



# Comprehensive Plan Rewrite

Community Workshop #1 – February 25, 2021



# Meeting Agenda



- 5:30 – 5:40 Welcome / Agenda Review / Project Team Intros
- 5:40 – 5:50 Role of the Comprehensive Plan & Process
- 5:50 – 6:10 Looking Forward: Guiding Growth & Change
- 6:10 – 6:20 *Q & A*
- 6:20 – 6:30 Vision & Goals Framework
- 6:30 – 7:10 Vision & Goals Discussion
- 7:10 – 7:15 Next Steps & Virtual Open House Launch





# Project Team Introductions







Jay Renkens, AICP  
Principal-In-Charge



Andy Rutz, CNU-A  
Project Manager



Krystin Ramirez  
Deputy Project Manager



Hannah Watson  
Urban Designer / Planner



TJKM Transportation  
Consultants



Economic & Planning  
Systems



Matt Prosser  
Vice President & Economist





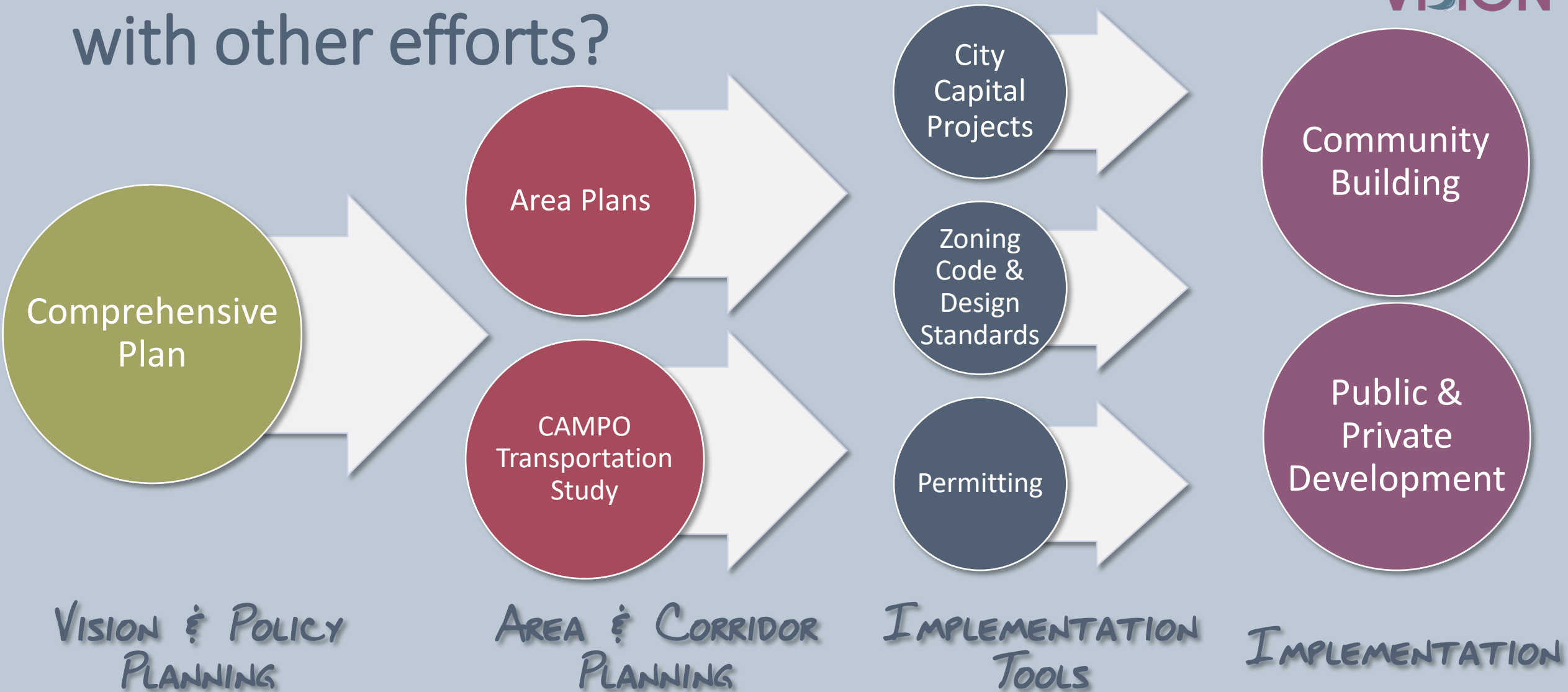
# Role of the Comprehensive Plan



# Role of the Comprehensive Plan

- Will establish the **vision, goals, and policy direction** for the next 20 years
- An umbrella document that will **integrate high level direction from past and current planning efforts.**
- Will establish the **types of neighborhoods and districts** we want moving forward.
  - What types of housing, workplaces, and shopping do we want and where should they go?
  - What amenities and infrastructure do these places need?
- An **implementation strategy** with specific phasing and action items.

# How does the Comprehensive Plan fit in with other efforts?





# Comprehensive Plan Process & Approach

## STEP 1: Vision & Values

Community established aspirations for the next 20 years in San Marcos

## STEP 2: Guiding Principles

Statements to measure recommendations and strategies against

## STEP 3: Planning Elements

Detailed recommendations – for a variety of topics – to positively shape the quality of life & place for the community

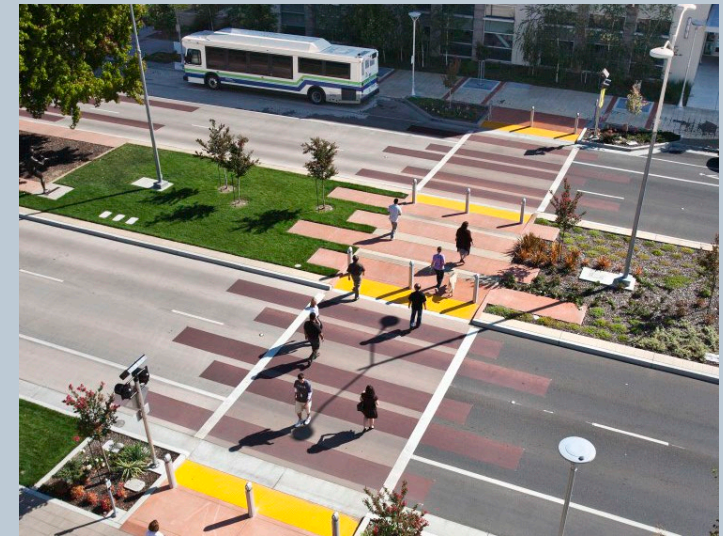
## STEP 4: Implementation Strategies

Mechanisms to help realize the vision of the San Marcos community



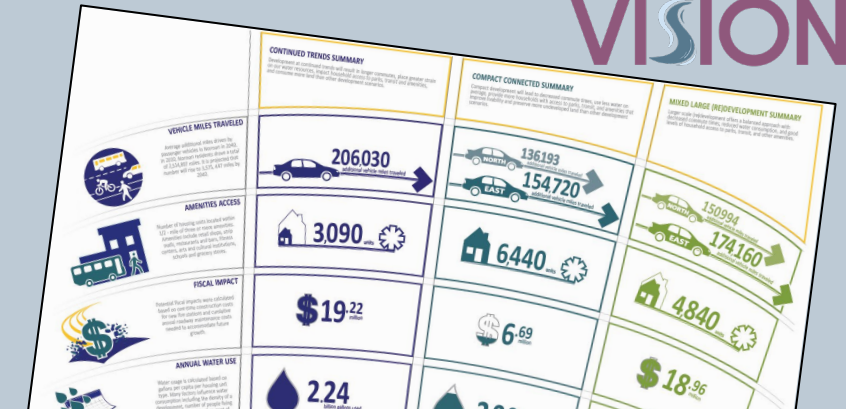
# What topics are covered in this Plan?

- Land Use
- Community Design and Character
- Arts and Culture
- Economic Development
- Housing
- Transportation
- Parks, Public Spaces and Facilities
- Environment and Resource Protection
- Health, Safety and Wellness
- Intergovernmental Coordination



# Land Use

- How will we accommodate projected growth?
- Vision for change within San Marcos in the next 20 years
- Identifies areas for specific types of uses – residential, commercial, employment, industrial, open space, etc.
- Provides guidance on the corresponding amenities that should supplement those uses



## Scenario Summary

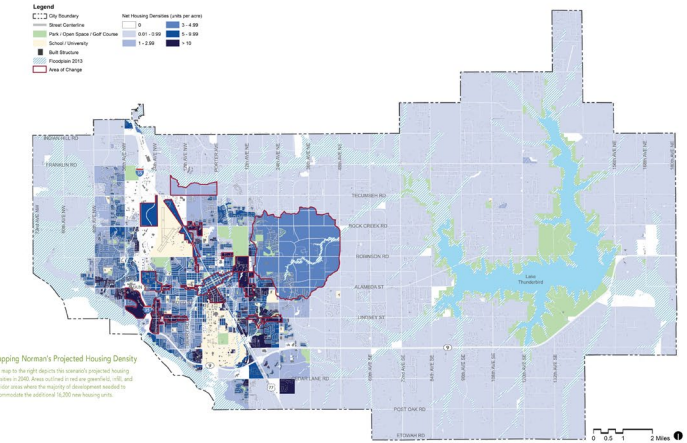
This scenario explores the impact of population and housing growth on Norman if it diversifies its development pattern to focus on smaller scale corridor revitalization in addition to continued development of agricultural areas east of the urbanized area and in underutilized infill areas in our city. This scenario has the highest proportion of infill development.

For this scenario:

- 33% of future housing growth is projected to occur in undeveloped agricultural areas east of the urbanized area;
- 33% in larger scale underutilized areas in Norman's core; and
- 34% in smaller scale redevelopments along corridors.

### Housing Unit Mix

In 2016, 62% of Norman's housing is single-family detached units, 3% is single-family attached, and 35% is multi-family units. This scenario will significantly increase the percent of new single-family units attached and multi-family units attached but will only slightly affect the mix of housing units offered in Norman.



## Evaluation Criteria



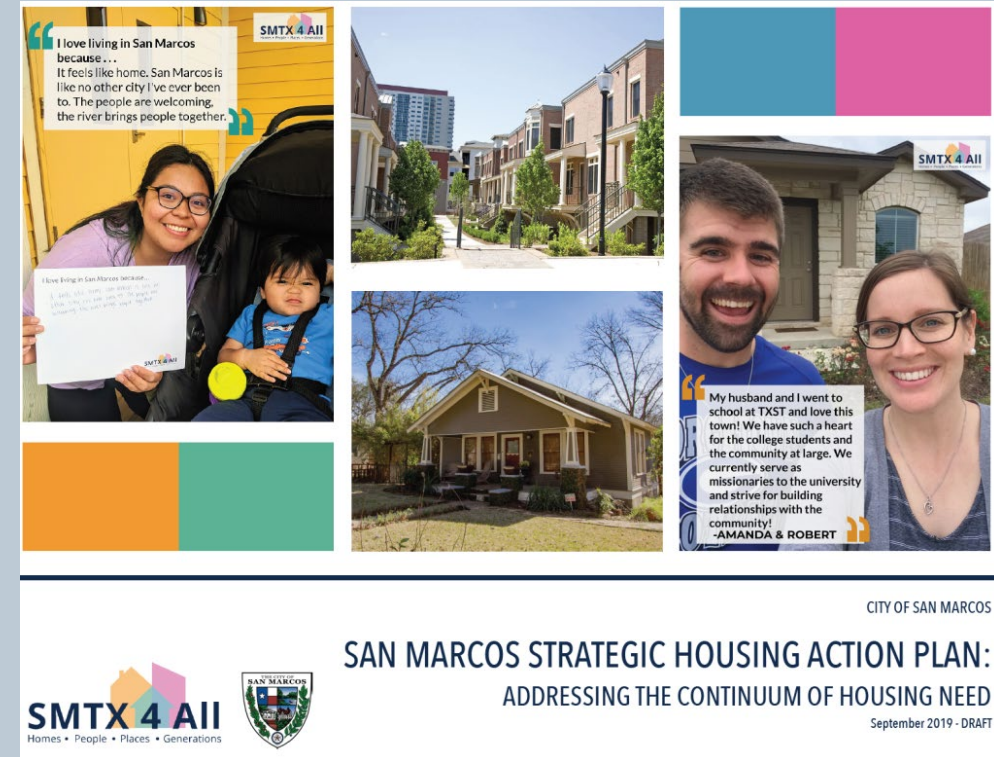
Scenario - Compact Connected: Option A - East Development



- Catalogs existing design and neighborhood character in an effort to enhance and strengthen it
- Celebrates historic and cultural assets and identifies opportunities for additional public art & cultural assets
- Provides guidance to retain neighborhood character within growth areas
- Recommends tools to promote/manage growth in a uniquely San Marcos way

# Economic Development & Housing

- Identifies economic and employment assets within the community
- Provides guidance for leveraging and building upon those assets
- Identifies the demand for housing, including the types
- Promotes increased access and attainment for current and future housing in San Marcos
- Recommends tools for enhancing existing housing/neighborhoods



# Transportation

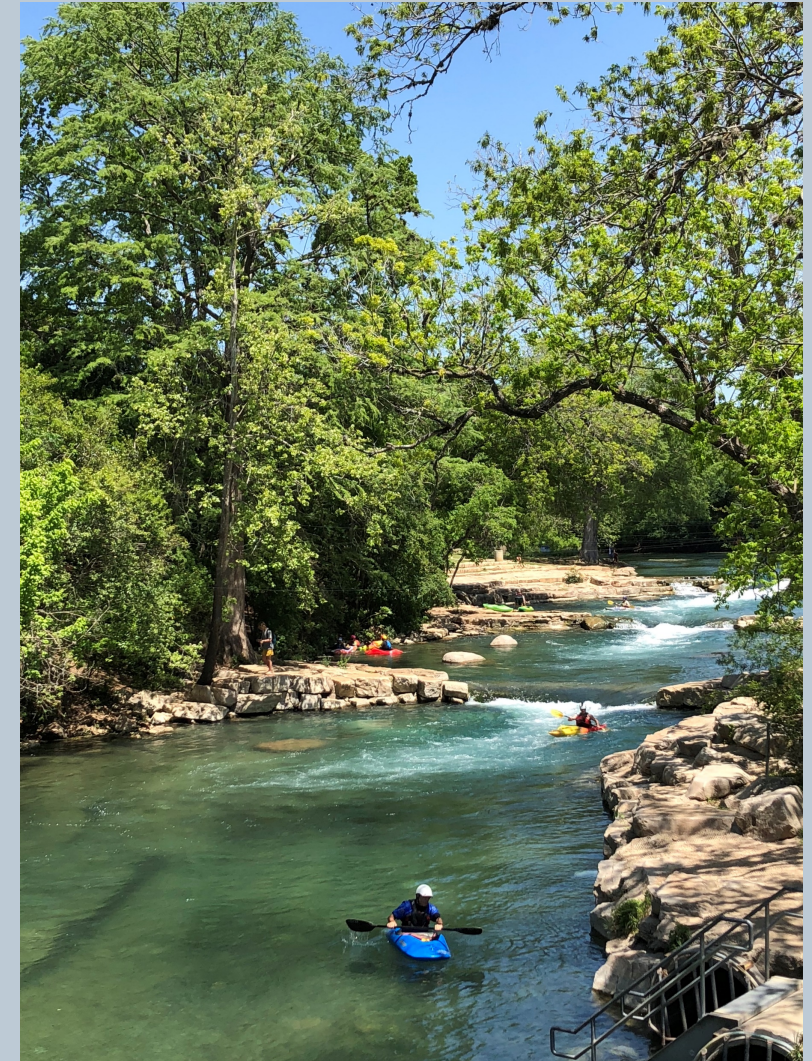
- Explores transportation and mobility priorities in the community – Pedestrians, Cyclists, Automobiles, Freight, etc. – to meet the needs of all users
- Recommends tools to ensure that roadways and corridors balance safety and efficiency as San Marcos pursues its future vision





# Parks, Public Spaces & Facilities

- Leverages partnerships and other infrastructure investments to supplement with Parks and Public Space whenever possible
- Analyzes access to active and passive recreation amenities with the goal that all residents have access within a 10-minute walk
- Identifies areas within the City where future Park and Public Space amenities exist & align with the community vision



# Environment & Resource Protection | Health, Safety & Wellness

- Promotes best practices for sustainability and resiliency built around land conservation and development
- Establishes priorities for natural resources within San Marcos as the community works to realize its Land Use vision
- Evaluates all other Plan recommendations through the lens of Public Health, Safety & Wellness, so that as San Marcos evolves, it does so in a manner that promotes resident quality of life

# Intergovernmental Coordination

- Operationalizes efficient coordination with regional partners and other agencies into the process at the early stages
- Leverages work done by concurrent or recent planning efforts – such as the CAMPO Transportation Study – to efficiently inform Area & Corridor Plan efforts that will be promoted by the Comprehensive Plan
- Provides guidance on the roles and responsibilities of intergovernmental partners in realizing the vision for San Marcos



# A Focus on Creating Great Places

- Define and implement desirable **neighborhoods, centers, and corridors** for San Marcos' future.
- **Develop around our city's existing and future assets:**
  1. Land Use
  2. Mobility
  3. Parks, waterways and other natural features
  4. Sustainability
- **Protect existing neighborhoods as they evolve**

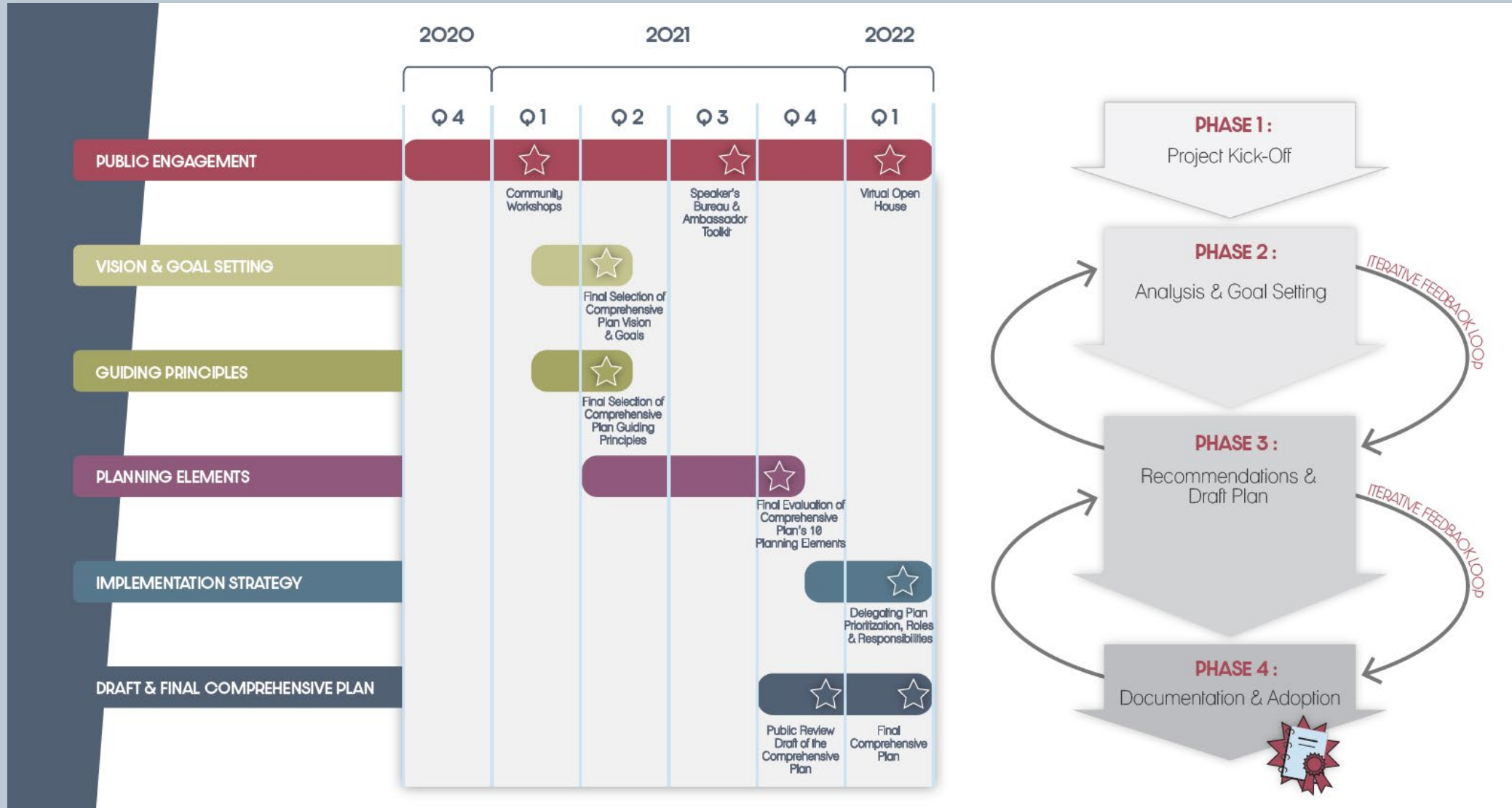


# A Focus on Creating Great Places

- Focus on appropriate levels of baseline and desired amenities
- Based on the spectrum of existing neighborhoods, centers, and corridors
- Guide growth to identify potential neighborhoods, centers, and corridors



# Process & Timeline





# Types of Public Engagement

## Small Group/ Stakeholder

- 9 Focus Groups
- 8 Comprehensive Plan Steering Committee Meetings
- 3 City Council Workshops
- 2 Community Toolkits

## Community-Wide

- 3 Community Workshops
- 3 Virtual Open Houses
- 4-5 Web-based Surveys

## Broadcast Notifications

- Project Website: [www.visionsmtx.com](http://www.visionsmtx.com)
- Social media, e-mail, & web announcements for meetings



# Looking Forward: Guiding Growth and Change



### 69,700 residents in San Marcos in 2019

- San Marcos accounts for about 30% of Hays County
- San Marcos Captured 27% of population growth since 2000

Population, 2000-2019

Population	2000	2019	2000-2019		
			Total	Ann. #	Ann. %
San Marcos	34,733	69,731	34,998	1,842	3.7%
Hays County	97,589	228,364	130,775	6,883	4.6%
<i>City as % of Hays County</i>	35.6%	30.5%	26.8%		
Austin-Round Rock-Georgetown MSA	1,249,963	2,223,897	973,934	51,260	3.1%

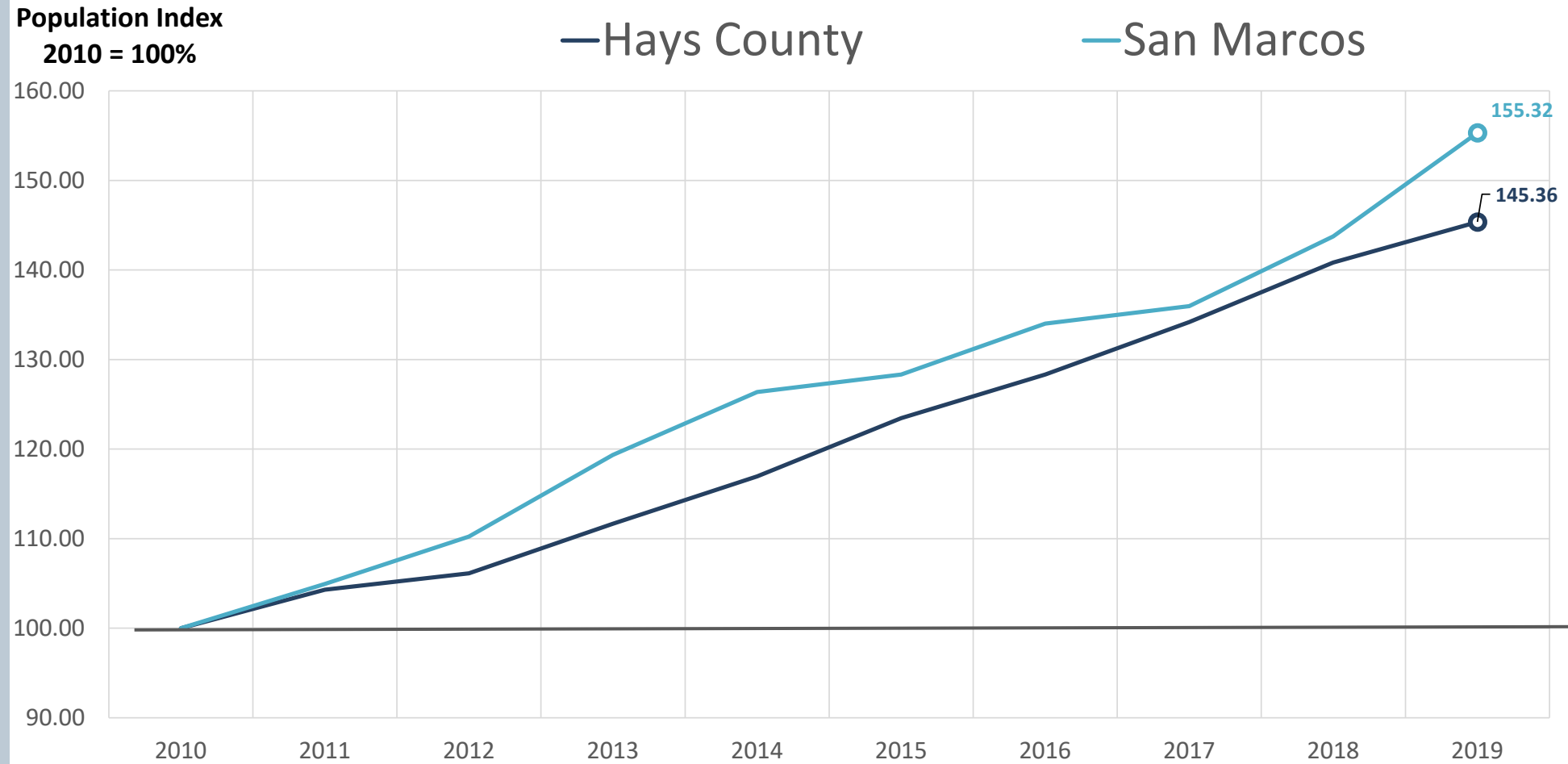
Source: Texas Demographic Center; U.S. Census; Economic & Planning Systems



# E&D Framework

## Population, 2010-2019

- San Marcos increased by 55%
- Hays County increased by 45%



Source: Texas Demographic Center; U.S. Census; Economic & Planning Systems

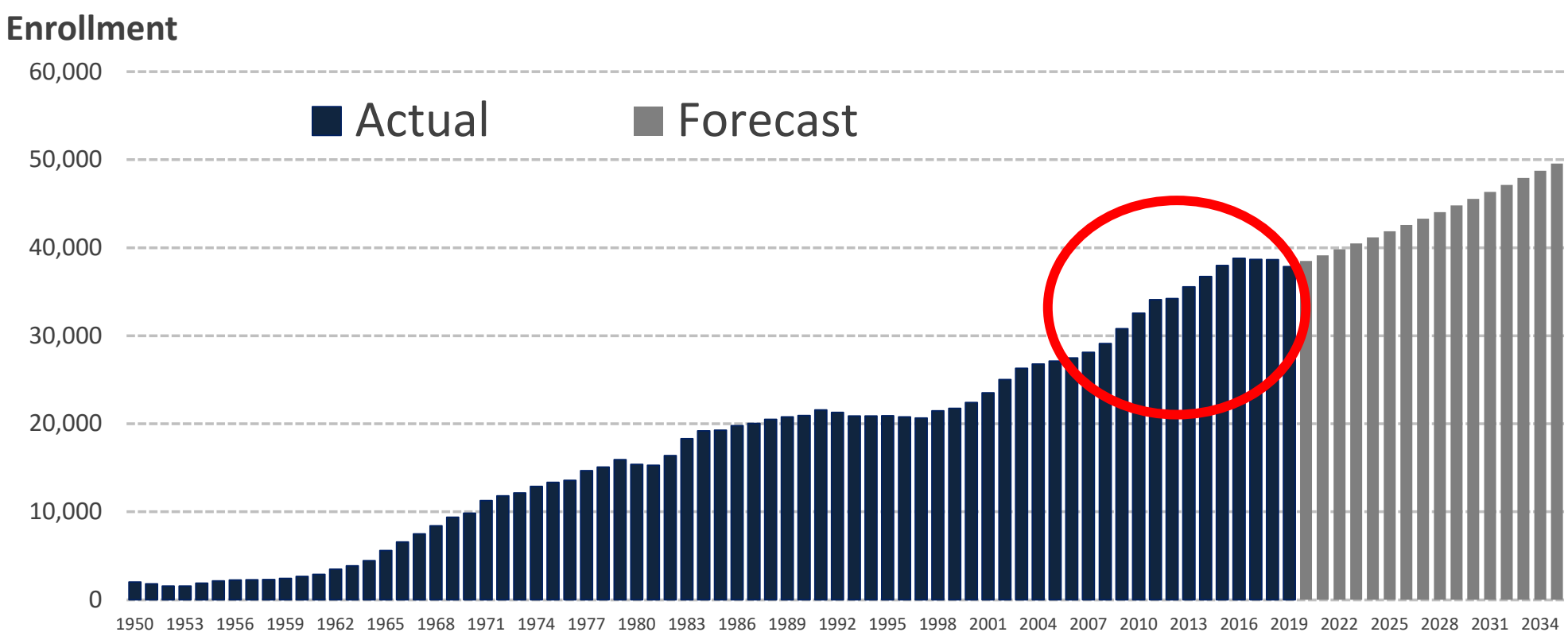
# E&D Framework

## Student Demographics



- Texas State enrollment is 38,000
- Approx. **20,000** students living off campus in **7,000** housing units

Texas State University Enrollment, 1950-2034



Source: Texas State University; Economic & Planning Systems



### San Marcos Out-Commuting, 2002-2018

- Approximately 68% of residents commute out of the City for work
- Nearly double the amount in 2002
- About 19% of San Marcos residents commute to Austin for work
- 5% commute to San Antonio for work

Commuting	2002	2010	2018	2002-2018		
				Total	Ann. #	Ann. %
San Marcos Residents						
Work in San Marcos	6,571	6,048	7,420	849	53	0.8%
Out-Commuters	<u>7,854</u>	<u>12,366</u>	<u>15,527</u>	<u>7,673</u>	<u>480</u>	<u>4.4%</u>
Total Residents	14,425	18,414	22,947	8,522	533	2.9%
Work in San Marcos	45.6%	32.8%	32.3%			
Out-Commuters	<u>54.4%</u>	<u>67.2%</u>	<u>67.7%</u>			
Total Residents	100.0%	100.0%	100.0%			

Source: LEHD; Economic & Planning Systems



## Household Growth



Average Household Size  
**2.26 people per household**  
2.75 average in Hays County

### Households, 2000 to 2020

- San Marcos has captured 20% of household growth in Hays County

Households	2000	2020	2000-2020		
			Total	Ann. #	Ann. %
San Marcos	13,248	23,058	9,810	491	2.8%
Hays County	33,410	82,767	49,357	2,468	4.6%
City as % of Hays County	39.7%	27.9%	19.9%		
Austin-Round Rock-Georgetown MSA	471,855	867,862	396,007	19,800	3.1%

Source: U.S. Census; Esri Business Analyst; Economic & Planning Systems

# Housing Demand Analysis

## Housing Demand Model Methodology



### Forecast Growth

Number of households forecast for Hays County



### Household Structure

“Consumer Groups”  
Age of householder, income, family type



### Housing Tenure and Income

Owner vs renter households by single family and multifamily by Income



### Unit Type Capture

Demand by housing unit type captured in San Marcos



# Housing Demand Analysis

## National Housing Trends

- Growing interest in the types of neighborhoods and communities people want to live in.
- **National Association of Realtors**
  - **Cost Matters:** 59% of buyers will make trade-offs to stay in budget.
  - **Sense of Place and Walkability:** A majority prefer neighborhoods with a mix of houses, shops, and businesses and are walkable.
  - **Convenience:** 59% would downsize for a commute time under 20 minutes.





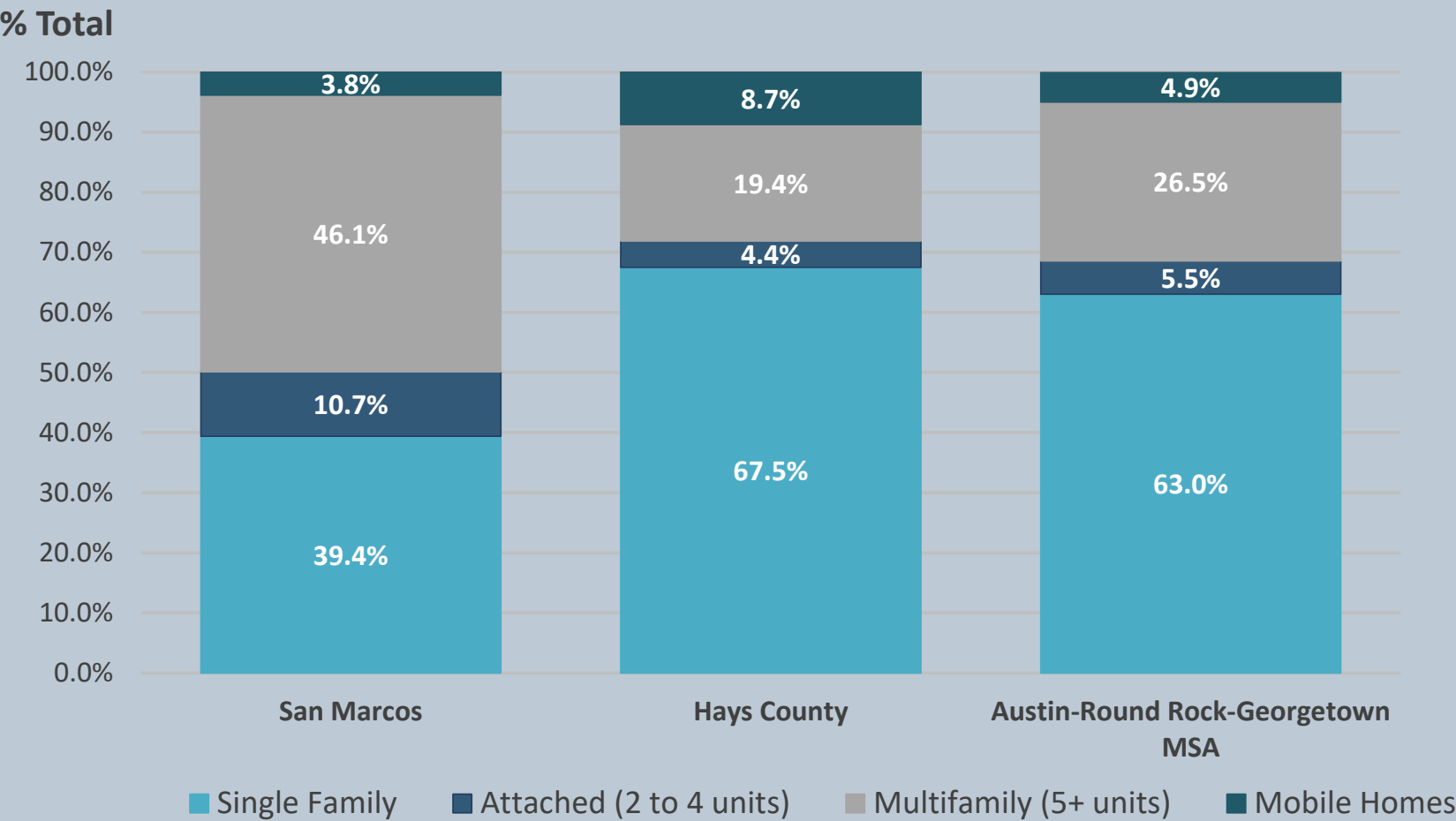
# Housing Demand Analysis

## Housing Unit Types



- San Marcos has a greater diversity of housing types than Hays County and the MSA
- San Marcos has a much greater proportion of multifamily units than Hays County and the MSA.

Units in Structure, 2019



Source: U.S. Census; Economic & Planning Systems

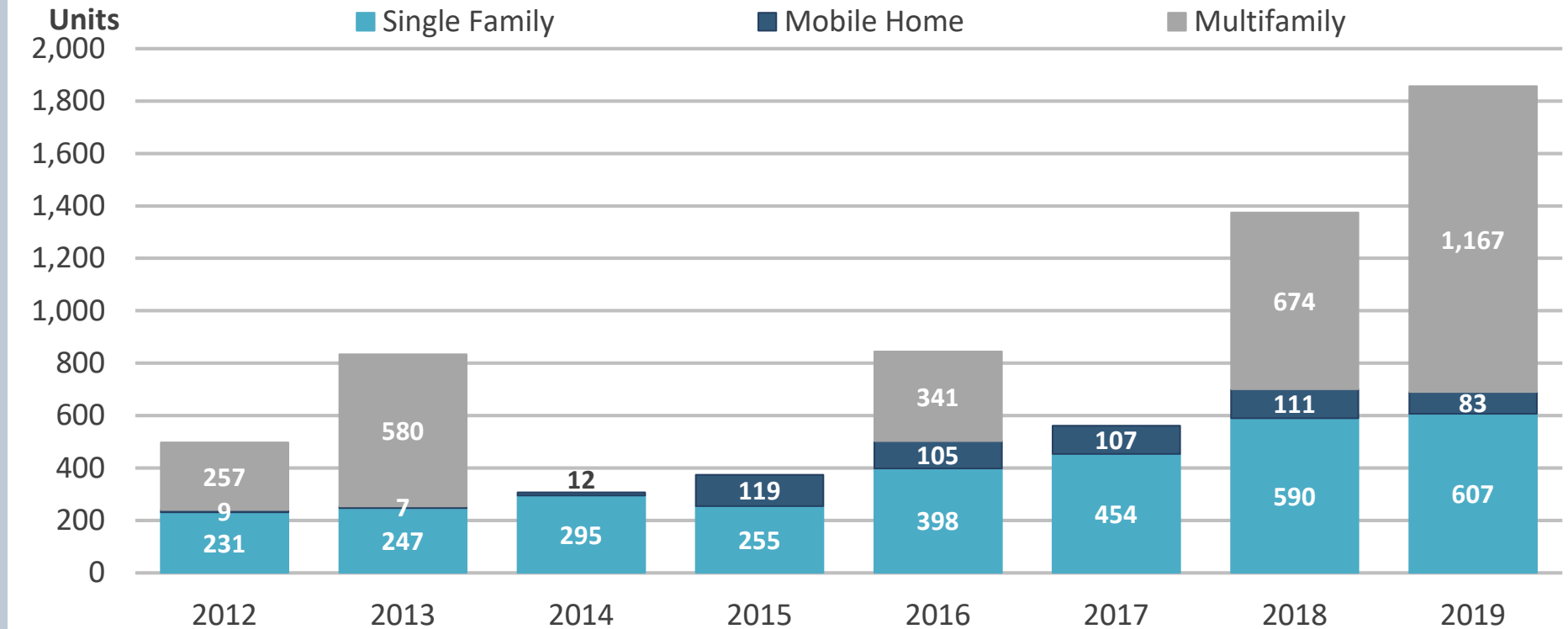


# Housing Demand Analysis

## Housing Development Trends

- An average of 844 units permitted annually since 2012
- Growing number of single-family units permitted per year

San Marcos Residential Building Permits, 2012-2019



Source: City of San Marcos; Economic & Planning Systems

# Housing Demand Analysis

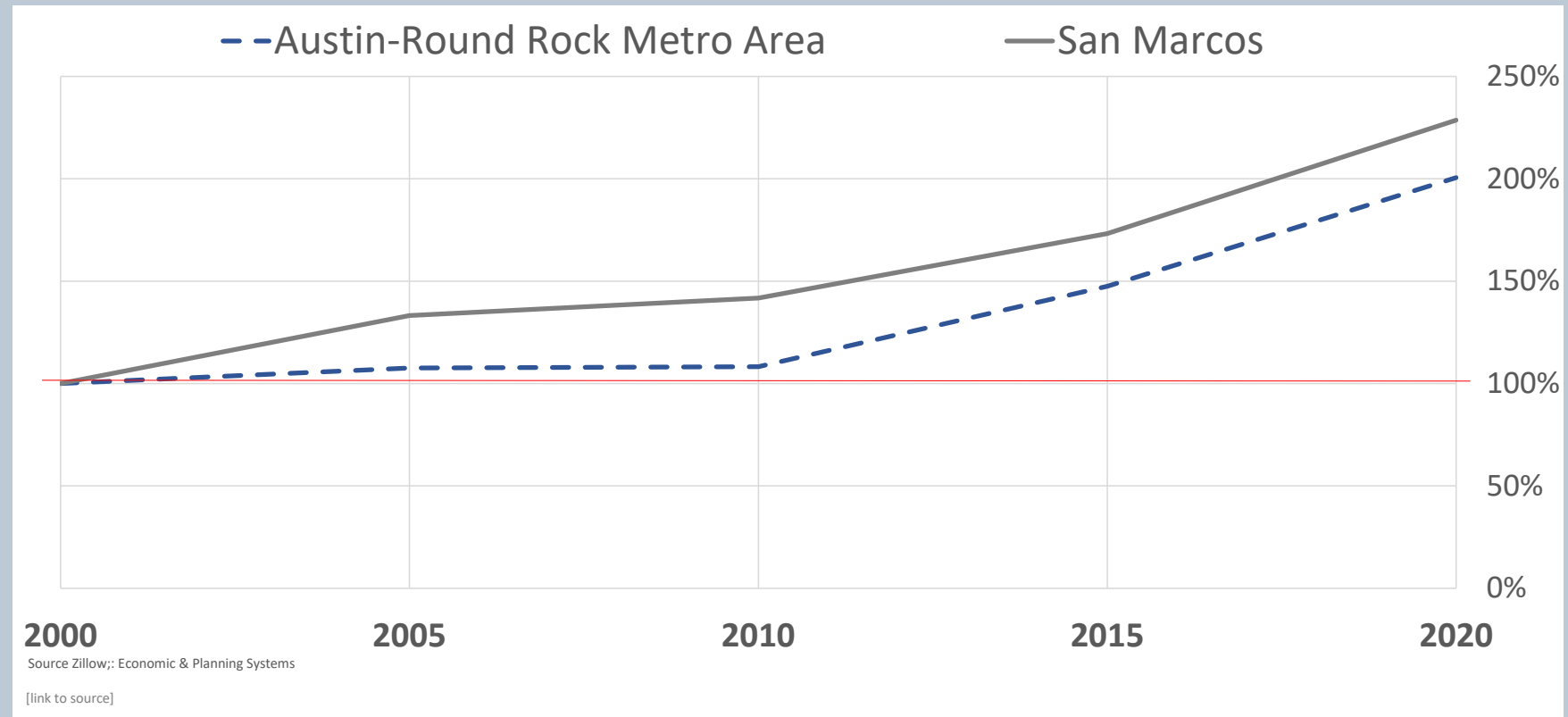
## Housing Affordability

\$ 2019 Median Household Income  
**\$40,370**

Median Home Sale Price - **\$272,000**

Average home prices have increased at a greater rate than metro area

Zillow Home Price Estimate Index, 2000 to 2020



# Housing Demand Analysis

## San Marcos Household Types

### Student and Young Workforce

- University off-campus housing demand
- Under 25 workforce

### Emerging singles and families

- 25 to 44 years old, family and non-family households

### Mid-life singles and families

- 45 to 64 year old, family and non-family households

### Seniors

- 65+ years old

## Households | %

7,000 | 30%

8,500 | 37%

5,000 | 22%

2,600 | 11%



# Housing Demand Analysis

## Housing Product Types



Single Family



Attached Housing



Multifamily



Student Oriented MF

# Housing Demand Analysis

## Housing Unit Demand

### Hays County Population and Household Forecast, 2020 to 2050

				Change 2020-2050		
Description	Factor	2020	2050	Total #	Ann. #	Ann. %
Forecast						
Population		234,896	746,149	511,253	17,042	3.9%
Pop per HH		2.84	2.60			
Households		82,767	287,268	204,501	6,817	4.2%
Housing Units	5% Vacancy	89,176	301,632	212,456	7,082	4.1%

Source: State of Texas; Economic & Planning Systems

- Hays County Forecast to grow by 212,500 housing units by 2050
- San Marcos has historically captured 20% to 30%
  - Equates to 42,000 to 64,000 new units by 2050

# E&D Framework

## Employment Trends

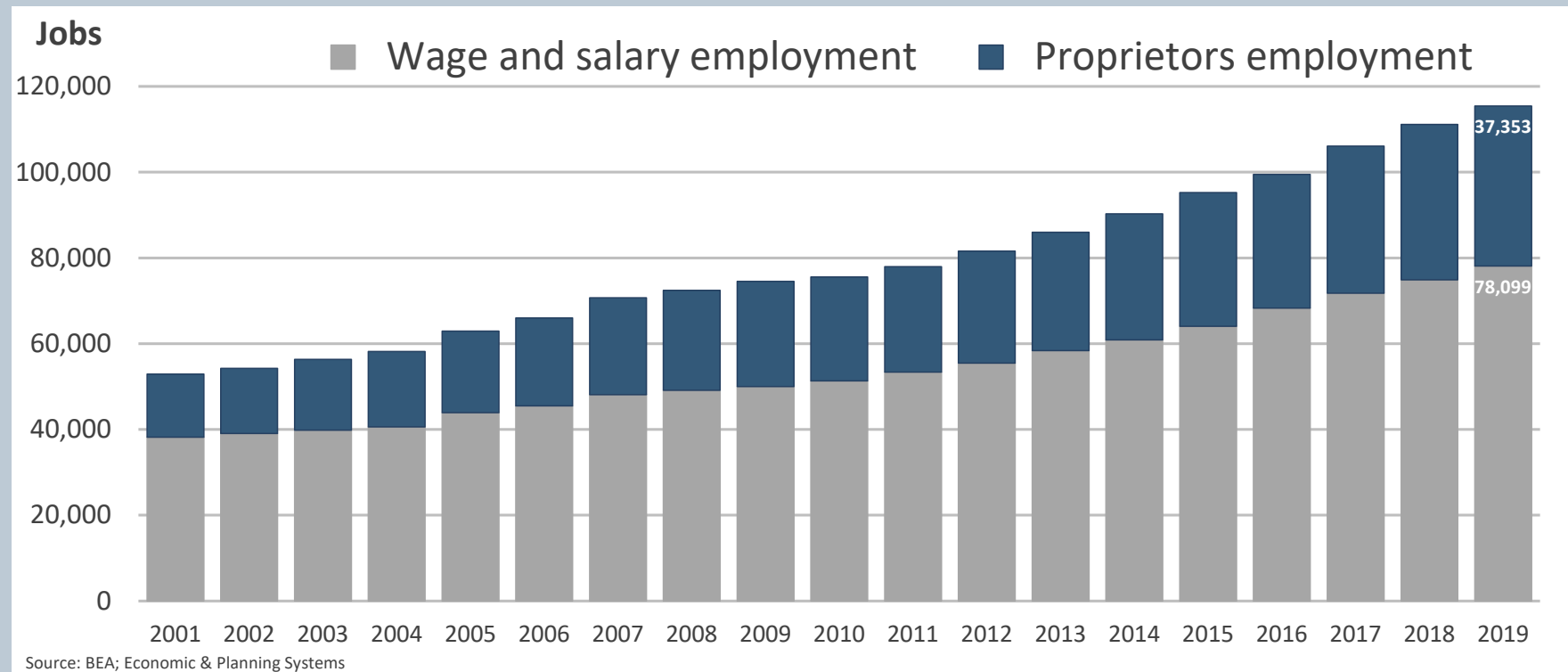


**Hays County Employment Growth 115,452 jobs (2019 BEA)**  
4.8% annual growth since 2010

### Hays County Employment, 2001 to 2019

- Largest Industries

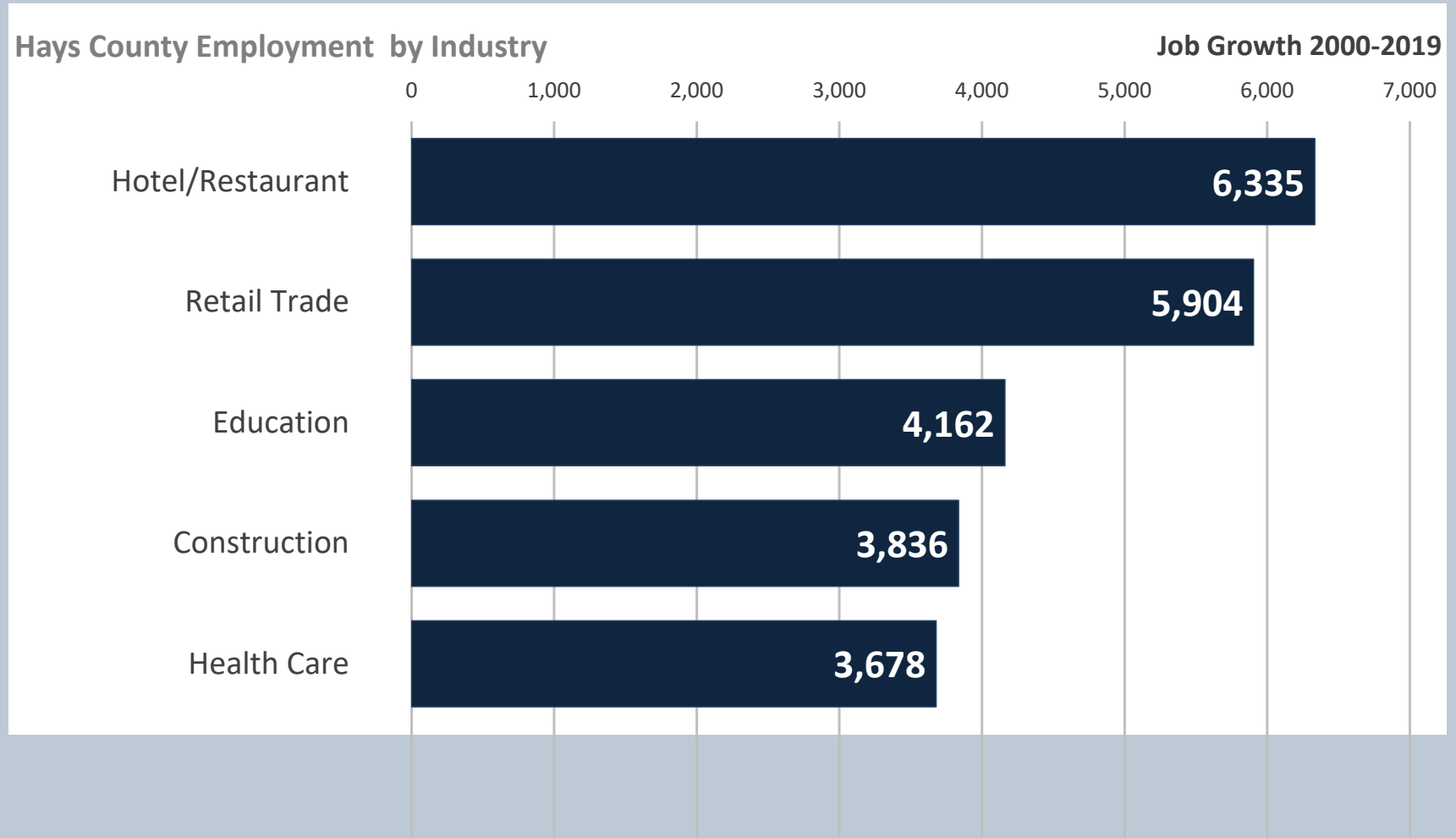
- Education
- Retail Trade
- Accommodations / Food Services
- Health Care
- Construction



# Employment Demand Analysis

## Employment Trends

### Hays County Employment Change by Industry, 2000 to 2019



- Largest Growth Industries
  - Hotel/Restaurant
  - Retail Trade
  - Education
  - Construction
  - Health Care



# Employment Demand Analysis

## Employment Land Demand Model Methodology



### Forecast Scenarios

Industry cluster specific employment forecast



### Building Type Allocation

Convert employment forecast to non-residential building categories



### Non-Residential Demand Estimate

Forecast total non-residential space demand



### Land Demand Estimate

Convert non-residential space to land demand forecast using FAR estimates



# Employment Demand Analysis

## Economic Drivers



Education



Tourism



Regional Service Hub



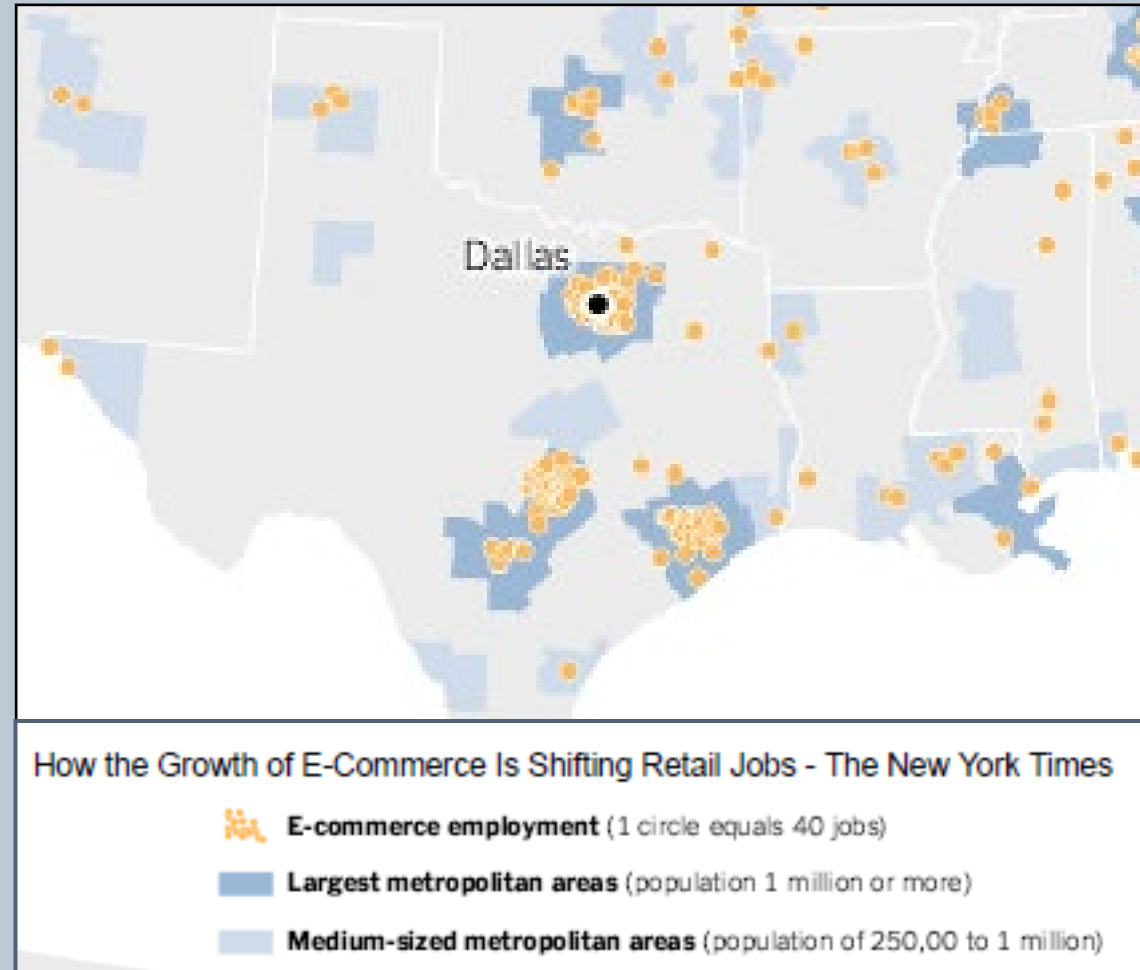
Distribution/Manufacturing

# Employment Demand Analysis

## National Industrial Development Trends

- **Automation Impact on Manufacturing**
  - Production up but employment flat/declining
  - A source of “Middle Skills Jobs”
- **Growth of Logistics**
  - Warehouse and distribution demands growing
  - Delivery and fulfillment jobs replacing retail jobs

### E-Commerce Employment Centers





# Employment Demand Analysis

## National Office Development Trends

- **Location preferences are changing**
  - Mixed use environments
  - Near other professionals or workforce
  - Superior transportation/transit access
- **Remote and flexible work**
  - Flexible and adaptable workspaces
  - Adaptable workspaces to match company needs, health standards, and growth demands





# Employment Demand Analysis

## National Retail Market Trends

- Retail market changing at rapid pace driven by E-commerce
- Food and Beverage growing share of retail space demand
- Retail spending bifurcating between convenience and experience



# Employment Demand Analysis

## Employment Development Types

- **Highway Retail/Services**
  - Commercial uses oriented to entire community and larger regional with locations near interstate
- **Community Serving Retail Services**
  - Commercial uses oriented to neighborhoods or portions of the community within more mixed-use environments (e.g. neighborhood center, Downtown)
- **Office / Employment / Education**
  - Traditional office uses, employment in office/flex industrial buildings, and institutional uses such as education and health care
- **Industrial / Distribution**
  - Medium and large-scale industrial uses with larger lots and buildings near major transportation routes

# Employment Demand Analysis

## Employment Forecast



- Hays County forecast to grow at 3.96% annually by CAMPO
- Estimated 170,000 new jobs by 2050
- San Marcos accounts for 30% of jobs in the county
- This rate of capture equates to 51,000 new jobs by 2050

Hays County Forecast Employment by Sector Type, 2020 to 2050

Sector	2019	2030	2040	2050	Change 2020-2050		
					Total	Ann. #	Ann. %
Driving Industries	31,251	51,331	83,948	106,155	74,904	2,416	4.0%
Business Support Industries	18,246	32,237	54,299	70,804	52,558	1,695	4.5%
Community Support Industries	23,838	36,645	54,340	66,376	42,538	1,372	3.4%
Total	73,335	120,213	192,587	243,335	170,000	5,484	3.9%

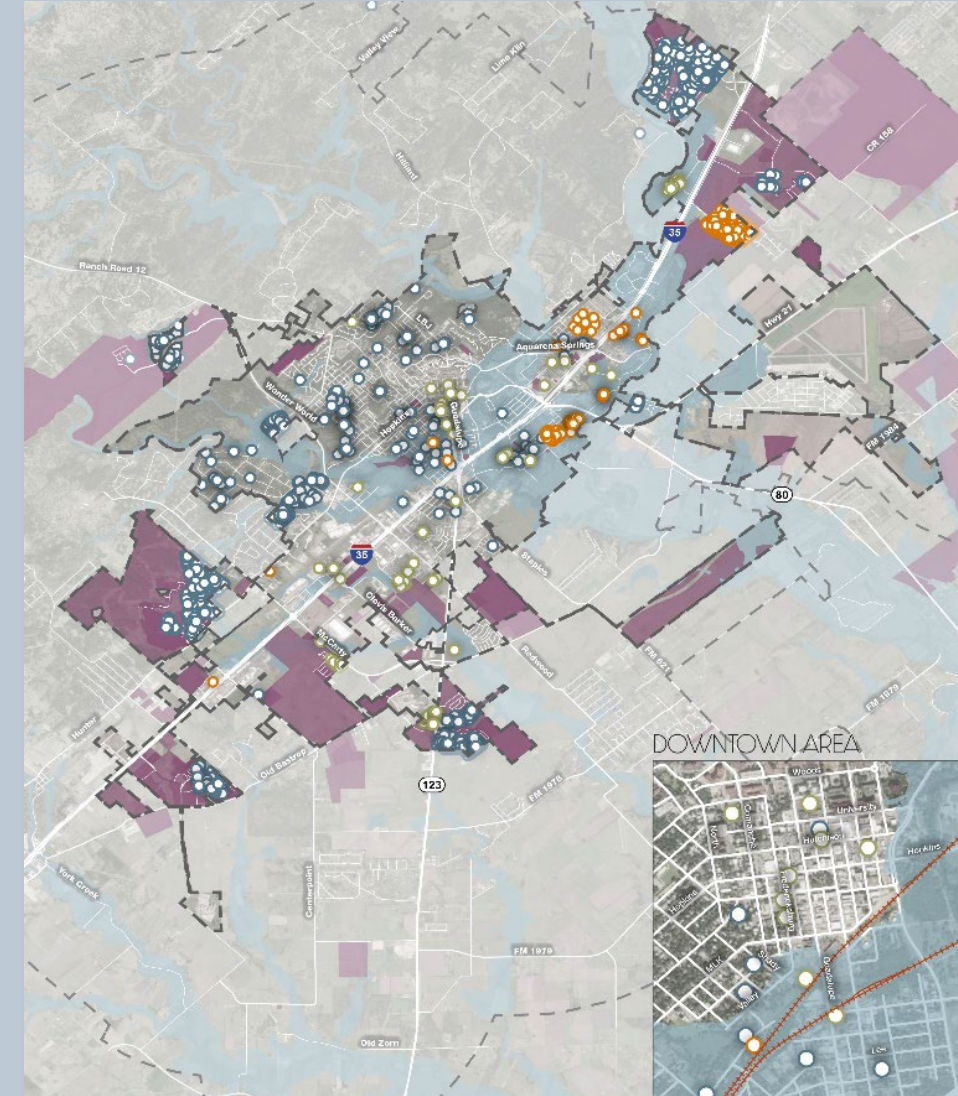
Source: Texas State Demographer;BLS QCEW; BEA; Economic & Planning Systems



# Land Capacity Analysis

## Recent and Planned Development

- 4+ larger new single-family neighborhoods with not one singular area capturing this type of growth
- Large student housing developments along I-35 in middle of City
- Showing up as mobile home in some cases
- Significant “infill” around downtown
- Commercial development is predominately to the south

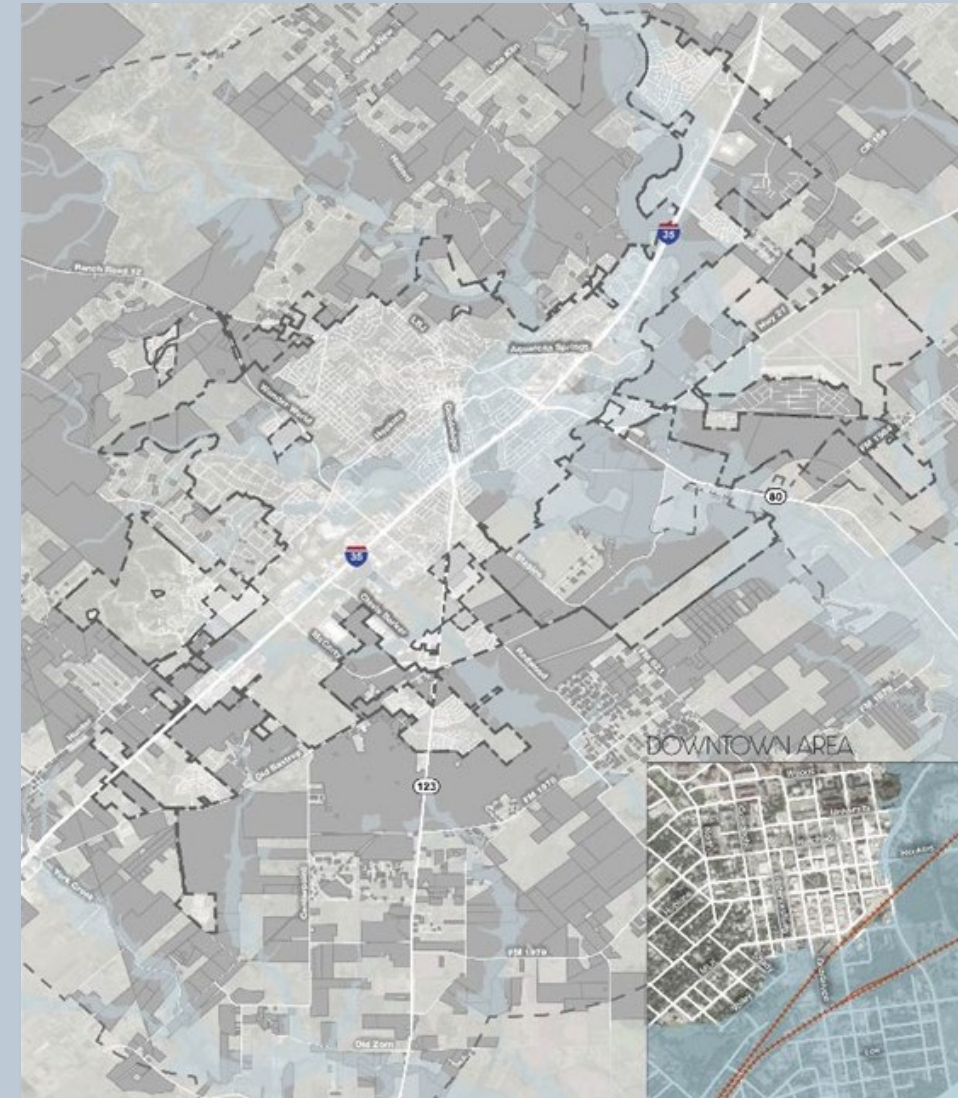




# Land Capacity Analysis

## Development Sites

- Large development potential areas along I-35 on north and south ends of the community.
- The other major regional connection route (Highway 123) also has areas along it that have development capacity.
- **Plan Considerations**
  - Growth around the airport?
  - Desirability and/or ability to grow to the northwest?
  - Ability to grow outwards through annexation?
  - Future impact of unincorporated development



# How Other Communities Have Grown

## Approaches to Creating New Housing & Jobs:

- **Conserve**
  - Maintain neighborhoods and districts that are built out and largely complete.
- **Complement**
  - Infill existing neighborhoods and districts with additional housing and employment opportunities.
- **Complete**
  - Add missing amenities and services to existing areas and intensify remaining development opportunities.
- **Create**
  - Develop new neighborhoods and districts with sufficient infrastructure and access to amenities and services.

# How Other Communities Have Grown

There are many ways communities plan for growth, each with their own trade-offs.

- **Conserve & Create**

- An emphasis on preservation of existing character and growing new neighborhoods and districts on the edge of the community
- *Example Community:*
  - Georgetown, TX



- **Complement & Complete**

- An emphasis on minimizing expansion to the City's footprint by infilling and densifying existing neighborhoods and districts
- *Example Community:*
  - Addison, TX





# How Other Communities Have Grown

There are many ways communities plan for growth, each with their own trade-offs.

- **All 4 “C’s”**

- Some communities allow and rely on a combination of the two other approaches, embracing moderate change throughout the city
- *Example Community:*
  - Kyle, TX



- **None of the Above**

- A handful of communities have not planned for or allowed projected growth. When effective, the result tends to be a lack of diversity and affordability.
- *Example Community:*
  - Boulder, CO





# SMTX VISION

## Q & A





# Vision & Goals Framework





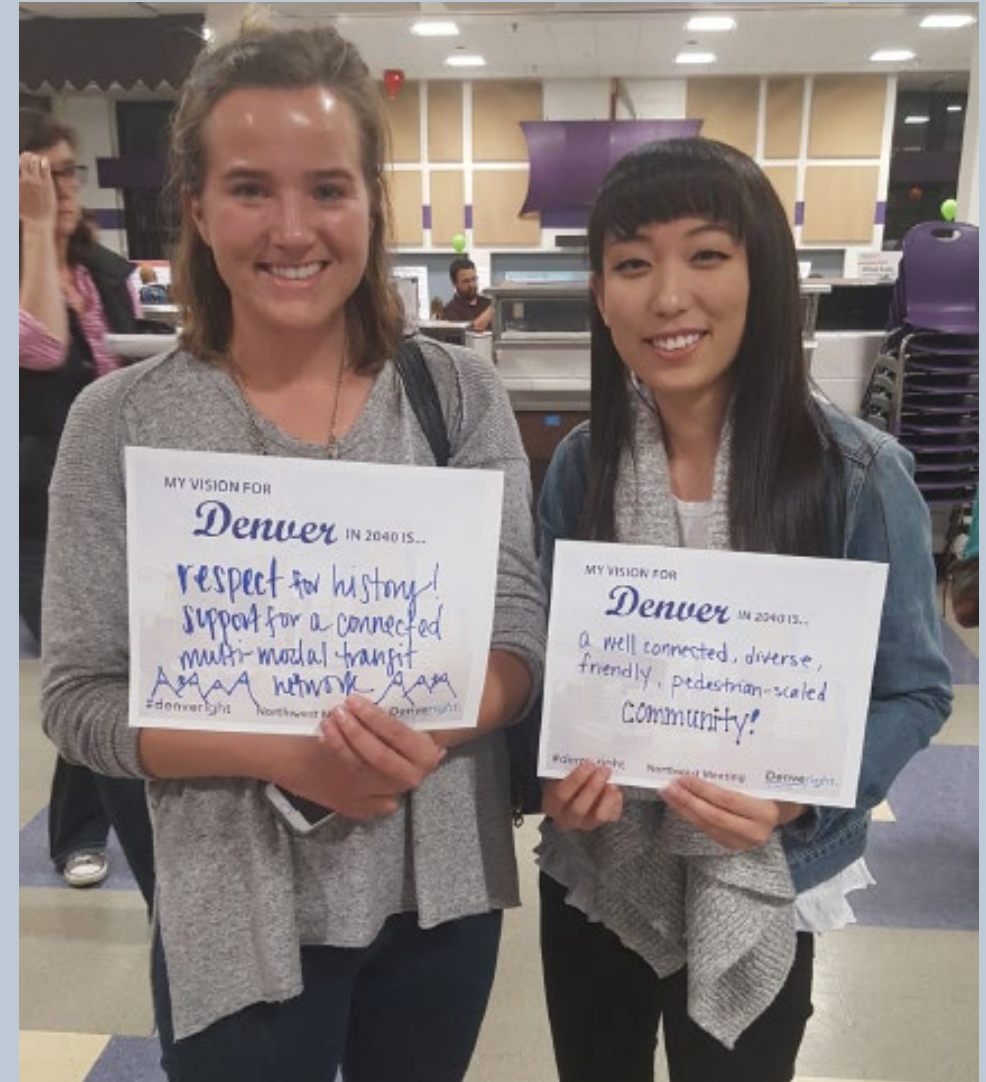
# Vision and Goal Setting

WHERE WE ARE  
IN THE  
COMPREHENSIVE  
PLAN PROCESS



# Vision and Goal Setting

- Built upon this meeting, input from Comprehensive Plan Steering Committee, & City Council
- Vision Framework may help inform enhancements to the structure of the Plan
- Helps to guide the development of Plan Element topics by providing a foundation point to build from



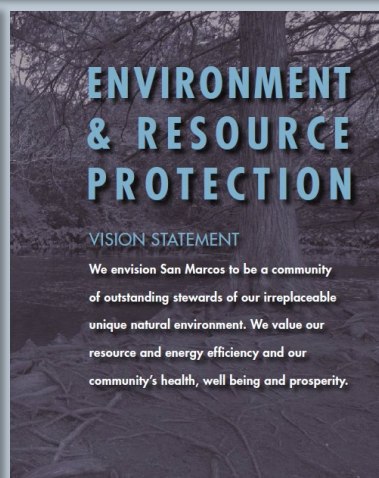
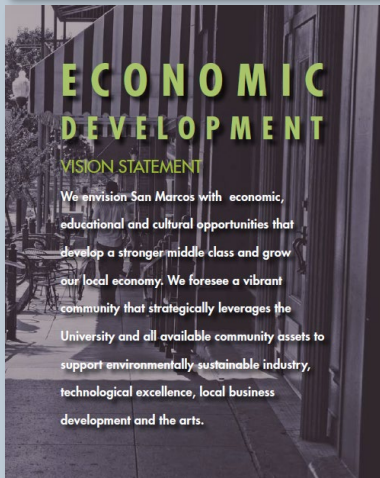
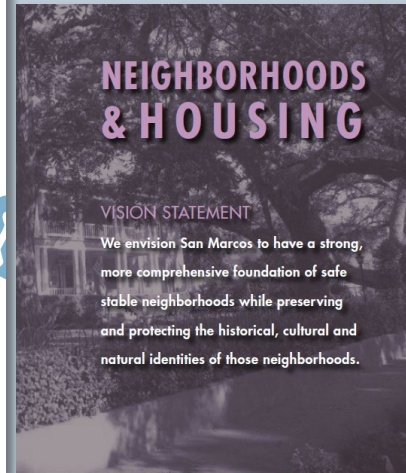
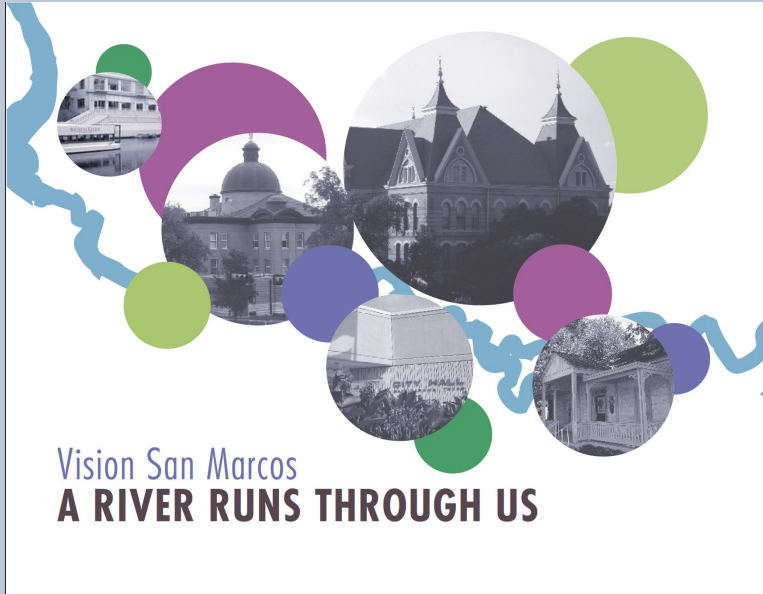


# Guiding Principles

- Contextually-specific to San Marcos, to ensure meaningful concept & recommendation development
- Derived from background document review, adopted Plan guidance, City Staff and community stakeholder inputs
- Planning Element strategies and recommendations will be measured against these principles



# Existing Vision Guidance



## COMPREHENSIVE PLAN VISION GOALS

- A connected network of efficient, safe and convenient multimodal transportation options while protecting the environment.
- A safe, well-coordinated transportation system implemented in an environmentally sensitive manner.
- A multimodal transportation network to improve accessibility and mobility, minimize congestion and reduce pollution.



# Existing Vision Guidance

CITY OF SAN MARCOS

**SAN MARCOS STRATEGIC HOUSING ACTION PLAN:**  
ADDRESSING THE CONTINUUM OF HOUSING NEED

September 2019 - DRAFT

**SMTX 4 All**  
Homes • People • Places • Generations

SMTX 4 All focuses on initiatives that provide all homes, for all people, in all places, for generations.



## Vision

Create a unified parks and recreation system that serves the entire San Marcos community, supports tourism efforts, and continues to foster stewardship of the San Marcos River, Blanco River, and surrounding environment.

## Vision and Plan Goals

Similar to the 2010 planning process, citizen engagement was used to identify necessary modifications to the City's vision and plan goals for moving forward with the parks, recreation, and open space system. This feedback was further discussed and vetted with the Parks and Recreation Advisory Board to determine needed revisions.

The vision and plan goals guiding the 2019 San Marcos Parks, Recreation, and Open Space Master Plan include:

### Vision

Create a unified parks and recreation system that serves the entire San Marcos community, supports tourism efforts, and continues to foster stewardship of the San Marcos River, Blanco River, and surrounding environment.

### Plan Goals

1. **Funding** – allocate adequate funding for the long-term benefit of the parks system.
2. **Maintenance** – establish a set of departmental standards of which maintenance practices adhere.
3. **Safety** – maintain parks for the health, safety, and welfare of the public.
4. **Programming** – offer a variety of recreational and cultural City programs.
5. **Sustainability** – plan for the long-term health of the parks and recreation system.
6. **Environmental** – sensitivity to natural areas, waterways, habitat, and the aquifer recharge zone.
7. **Tourism** – promote recreational and cultural tourism through the development of regional facilities.
8. **Connectivity** – develop an interconnected system of parks, trails, and greenbelts throughout the San Marcos ETJ.
9. **University** – create a plan that can be implemented over time with the coordination and cooperation of Texas State University.



# Vision & Goals Discussion







# Next Steps & Virtual Open House Launch



# Next Steps

- Virtual Open House – Launch
  - Available through March 19<sup>th</sup>
  - <https://openhouse.visionsmtx.com/>
- Advance Vision & Goals Framework through Public Participation and establish Guiding Principles – **Q1 2021**
- Visit the website!
  - [www.visionsmtx.com](http://www.visionsmtx.com)



# Comprehensive Plan Rewrite

Community Workshop #1 – February 25, 2021

