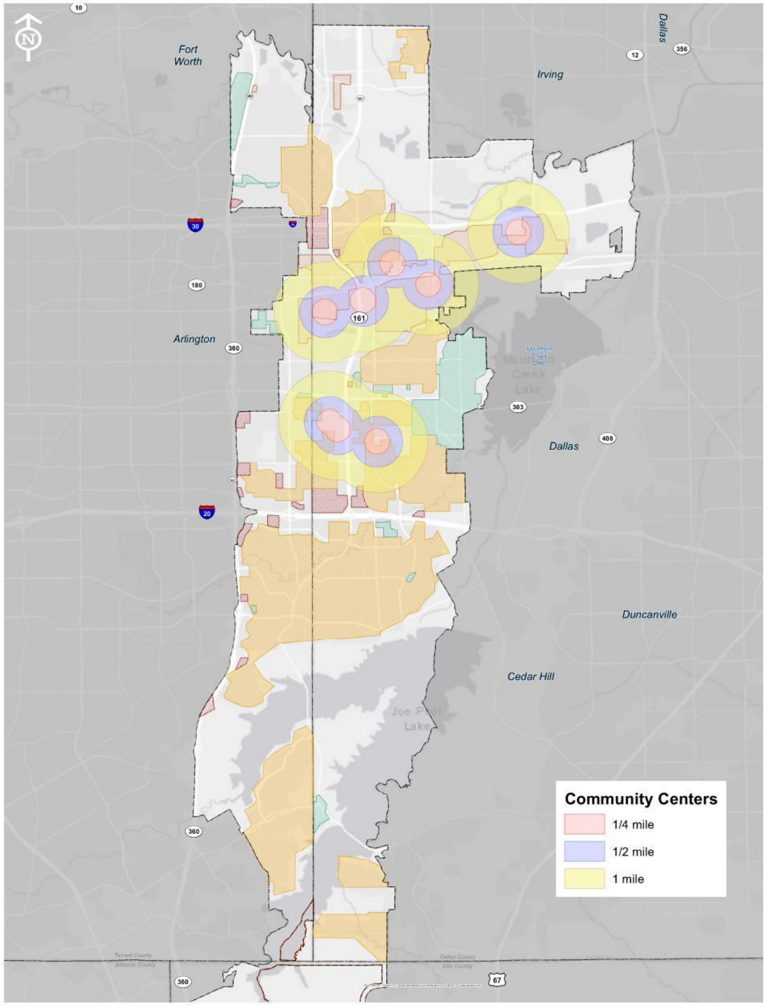


Figure 30: Proximity to Community Centers



Single-Family Recommendations

Give Property Owners More to Enjoy and Less to Maintain

As seen in the Analysis Zones section, many areas of the city, particularly in the far north and south, contain large, unbroken areas of detached single-family housing. While many of these areas are low-crime and high-income, the development pattern also locks its residents into financially supporting a lifestyle of auto commuting and home maintenance, which can impose a long-term burden on residents, reduce disposable income and impact quality of life. Rapidly increasing home prices in the Metroplex also put housing out of reach for many potential residents, meaning single-family for-sale housing becomes attainable only to high-income individuals or corporations that are buying an increasing percentage of these homes to provide them as rental units.

These areas of single-family housing also contain significant common amenities that are the responsibility of homeowners associations (HOAs). The increasing costs of labor and materials increases the likelihood over time that these amenities will become unsustainable. Although the City has had success in implementing Public Improvement Districts (PIDs), this tool isn't usable for all types of amenities and also tends to reduce the disposable income of residents in the district by imposing an additional tax burden.

To mitigate against these costs for future residents, the City should attempt to minimize future maintenance costs that will be borne directly or indirectly by homeowners. As with multi-family strategies listed above, flexibility should be provided in the City's development regulations for infill development and development with access to existing amenities such as parks and recreation centers. Redundant or isolated amenities should be avoided.

While some existing neighborhoods have formed HOAs or PIDs to address declining common features such as landscaping, fencing, or screening walls, this should not be considered a failsafe strategy. Where neighborhoods don't have the capacity to support a PID, the City should consider other methods such as a city match for homeowner improvements to housing or landscaping of City right-of-way adjacent to a subdivision perimeter.

Target City Investments Towards Amenity Creation

In areas where properties are experiencing private property maintenance issues such as erosion, the City should explore opportunities to provide engineering solutions to these issues, particularly when these improvements can also provide recreational amenities such as trails and linear parks.

The City may also choose to target its highest-visibility corridors for larger capital improvements such as screening walls, sidewalk, and drainage improvements along S Carrier Pkwy. and Corn Valley Road where they would provide the greatest impact to neighborhoods and commuters.

Allow Property Owners to Maximize Use of Their Property

In older areas where incomes have not kept pace with housing costs, such as the central areas of Grand Prairie, the City should consider infill housing policy that allows an addition unit by-right as long as fire separation standards can be met. This policy would allow property owners to unlock additional value from their properties, and place more housing in areas with existing services.

As a further step, the City could consider incentivizing local business and startups to revitalize declining commercial areas, which in many cases have suffered the effects of declining spending power in the surrounding neighborhoods.

Decrease Barriers to Quality Attainable Housing

With rising housing costs, the City should maintain a focus on affordability through decreasing barriers to housing. The City can spearhead this initiative by allowing residential areas to adapt where appropriate, allowing the construction of additional units, context-sensitive infill housing such as townhomes and fourplexes, and relaxed or flexible design standards such as minimum floor sizes, garage requirements, and building materials standards. Additional consideration should be given for development located near schools, community centers, parks, libraries, and other services, such as reduced lot size and width minimums, reduced landscaping requirements, flexibility in driveway materials, and other concessions that reduce the costs associated with home construction and ownership.

Create a Guide to Good Housing

The City should also consider creating a pattern book containing good and bad examples of infill housing, appropriate design criteria based on neighborhood or context, examples of common amenities, and guidelines for avoiding the creation of excessive unusable space that owners must maintain but cannot fully enjoy such as odd lots or lots with large side yards and parkways outside of fences.

Figure 31: Example of Inappropriate Infill Design

Figure 32: Residential Lot With Excessive Unusable Space

Sector Recommendations

North Sector

1. Because much of this sector is developed as industrial, the potential for negative impacts is high and any residential development should be carefully planned to avoid impacts and nuisances;
2. Housing should be concentrated where it will provide access to jobs and the existing amenities in the corridor, particularly near the City's existing parks, the regional trail along the Trinity River, and schools;
3. The City should not allow density increases without a corresponding increase in services and amenities or improved access to existing services and amenities. Access to SH 161, SH 360, or IH-30 should not, by itself, be seen as an amenity; and
4. The large majority of the market supply for high-density housing in this sector should be directed towards the IH-30 and Belt Line intersection and to the north along SH 360 near the Trinity River where development can occur within the appropriate mixed-use context and with improved access to jobs and other amenities.

Urban Core

1. Housing development should align with the Downtown Master Plan with density gradually increasing from the Approach Zone to the center of Downtown;
2. As a possible exception to 1 above, higher-density uses are appropriate near the interchange of SH 161 and Main Street or Jefferson Street if corresponding commercial/retail development is provided before or simultaneous to residential construction;
3. Housing proposed along Main Street should incorporate commercial elements on the ground floor in keeping with existing development; and
4. The City should financially incentivize construction of residential development along Main Street and Jefferson Street in the urban core until the market begins to supply appropriate levels of residential product.

Central Sector

1. As the largest economically depressed area of the city, housing in this sector should be developed in a way that is respectful of existing neighborhoods and will not displace existing residents over time;
2. Large density increases should be avoided where there is not a corresponding increase in services that are lacking in the area, such as parks, grocery stores, and quality restaurants;
3. Redevelopment and reconstruction of homes and neighborhoods in this sector should be encouraged and incentivized through reduced permit fees, expedited approvals, or City-matching funds as available for homes that are in keeping with existing residences; and
4. In appropriate commercial areas along Main Street and Jefferson Street, high-density residential may be allowed, particularly where there is a high degree of connectivity to Downtown or other destinations and resources, potential

nuisances such as industrial or non-conforming uses will be addressed or mitigated, or the development can serve to create or enhance a "gateway" along these thoroughfares.

South Central Sector

1. Future development should be concentrated in "nodes" along Pioneer Parkway, generally consisting of the areas near Asia Times Square, the Carrier Parkway intersection, and the Belt Line Road intersection;
2. As the area possesses one of the highest concentrations of employment and neighborhood and regional-serving retail, and as an area where the median year built for residential units is ten years older than the overall City-wide median year built, the City should consider incentivizing new residential construction in this area if the new construction is consistent with the characteristics of existing residential development;
3. Because this area has the highest share of residents who walk to work, the City, in partnership with developers, should avoid or eliminate connectivity barriers that make it difficult to reach jobs or services in the area by means other than a car; and
4. The City should continue to pursue development that will increase and retain quality jobs in the sector, particularly along Pioneer Parkway, in and around EpicCentral, and at the Mayfield and SH 360 intersection near Grand Prairie Municipal Airport, where there is currently a large amount of vacant commercial land.

IH-20 Corridor

1. Because recent residential development in this sector has been highly concentrated around the SH 161 and IH-20 interchange, market supply should be directed to other areas;
2. Remaining undeveloped parcels along SH 161 and IH-20 should be reserved for office, retail, restaurants, and other destination uses to support and complement the environment created by the City's investment in EpicCentral;
3. Remaining undeveloped parcels along IH-20, Belt Line Road, and Lake Ridge Parkway should not be primarily convenience-based but should contribute to and respond to the assets of the southern half of the city, including its proximity to lakes, parks, and recreational opportunities. As such, development should be destination-oriented, consisting of specialty retail and high-quality hospitality uses; and
4. As two of Grand Prairie's "gateways" along a major national corridor, the interchanges of IH-20 and Great Southwest Parkway and Belt Line Road should be developed in a way that features very high-quality design and destination appeal. Where residential development is a component of development in these locations, it should be highly integrated and accessible to commercial uses in a way that contributes to day and nighttime activity at these locations, including horizontal mixed use where it can be incentivized or supplied by the market. Standalone multi-family development in these areas should be highly discouraged.

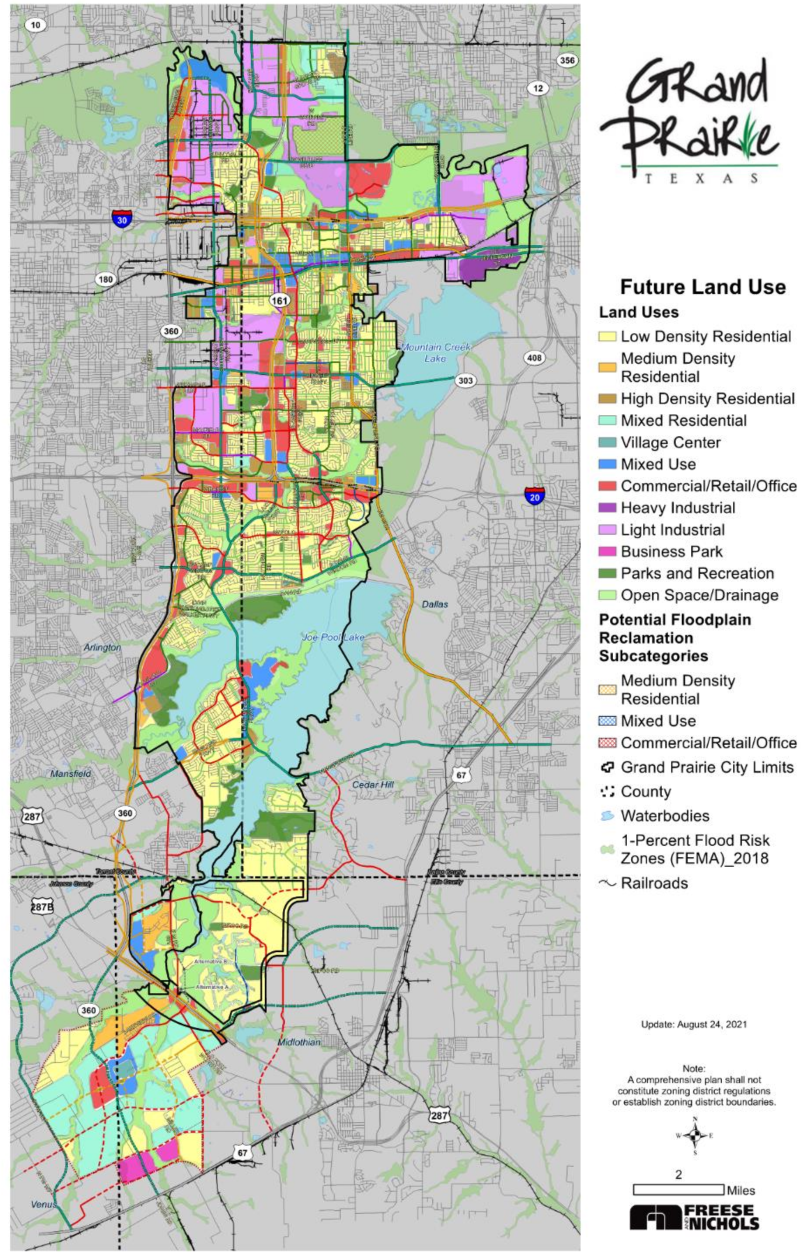
Far South Sector

1. Supply of high and medium-density residential product should be restricted unless corresponding commercial and recreational amenities are constructed at the same time, including grocery stores, retail, quality restaurants, and access to public parks and trails;
2. The City should reserve remaining Lake Ridge Parkway frontage for retail and commercial uses; and
3. Development south of Joe Pool Lake should correspond to the recommendations of the 360 Southgate Plan.

Recommended Future Land Use Map Changes

On August 17, 2021, City Council approved 21 updates to the Future Land Use Map that was adopted in 2018. The updated map reflects the recommendations and strategies developed in this plan. As with any Comprehensive Plan element, the Future Land Use Map is a policy guide and does not establish zoning on a property.

Future changes to the Future Land Use Map should be considered concurrently with zoning change requests or as part of future studies to ensure that the map adequately represents the City's vision for housing and development and is calibrated to the appropriate development context to create housing and neighborhoods that are integrated with other uses and maintain viability over multiple generations.



Implementation

The implementation of this housing strategy is designed to provide general principles and guidelines for development and redevelopment of housing in Grand Prairie. To truly be successful, these principles should be implemented for decisions on the City Council and at the everyday staff level.

This strategy is intended to provide the flexibility to work with other plans and policies. It does not dictate how much of a certain type of housing should or should not be built. Beyond the universal recommendations, area specific recommendations found in the Sector Recommendations should supplement and support plans specific to those areas both now and in the future.

Other City initiatives for neighborhood revitalization and construction of affordable housing should be considered in the context of these recommendations, but how the principles are applied depends on many factors including location, zoning, budget allocations, and timing. These recommendations may be considered as new revenue streams become available.

The following Implementation Matrix includes several columns to fully describe each recommendation, what parties will be responsible for implementation, and the projected time frame for completion.

The "**Recommendation**" row indicates the overall recommendation.

The "**Action**" column describes the specific action item to be completed.

The “**Guiding Principle**” column ties each Action to one of the six stated principles:

1. *Build contextual housing that residents want and value*.
2. *Allocate housing close to everyday destinations.*
3. *Remove barriers between housing and services.*
4. *Avoid new housing near threats and nuisances.*
5. *Allow for adaptation of residential areas over time*.
6. *Provide residents more to enjoy and less to maintain*.

The "**Responsible Lead**" column identifies the City staff department that is responsible for leading progress on each Action. It is important to note that most actions cannot be completed by the Responsible Lead alone; collaboration with other City departments, partnerships with outside organizations (e.g., Dallas County), and decisions by elected and appointed officials are required in many cases.

The "**Time Frame**" column specifies the time frame during which implementation of an action item should occur.

The **“Cost to City”** column provides a very generalized assessment of the potential costs to the City to implement the recommendation. Most recommendations are designed to be easy and cost-effective to administer, while others involve zoning or regulatory changes that may incur costs related to public notices or property owner meetings. A single “$” indicates marginal or very low costs while “$$” indicates more substantial costs related to land acquisition or potential legal fees.

Universal Recommendations				
Action	Recommendation Link	Responsible Lead	Time Frame	Cost to City
NODES AND MAJOR INTERSECTIONS				
1.a Master plan housing to correspond with public and private services, including parks, trails, retail, office, and restaurants	Align Housing with Services and Amenities	Planning and Development Department; Private Developers	Continuous	N/A
1.b Avoid concentrations of residential units (any type) without supporting non-residential services	More to Enjoy and Less to Maintain; Align Housing with Services and Amenities	Planning and Development Department	Continuous	N/A
1.c Allow incremental redevelopment of existing commercial centers with the inclusion of residential components	Align Housing with Services and Amenities; More to Enjoy and Less to Maintain; Allow Property Owner to Maximize Use of Their Property	Planning and Development Department; Community Revitalization	Continuous	N/A

Universal Recommendations				
Action	Recommendation Link	Responsible Lead	Time Frame	Cost to City
GREENFIELD AREAS				
2.a Avoid rezoning to residential without an "anchor" feature, service, institution, or jobs generator	Align Housing with Services and Amenities; Use Preference Tiers	Planning and Development Department; Economic Development	Continuous	N/A
2.b If no anchor is present at a development site, prioritize and incentivize commercial or industrial development that will result in job creation or a destination and will not create a potential island of residential	Target City Investments Towards Amenity Creation	Planning and Development Department; Economic Development	Continuous	$
2.c Encourage housing variety so that no more than 2/3rds of housing in an area is of the same type or price point	Avoid Rapid Density Increases; Decrease Barriers to Quality Attainable Housing	Planning and Development Department	Continuous	N/A

Universal Recommendations				
Action	Recommendation Link	Responsible Lead	Time Frame	Cost to City
INFILL AREAS				
3.a Allow older SF residential area to respond to market demand with appropriate product on undeveloped commercial lots (duplex, townhome, 4-8 plexes on "end cap" lots)	Decrease Barriers to Quality Housing	Planning and Development Department	Continuous	N/A
3.b Incentivize appropriate housing where existing services are present and especially where these services may be underutilized (parks, retail, schools)	Align Housing with Services and Amenities	Planning and Development Department; Economic Development; Community Revitalization	1-5 Years	$$
3.c Create housing overlay to allow incremental density (such as affordable Accessory Dwelling Units on single-family lots) in existing developed "Vought Era" neighborhoods undergoing decline or facing gentrification	Avoid Rapid Density Increases; More to Enjoy and Less to Maintain; Allow Property Owner to Maximize Use of Property	Planning and Development Department	Continuous	$

Universal Recommendations				
Action	Recommendation Link	Responsible Lead	Time Frame	Cost to City
ACTION ITEMS				
A.1 Create rental registry to track changes in rentership	Avoid Rapid Density Increases; Allow Property Owners to Maximize Use of Property	Planning and Development Department; Code Compliance/PD; Housing	1-5 Years	$
A.2 Monitor neighborhood health, including rental density, access to parks, commercial vacancy and quality, change in prices/value and sales, school capacity, owner participation in city redevelopment and revitalization programs	Align Housing with Services and Amenities	Planning and Development Department; Housing; Code Compliance Community Revitalization; GIS	Continuous	$
A.3 Monitor ratio and density of owner-occupied and renter-occupied housing by analysis zone	Avoid Rapid Density Increases; Decrease Barriers to Quality Attainable Housing	Planning and Development Department; GIS	Continuous	$

Universal Recommendations				
Action	Recommendation Link	Responsible Lead	Time Frame	Cost to City
ACTION ITEMS				
A.4 Create character-based pattern book to provide guidelines and recommendations for future neighborhoods and residential rezonings	More to Enjoy and Less to Maintain; Create a Guide to Good Housing	Planning and Development Department	1-5 Years	$
A.5 Create a land banking program to acquire and (re)develop underutilized parcels of land in neighborhoods close to the Urban Core	Align Housing with Services and Amenities; Target City Investments Towards Amenity Creation; Decrease Barriers to Quality Housing	Planning and Development Department; Economic Development; Housing	3-7 Years	$$
A.6 Create annual or semi-annual city-wide housing report that updates key assumptions of this study and measure success at achieving goals and objectives		Planning and Development Department; GIS	2-5 Years	$

Sector Recommendations				
Action	Recommendation Link	Responsible Lead	Time Frame	Cost to City
NORTH SECTOR				
N.1 Master plan housing on remaining parcels to correspond with public and private services	Align Housing with Services and Amenities; Target City Investments to Amenity Creation	Planning and Development; Economic Development	1-5 Years	$
N.2 Stabilize existing neighborhoods by hiring additional staff to work with HOAs, PIDs, and code enforcement staff to monitor areas of significant decline and connect residents with appropriate resources	More to Enjoy and Less to Maintain; Allow Owners to Maximize Use of Property; Decrease Barrier to Quality Housing	Planning and Development; Code Compliance; Community Revitalization	1-5 Years	$$
N.3 Develop key catalyst sites with residential density at or near gateways to downtown	Align Housing with Services and Amenities	Planning and Development; Economic Development	1-5 Years	$

Sector Recommendations				
Action	Recommendation Link	Responsible Lead	Time Frame	Cost to City
URBAN CORE				
UC.1 Develop key catalyst sites with residential density at or near gateways to downtown	Align Housing with Services and Amenities	Planning and Development; Economic Development	1-5 Years	$
UC.2 Downtown and the urban core should be populated with incremental density such as townhomes and small apartment, particularly at "end caps" and along major secondary corridors such as SW 3rd Street and Grand Prairie Road	Align Housing with Services and Amenities	Planning and Development	1-5 Years	N/A
UC.3 Proactively rezone downtown to establish character-based zoning that aligns with the vision and goals of the Downtown Master Plan	Align Housing with Services and Amenities; Target City Investments Towards Amenity Creation	Planning and Development	1-5 Years	$

Sector Recommendations				
Action	Recommendation Link	Responsible Lead	Time Frame	Cost to City
CENTRAL SECTOR				
C.1 Continue to spearhead development of affordable housing units but allow for more contextual design	A Guide to Good Housing	Planning and Development; Housing	Continuous	$
C.2 Identify blocks of vacant and distressed properties that can be redeveloped as incremental density	More to Enjoy and Less to Maintain; Decrease Barriers to Attainable Housing	Planning and Development; Housing; GIS	1-5 Years	$
C.3 Focus commercial development at corner sites along Main and Jefferson Streets and allow for quality medium to high-density residential mid-block	Align Housing with Services and Amenities	Planning and Development	Continuous	N/A
C.4 Focus higher-density housing where it will not be disruptive to existing neighborhoods and will place more residents near jobs centers (such as Great Southwest IP and the Hospital District)	Avoid Rapid Density Increases; Align Housing with Services and Amenities	Planning and Development	Continuous	N/A

Sector Recommendations				
Action	Recommendation Link	Responsible Lead	Time Frame	Cost to City
SOUTH CENTRAL SECTOR				
SC.1 Focus infill housing near existing schools, parks, and services	Align Housing with Services and Amenities	Planning and Development	Continuous	N/A
SC.2 Target undeveloped and underutilized commercial areas along Pioneer, particularly at its intersection with Belt Line, Carrier, and Great Southwest Parkway for mixed-use development in accordance with this Pioneer Corridor Plan and also along those corridors in accordance with the revised Future Land Use Map	Align Housing with Services and Amenities	Planning and Development; Housing; Economic	1-5 Years	$
SC.3 Preserve and build on existing housing balance with the goal of maintaining full lifecycle housing options in the sector	More to Enjoy and Less to Maintain; Decrease Barriers to Quality Attainable Housing	Planning and Development	Continuous	N/A

Sector Recommendations				
Action	Recommendation Link	Responsible Lead	Time Frame	Cost to City
IH-20 CORRIDOR				
IH.1 Incentivize mixed-use development and redevelopment at key gateway nodes (Great Southwest and Belt Line) and at Lake Ridge Parkway	Align Housing with Services and Amenities; Target City Investment Toward Amenity Creation	Planning and Development; Economic Development	1-5 Years	$
IH.2 Avoid rezoning additional property to residential without presence of supporting retail or written guidelines that time delivery of residential with retail	Avoid Rapid Density Increases; Align Housing with Services and Amenities	Planning and Development; Housing; Economic Development	Continuous	N/A
IH.3 Prioritize acquisition and development of key trail corridors along and near Fish Creek and Prairie Creek that links residential with nonresidential amenities and services	More to Enjoy and Less to Maintain; Target City Investments to Amenity Creation	Planning and Development; Parks	1-5 Years	$

Sector Recommendations				
Action	Recommendation Link	Responsible Lead	Time Frame	Cost to City
FAR SOUTH SECTOR				
S.1 Avoid concentrations of single types of housing or price points in remaining greenfield areas, especially multi-family islands	Avoid Rapid Density Increases	Planning and Development	Continuous	N/A
S.2 Monitor neighborhood health by hiring additional staff to act as liaisons and proactivity work with HOAs, PIDs, and neighborhood groups to assess housing and neighborhood conditions	Allow Property Owners to Maximize Use of Property	Planning and Development; Community Revitalization	1-5 Years	N/A
S.3 Use developing mixed-use node at Lake Ridge and England Pkwy as development model for remainder of Lake Ridge Frontage	Align Housing with Services and Amenities	Planning and Development	Continuous	N/A
S.4 Implement Southgate 360 Plan in ETJ	Align Housing with Services and Amenities; More to Enjoy and Less to Maintain	Planning and Development; Economic Development; Parks; Transportation	1-10 Years	Per Annex. Study

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