



# Legacy Office Competitiveness

## BACKGROUND REPORT



**JULY, 2016**

Economic Development  
Planning

POD Design, DDA, Side Street Planning





## Introduction

### Purpose

The City of Dublin experienced incredible growth in office development from 1980 through the early 2000s. A financial boon for the city due to generated income taxes, there was incentive to continue building the same type of large-scale single-user office throughout a number of designated districts. These offices were largely built under the same set of zoning code standards, with generally similar ratios of employees per square foot, and relied solely on automobile access.

Several changes have occurred in the past decade that present a challenge to this model in both the quantity and quality of the office experience as compared to other opportunities being developed. Two factors in particular are reshaping the demand for suburban office and are sometimes a challenge to reconcile. The first is a shift in the perceived and actual parking demand for certain users that now utilize a much higher employee per square foot ratio than in earlier times. The second is the consistently increasing employee desire for nearby convenience and entertainment uses, ideally within a walkable development model. With Dublin’s homogeneous stand-alone development model for much of the office development and an aging building stock, this pro-active analysis was undertaken.

### Team

POD Design, DDA and Side Street Planning comprised the team to complete this multi-disciplinary initial analysis. With expertise in site design, market analysis and code review, this stage describes an overall picture of the current conditions and an outline of next steps.

## Process

The process for the Office Competitiveness Analysis involved several specific elements. The following outlines the general approach:

### City working group

Key city staff members formed a working group to guide the process. This included the Economic Development Director and Planning Director as well as key staff members from both departments. Other city experts were involved to provide input as needed. This group met roughly monthly throughout the process.



### Existing Conditions Assessment

Based on information provided by the city, team research, and direct planning team observations, an existing conditions assessment was assembled. This provided an overall understanding of the staff-identified study area, including technical details and illustrated through mapping and data studies.

#### DATA GATHERING

In order to create a baseline for the parking usage of current office uses, the planning team conducted a basic site survey. The methodology included a minimum of 3 visits per site, conducted at various times of the day and days of the week. As a result, a determination was made for each site as to a general capacity analysis (overall usage) and a general location analysis (spatial distribution of parkers).

#### MARKET ANALYSIS

A general Market Analysis was then conducted to determine both current conditions and future potential. This general study established the source and quantity of potential untapped demand already existing in the area. This was followed by benchmarking of potential uses, matching the near-term and mid-term demand profile for the area.

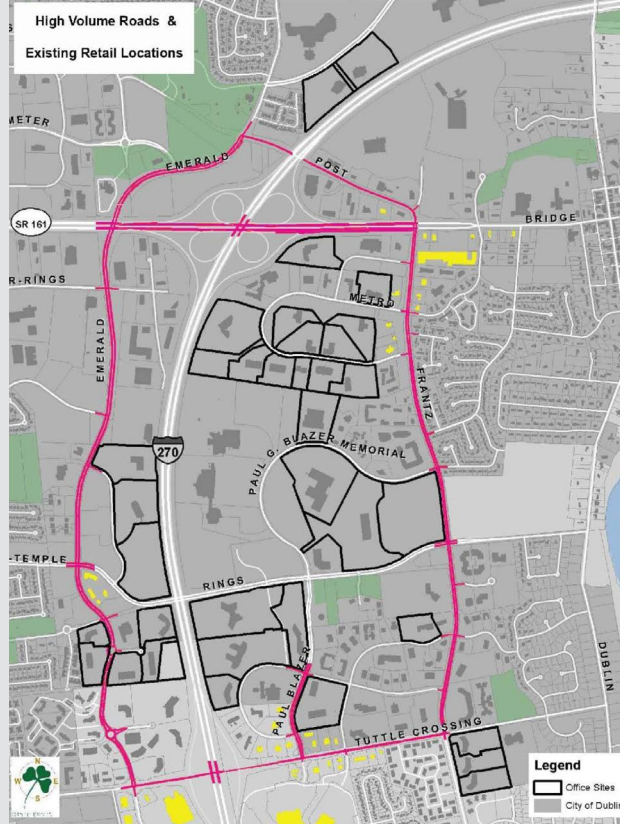
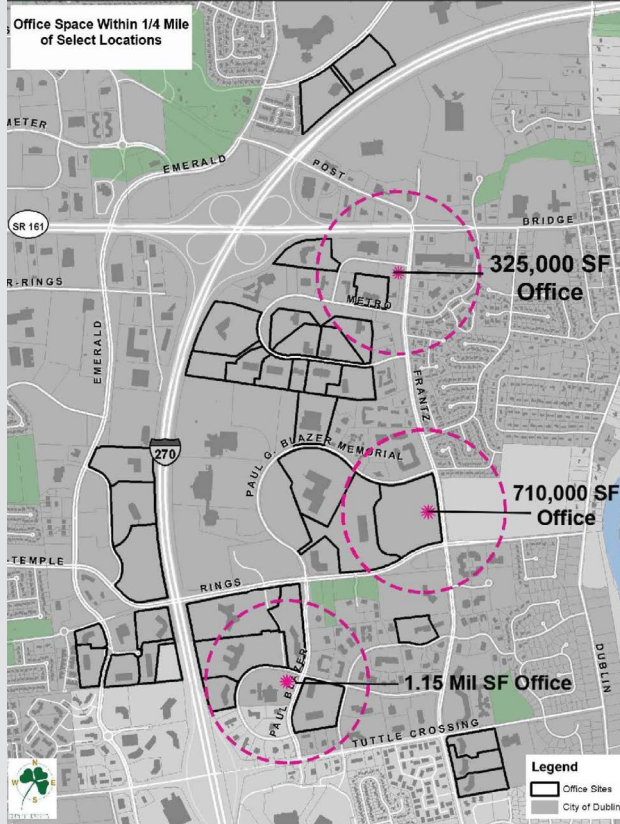
#### SITE ANALYSIS

An overall site analysis was conducted of each office location in the study area. This established the level of efficiency of each site, obstacles to usage, and correlations between design and success/failure of sites from various competitive aspects.

#### ZONING ANALYSIS

A basic zoning analysis established the obstacles and opportunities for change in the current code. A comparison between stated city goals and the results of the existing zoning demonstrated a disconnect that can be corrected with revisions and policy changes.





## Site Analysis

The prevailing office development pattern for much of that time was largely homogeneous, exemplified by the following characteristics:

- Single-use sites and buildings
- Campus-style setting
- Freeway frontage where possible
- Buildings surrounded by large surface parking areas
- The shape of parking dictated by site boundaries
- The site design and landscaping highly influenced by a common zoning code

The result of these characteristics is an oversupply of the same type of office development, which is not responding to the most significant trends in office demand for Central Ohio.

## Public meeting

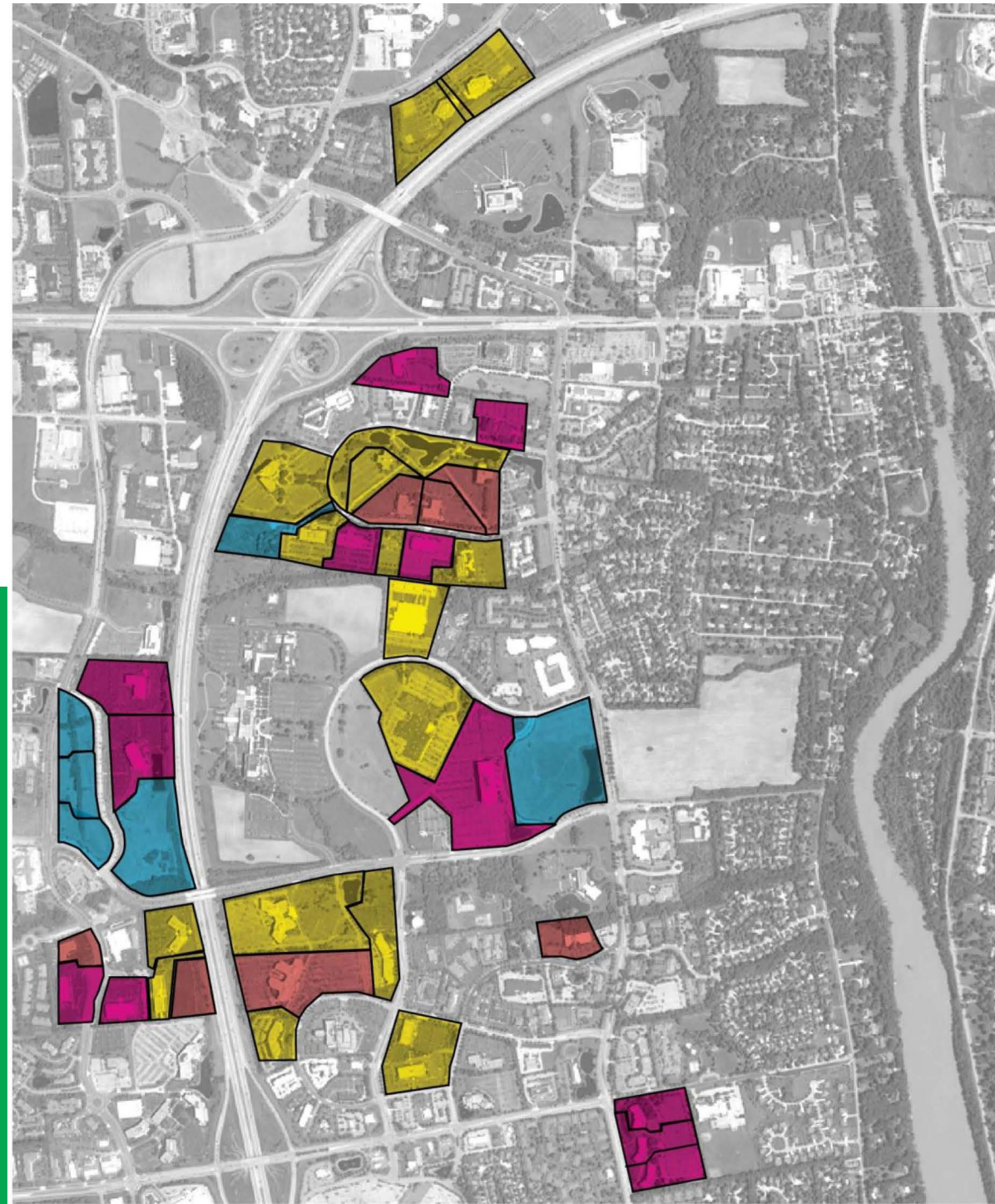
A public meeting was hosted for building owners, tenants and office brokers in the area. The meeting included a series of interactive on-line questions that allowed immediate participant feedback. The planning team presented the conditions assessment along with benchmarking of potential development approaches to the existing sites and study area. A robust series of breakout discussions followed, providing valuable input to guide the approach of the subsequent Area Plan process.

## Summary report

The information for this initial phase has been gathered in this brief summary report. This serves as a launching point for the more detailed Area Plan study that follows this initial assessment.







- Greenfield
- Constraints, But Possible Parking Expansion
- Land-locked, But Possible Parking Expansion
- Land-locked, Limited Expansion

### Site classifications

- Greenfield – Undeveloped sites that are zoned or identified for office in the Comprehensive Plan
- Constraints, but possible parking expansion – Site allows for possible adjacent expansion onto undeveloped land or within
- Land-locked, but possible parking expansion – Site allows for possible parking expansion within the existing site
- Land-locked, limited expansion – Site is constrained for parking expansion both without and within

The target sites were classified into the identified categories in order to identify common challenges and opportunities in each type of site.



- High (6 and Higher)
- Above Average (5.0 to 5.9)
- Average\* (4.0 and 4.9)
- Below Average (Less than 4.0)

\*Average represents the regional parking ratio average among Dublin and select northern suburbs along I-270s as well as other newer office developments in Columbus

### Existing Parking

#### Overall

Ratios – Average parking ratios for Central Ohio suburban office development is 4 spaces per 1,000 square feet. This is a typical range in many zoning codes and had proven to be the market standard for many years in places with limited transportation options beyond automobiles. For these sites, most employees arrive as single-occupant drivers. In recent years, there has been a trend for some users toward higher parking ratios due to more employees per 1,000 square feet of building space. This is particularly pronounced in large single-user buildings where one corporation takes an entire building originally planned to house numerous businesses. By removing redundant common areas such as lobbies for multiple users, the single-user maximizes the number of employees. Another recent development has been the proliferation of call centers which use very little space per employee and have challenges during shift changes when those arriving overlap those departing the site.





### Site Analysis

In order to understand the current conditions regarding parking usage, the planning team conducted an informal visual survey at all the designated study sites. The team went to each site a minimum of 3 times, observing the parking lots at different times throughout the day and on different days of the week.

Identifying used and unused portions of the parking areas, data was generated as to both the usage rates and locations of parkers.



### Usage Rates

While certain users are experiencing parking shortages, many had consistent vacancy in a workable percentage of their parking lots.

Those experiencing difficulty were typically very large single-user buildings and call centers during shift changes. The problem for those other users who perceived a parking shortage was that the parking existed but not within a convenient distance or location on the site.

### Site observations for Frantz and Rings Road Parking Occupancy

- 0% Building Vacancy
- 15% Parking Vacancy
- 4.7 Cars Per 1000 SQ. FT. of Office Space

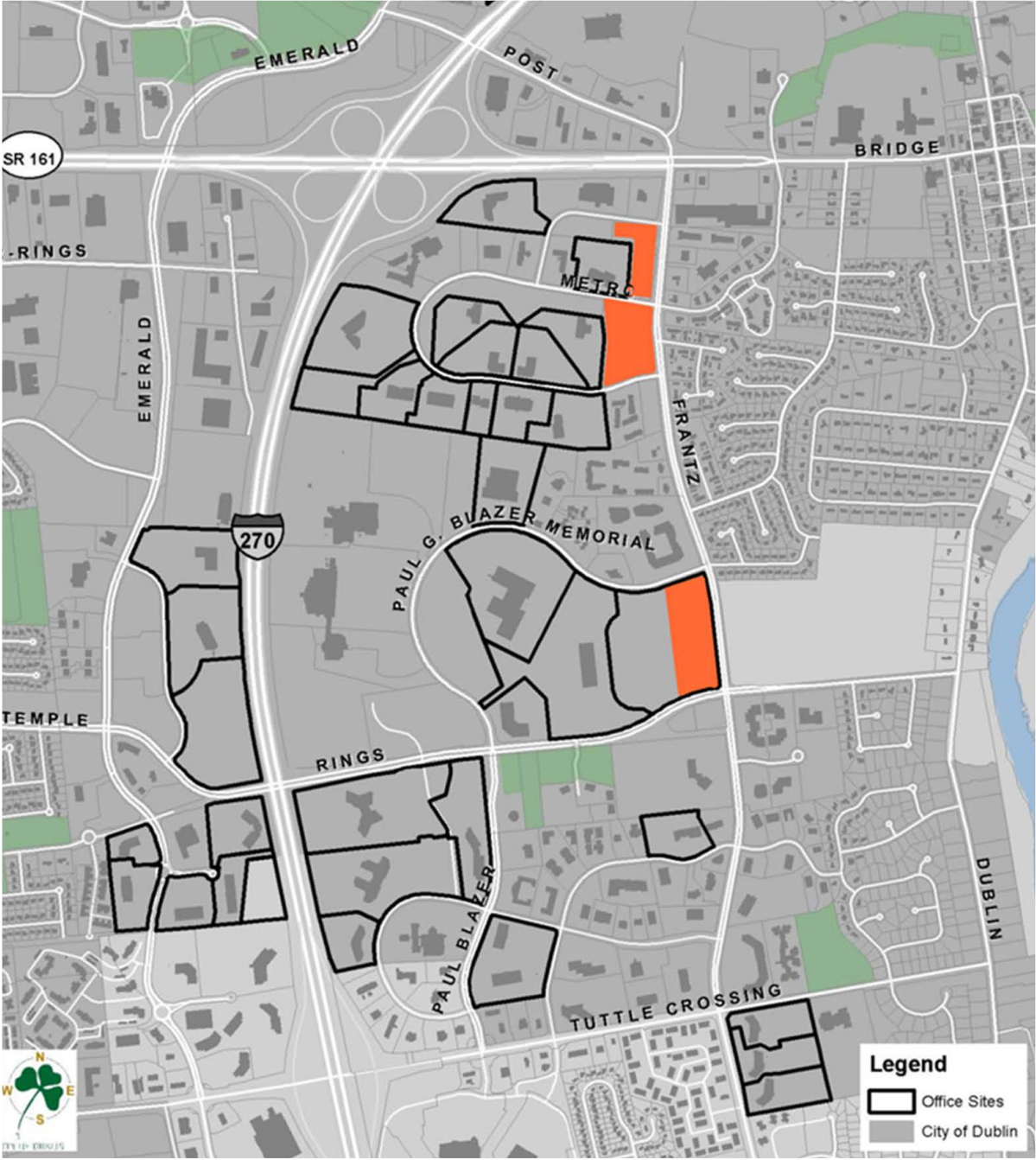


### Locations

Unsurprisingly, parkers tended to locate closest to building entrances. Our observations showed that people largely parked within a distance of 400 or 500 feet to the nearest door in a typical parking layout with unobstructed views. This sometimes meant that users would even park on adjacent lots and traverse the wide landscape barriers in order to have closer spaces than more distant spaces in their own lots. Several issues were identified on sites with perceived parking shortages:

- Parking areas located at a great distance from doors, sometimes on the freeway side of a building with no facing entrance
- Overgrown landscape areas that obscured the view of the entrance from certain nearby parking areas.
- Large areas of landscape buffering between adjacent lots in strategic locations for near-door parking
- Adjacent lots with no efficiencies for sharing due to inefficient site design





Preliminary Retail Site Opportunities (highlighted in orange)

## Market Analysis

The focus of the initial analysis was to assess whether or not viable retail/restaurant scenarios exists adjacent Dublin's legacy office parks and the potential locations for green field sites and/or mixed-use redevelopment. The Frantz Road corridor was identified as a key area for integration of retail with legacy office parks because it offers retailers the necessary market exposure and concentrated consumer spending power.

### Market Exposure

- Average Daily Traffic (ADT) counts in excess of 25,000 vehicles
- Concentration of retailers/restaurants at northern end of Frantz Road
- Greenfield and redevelopment opportunities with frontage along Frantz Road

### Consumer Spending Power: Office Workers and Hotel Patrons

- Estimated 200,000 annual room nights within ¼ mile radius at northern end of Frantz Road
- More than 5,000 office workers within walking distance (1/4 mile) of Frantz Road sites
- Total annual retail and restaurant spending power of \$43 million (office workers and hotel patrons)



Estimated Annual Spending  
**\$18.6 MIL**

Office Workers within  
1/4 mile of sites



Estimated Annual Spending  
**\$24.4 MIL**

Hotel Patrons within  
1/4 mile of sites

## Case Studies

### SITE #1 GREENFIELD DEVELOPMENT



With open, undeveloped ground adjacent to this large single-user building, development opportunities are significant. Currently, a portion of this site is being used to expand parking for the high-usage office user on the west portion of the site. This site is also an opportunity to incorporate a mix of uses to serve the existing office workers and to take advantage of the heavily traveled Frantz Road corridor. As outlined in the market analysis, immediate opportunities include restaurant and small format grocery uses. Future development could take an even more aggressive approach to density based on the large amount of open acreage. These uses should incorporate complementary parking uses for shared opportunities. This is also an opportunity to pursue a more progressive approach to stormwater management through green approaches to the parking design and infrastructure.

### SITE #2 EXITING OFFICE CORRIDOR CHANGES



Metro Place has many vestiges of outdated site design. Within the office area, the parking areas are designed independently for each use resulting in significant inefficiencies. Just systematizing this parking would result in a great increase in parking capacity. This study site also presents a huge untapped opportunity for development along Frantz Road, supplying a mix of needed uses. As the market analysis describes, tapping into both the office workers and hotel guests in the area will support a variety of uses. Development will also require a rethinking of the stormwater pond network that currently impacts development opportunities along the corridor.

### SITE #3 CODE IMPACTS



Based on the current code, site and parking lot landscaping and screening is sometime effective and additive, and other times an impediment to site efficiency without achieving the larger city goals. This site illustrates many of the issues that must be addressed in a detailed code update. These include parking lot perimeter screening, entry drive features, freeway screening and the spacing and size of landscape islands throughout. Numerous elements were identified in a preliminary code analysis during this phase, and serve as the basis for specific code change recommendations in the Area Plan.

### SITE #4 SITE DESIGN AND PARKING APPROACH



This site represents an example of office development that uses successful design while also working from a parking standpoint. With separate buildings fronting on a public street, this site design allows a large pool of shared parking across the uses. In addition, small areas of convenience parking for visitors are located nearer the frontage right-of-way. By pooling the parking into one large and efficient rear lot, large areas of greenspace are left preserved adjacent to the buildings. This creates a larger park-like setting for the rear of the buildings, attractive aesthetics and shaded entry areas. In addition, nearly all spaces are within 450' of building entries.



# Findings/Outcomes

Accommodating this changing demand requires considering one of several approaches:

- 1) Finding ways to increase the amount of parking by expanding parking areas;
- 2) Finding ways to increase parking within the existing parking lot boundaries;
- 3) Creating a mix of uses with complementary parking demands;
- 4) Facilitate alternative transportation options to reduce individual driver demand.

A combination of several of these approaches is likely the best solution and will be explored further in the subsequent Area Plan phase.

## Near term:

### Optimize parking

- Look for opportunities to expand parking adjacent to or within sites, while following quality site design approaches and meeting the goals of the city for landscape screening.

### Key “green” approaches

- Implement more sustainable approaches to parking lot and site design then currently utilized. The use of techniques such as swales and pervious pavement could improve the quality and decrease the quantity of stormwater runoff while potentially adding parking spaces. This is due to the current disconnect between the intent of the landscape code and the resulting outcomes of its implementation.

### Code updates

- Undertake code updates that focus on the goals of site design and landscaping. Opportunities for change were identified in this phase and will be specifically examined and drafted for adoption in the Area Plan phase.

### Develop complementary mix of uses

- Create amenities that will improve office competitiveness, reduce vehicle trips and increase productivity. As identified in the market analysis, there are existing underserved markets here and gaps in certain uses.

### Quality site design for new development

- Stand-alone office users in the traditional suburban style should be discouraged in favor of a better, more flexible site approach. Using good examples identified in the case studies as a model, this approach will be more sustainable and usher in an improved development pattern for this use throughout the city.



## Long term:

### Redevelop existing sites with quality site design / alternate uses

- Finding ways to retrofit sites will be a key part of the transition away from an oversupply of outdated office development. This will be a component of the strategy to reposition consistently thriving office for the next generation. As the region continues to develop mixed-use, walkable office environments, Dublin will also have to pivot to compete. Some of the current model will survive this shift, but much will need to be supported by a nearby mix of uses and others might need a wholly different development approach in the future.

### Develop transportation alternatives

- Follow trends to determine the ongoing usage rates for parking in suburban office. If the ratios continue to be high or increase for certain users, alternate means to transport workers will be vital to maximizing the utility of built-out sites with limited or no parking expansion potential.
- Consider site design based on potential future technology advances, such as people movers and autonomous vehicles. This imminent technology will greatly influence transportation choices in the coming 10-15 years, and Dublin should position itself to adapt to these changes rather than react after the fact. Monitor progress and impacts as shifts occur that will effect land use and individual driver access to sites.

# Next Steps

## Create Area Plan for key sites/ corridors

- Development strategies
- Site retrofit strategies
- Capitalize on market opportunities
- Detailed code updates
- Corridor plan





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